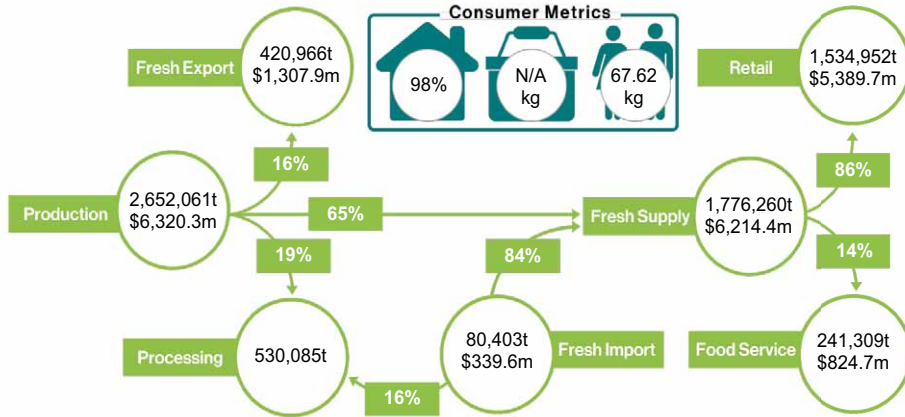




All Fruit - Overview

All Fresh Fruit Overview

ALL FRESH FRUIT SUPPLY CHAIN – YEAR ENDING JUNE 2023



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

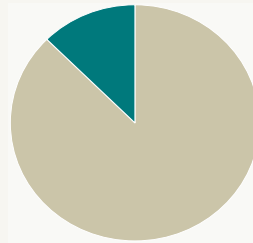
TOTAL PRODUCTION:



\$6,320.3M

2,652,061t produced and valued at **\$6,320.3M** with 19% sent to be processed.

RETAIL VS FOOD SERVICE:



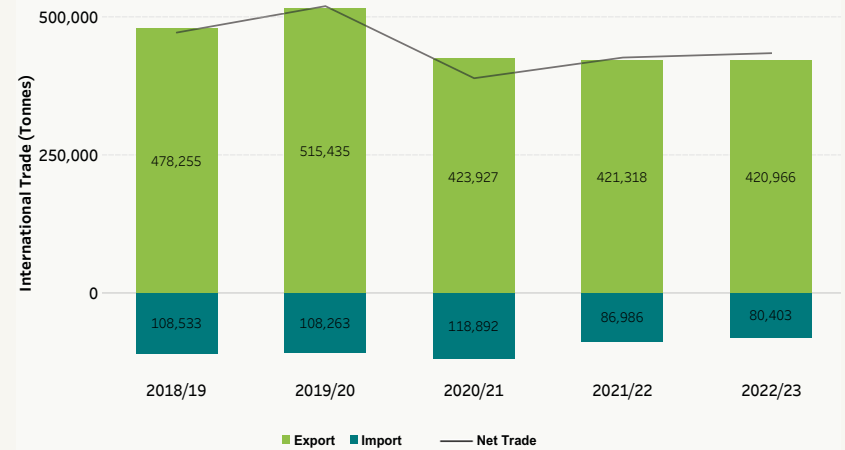
■ Retail 86% ■ Food Service 14%

The wholesale value of the fresh supply was **\$6,214.4M**, with **\$5,389.7M** distributed into retail and **\$824.7M** into food service.

YEAR ENDING JUNE	2021	2022		2023	
	Value	Value	% YoY	Value	% YoY
Production (t)	2,638,893	2,639,462	<1%	2,652,061	<1%
Production (\$m)	\$5,855.0	\$5,612.2	-4%	\$6,320.3	+13%
Fresh Export Volume (t)	423,927	421,318	>-1%	420,966	>-1%
Fresh Export Value (\$m)	\$1,220.9	\$1,230.4	<1%	\$1,307.9	+6%
Fresh Import Volume (t)	118,892	86,986	-27%	80,403	-8%
Fresh Import Value (\$m)	\$516.1	\$334.0	-35%	\$339.6	+2%
Fresh Supply (t)	1,771,493	1,761,905	>-1%	1,776,260	<1%
Fresh Supply Wholesale Value (\$m)	\$5,859.6	\$5,451.6	-7%	\$6,214.4	+14%
Supply per Capita (kg)	68.80	67.90	-1%	67.62	>-1%
Retail Supply (t)	1,534,502	1,517,835	-1%	1,534,952	+1%
Retail Supply Wholesale Value (\$m)	\$5,048.4	\$4,722.5	-6%	\$5,389.7	+14%
Food Service Supply (t)	236,991	244,071	+3%	241,309	-1%
Food Service Wholesale Value (\$m)	\$811.2	\$729.1	-10%	\$824.7	+13%

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

ALL FRESH FRUIT INTERNATIONAL TRADE

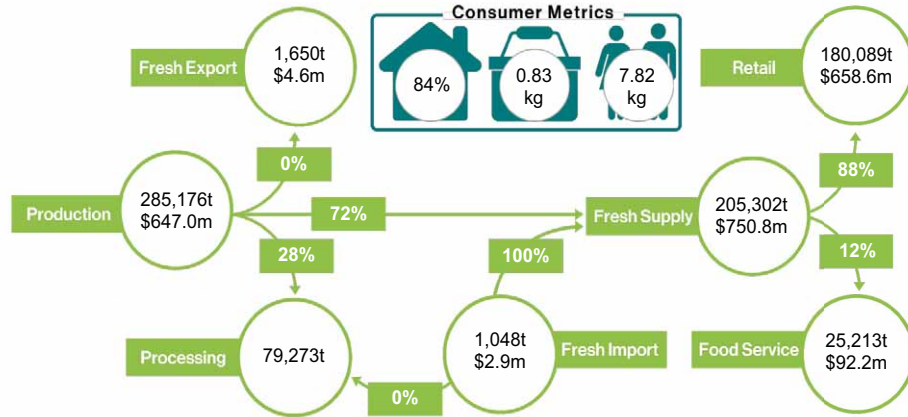


Apples



Fresh Apples Overview

FRESH APPLES SUPPLY CHAIN – YEAR ENDING JUNE 2023



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

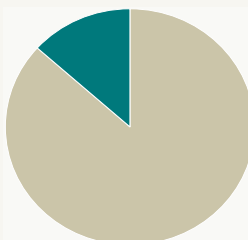
TOTAL PRODUCTION:



\$647M

285,176t produced and valued at \$647M with 28% sent to be processed.


RETAIL VS FOOD SERVICE:



■ Retail 88% ■ Food Service 12%

The wholesale value of the fresh supply was \$750.8M, with \$658.6M distributed into retail and \$92.2M into food service.

PER CAPITA CONSUMPTION:



84%

84% of Australian households purchased apples, buying an average of **830g** per shopping trip.

PER CAPITA CONSUMPTION:

7.82kg 

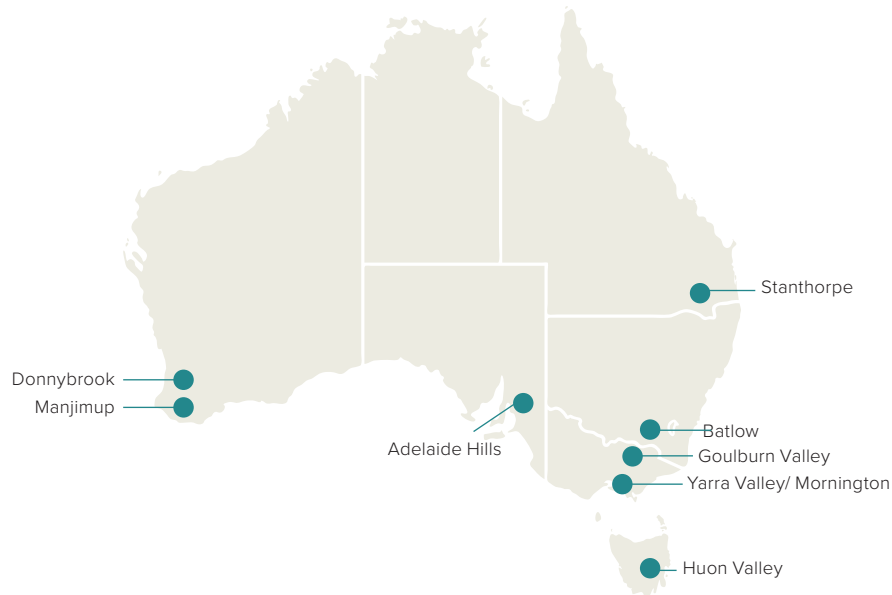
in 2022/23 based on the volume supplied.

YEAR ENDING JUNE	2021	2022		2023	
	Value	Value	% YoY	Value	% YoY
Production (t)	280,273	307,630	+10%	285,176	-7%
Production (\$m)	\$619.8	\$568.6	-8%	\$647.0	+14%
Producing Trees (000 Trees)	11,421	11,421	-	11,421	-
Fresh Export Volume (t)	2,147	3,141	+46%	1,650	-47%
Fresh Export Value (\$m)	\$5.9	\$7.4	+26%	\$4.6	-37%
Fresh Import Volume (t)	1,727	925	-46%	1,048	+13%
Fresh Import Value (\$m)	\$4.7	\$2.4	-49%	\$2.9	+22%
Fresh Supply (t)	199,775	215,961	+8%	205,302	-5%
Fresh Supply Wholesale Value (\$m)	\$720.1	\$655.4	-9%	\$750.8	+15%
Supply per Capita (kg)	7.76	8.32	+7%	7.82	-6%
Retail Supply (t)	175,241	187,142	+7%	180,089	-4%
Retail Supply Wholesale Value (\$m)	\$631.6	\$568.0	-10%	\$658.6	+16%
Food Service Supply (t)	24,534	28,820	+17%	25,213	-13%
Food Service Wholesale Value (\$m)	\$88.4	\$87.5	-1%	\$92.2	+5%

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:



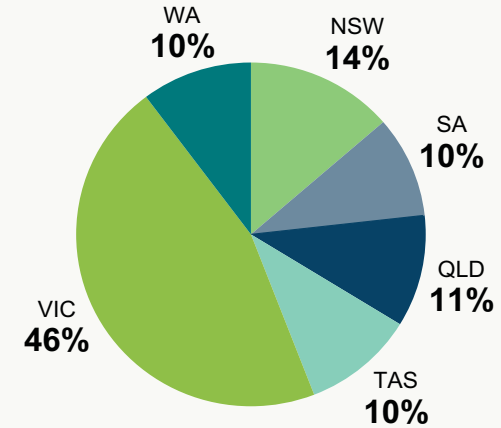
11,421
trees

PRODUCTION WINDOW:



Year-round

2022/23 FRESH APPLES PRODUCTION BY STATE



Source: APAL

2022/23 FRESH APPLES SEASONALITY BY STATE

State	Volume (t)	Value (\$m)	Jul	Aug	Sep	Oct	Nov	Dec	Jan	Feb	Mar	Apr	May	Jun
Victoria	130,177	\$295.3	High	High	High	High	High	High	High	High	High	High	High	High
New South Wales	38,953	\$88.4	High	High	High	High	High	High	High	High	High	High	High	High
Queensland	30,075	\$68.2	High	High	High	High	High	High	High	High	High	High	High	High
South Australia	27,256	\$61.8	High	High	High	High	High	High	High	High	High	High	High	High
Tasmania	29,523	\$67.0	High	High	High	High	High	High	High	High	High	High	High	High
Western Australia	29,193	\$66.2	High	High	High	High	High	High	High	High	High	High	High	High

Availability legend: High Medium Low None

Source: APAL

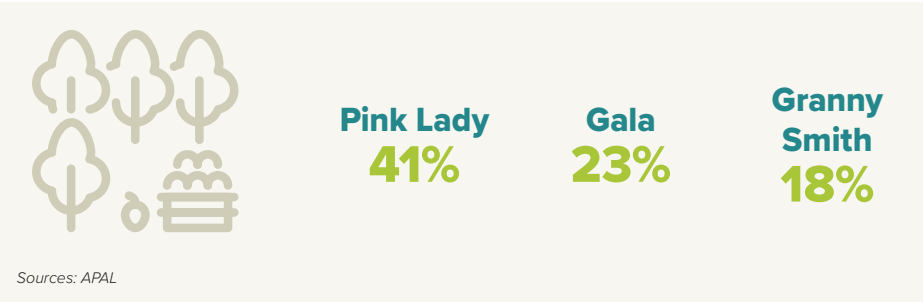
MAIN APPLES VARIETIES

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.



2022/23 FRESH APPLES SEASONALITY BY VARIETY

Variety	Volume (t)	Jul	Aug	Sep	Oct	Nov	Dec	Jan	Feb	Mar	Apr	May	Jun
Pink Lady	84,420	Medium	Medium	Low	Low	None	None	None	None	None	High	High	High
Royal Gala	47,358	Medium	Medium	Medium	Medium	None	None	None	None	High	High	High	High
Granny Smith	37,063	Medium	Medium	Medium	Medium	Medium	Medium	Medium	Medium	High	High	High	High
Sundowner	2,059	Medium	Medium	Medium	Medium	Medium	Medium	Medium	Medium	High	High	High	High
Other	35,004	Medium	Medium	Medium	Medium	Medium	Medium	Medium	Medium	High	High	High	High
Processing	79,273	Medium	Medium	Medium	Medium	Medium	Medium	Medium	Medium	High	High	High	High

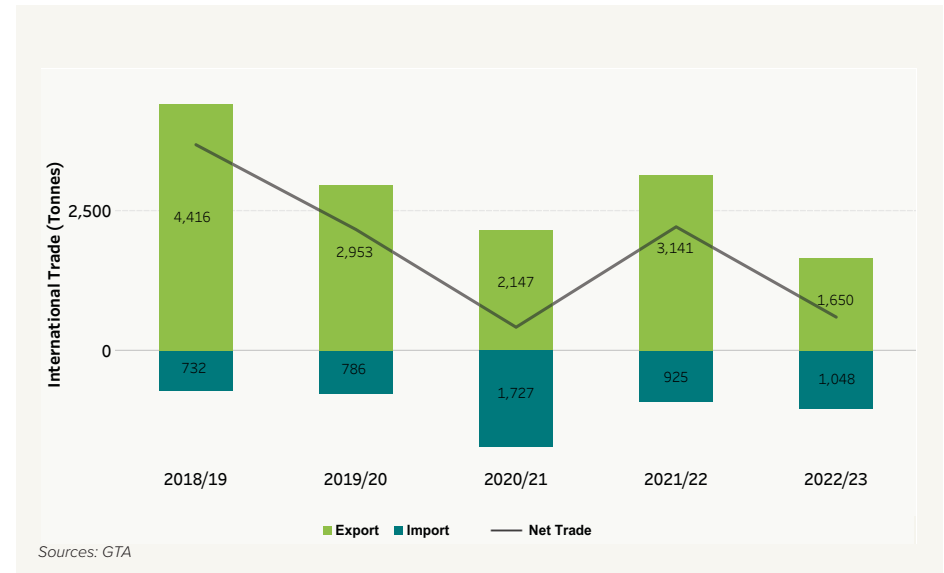
Availability legend: High (Dark Green), Medium (Light Green), Low (Yellow-Green), None (Grey)

Sources: APAL

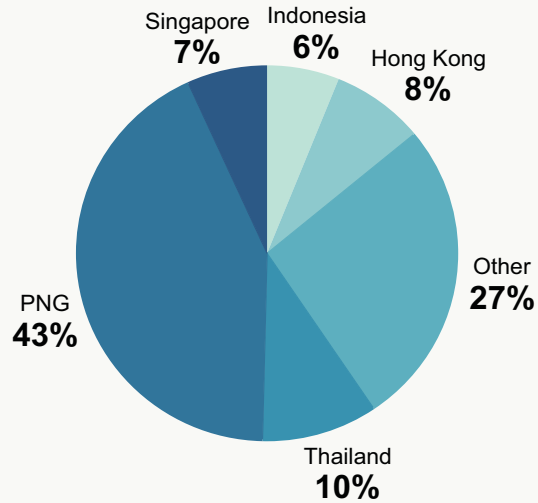
Fresh Apples International Trade

FRESH APPLES INTERNATIONAL TRADE

Australia has traditionally been a net exporter of fresh apples, typically exporting between **1,500-4,500 tonnes** per year. For the year ending June 2023, Australia exported **1,650 tonnes**. The exports and imports over the last five financial years are profiled in the graph below, where imports are counted as negative tonnes.



2022/23 FRESH APPLES EXPORTS BY COUNTRY



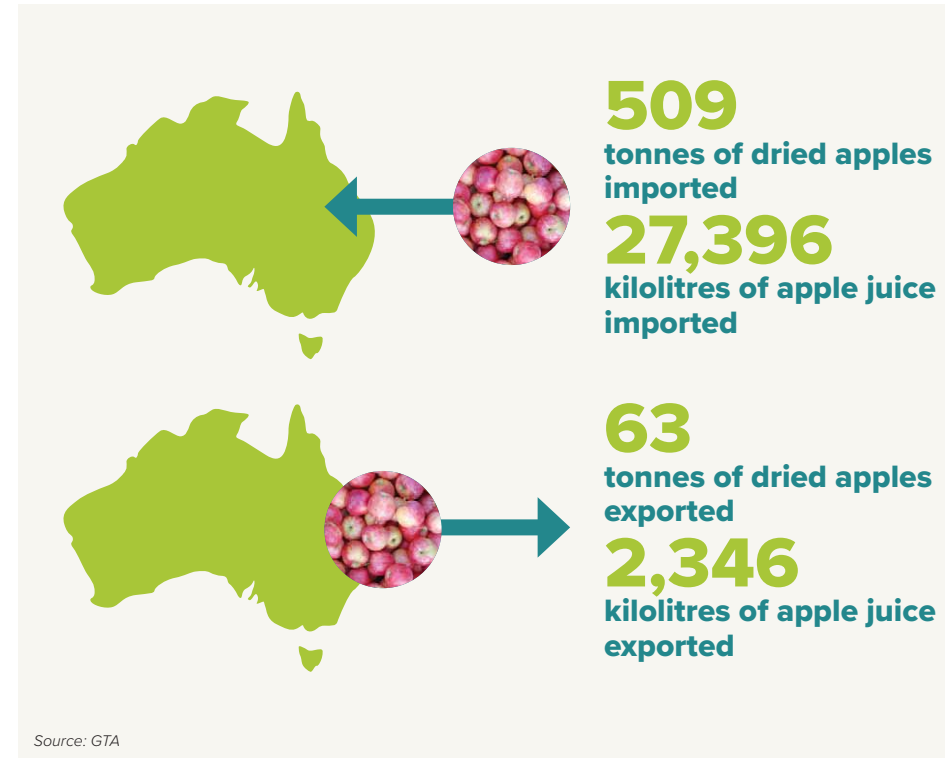
Source: GTA

For the year ending June 2023, **43%** of exported fresh apples were sent to **Papua New Guinea (PNG)**, as profiled in the chart above.

Processed Apples International Trade

2022/23 PROCESSED APPLES INTERNATIONAL TRADE

For the year ending June 2023, an additional **509 tonnes** of dried apples were imported, while **63 tonnes** were exported. Australia also imported **27,396 kilolitres** of apple juice, while exporting **2,346 kilolitres** of apple juice. These volumes have not been included in the fresh imports and exports profiled on page 32.



Source: GTA

FRESH APPLES IMPORTS AND EXPORTS BY STATE

Imports by State Destination (Tonnes)				Exports by State of Production Origin (Tonnes)			
Year Ending June	2021	2022	2023	Year Ending June	2021	2022	2023
Victoria	1,014	563	555	Victoria	1,657	1,969	1,012
New South Wales	588	323	387	Queensland	248	441	337
Queensland	53	20	56	Tasmania	92	478	127
Western Australia	73	19	50	Western Australia	86	50	98
TOTAL	1,727	925	1,048	South Australia	29	12	31
				Other	35	191	44
				TOTAL	2,147	3,141	1,650

FRESH APPLES IMPORTS AND EXPORTS BY COUNTRY

Imports by Country (Tonnes)				Exports by Country (Tonnes)			
Year Ending June	2021	2022	2023	Year Ending June	2021	2022	2023
China	1,727	925	1,048	PNG	579	795	706
Vietnam	-	< 0.5	-	Thailand	218	162	162
Other	-	< 0.5	-	Hong Kong	282	334	130
TOTAL	1,727	925	1,048	Singapore	53	96	112
				Indonesia	16	52	101
				Other	1,000	1,700	438
				TOTAL	2,147	3,141	1,650

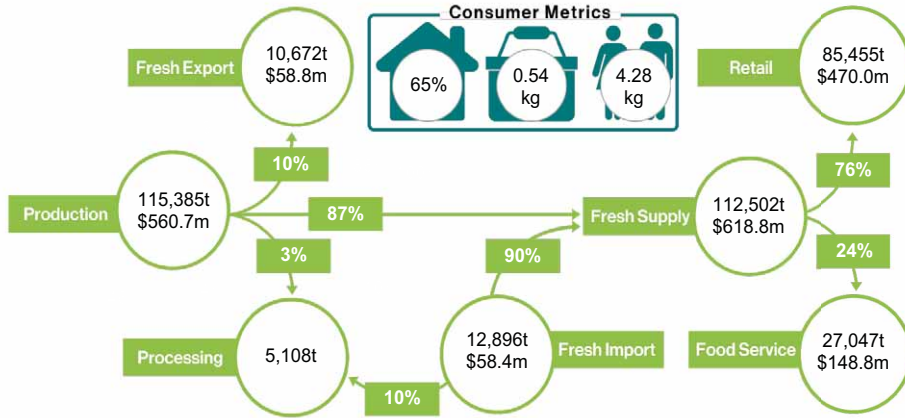
Source: GTA

A photograph of several avocados on a wooden surface. One avocado is cut in half, showing the green flesh and a large brown pit. Another avocado is cut in half, showing the green flesh and a large brown pit. A third avocado is whole and dark green. The word "Avocados" is written in large white letters across the center of the image.

Avocados

Fresh Avocados Overview

FRESH AVOCADOS SUPPLY CHAIN – YEAR ENDING JUNE 2023



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

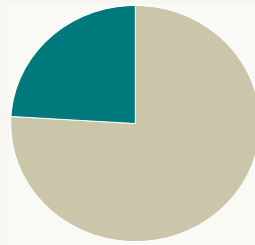
TOTAL PRODUCTION:



\$560.7M

115,358t produced and valued at **\$560.7M** with 4% sent to be processed.

RETAIL VS FOOD SERVICE:



■ Retail 76% ■ Food Service 24%

The wholesale value of the fresh supply was **\$618.8M**, with **\$470M** distributed into retail and **\$148.8M** into food service.

CONSUMER METRICS:



65% of Australian households purchased avocados, buying an average of **537g** per shopping trip.

PER CAPITA CONSUMPTION:



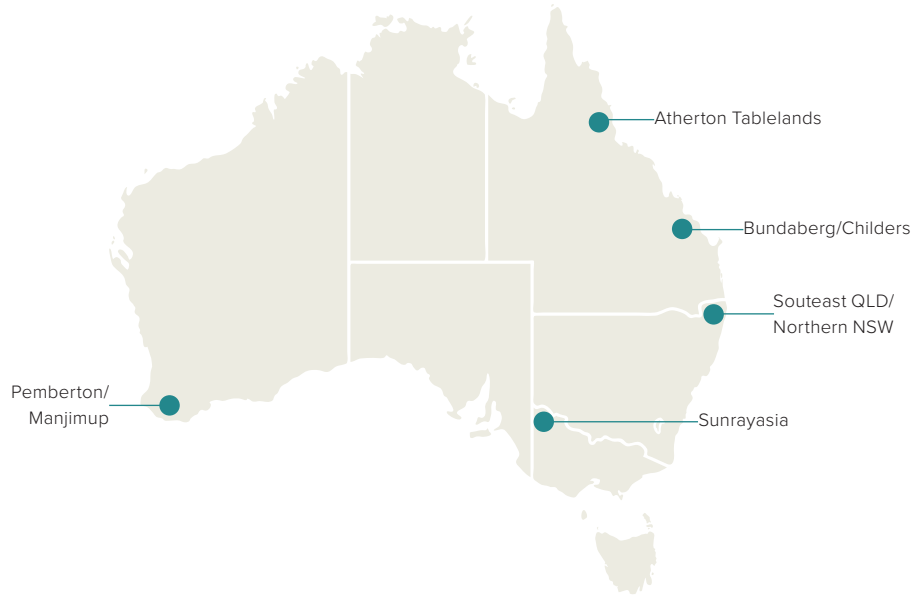
in 2022/23 based on the volume supplied.

YEAR ENDING JUNE	2021	2022		2023	
	Value	Value	% YoY	Value	% YoY
Production (t)	78,085	122,197	+56%	115,385	-6%
Production (\$m)	\$488.7	\$363.8	-26%	\$560.7	+54%
Production area (Ha)	-	-	-	19,223	-
Fresh Export Volume (t)	3,155	11,611	>100%	10,672	-8%
Fresh Export Value (\$m)	\$22.0	\$52.0	>100%	\$58.8	+13%
Fresh Import Volume (t)	28,027	12,640	-55%	12,896	+2%
Fresh Import Value (\$m)	\$184.7	\$43.1	-77%	\$58.4	+36%
Fresh Supply (t)	97,848	117,919	+21%	112,502	-5%
Fresh Supply Wholesale Value (\$m)	\$717.3	\$383.2	-47%	\$618.8	+61%
Supply per Capita (kg)	3.80	4.54	+20%	4.28	-6%
Retail Supply (t)	74,693	89,570	+20%	85,455	-5%
Retail Supply Wholesale Value (\$m)	\$547.6	\$291.1	-47%	\$470.0	+61%
Food Service Supply (t)	23,155	28,349	+22%	27,047	-5%
Food Service Wholesale Value (\$m)	\$169.8	\$92.1	-46%	\$148.8	+61%

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:



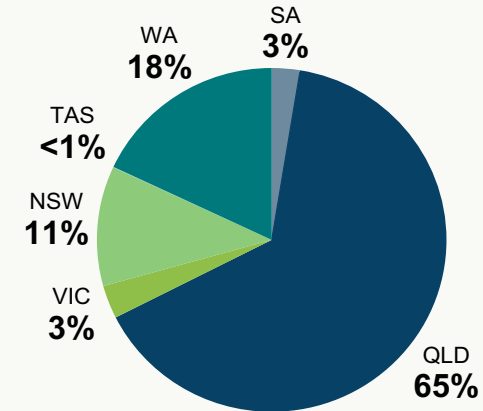
19,223
Ha

PRODUCTION WINDOW:



Year-round

2022/23 FRESH AVOCADOS PRODUCTION BY STATE



Source: AAL

2022/23 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	10,850	74,957	\$364.3	High	High	High	None	None	None	None	None	None	None	None	None
Western Australia	4,680	20,782	\$101.0	High	High	High	High	High	High	High	High	High	High	High	High
New South Wales	2,324	12,966	\$63.0	High	High	High	High	None	None	None	None	None	None	None	None
Victoria	949	3,615	\$17.6	High	High	High	High	None	None	None	None	None	None	None	None
South Australia	402	2,994	\$14.5	High	High	High	High	None	None	None	None	None	None	None	None
Tasmania	18	70	\$0.3	High	High	High	High	None	None	None	None	None	None	None	None

Availability legend: High (Dark Green), Medium (Light Green), Low (Yellow-Green), None (Grey)

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.



2022/23 FRESH AVOCADOS SEASONALITY BY VARIETY

Variety	Volume (t)	Jul	Aug	Sep	Oct	Nov	Dec	Jan	Feb	Mar	Apr	May	Jun
Hass	89,678	Medium	Medium	High	High	High	Medium	Low	Low	None	Low	Low	Low
Shepard	22,595	None	None	None	None	None	None	None	Low	High	Medium	None	None
Other	3,111	High	Medium	Medium	Medium	None	None	None	None	Low	Low	Low	Low

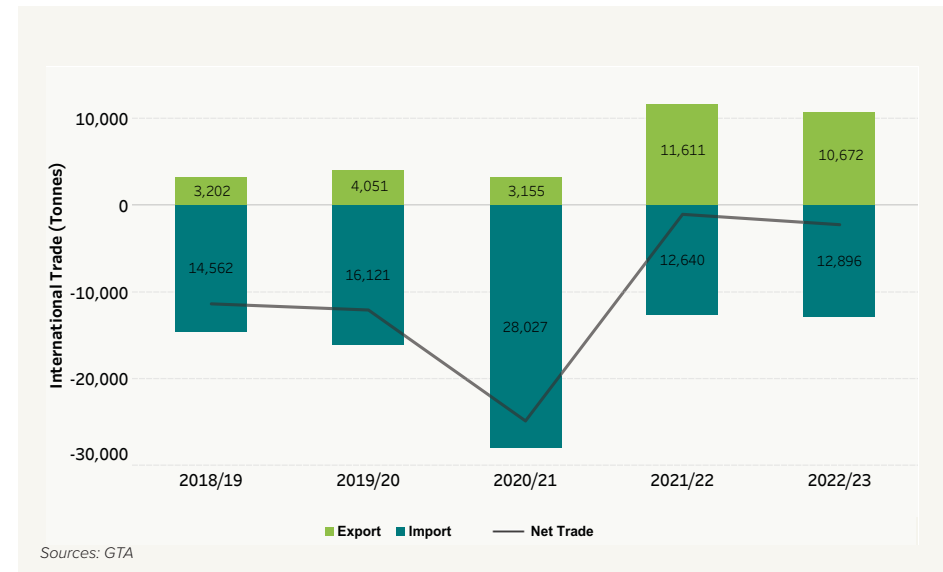
Availability legend: High Medium Low None

Sources: AAL

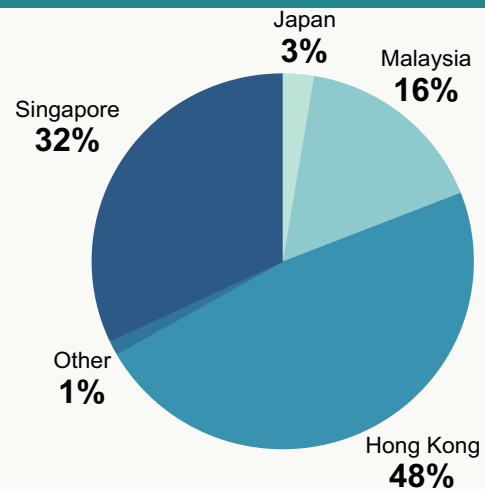
Fresh Avocados International Trade

FRESH AVOCADOS INTERNATIONAL TRADE

Australia has traditionally been a net importer of fresh avocados, For the year ending June 2023, Australia imported **12,896 tonnes**, and exported **10,672 tonnes**. The exports and imports over the last five financial years are profiled in the graph below, where imports are counted as negative tonnes.



2022/23 FRESH AVOCADOS EXPORTS BY COUNTRY



Source: GTA

For the year ending June 2023, **48%** 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	2021	2022	2023	Year Ending June	2021	2022	2023
New South Wales	14,922	7,180	7,070	Queensland	2,111	5,537	7,204
Queensland	7,315	4,643	3,976	New South Wales	581	2,195	1,527
Victoria	5,755	818	1,850	Western Australia	237	2,653	1,210
Western Australia	35	-	-	Victoria	214	926	461
TOTAL	28,027	12,640	12,896	South Australia	6	280	267
				Other	6	20	2
				TOTAL	3,155	11,611	10,672

FRESH AVOCADOS IMPORTS AND EXPORTS BY COUNTRY

Imports by Country (Tonnes)				Exports by Country (Tonnes)			
Year Ending June	2021	2022	2023	Year Ending June	2021	2022	2023
New Zealand	25,509	12,598	12,029	Hong Kong	1,425	5,358	5,074
Chile	2,518	42	868	Singapore	996	3,580	3,397
Other	< 0.5	-	-	Malaysia	616	2,254	1,745
TOTAL	28,027	12,640	12,896	Japan	-	106	277
				Indonesia	58	65	48
				Other	60	248	131
				TOTAL	3,155	11,611	10,672

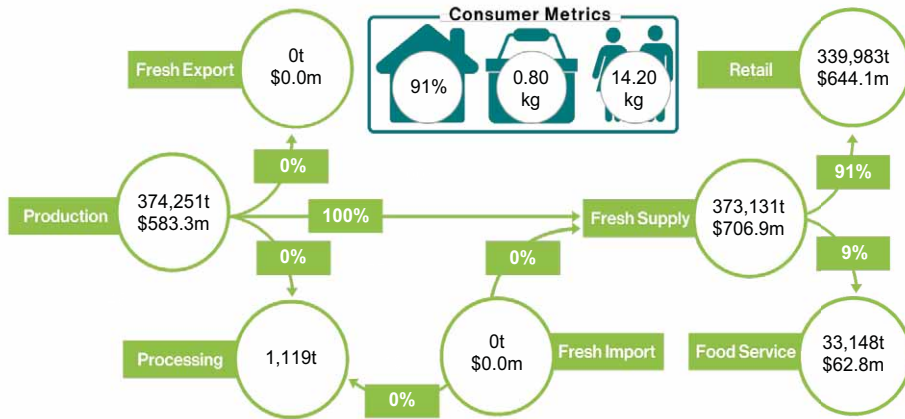
Source: GTA

A close-up photograph of a bunch of ripe, yellow bananas resting in a dark brown, woven wicker basket. The bananas are curved and have a few small brown spots on their peels. The background is slightly blurred, showing more bananas and the texture of the basket.

Bananas

Fresh Bananas Overview

FRESH BANANAS SUPPLY CHAIN – YEAR ENDING JUNE 2023



Consumer Metrics

- 91% (House icon)
- 0.80 kg (Shopping bag icon)
- 14.20 kg (Person icon)

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

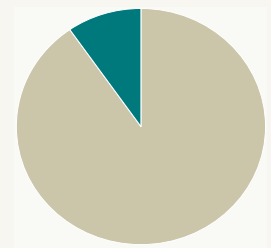
TOTAL PRODUCTION:



\$583.3M

374,251t produced and valued at \$583.3M

RETAIL VS FOOD SERVICE:



■ Retail 91% ■ Food Service 9%

The wholesale value of the fresh supply was \$706.9M, with \$644.1M distributed into retail and \$62.8M into food service.

CONSUMER METRICS:



91%

91% of Australian households purchased bananas, buying an average of **796g** per shopping trip.

PER CAPITA CONSUMPTION:

14.2kg



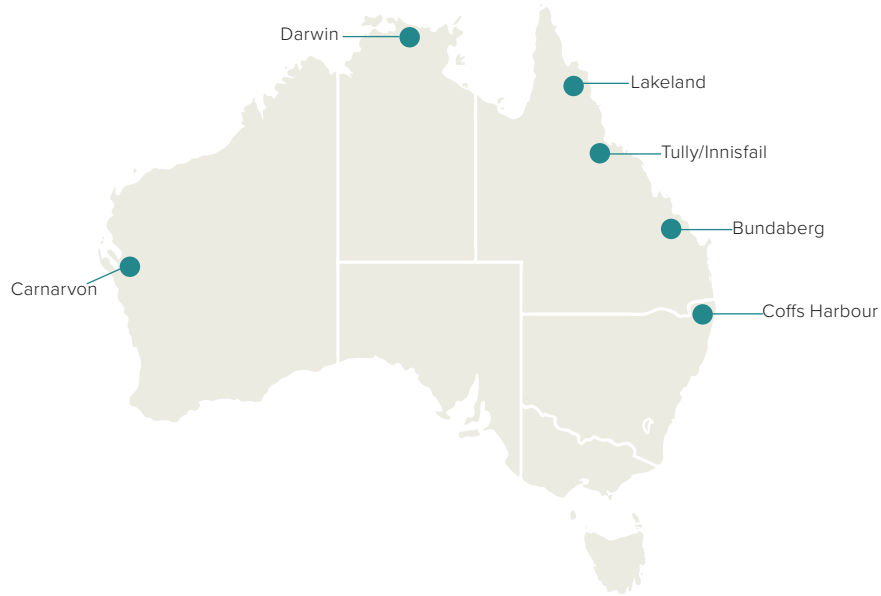
in 2022/23 based on the volume supplied.

YEAR ENDING JUNE	2021	2022		2023	
	Value	Value	% YoY	Value	% YoY
Production (t)	402,982	374,033	-7%	374,251	<1%
Production (\$m)	\$596.8	\$501.6	-16%	\$583.3	+16%
Production area (Ha)	-	-	-	13,670	-
Fresh Export Volume (t)	-	-	-	-	-
Fresh Export Value (\$m)	\$-	\$-	-	\$-	-
Fresh Import Volume (t)	-	-	-	-	-
Fresh Import Value (\$m)	\$-	\$-	-	\$-	-
Fresh Supply (t)	401,777	372,914	-7%	373,131	<1%
Fresh Supply Wholesale Value (\$m)	\$723.2	\$607.8	-16%	\$706.9	+16%
Supply per Capita (kg)	15.60	14.37	-8%	14.20	-1%
Retail Supply (t)	361,961	336,869	-7%	339,983	<1%
Retail Supply Wholesale Value (\$m)	\$651.5	\$549.0	-16%	\$644.1	+17%
Food Service Supply (t)	39,816	36,045	-9%	33,148	-8%
Food Service Wholesale Value (\$m)	\$71.7	\$58.7	-18%	\$62.8	+7%

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

Fresh Bananas Production

MAJOR PRODUCTION AREAS



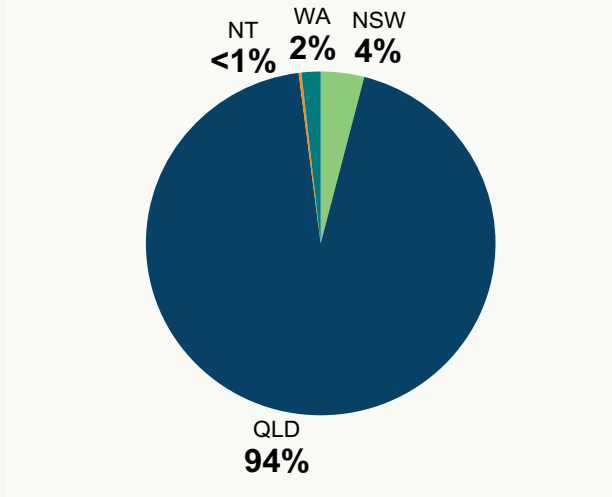
Source: ABGC

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:



2022/23 FRESH BANANAS PRODUCTION BY STATE



Source: ABGC

2022/23 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	12,399	351,796	\$548.3	High	High	High	High	High	High	High	High	High	High	High	High
New South Wales	866	14,970	\$23.3	High	Medium	Medium	Medium	Medium	Medium	Medium	Medium	Medium	Medium	Medium	Medium
Western Australia	265	6,549	\$10.2	High	High	High	High	High	High	High	High	High	High	High	High
Northern Territory	140	936	\$1.5	High	Medium	Medium	Medium	Medium	Medium	Medium	Medium	Medium	Medium	Medium	Medium

Availability legend: High (Dark Green), Medium (Light Green), Low (Yellow-Green), None (Grey)

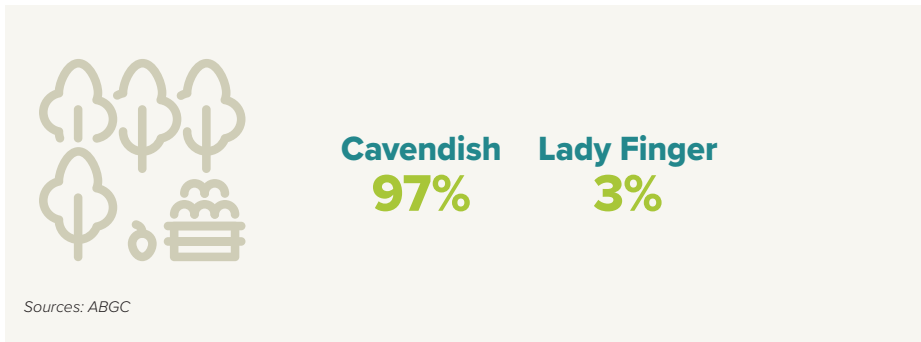
Source: ABGC

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.



2022/23 FRESH BANANAS SEASONALITY BY VARIETY

Variety	Volume (t)	Jul	Aug	Sep	Oct	Nov	Dec	Jan	Feb	Mar	Apr	May	Jun
Cavendish	363,023	High	High	High	High	High	Medium	Medium	Medium	Medium	Medium	Medium	Medium
Lady Fingers	11,228	Low	Low	Low	Low	Low	Low	Low	Low	Low	Low	Low	Low

Availability legend: High Medium Low None

Sources: ABGC

Processed Bananas International Trade

2022/23 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 2023, **62 tonnes** of dried bananas were imported, while **23 tonnes** was exported.

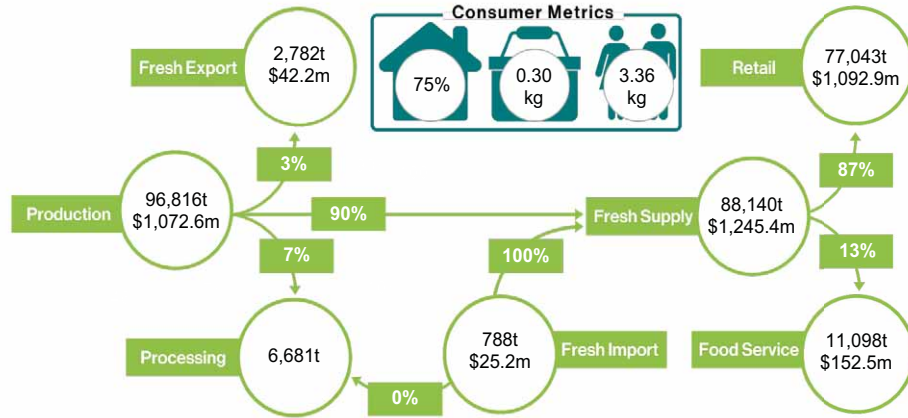




Berries - Overview

Fresh Berries Overview

FRESH BERRIES SUPPLY CHAIN – YEAR ENDING JUNE 2023



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

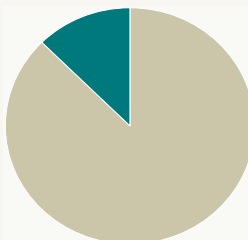
TOTAL PRODUCTION:



\$1,072.6M

96,816t produced and valued at **\$1,072.6M** with 7% sent to be processed.

RETAIL VS FOOD SERVICE:



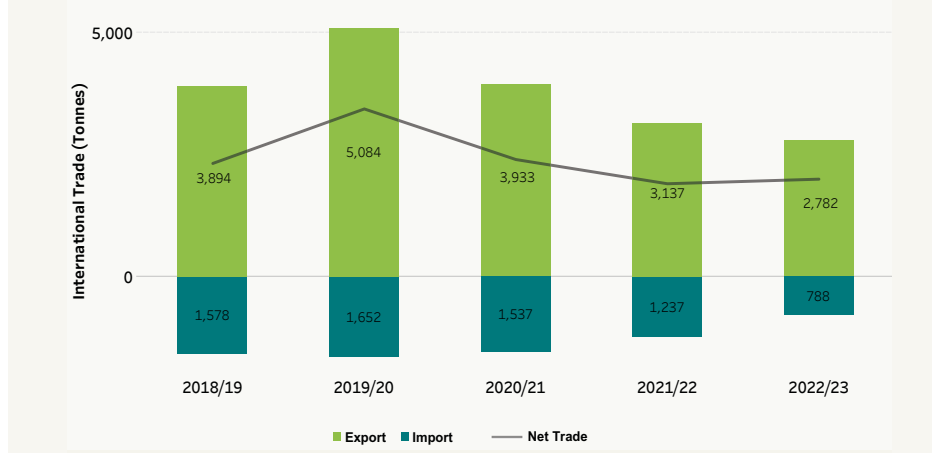
Retail 87% **Food Service 13%**

The wholesale value of the fresh supply was **\$1,245.4M**, with **\$1,092.9M** distributed into retail and **\$152.5M** into food service.

YEAR ENDING JUNE	2021	2022		2023	
	Value	Value	% YoY	Value	% YoY
Production (t)	112,326	97,552	-13%	96,816	>-1%
Production (\$m)	\$1,055.5	\$1,029.3	-2%	\$1,072.6	+4%
Production area (Ha)	-	-	-	-	-
Fresh Export Volume (t)	3,933	3,137	-20%	2,782	-11%
Fresh Export Value (\$m)	\$34.0	\$39.0	+15%	\$42.2	+8%
Fresh Import Volume (t)	1,537	1,237	-20%	788	-36%
Fresh Import Value (\$m)	\$32.3	\$29.1	-10%	\$25.2	-13%
Fresh Supply (t)	101,540	88,336	-13%	88,140	>-1%
Fresh Supply Wholesale Value (\$m)	\$1,246.2	\$1,208.5	-3%	\$1,245.4	+3%
Supply per Capita (kg)	3.94	3.40	-14%	3.36	-1%
Retail Supply (t)	88,728	76,872	-13%	77,043	<-1%
Retail Supply Wholesale Value (\$m)	\$1,096.9	\$1,057.5	-4%	\$1,092.9	+3%
Food Service Supply (t)	12,812	11,465	-11%	11,098	-3%
Food Service Wholesale Value (\$m)	\$149.3	\$150.9	+1%	\$152.5	<-1%

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

FRESH BERRIES INTERNATIONAL TRADE

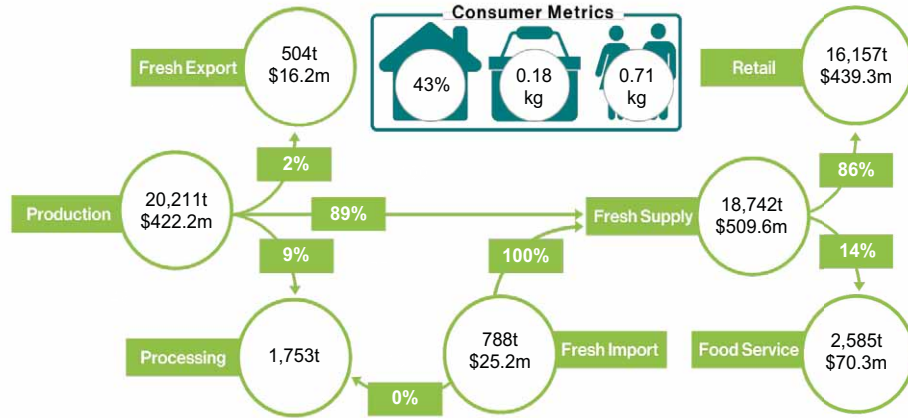




Berries - Blueberries

Fresh Blueberries Overview

FRESH BLUEBERRIES SUPPLY CHAIN – YEAR ENDING JUNE 2023



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

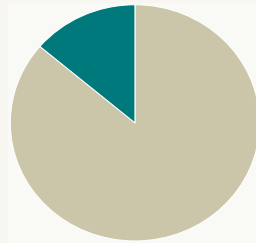
TOTAL PRODUCTION:



\$422.2M

20,211t produced and valued at **\$422.2M** with **9%** sent to be processed.

RETAIL VS FOOD SERVICE:



■ Retail 86% ■ Food Service 14%

The wholesale value of the fresh supply was **\$509.6M**, with **\$439.3M** distributed into retail and **\$70.3M** into food service.

CONSUMER METRICS:



43% of Australian households purchased blueberries, buying an average of **183g** per shopping trip.

PER CAPITA CONSUMPTION:



0.71kg in 2022/23 based on the volume supplied.

YEAR ENDING JUNE	2021	2022		2023	
	Value	Value	% YoY	Value	% YoY
Production (t)	23,452	19,608	-16%	20,211	+3%
Production (\$m)	\$411.2	\$407.1	-1%	\$422.2	+4%
Fresh Export Volume (t)	342	517	+51%	504	-2%
Fresh Export Value (\$m)	\$8.4	\$15.8	+88%	\$16.2	+3%
Fresh Import Volume (t)	1,531	1,231	-20%	788	-36%
Fresh Import Value (\$m)	\$32.2	\$29.0	-10%	\$25.2	-13%
Fresh Supply (t)	22,606	18,621	-18%	18,742	<1%
Fresh Supply Wholesale Value (\$m)	\$517.9	\$503.8	-3%	\$509.6	+1%
Supply per Capita (kg)	0.88	0.72	-18%	0.71	>-1%
Retail Supply (t)	19,572	16,053	-18%	16,157	<1%
Retail Supply Wholesale Value (\$m)	\$448.4	\$434.3	-3%	\$439.3	+1%
Food Service Supply (t)	3,034	2,568	-15%	2,585	<1%
Food Service Wholesale Value (\$m)	\$69.5	\$69.5	>-1%	\$70.3	+1%

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

Fresh Blueberries Production

MAJOR PRODUCTION AREAS



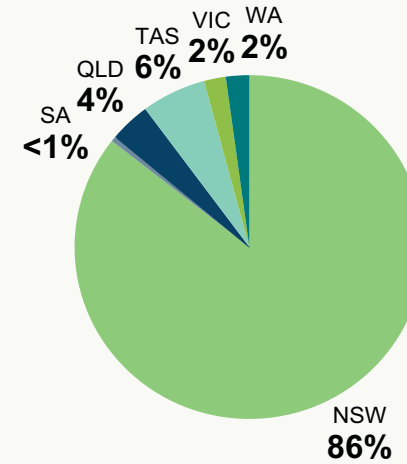
Source: BA

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 WINDOW:



2022/23 FRESH BLUEBERRIES PRODUCTION BY STATE



Source: BA

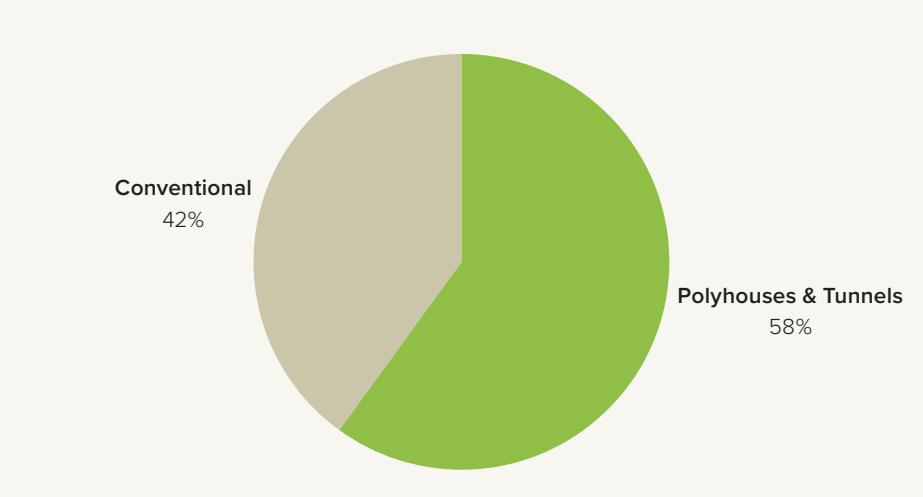
2022/23 FRESH BLUEBERRIES SEASONALITY BY STATE

State	Volume (t)	Value (\$m)	Jul	Aug	Sep	Oct	Nov	Dec	Jan	Feb	Mar	Apr	May	Jun
New South Wales	17,301	\$361.4	High	High	High	High	High	High	High	Medium	Low	None	None	None
Tasmania	1,213	\$25.3	None	None	None	None	None	None	High	High	High	Medium	None	None
Queensland	758	\$15.8	None	None	None	None	None	Low	Low	Low	Low	None	None	None
Western Australia	435	\$9.1	None	Low	Low	High	High	Low	None	None	None	None	None	None
Victoria	404	\$8.4	None	None	None	None	None	Medium	High	High	High	Medium	None	None
South Australia	101	\$2.1	None	None	None	None	None	Medium	High	High	Medium	Medium	Low	None

Availability legend: High Medium Low None

Source: BA

2022/23 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 58%** and **Conventional 42%**.

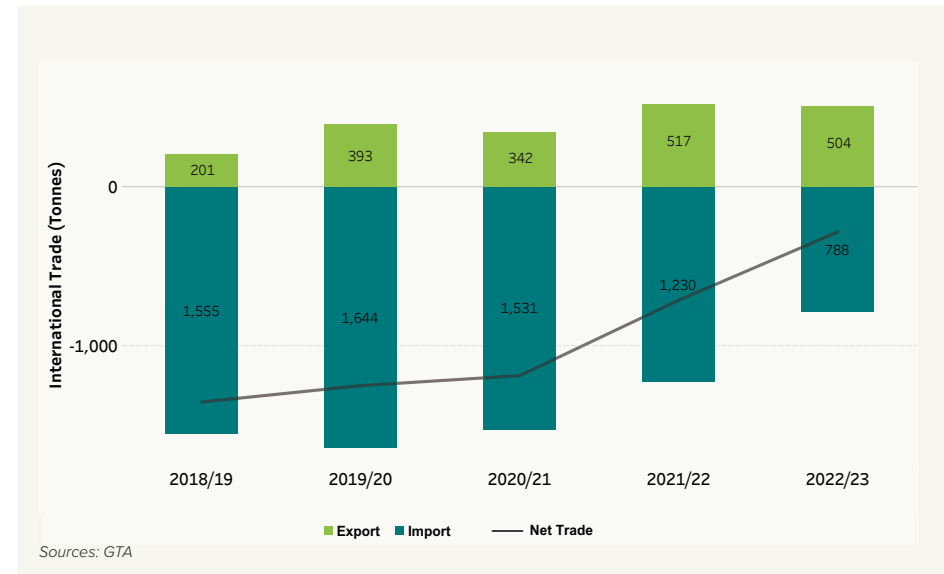
2022/23 FRESH BLUEBERRIES PRODUCTION SYSTEM BY STATE

State	Polyhouses & Tunnels			Conventional		
	Hectares (Ha)	Volume (t)	Value (\$m)	Hectares (Ha)	Volume (t)	Value (\$m)
New South Wales	1259	10,071	\$243.1	-	7,230	\$118.3
Victoria	29	235	\$5.7	-	169	\$2.8
Queensland	55	441	\$10.7	-	317	\$5.2
Western Australia	32	253	\$6.1	-	182	\$3.0
South Australia	7	59	\$1.4	-	42	\$0.7
Tasmania	88	706	\$17.0	-	507	\$8.3
Northern Territory	0	0	\$-	-	0	\$-

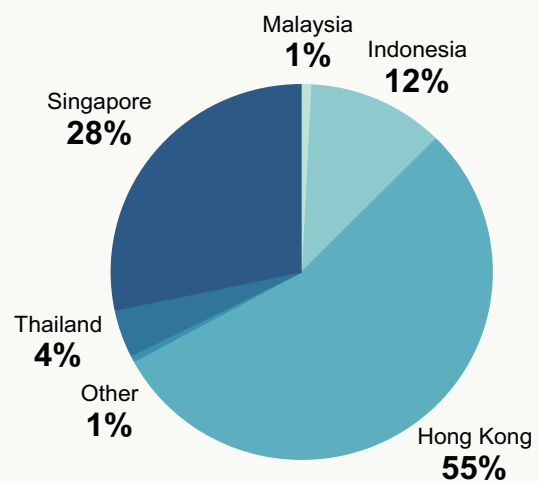
Fresh Blueberries International Trade

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 2023, Australia imported **788 tonnes**. The exports and imports over the last five financial years are profiled in the graph below, where imports are counted as negative tonnes.



2022/23 FRESH BLUEBERRIES EXPORTS BY COUNTRY



Source: GTA

For the year ending June 2023, **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	2021	2022	2023	Year Ending June	2021	2022	2023
New South Wales	835	587	522	New South Wales	249	418	357
Western Australia	249	252	195	Queensland	66	84	138
Victoria	126	179	55	Tasmania	5	2	6
Queensland	321	205	14	Victoria	15	12	2
South Australia	-	8	2	South Australia	2	1	-
TOTAL	1,531	1,230	788	Other	5	< 0.5	< 0.5
				TOTAL	342	517	504

FRESH BLUEBERRIES IMPORTS AND EXPORTS BY COUNTRY

Imports by Country (Tonnes)				Exports by Country (Tonnes)			
Year Ending June	2021	2022	2023	Year Ending June	2021	2022	2023
New Zealand	1,507	1,223	788	Hong Kong	172	283	275
Chile	24	5	-	Singapore	107	190	142
Serbia	-	2	-	Indonesia	35	29	59
TOTAL	1,531	1,230	788	Thailand	24	7	21
				Malaysia	3	4	4
				Other	2	3	3
				TOTAL	342	517	504

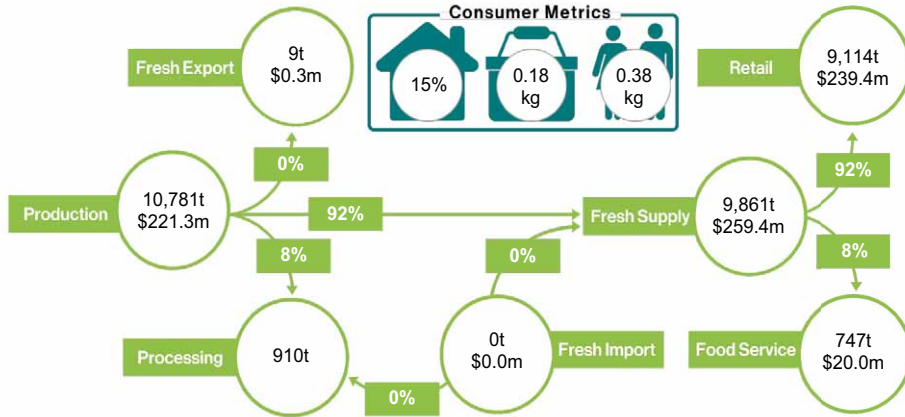
Source: GTA



Berries - Rubus

Fresh Rubus Berries Overview

FRESH RUBUS BERRIES SUPPLY CHAIN – YEAR ENDING JUNE 2023



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

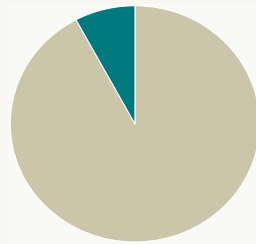
TOTAL PRODUCTION:



\$221.3M

10,781t produced and valued at **\$221.3M** with **8%** sent to be processed.

RETAIL VS FOOD SERVICE:



■ Retail 92% ■ Food Service 8%

The wholesale value of the fresh supply was **\$259.4M**, with **\$239.4M** distributed into retail and **\$20M** into food service.

CONSUMER METRICS:



15% of Australian households purchased rubus berries, buying an average of **181g** per shopping trip.

PER CAPITA CONSUMPTION:



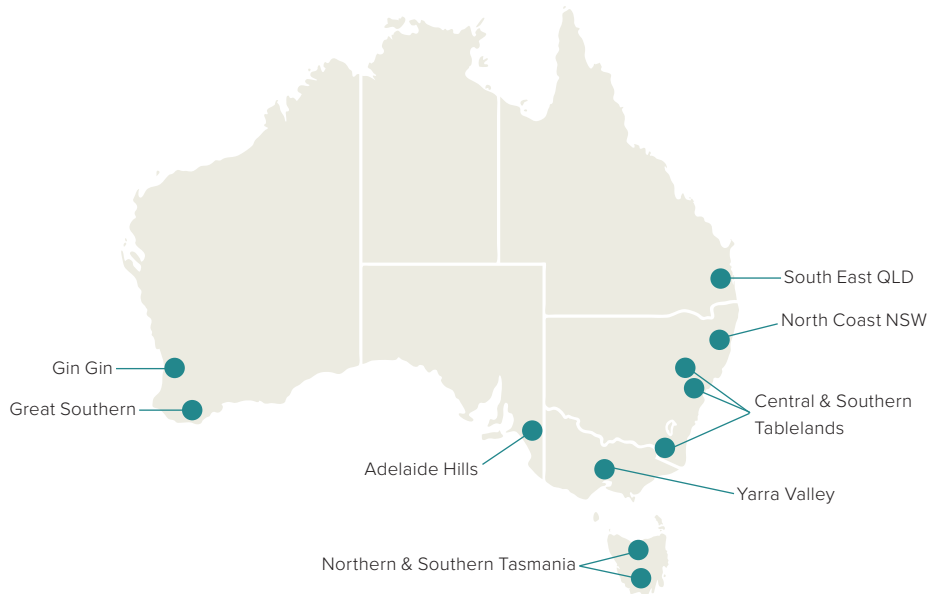
in 2022/23 based on the volume supplied.

YEAR ENDING JUNE	2021	2022		2023	
	Value	Value	% YoY	Value	% YoY
Production (t)	11,123	9,632	-13%	10,781	+12%
Production (\$m)	\$227.2	\$205.3	-10%	\$221.3	+8%
Fresh Export Volume (t)	13	26	+93%	9	-65%
Fresh Export Value (\$m)	\$0.2	\$0.5	>100%	\$0.3	-38%
Fresh Import Volume (t)	-	-	-	-	-
Fresh Import Value (\$m)	\$-	\$-	-	\$-	-
Fresh Supply (t)	10,179	8,758	-14%	9,861	+13%
Fresh Supply Wholesale Value (\$m)	\$266.2	\$240.2	-10%	\$259.4	+8%
Supply per Capita (kg)	0.40	0.34	-15%	0.38	+11%
Retail Supply (t)	9,472	8,088	-15%	9,114	+13%
Retail Supply Wholesale Value (\$m)	\$247.4	\$221.4	-10%	\$239.4	+8%
Food Service Supply (t)	706	670	-5%	747	+11%
Food Service Wholesale Value (\$m)	\$18.8	\$18.8	>-1%	\$20.0	+7%

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

Fresh Rubus Berries Production

MAJOR PRODUCTION AREAS



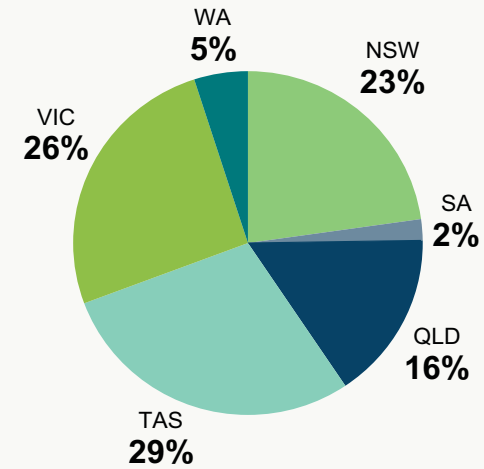
Source: BA

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.

PRODUCTION WINDOW:



2022/23 FRESH RUBUS BERRIES PRODUCTION BY STATE



Source: BA

2022/23 FRESH RUBUS BERRIES SEASONALITY BY STATE

State	Volume (t)	Value (\$m)	Jul	Aug	Sep	Oct	Nov	Dec	Jan	Feb	Mar	Apr	May	Jun
Tasmania	3,095	\$63.5					Low	High	High	High	High	Low	Low	
Victoria	2,775	\$57.0				Low	High	High	High	High	Low	Low		
New South Wales	2,455	\$50.4	High	High	High	Low	Low	Low	Low	Low	Low	High	High	High
Queensland	1,708	\$35.1	High	High	High	Low	Low				Low	Low	High	High
Western Australia	534	\$11.0				Low	Low	Low	Low	Low	Low			
South Australia	213	\$4.4				Low	Low	Low	Low	Low	Low			

Availability legend: High (Dark Teal), Medium (Light Teal), Low (Light Green), None (Light Grey)

Source: BA

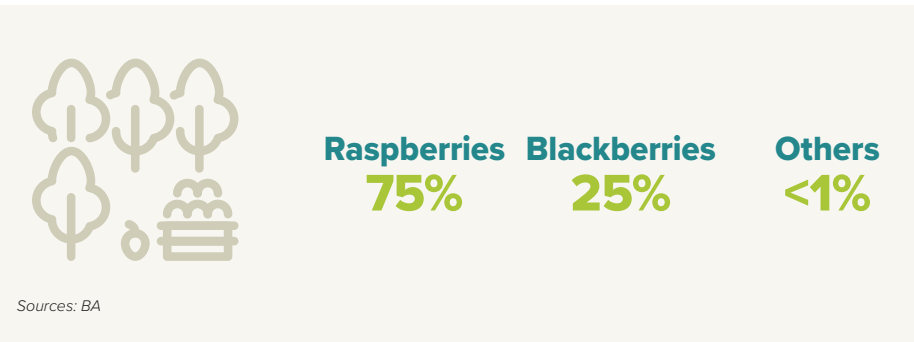
MAIN RUBUS BERRIES TYPES

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



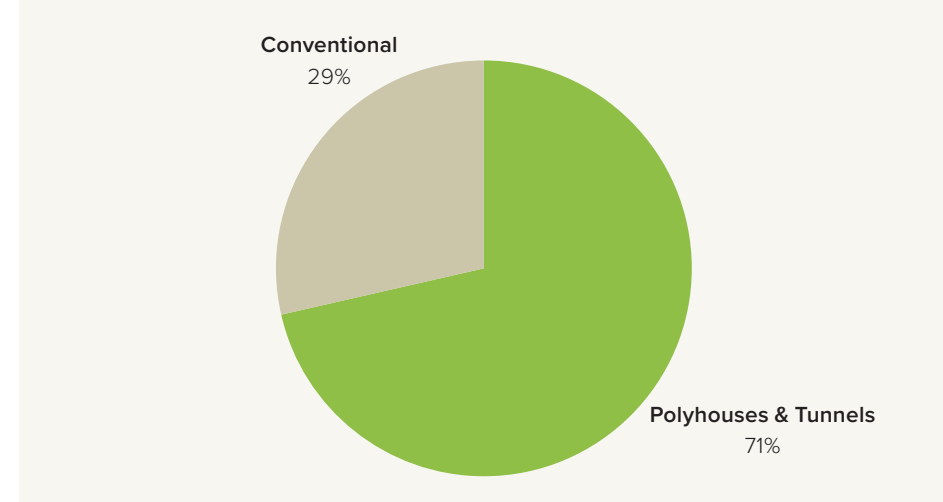
2022/23 FRESH RUBUS BERRIES SEASONALITY BY VARIETY

Variety	Volume (t)	Jul	Aug	Sep	Oct	Nov	Dec	Jan	Feb	Mar	Apr	May	Jun
Raspberries	7,138	Medium	Medium	Medium	High	High	High	High	High	High	High	Medium	Medium
Blackberries	3,594	None	None	None	None	Low	High	High	Medium	None	None	None	None
Other	49	None	None	None	None	Low	Low	Low	Low	None	None	None	None

Availability legend: High Medium Low None

Source: BA

2022/23 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 71%** and **Conventional 29%**.

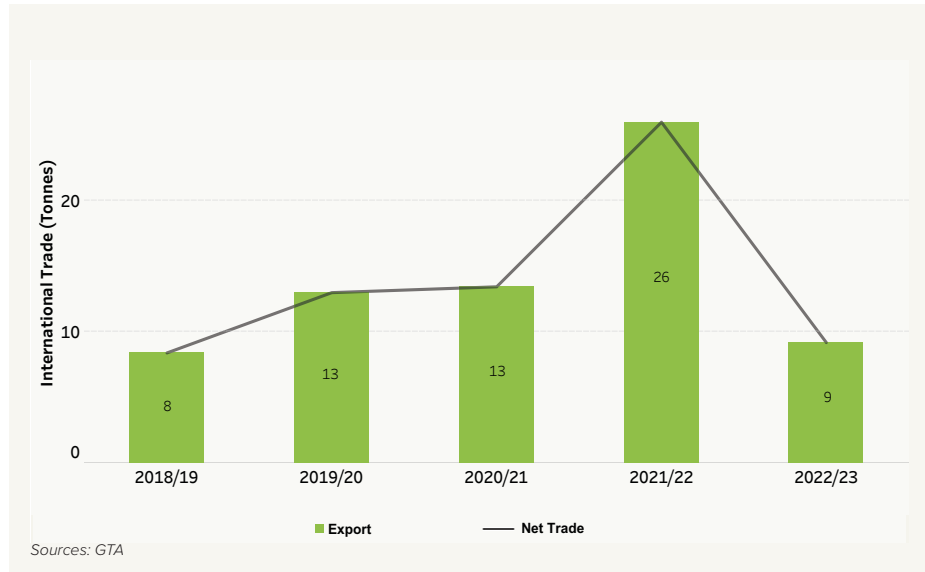
2022/23 FRESH RUBUS BERRIES PRODUCTION SYSTEM BY STATE

State	Polyhouses & Tunnels			Conventional		
	Hectares (Ha)	Volume (t)	Value (\$m)	Hectares (Ha)	Volume (t)	Value (\$m)
New South Wales	219	1,753	\$39.3	0	702	\$11.1
Victoria	248	1,982	\$44.5	0	793	\$12.5
Queensland	152	1,220	\$27.4	0	488	\$7.7
Western Australia	48	381	\$8.6	0	153	\$2.4
South Australia	19	152	\$3.4	0	61	\$1.0
Tasmania	276	2,211	\$49.6	0	885	\$14.0
Northern Territory	0	0	\$-	0	0	\$-

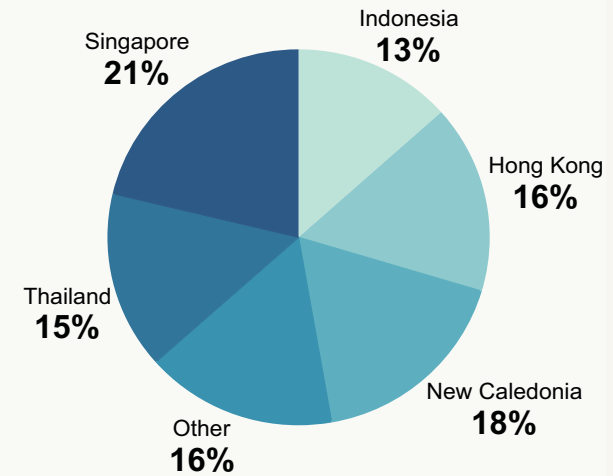
Fresh Rubus Berries International Trade

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.



2022/23 FRESH RUBUS BERRIES EXPORTS BY COUNTRY



Source: GTA

For the year ending June 2023, **21%** of exported fresh rubus berries were sent to **Singapore**, as profiled in the chart above.

FRESH RUBUS BERRIES EXPORTS BY STATE

Exports by State of Production Origin (Tonnes)			
Year Ending June	2021	2022	2023
Victoria	10	11	4
New South Wales	2	10	4
Queensland	1	3	1
Tasmania	< 0.5	1	< 0.5
Northern Territory	< 0.5	-	-
Other	< 0.5	1	< 0.5
TOTAL	13	26	9

FRESH RUBUS BERRIES EXPORTS BY COUNTRY

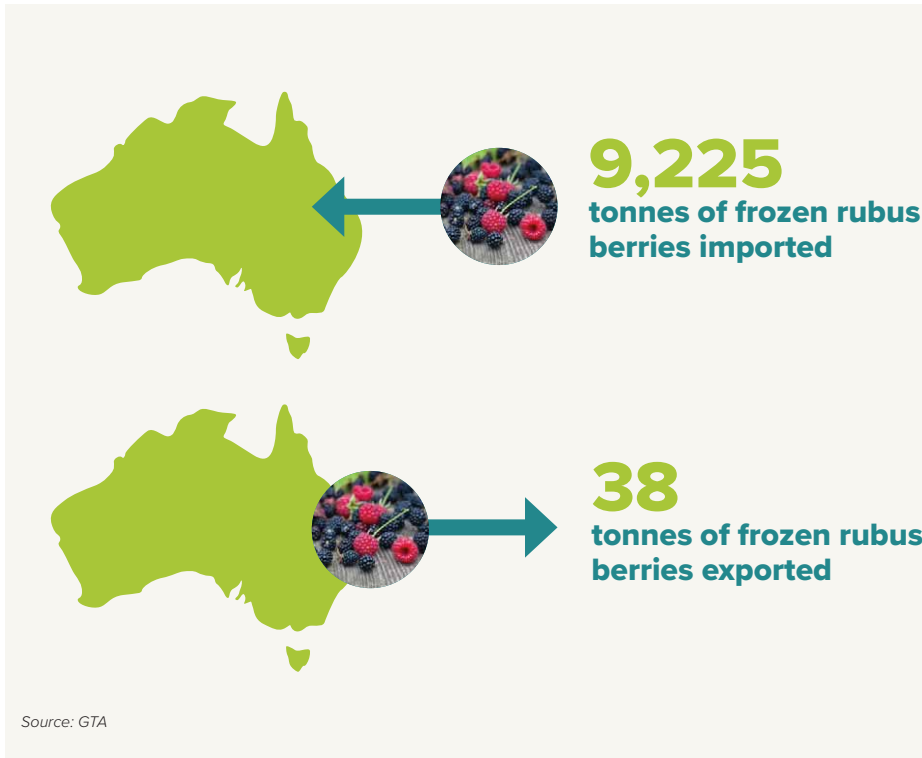
Exports by Country (Tonnes)			
Year Ending June	2021	2022	2023
Singapore	2	14	2
New Caledonia	< 0.5	1	2
Hong Kong	1	1	1
Thailand	-	-	1
Indonesia	-	1	1
Other	10	10	1
TOTAL	13	26	9

Source: GTA

Processed Rubus Berries International Trade

2022/23 PROCESSED RUBUS BERRIES INTERNATIONAL TRADE

For the year ending June 2023, an additional **9,225 tonnes** of frozen rubus berries were imported, while **38 tonnes** were exported.

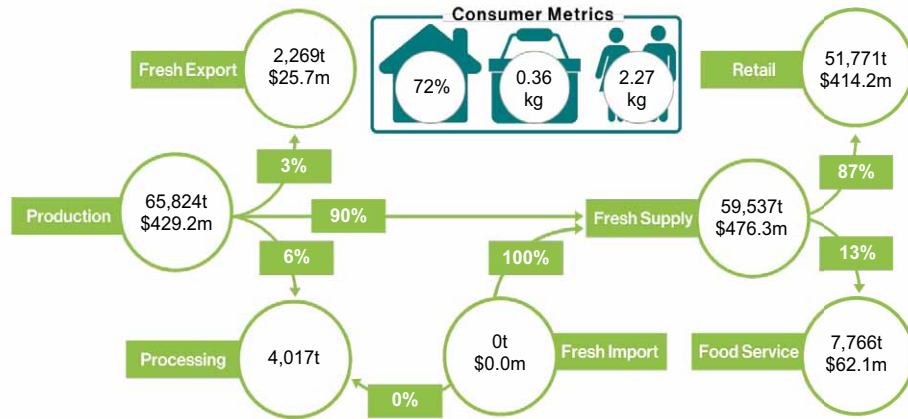




Berries - Strawberries

Fresh Strawberries Overview

FRESH STRAWBERRIES SUPPLY CHAIN – YEAR ENDING JUNE 2023



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

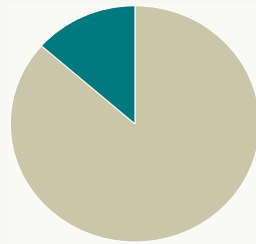
TOTAL PRODUCTION:



\$429.2M

65,824t produced and valued at \$429.2M with 6% sent to be processed.

RETAIL VS FOOD SERVICE:



■ Retail 87% ■ Food Service 13%

The wholesale value of the fresh supply was \$476.3M, with \$414.2M distributed into retail and \$62.1M into food service.

CONSUMER METRICS:



72% of Australian households purchased strawberries, buying an average of 364g per shopping trip.

PER CAPITA CONSUMPTION:



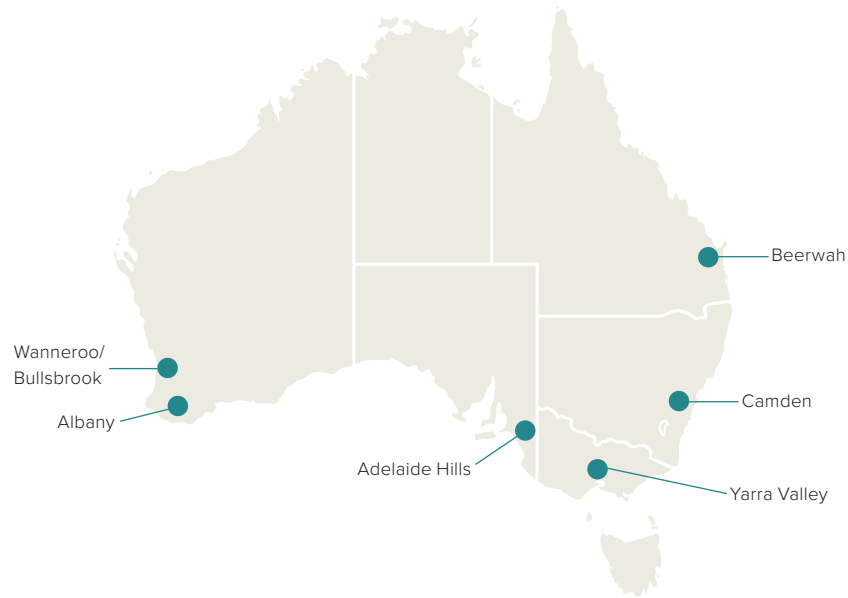
2.27kg in 2022/23 based on the volume supplied.

YEAR ENDING JUNE	2021	2022		2023	
	Value	Value	% YoY	Value	% YoY
Production (t)	77,751	68,312	-12%	65,824	-4%
Production (\$m)	\$417.2	\$416.9	>-1%	\$429.2	+3%
Fresh Export Volume (t)	3,578	2,595	-27%	2,269	-13%
Fresh Export Value (\$m)	\$25.5	\$22.8	-11%	\$25.7	+13%
Fresh Import Volume (t)	7	6	-8%	<1	-100%
Fresh Import Value (\$m)	< \$0.1	< \$0.1	>100%	\$-	-100%
Fresh Supply (t)	68,755	60,957	-11%	59,537	-2%
Fresh Supply Wholesale Value (\$m)	\$462.1	\$464.5	<1%	\$476.3	+3%
Supply per Capita (kg)	2.67	2.35	-12%	2.27	-4%
Retail Supply (t)	59,683	52,731	-12%	51,771	-2%
Retail Supply Wholesale Value (\$m)	\$401.2	\$401.8	<1%	\$414.2	+3%
Food Service Supply (t)	9,072	8,226	-9%	7,766	-6%
Food Service Wholesale Value (\$m)	\$61.0	\$62.7	+3%	\$62.1	>-1%

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

Fresh Strawberries Production

MAJOR PRODUCTION AREAS



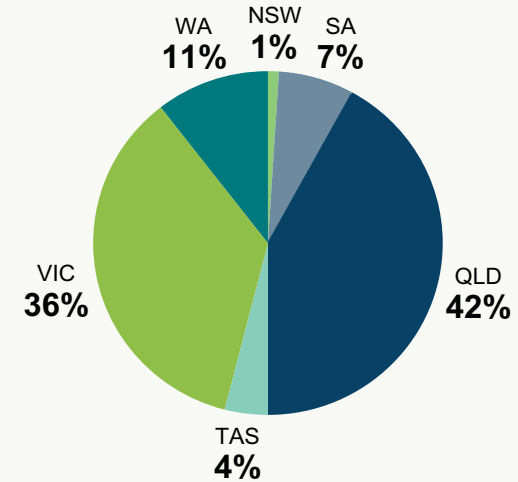
Source: SAI

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

PRODUCTION WINDOW:



2022/23 FRESH STRAWBERRIES PRODUCTION BY STATE



Source: SAI

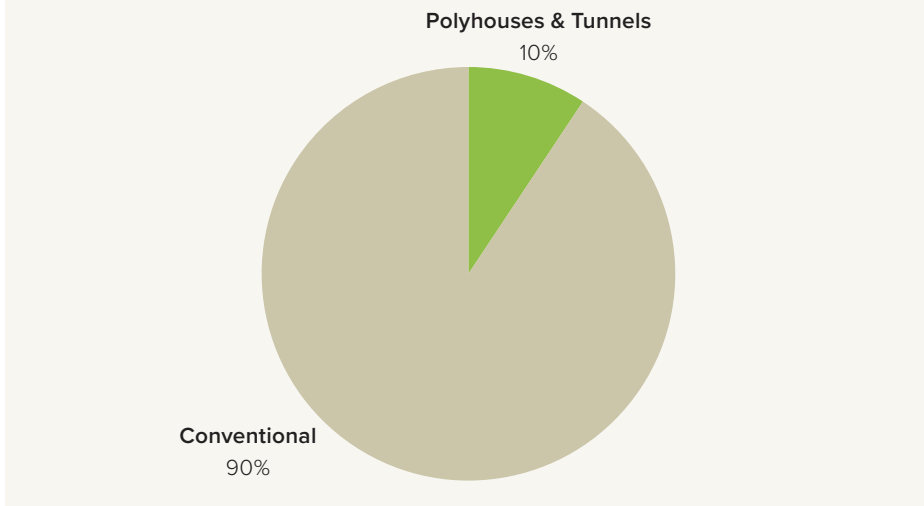
2022/23 FRESH STRAWBERRIES SEASONALITY BY STATE

State	Volume (t)	Value (\$m)	Jul	Aug	Sep	Oct	Nov	Dec	Jan	Feb	Mar	Apr	May	Jun
Queensland	27,646	\$180.2	High	High	High	Medium	Medium	None	None	None	Low	Low	Low	Low
Victoria	23,368	\$152.3	None	None	None	Medium	High	High	High	High	High	Medium	Medium	Medium
Western Australia	6,912	\$45.1	High	High	High	Medium	Medium	Low	None	None	None	None	None	Low
South Australia	4,608	\$30.0	None	Low	Low	Medium	High	High	High	High	High	Medium	Medium	Medium
Tasmania	2,633	\$17.2	None	None	None	Medium	Medium	High	High	High	Medium	Medium	Medium	None
New South Wales	658	\$4.3	None	None	None	Medium	Medium	High	High	High	Medium	Medium	Medium	None

Availability legend: High (Dark Blue), Medium (Light Blue), Low (Green), None (Grey)

Source: SAI

2022/23 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 10%** and **Conventional 90%**.

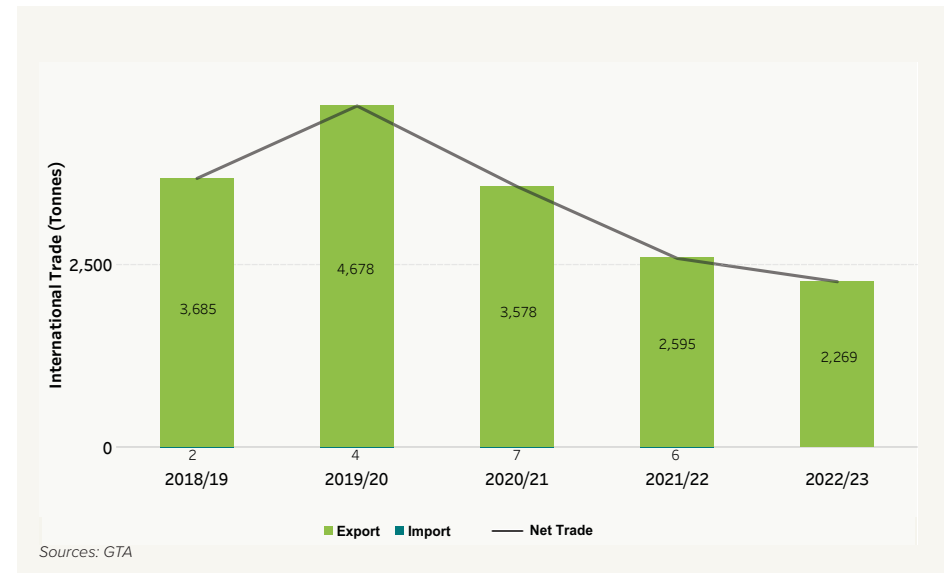
2022/23 FRESH STRAWBERRIES PRODUCTION SYSTEM BY STATE

State	Polyhouses & Tunnels			Conventional		
	Hectares (Ha)	Volume (t)	Value (\$m)	Hectares (Ha)	Volume (t)	Value (\$m)
New South Wales	4	64	\$0.5	-	594	\$3.8
Victoria	151	2,265	\$16.8	-	21,102	\$135.6
Queensland	179	2,680	\$19.9	-	24,966	\$160.4
Western Australia	45	670	\$5.0	-	6,242	\$40.1
South Australia	30	447	\$3.3	-	4,161	\$26.7
Tasmania	17	255	\$1.9	-	2,378	\$15.3
Northern Territory	0	0	\$-	-	0	\$-

Fresh Strawberries International Trade

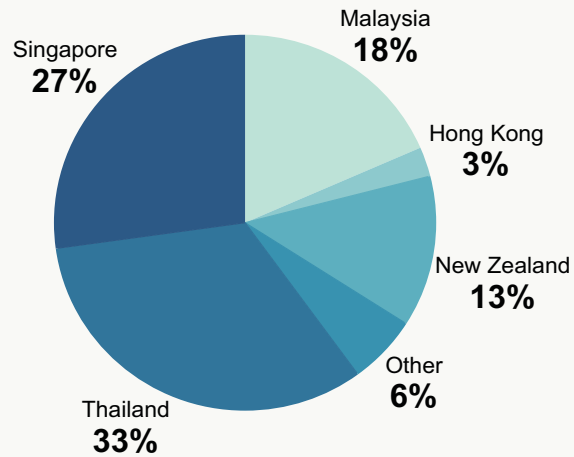
FRESH STRAWBERRIES INTERNATIONAL TRADE

Australia has traditionally been a net exporter of fresh strawberries. For the year ending June 2023, Australia exported **2,269 tonnes**. The exports and imports over the last five financial years are profiled in the graph below, where imports are counted as negative tonnes.





2022/23 FRESH STRAWBERRIES EXPORTS BY COUNTRY



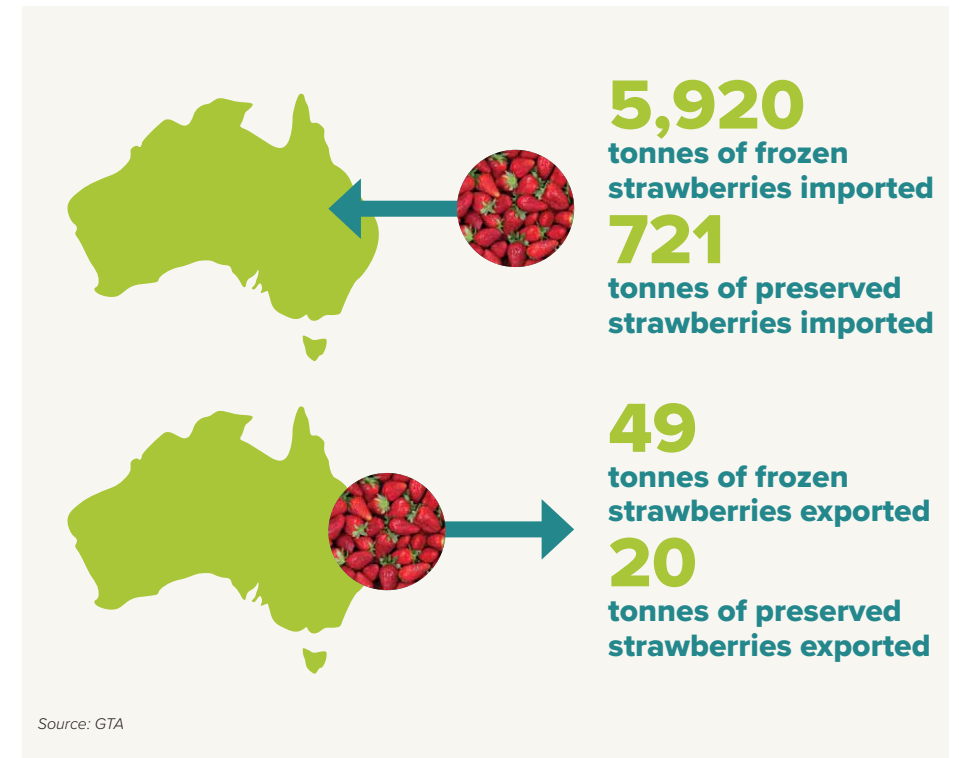
Source: GTA

For the year ending June 2023, **33%** of exported fresh strawberries were sent to **Thailand**, as profiled in the chart above.

Processed Strawberries International Trade

2022/23 PROCESSED STRAWBERRIES INTERNATIONAL TRADE

For the year ending June 2023, an additional **5,920 tonnes** of frozen strawberries were imported, while **49 tonnes** were exported. Australia also imported **721 tonnes** of preserved strawberries, while exporting **20 tonnes** of preserved strawberries.



Source: GTA

FRESH STRAWBERRIES IMPORTS AND EXPORTS BY STATE

Imports by State Destination (Tonnes)				Exports by State of Production Origin (Tonnes)			
Year Ending June	2021	2022	2023	Year Ending June	2021	2022	2023
Queensland	-	1	< 0.5	Western Australia	2,548	1,890	1,898
Victoria	< 0.5	5	-	Queensland	689	597	321
New South Wales	< 0.5	1	-	Victoria	59	29	42
South Australia	6	-	-	New South Wales	279	70	7
Other	< 0.5	-	< 0.5	Tasmania	-	-	1
TOTAL	7	6	0	Other	2	8	-
				TOTAL	3,578	2,595	2,269

FRESH STRAWBERRIES IMPORTS AND EXPORTS BY COUNTRY

Imports by Country (Tonnes)				Exports by Country (Tonnes)			
Year Ending June	2021	2022	2023	Year Ending June	2021	2022	2023
India	-	-	< 0.5	Thailand	891	682	746
Spain	3	5	-	Singapore	783	552	617
Sth. Korea	< 0.5	1	-	Malaysia	519	429	419
Japan	< 0.5	< 0.5	-	New Zealand	584	449	296
Chile	3	-	-	Hong Kong	340	135	58
Other	< 0.5	< 0.5	< 0.5	Other	461	348	134
TOTAL	7	6	0	TOTAL	3,578	2,595	2,269

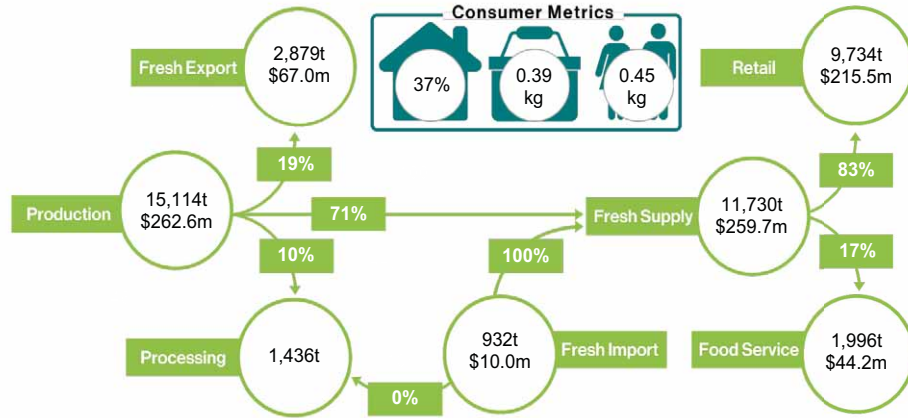
Source: GTA

Cherries



Fresh Cherries Overview

FRESH CHERRIES SUPPLY CHAIN – YEAR ENDING JUNE 2023



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

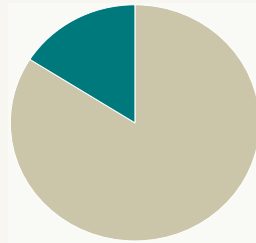
TOTAL PRODUCTION:



\$262.6M

15,114t produced and valued at **\$262.6M** with 10% sent to be processed.

RETAIL VS FOOD SERVICE:



■ Retail 83% ■ Food Service 17%

The wholesale value of the fresh supply was **\$259.7M**, with **\$215.5M** distributed into retail and **\$44.2M** into food service.

CONSUMER METRICS:



37% of Australian households purchased cherries, buying an average of **386g** per shopping trip.

PER CAPITA CONSUMPTION:



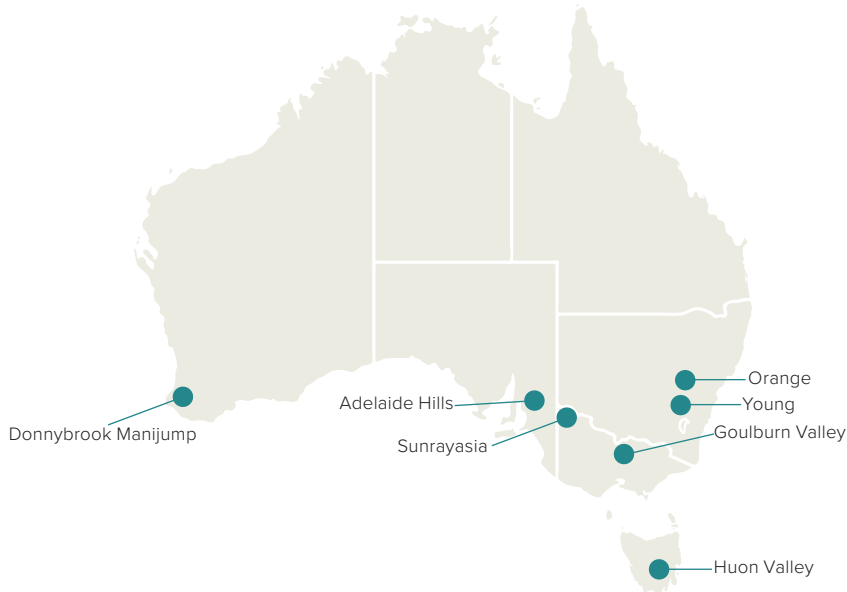
in 2022/23 based on the volume supplied.

YEAR ENDING JUNE	2021	2022		2023	
	Value	Value	% YoY	Value	% YoY
Production (t)	20,074	17,403	-13%	15,114	-13%
Production (\$m)	\$231.3	\$226.5	-2%	\$262.6	+16%
Production area (Ha)	-	-	-	-	-
Fresh Export Volume (t)	4,715	3,885	-18%	2,879	-26%
Fresh Export Value (\$m)	\$82.4	\$74.5	-10%	\$67.0	-10%
Fresh Import Volume (t)	1,345	1,147	-15%	932	-19%
Fresh Import Value (\$m)	\$14.1	\$11.2	-21%	\$10.0	-11%
Fresh Supply (t)	14,537	13,083	-10%	11,730	-10%
Fresh Supply Wholesale Value (\$m)	\$206.0	\$208.1	<1%	\$259.7	+25%
Supply per Capita (kg)	0.56	0.50	-11%	0.45	-11%
Retail Supply (t)	11,916	10,994	-8%	9,734	-11%
Retail Supply Wholesale Value (\$m)	\$168.9	\$174.8	+4%	\$215.5	+23%
Food Service Supply (t)	2,622	2,089	-20%	1,996	-4%
Food Service Wholesale Value (\$m)	\$37.2	\$33.2	-11%	\$44.2	+33%

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

Fresh Cherries Production

MAJOR PRODUCTION AREAS



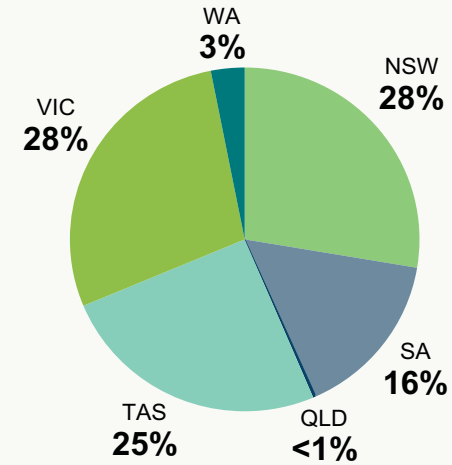
Source: CGAI

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

PRODUCTION WINDOW:



2022/23 FRESH CHERRIES PRODUCTION BY STATE



Source: CGAI

2022/23 FRESH CHERRIES SEASONALITY BY STATE

State	Volume (t)	Value (\$m)	Jul	Aug	Sep	Oct	Nov	Dec	Jan	Feb	Mar	Apr	May	Jun
Victoria	4,262	\$74.0					High	High	High	Medium				
New South Wales	4,179	\$72.6				Low	High	High	Medium					
Tasmania	3,794	\$65.9						Low	High	Medium				
South Australia	2,373	\$41.2				Low	High	High	Medium					
Western Australia	469	\$8.1					Low	Medium	High	Medium				
Queensland	38	\$0.7				Low	Medium	High	High	Medium				

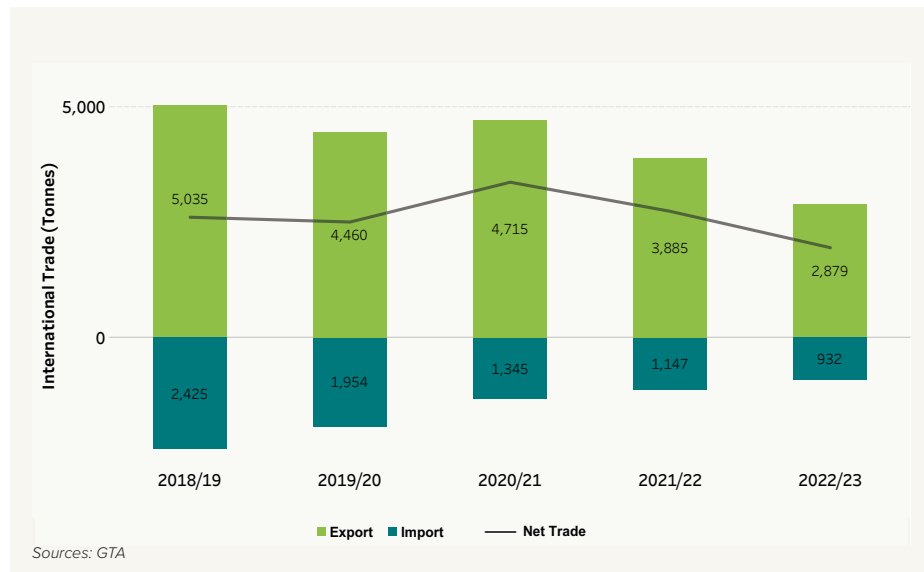
Availability legend: High Medium Low None

Source: CGAI

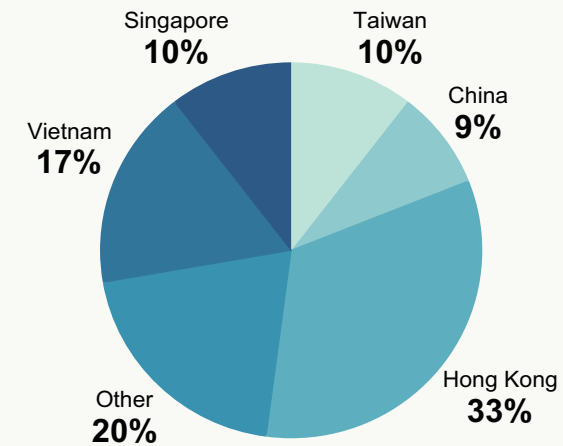
Fresh Cherries International Trade

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 2023, Australia imported **932 tonnes** of fresh cherries, primarily from the United States, and exported **2,879 tonnes**. The exports and imports over the last five financial years are profiled in the graph below, where imports are counted as negative tonnes.



2022/23 FRESH CHERRIES EXPORTS BY COUNTRY



Source: GTA

For the year ending June 2023, **33%** 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	2021	2022	2023	Year Ending June	2021	2022	2023
New South Wales	987	743	519	Tasmania	2,415	2,265	1,977
Victoria	185	225	298	Victoria	1,513	1,054	629
Western Australia	116	98	83	New South Wales	612	313	155
Queensland	57	80	31	South Australia	163	198	101
Other	-	< 0.5	-	Queensland	11	55	13
TOTAL	1,345	1,147	932	Other	1	< 0.5	4
				TOTAL	4,715	3,885	2,879

FRESH CHERRIES IMPORTS AND EXPORTS BY COUNTRY

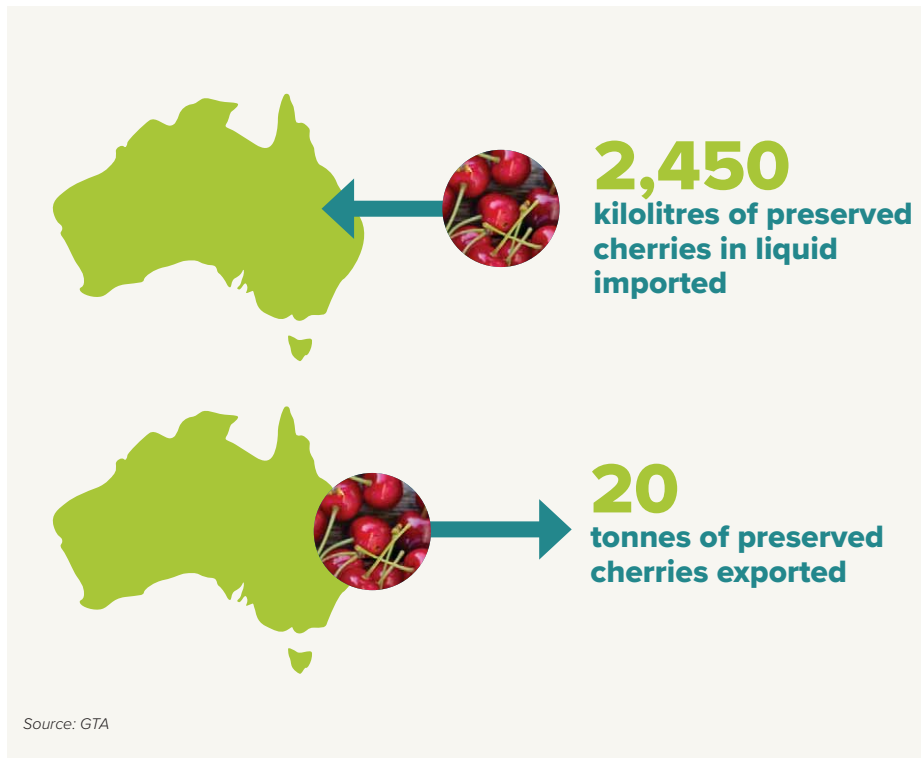
Imports by Country (Tonnes)				Exports by Country (Tonnes)			
Year Ending June	2021	2022	2023	Year Ending June	2021	2022	2023
US	1,345	1,147	932	Hong Kong	1,167	1,040	954
UAE	-	-	< 0.5	Vietnam	760	792	497
TOTAL	1,345	1,147	932	Taiwan	404	459	301
				Singapore	537	498	301
				China	864	278	246
				Other	984	818	581
				TOTAL	4,715	3,885	2,879

Source: GTA

Processed Cherries International Trade

2022/23 PROCESSED CHERRIES INTERNATIONAL TRADE

For the year ending June 2023, an additional **2,450 kilolitres** of preserved cherries in liquid were imported, while **20 tonnes** of preserved cherries were exported.

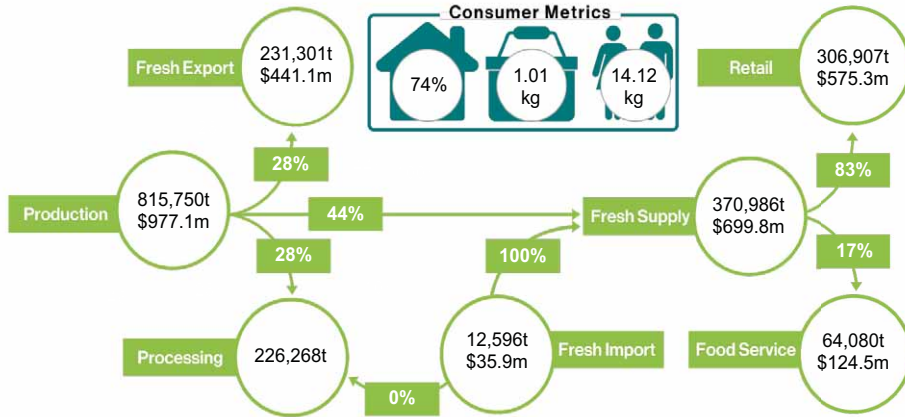




Citrus - Overview

Fresh Citrus Overview

FRESH CITRUS SUPPLY CHAIN – YEAR ENDING JUNE 2023



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

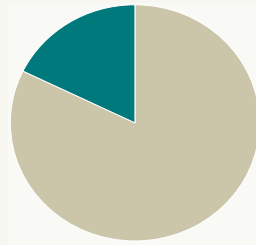
TOTAL PRODUCTION:



\$977.1M

815,750t produced and valued at \$977.1M with 28% sent to be processed.

RETAIL VS FOOD SERVICE:



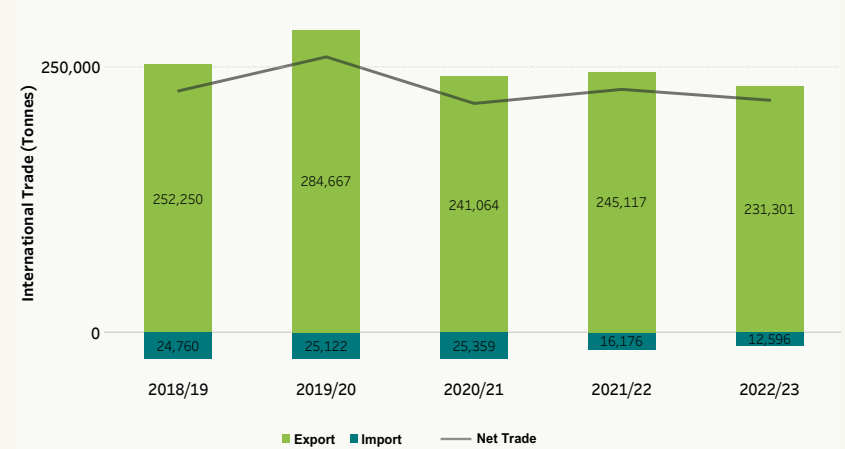
■ Retail 83% ■ Food Service 17%

The wholesale value of the fresh supply was \$699.8M, with \$575.3M distributed into retail and \$124.5M into food service.

YEAR ENDING JUNE	2021	2022		2023	
	Value	Value	% YoY	Value	% YoY
Production (t)	711,443	766,857	+8%	815,750	+6%
Production (\$m)	\$918.0	\$913.7	>-1%	\$977.1	+7%
Production area (Ha)	22,044	22,540	+2%	23,055	+2%
Fresh Export Volume (t)	241,064	245,117	+2%	231,301	-6%
Fresh Export Value (\$m)	\$445.9	\$454.6	+2%	\$441.1	-3%
Fresh Import Volume (t)	25,359	16,176	-36%	12,596	-22%
Fresh Import Value (\$m)	\$62.6	\$44.1	-30%	\$35.9	-19%
Fresh Supply (t)	300,916	311,042	+3%	370,986	+19%
Fresh Supply Wholesale Value (\$m)	\$658.8	\$617.0	-6%	\$699.8	+13%
Supply per Capita (kg)	11.69	11.99	+3%	14.12	+18%
Retail Supply (t)	252,063	258,457	+3%	306,907	+19%
Retail Supply Wholesale Value (\$m)	\$546.2	\$507.4	-7%	\$575.3	+13%
Food Service Supply (t)	48,853	52,585	+8%	64,080	+22%
Food Service Wholesale Value (\$m)	\$112.6	\$109.6	-3%	\$124.5	+14%

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

FRESH CITRUS INTERNATIONAL TRADE

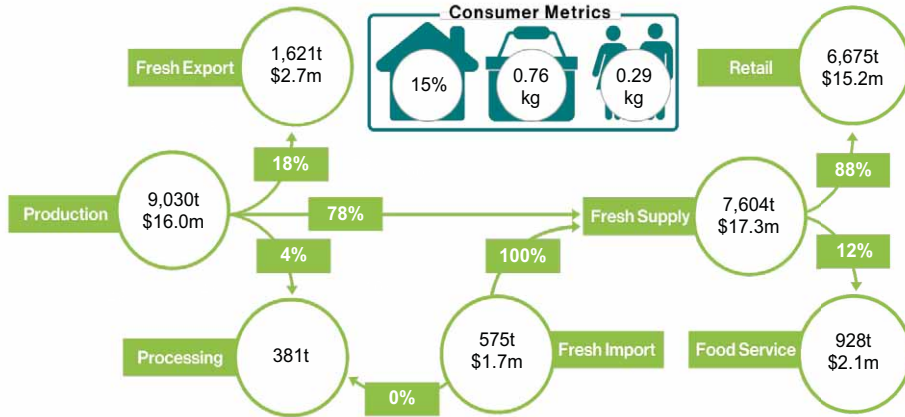




Citrus - Grapefruit

Fresh Grapefruit Overview

FRESH GRAPEFRUIT SUPPLY CHAIN – YEAR ENDING JUNE 2023



Consumer Metrics

- 15% (Household icon)
- 0.76 kg (Shopping bag icon)
- 0.29 kg (Person icon)

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

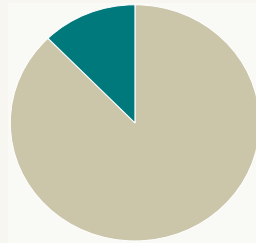
TOTAL PRODUCTION:



\$16M

9,030t produced and valued at **\$16M** with 4% sent to be processed.

RETAIL VS FOOD SERVICE:



■ Retail 88% ■ Food Service 12%

The wholesale value of the fresh supply was **\$17.3M**, with **\$15.2M** distributed into retail and **\$2.1M** into food service.

CONSUMER METRICS:



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

PER CAPITA CONSUMPTION:



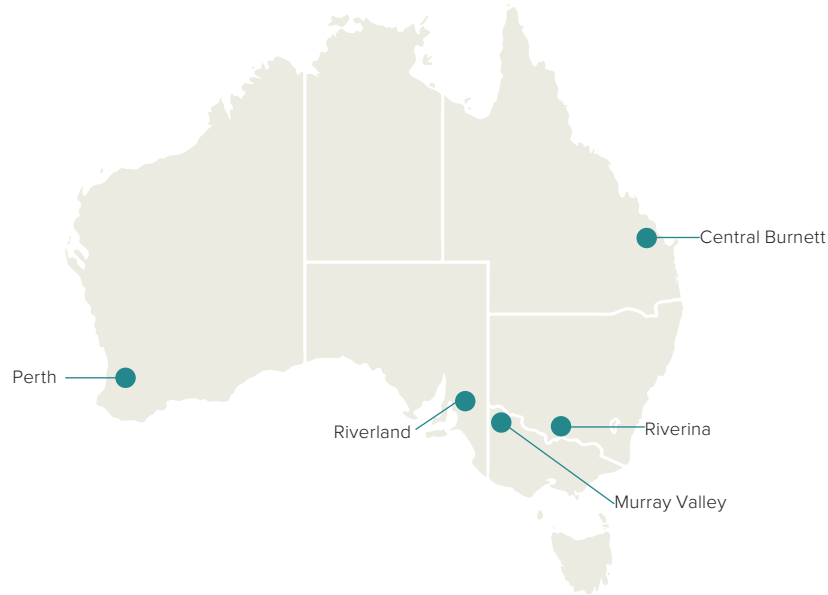
0.29kg in 2022/23 based on the volume supplied.

YEAR ENDING JUNE	2021	2022		2023	
	Value	Value	% YoY	Value	% YoY
Production (t)	11,792	11,190	-5%	9,030	-19%
Production (\$m)	\$21.0	\$17.7	-16%	\$16.0	-10%
Production area (Ha)	261	258	-1%	258	-
Fresh Export Volume (t)	2,256	1,468	-35%	1,621	+10%
Fresh Export Value (\$m)	\$3.8	\$2.4	-37%	\$2.7	+13%
Fresh Import Volume (t)	1,353	982	-27%	575	-41%
Fresh Import Value (\$m)	\$3.0	\$2.6	-14%	\$1.7	-36%
Fresh Supply (t)	10,393	10,233	-2%	7,604	-26%
Fresh Supply Wholesale Value (\$m)	\$23.9	\$20.3	-15%	\$17.3	-15%
Supply per Capita (kg)	0.40	0.39	-2%	0.29	-27%
Retail Supply (t)	9,156	8,976	-2%	6,675	-26%
Retail Supply Wholesale Value (\$m)	\$21.0	\$17.8	-15%	\$15.2	-15%
Food Service Supply (t)	1,236	1,257	+2%	928	-26%
Food Service Wholesale Value (\$m)	\$2.8	\$2.5	-12%	\$2.1	-15%

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 AREA:



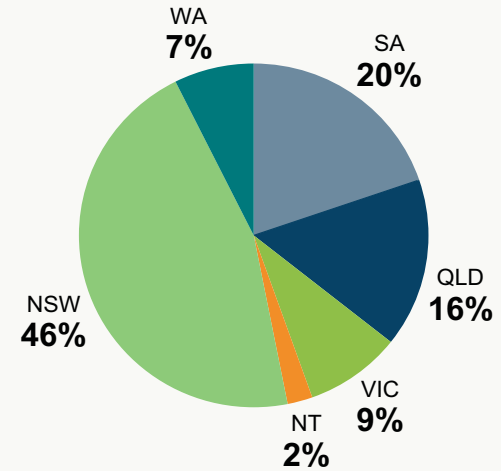
258
Ha

PRODUCTION WINDOW:



Feb-Dec

2022/23 FRESH GRAPEFRUIT PRODUCTION BY STATE



Source: CA

2022/23 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	4,130	\$7.3	High	High	Medium	Medium	Medium	Medium	None	None	None	None	None	None
South Australia	1,785	\$3.2	High	High	Medium	Medium	Medium	Medium	None	None	None	None	None	High
Queensland	1,435	\$2.5	Medium	High	High	Medium	Medium	None	None	None	None	None	None	None
Victoria	805	\$1.4	High	Medium	Medium	Medium	Medium	Medium	None	None	None	None	None	High
Western Australia	665	\$1.2	Medium	Medium	Medium	Medium	Medium	Medium	None	None	None	None	None	None
Northern Territory	210	\$0.4	Medium	Medium	Medium	Medium	Medium	Medium	None	None	None	None	None	None

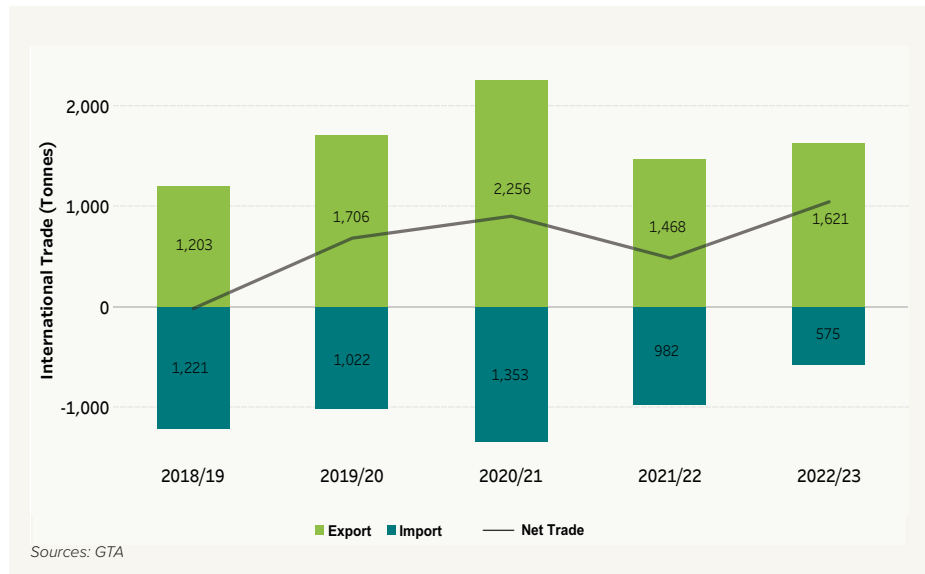
Availability legend: High (Dark Green), Medium (Light Green), Low (Yellow-Green), None (Grey)

Source: CA

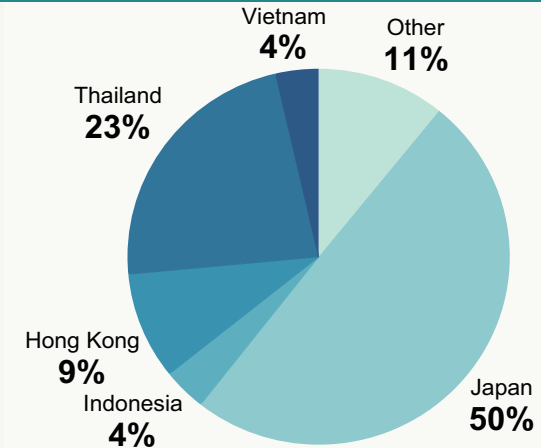
Fresh Grapefruit International Trade

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.



2022/23 FRESH GRAPEFRUIT EXPORTS BY COUNTRY



Source: GTA

For the year ending June 2023, **50%** 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	2021	2022	2023	Year Ending June	2021	2022	2023
New South Wales	423	299	248	New South Wales	807	450	860
Victoria	609	554	160	South Australia	1,199	794	553
Western Australia	320	116	106	Victoria	240	218	204
Queensland	-	-	61	Queensland	9	5	5
South Australia	-	12	-	Northern Territory	< 0.5	< 0.5	-
TOTAL	1,353	982	575	Other	1	< 0.5	-
				TOTAL	2,256	1,468	1,621

FRESH GRAPEFRUIT IMPORTS AND EXPORTS BY COUNTRY

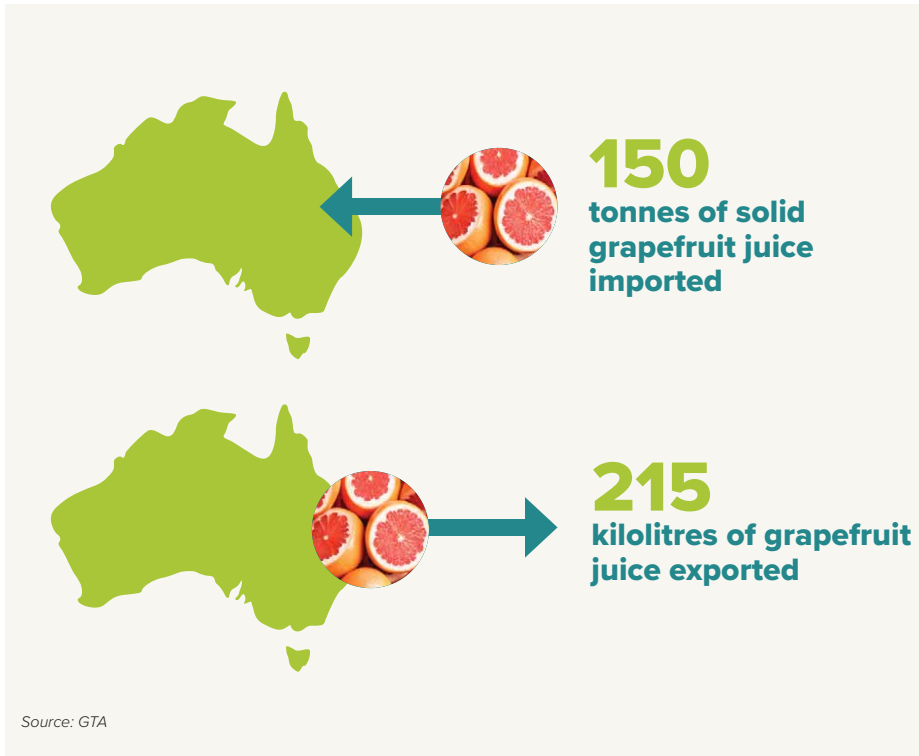
Imports by Country (Tonnes)				Exports by Country (Tonnes)			
Year Ending June	2021	2022	2023	Year Ending June	2021	2022	2023
Israel	340	189	333	Japan	1,511	971	807
US	847	692	217	Thailand	11	-	371
Egypt	166	56	24	Hong Kong	59	95	150
Iran	< 0.5	< 0.5	1	Indonesia	9	26	60
Thailand	-	-	< 0.5	Vietnam	-	-	59
Other	< 0.5	46	< 0.5	Other	666	375	176
TOTAL	1,353	982	575	TOTAL	2,256	1,468	1,621

Source: GTA

Processed Grapefruit International Trade

2022/23 PROCESSED GRAPEFRUIT INTERNATIONAL TRADE

For the year ending June 2023, an additional **150 tonnes** of solid grapefruit juice were imported, while **215 kilolitres** of grapefruit juice were exported.

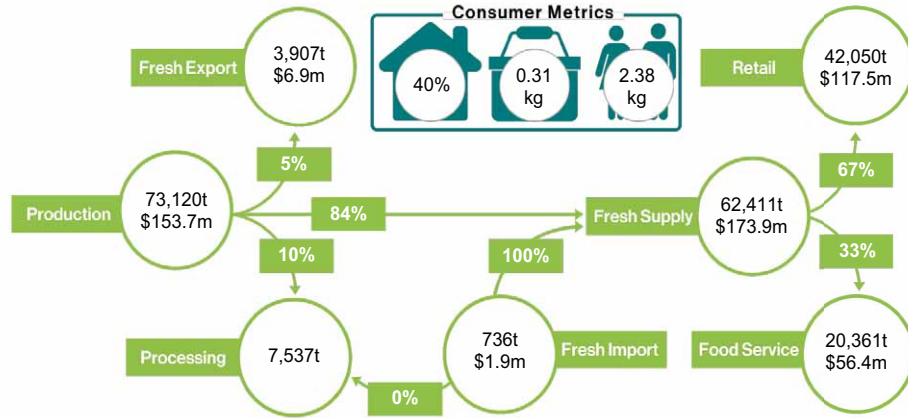




Citrus - Lemon/Lime

Fresh Lemon/Lime Overview

FRESH LEMON/LIME SUPPLY CHAIN – YEAR ENDING JUNE 2023



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

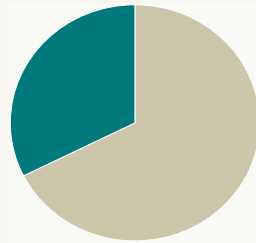
TOTAL PRODUCTION:



\$153.7M

73,120t produced and valued at \$153.7M with 10% sent to be processed.

RETAIL VS FOOD SERVICE:



■ Retail 67% ■ Food Service 33%

The wholesale value of the fresh supply was \$173.9M, with \$117.5M distributed into retail and \$56.4M into food service.

CONSUMER METRICS:



40% of Australian households purchased lemon/lime, buying an average of 309g per shopping trip.

PER CAPITA CONSUMPTION:



2.38kg in 2022/23 based on the volume supplied.

YEAR ENDING JUNE	2021	2022		2023	
	Value	Value	% YoY	Value	% YoY
Production (t)	59,914	66,004	+10%	73,120	+11%
Production (\$m)	\$135.8	\$138.3	+2%	\$153.7	+11%
Production area (Ha)	1,607	1,663	+3%	1,828	+10%
Fresh Export Volume (t)	4,197	4,678	+11%	3,907	-16%
Fresh Export Value (\$m)	\$8.5	\$8.2	-4%	\$6.9	-15%
Fresh Import Volume (t)	6,636	1,615	-76%	736	-54%
Fresh Import Value (\$m)	\$18.1	\$4.0	-78%	\$1.9	-54%
Fresh Supply (t)	56,167	55,801	>-1%	62,411	+12%
Fresh Supply Wholesale Value (\$m)	\$169.6	\$157.0	-7%	\$173.9	+11%
Supply per Capita (kg)	2.18	2.15	-1%	2.38	+10%
Retail Supply (t)	37,923	37,635	>-1%	42,050	+12%
Retail Supply Wholesale Value (\$m)	\$114.8	\$106.1	-8%	\$117.5	+11%
Food Service Supply (t)	18,244	18,166	>-1%	20,361	+12%
Food Service Wholesale Value (\$m)	\$54.8	\$50.9	-7%	\$56.4	+11%

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 AREA:



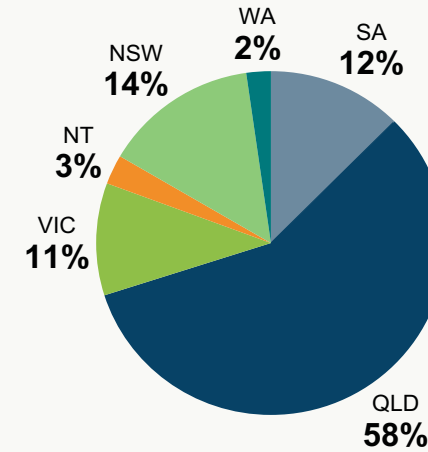
1,828
Ha

PRODUCTION WINDOW:



Jan-Nov

2022/23 FRESH LEMON/LIME PRODUCTION BY STATE



Source: CA

2022/23 FRESH LEMON/LIME SEASONALITY BY STATE

State	Volume (t)	Value (\$m)	Jul	Aug	Sep	Oct	Nov	Dec	Jan	Feb	Mar	Apr	May	Jun
Queensland	42,137	\$88.6	High	High	Medium	Medium	None	None	Low	Low	Low	Low	Low	Low
New South Wales	10,475	\$22.0	High	High	Medium	Medium	None	None	Low	Low	Low	Low	High	High
South Australia	9,115	\$19.2	None	Low	Medium	Medium	None	None	None	None	None	None	None	None
Victoria	7,716	\$16.2	Low	Medium	Medium	Medium	None	None	None	None	None	None	None	Low
Northern Territory	2,039	\$4.3	Medium	Medium	Medium	Medium	None	None	None	None	Low	Low	Low	Medium
Western Australia	1,639	\$3.4	High	Medium	Low	Low	None	None	Low	Low	Low	Low	Low	High

Availability legend: High (Dark Blue), Medium (Green), Low (Light Green), None (Grey)

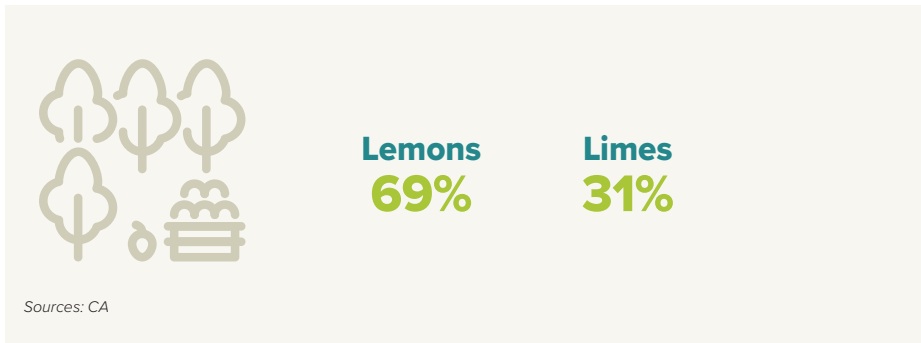
Source: CA

MAIN LEMON/LIME VARIETIES

For the year ending June 2023:

Lemons accounted for **69%** of fresh production.

Limes accounted for **31%** of fresh production.



2022/23 FRESH LEMON/LIME SEASONALITY BY VARIETY

Variety	Volume (t)	Jul	Aug	Sep	Oct	Nov	Dec	Jan	Feb	Mar	Apr	May	Jun
Lemons	50,680	High	Medium	Low	Low	None	None	None	Low	Medium	Medium	Medium	High
Limes	22,440	None	None	Low	Low	Low	Low	Low	Low	Medium	Medium	Low	None

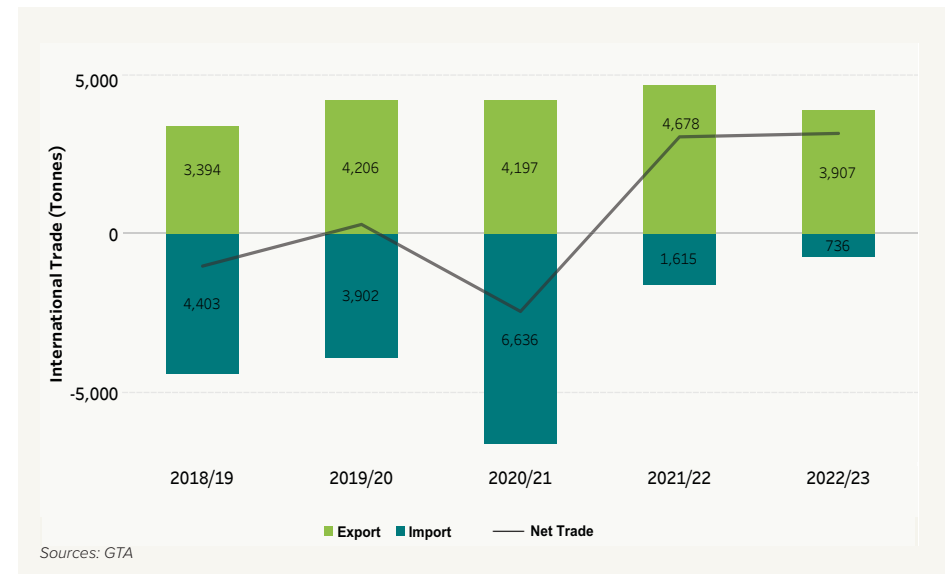
Availability legend: High (Dark Green), Medium (Light Green), Low (Yellow-Green), None (Grey)

Sources: CA

Fresh Lemon/Lime International Trade

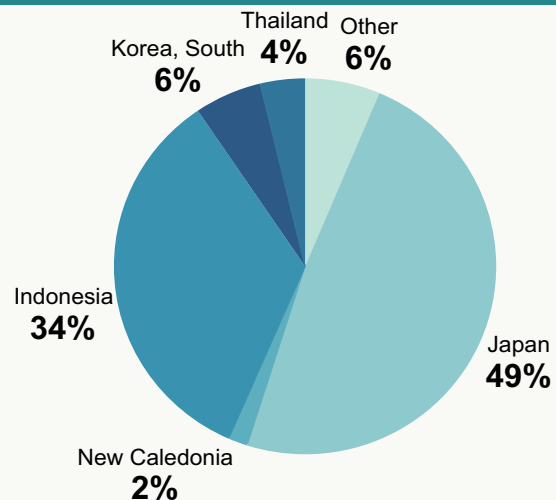
FRESH LEMON/LIME INTERNATIONAL TRADE

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.





2022/23 FRESH LEMON/LIME EXPORTS BY COUNTRY



Source: GTA

For the year ending June 2023, **49%** of exported fresh lemon/limes were sent to **Japan**, 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	2021	2022	2023	Year Ending June	2021	2022	2023
Victoria	2,677	604	347	South Australia	1,567	2,045	2,169
Western Australia	1,071	377	312	Queensland	644	593	1,021
New South Wales	2,385	634	78	New South Wales	554	709	385
Queensland	503	-	-	Victoria	1,426	1,326	332
TOTAL	6,636	1,615	736	Western Australia	7	3	< 0.5
				Other	< 0.5	1	< 0.5
				TOTAL	4,197	4,678	3,907

FRESH LEMON/LIME IMPORTS AND EXPORTS BY COUNTRY

Imports by Country (Tonnes)				Exports by Country (Tonnes)			
Year Ending June	2021	2022	2023	Year Ending June	2021	2022	2023
US	4,273	878	387	Japan	649	1,062	1,899
Egypt	2,168	658	345	Indonesia	2,004	2,076	1,328
UAE	3	4	3	Sth. Korea	-	129	222
Iran	2	2	1	Thailand	-	32	148
Italy	-	-	< 0.5	New Caledonia	8	64	64
Other	188	73	< 0.5	Other	1,536	1,314	248
TOTAL	6,636	1,615	736	TOTAL	4,197	4,678	3,907

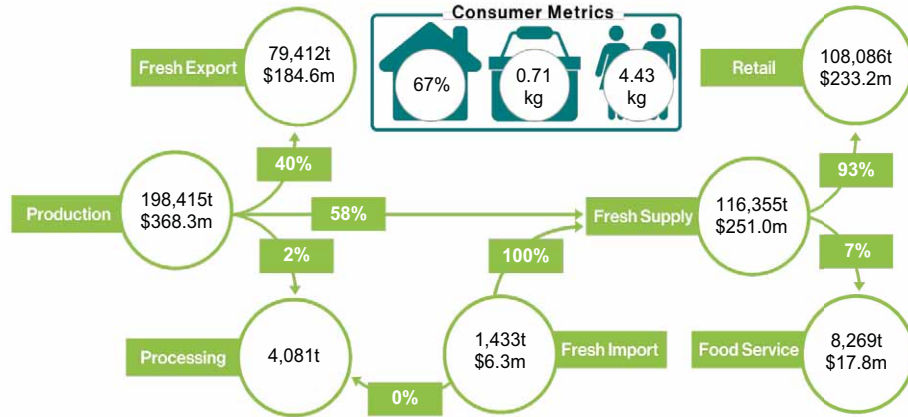
Source: GTA



Citrus - Mandarins

Fresh Mandarins Overview

FRESH MANDARINS SUPPLY CHAIN – YEAR ENDING JUNE 2023



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

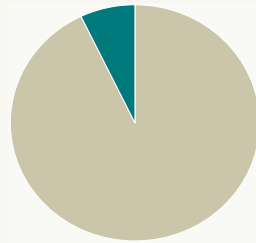
TOTAL PRODUCTION:



\$368.3M

198,415t produced and valued at \$368.3M with 2% sent to be processed.

RETAIL VS FOOD SERVICE:



■ Retail 93% ■ Food Service 7%

The wholesale value of the fresh supply was \$251M, with \$233.2M distributed into retail and \$17.8M into food service.

CONSUMER METRICS:



67% of Australian households purchased mandarins, buying an average of 711g per shopping trip.

PER CAPITA CONSUMPTION:



4.43kg in 2022/23 based on the volume supplied.

YEAR ENDING JUNE	2021	2022		2023	
	Value	Value	% YoY	Value	% YoY
Production (t)	166,040	183,590	+11%	198,415	+8%
Production (\$m)	\$323.6	\$336.4	+4%	\$368.3	+9%
Production area (Ha)	5,059	5,379	+6%	5,669	+5%
Fresh Export Volume (t)	62,051	77,694	+25%	79,412	+2%
Fresh Export Value (\$m)	\$148.2	\$183.3	+24%	\$184.6	<1%
Fresh Import Volume (t)	3,350	2,183	-35%	1,433	-34%
Fresh Import Value (\$m)	\$10.4	\$8.8	-15%	\$6.3	-29%
Fresh Supply (t)	103,924	104,303	<1%	116,355	+12%
Fresh Supply Wholesale Value (\$m)	\$239.5	\$216.4	-10%	\$251.0	+16%
Supply per Capita (kg)	4.04	4.02	>-1%	4.43	+10%
Retail Supply (t)	96,741	96,891	<1%	108,086	+12%
Retail Supply Wholesale Value (\$m)	\$223.0	\$201.0	-10%	\$233.2	+16%
Food Service Supply (t)	7,183	7,412	+3%	8,269	+12%
Food Service Wholesale Value (\$m)	\$16.6	\$15.4	-7%	\$17.8	+16%

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 AREA:



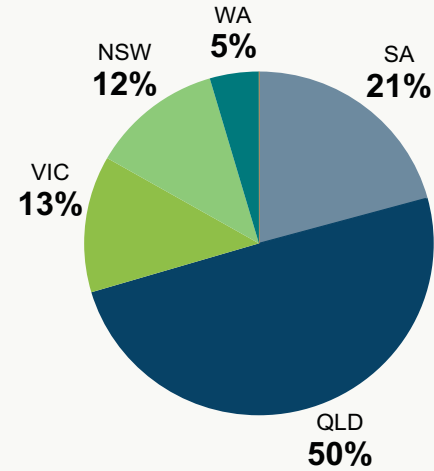
5,669
Ha

PRODUCTION WINDOW:



Mar-Oct

2022/23 FRESH MANDARINS PRODUCTION BY STATE



Source: CA

2022/23 FRESH MANDARINS SEASONALITY BY STATE

State	Volume (t)	Value (\$m)	Jul	Aug	Sep	Oct	Nov	Dec	Jan	Feb	Mar	Apr	May	Jun
Queensland	98,560	\$183.0	High	High	Medium	Low	None	None	None	None	None	None	None	None
South Australia	41,160	\$76.4	High	High	Medium	None	None	None	None	None	None	None	None	None
Victoria	25,515	\$47.4	High	High	Medium	None	None	None	None	None	None	None	None	None
New South Wales	24,220	\$45.0	Medium	High	High	Medium	None	None	None	None	None	None	None	None
Western Australia	8,960	\$16.6	High	Medium	Medium	Medium	None	None	None	None	None	None	None	None

Availability legend: High Medium Low None

Source: CA

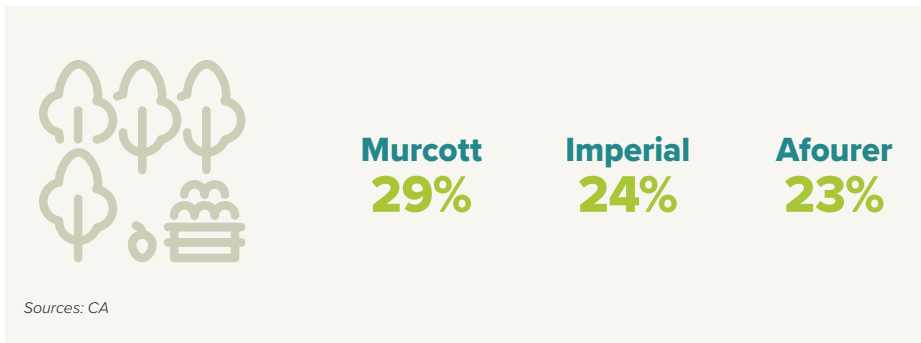
MAIN MANDARINS VARIETIES

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 2023.

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



2022/23 FRESH MANDARINS SEASONALITY BY VARIETY

Variety	Volume (t)	Jul	Aug	Sep	Oct	Nov	Dec	Jan	Feb	Mar	Apr	May	Jun
Murcott	56,357	High	Medium	Low	Low	None	None	None	None	None	None	None	None
Imperial	46,640	High	High	Medium	None	None	None	None	None	Low	Medium	High	High
Afourer	44,697	High	Medium	Medium	None	None	None	None	None	None	Low	Medium	High
Others	46,640	Medium	Medium	Medium	Medium	Medium	None	None	None	Low	Medium	Medium	Medium
Processing	4,081	Medium	Medium	Medium	Medium	None	None	None	None	Low	Medium	Medium	Medium

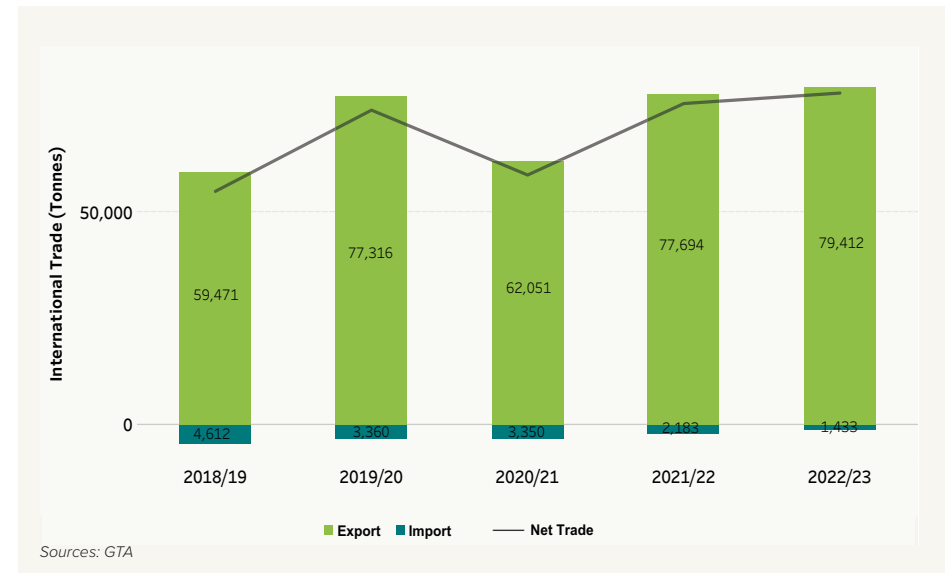
Availability legend: High Medium Low None

Sources: CA

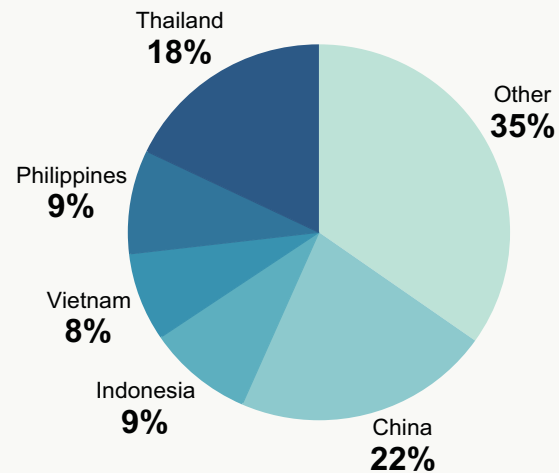
Fresh Mandarins International Trade

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 2023, Australia exported **79,412 tonnes**. The exports and imports over the last five financial years are profiled in the graph below, where imports are counted as negative tonnes.



2022/23 FRESH MANDARINS EXPORTS BY COUNTRY



Source: GTA

For the year ending June 2023, **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	2021	2022	2023	Year Ending June	2021	2022	2023
New South Wales	1,470	938	714	Queensland	32,991	44,574	47,867
Victoria	1,221	723	404	Victoria	10,009	12,490	16,022
Western Australia	586	493	287	South Australia	14,977	15,809	12,880
Queensland	74	29	28	New South Wales	1,152	2,575	2,327
TOTAL	3,350	2,183	1,433	Tasmania	-	-	154
				Other	433	565	162
				TOTAL	65,051	77,694	79,412

FRESH MANDARINS IMPORTS AND EXPORTS BY COUNTRY

Imports by Country (Tonnes)				Exports by Country (Tonnes)			
Year Ending June	2021	2022	2023	Year Ending June	2021	2022	2023
US	2,557	1,481	1,135	China	13,349	17,032	17,313
Egypt	615	562	279	Thailand	8,579	12,645	14,205
Israel	79	19	18	Indonesia	2,548	5,111	7,124
New Zealand	1	3	< 0.5	Philippines	4,775	7,992	7,100
China	-	-	< 0.5	Vietnam	2,069	2,423	6,046
Other	98	118	1	Other	28,242	30,810	27,623
TOTAL	3,350	2,183	1,433	TOTAL	65,051	77,694	79,412

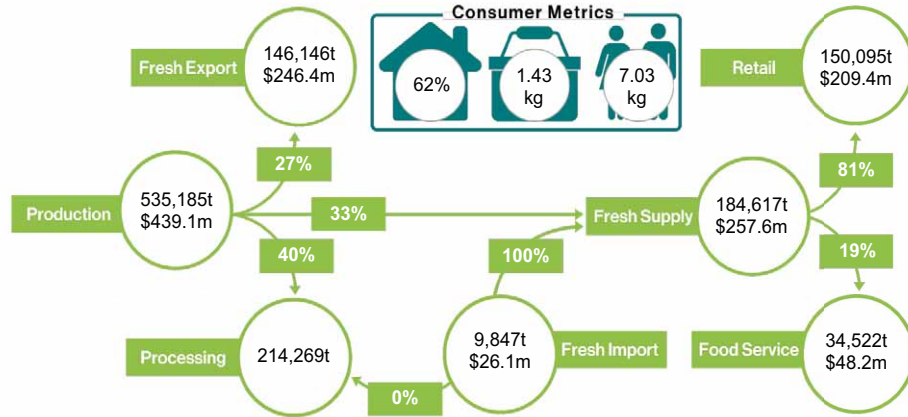
Source: GTA



Citrus - Oranges

Fresh Oranges Overview

FRESH ORANGES SUPPLY CHAIN – YEAR ENDING JUNE 2023



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

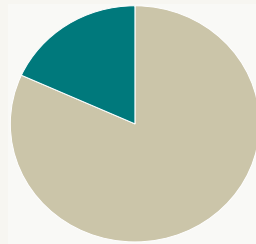
TOTAL PRODUCTION:



\$439.1M

535,185t produced and valued at **\$439.1M** with 40% sent to be processed.

RETAIL VS FOOD SERVICE:



■ Retail 81% ■ Food Service 19%

The wholesale value of the fresh supply was **\$257.6M**, with **\$209.4M** distributed into retail and **\$48.2M** into food service.

CONSUMER METRICS:



62% of Australian households purchased oranges, buying an average of **1.43kg** per shopping trip.

PER CAPITA CONSUMPTION:



in 2022/23 based on the volume supplied.

YEAR ENDING JUNE	2021	2022		2023	
	Value	Value	% YoY	Value	% YoY
Production (t)	473,697	506,072	+7%	535,185	+6%
Production (\$m)	\$437.6	\$421.3	-4%	\$439.1	+4%
Production area (Ha)	15,117	15,240	<1%	15,300	<1%
Fresh Export Volume (t)	172,416	161,052	-7%	146,146	-9%
Fresh Export Value (\$m)	\$285.1	\$260.2	-9%	\$246.4	-5%
Fresh Import Volume (t)	14,009	11,394	-19%	9,847	-14%
Fresh Import Value (\$m)	\$31.0	\$28.7	-7%	\$26.1	-9%
Fresh Supply (t)	130,432	140,705	+8%	184,617	+31%
Fresh Supply Wholesale Value (\$m)	\$225.8	\$223.4	-1%	\$257.6	+15%
Supply per Capita (kg)	5.07	5.42	+7%	7.03	+30%
Retail Supply (t)	108,243	114,955	+6%	150,095	+31%
Retail Supply Wholesale Value (\$m)	\$187.4	\$182.5	-3%	\$209.4	+15%
Food Service Supply (t)	22,190	25,750	+16%	34,522	+34%
Food Service Wholesale Value (\$m)	\$38.4	\$40.9	+6%	\$48.2	+18%

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 AREA:



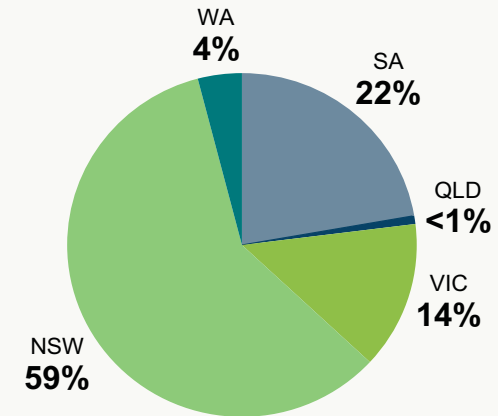
15,300
Ha

PRODUCTION WINDOW:



Year-round

2022/23 FRESH ORANGES PRODUCTION BY STATE



Source: CA

2022/23 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	315,875	\$259.2	High	High	High	Medium	Medium	Medium	Medium	Medium	Medium	Medium	Medium	Medium
South Australia	119,140	\$97.8	Medium	Medium	High	Medium	Medium	None	None	None	None	None	Medium	Medium
Victoria	74,270	\$60.9	High	High	High	Medium	Medium	Medium	None	None	None	None	Medium	Medium
Western Australia	21,665	\$17.8	Medium	High	Medium	Medium	Medium	None	None	None	None	None	Medium	Medium
Queensland	4,235	\$3.5	Medium	Medium	Medium	Medium	Medium	Medium	None	None	None	Medium	Medium	Medium

Availability legend: High (Dark Blue), Medium (Green), Low (Light Green), None (Grey)

Source: CA

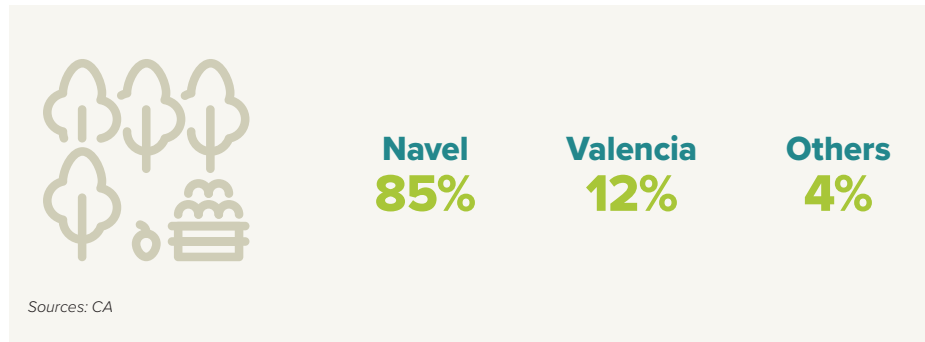
MAIN ORANGES VARIETIES

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 Valentias 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 **4%** of fresh production.



2022/23 FRESH ORANGES SEASONALITY BY VARIETY

Variety	Volume (t)	Jul	Aug	Sep	Oct	Nov	Dec	Jan	Feb	Mar	Apr	May	Jun
Navel	272,779	High	High	High	Medium	Low	None	None	None	None	None	None	None
Valencia	36,905	None	None	Low	Low	Low	Medium	High	Medium	Medium	Medium	None	None
Other	11,232	None	None	None	None	None	None	Low	Medium	Medium	Low	None	None

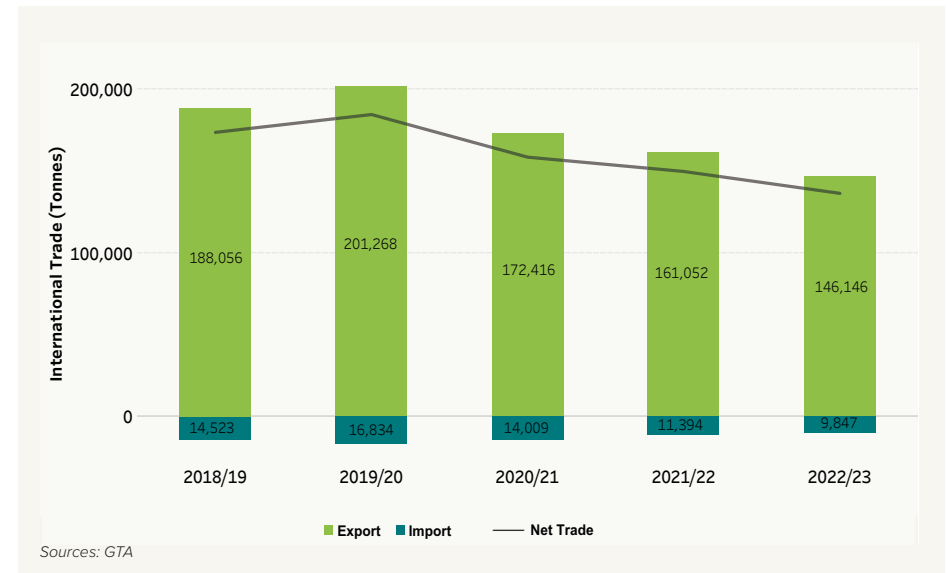
Availability legend: High (Dark Green), Medium (Light Green), Low (Yellow-Green), None (Grey)

Sources: CA

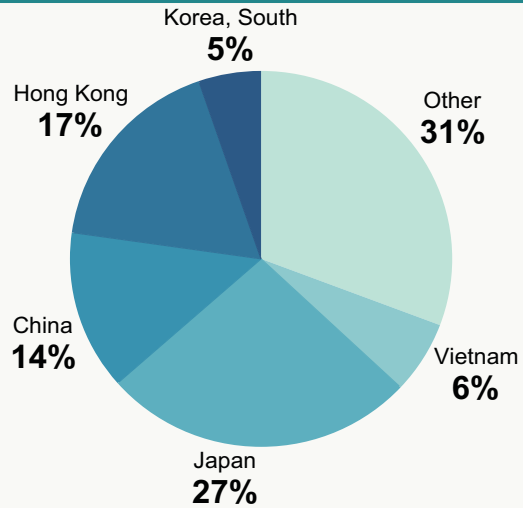
Fresh Oranges International Trade

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 **150,000-200,000 tonnes** per year. For the year ending June 2023, Australia exported **146,146 tonnes**. The exports and imports over the last five financial years are profiled in the graph below, where imports are counted as negative tonnes.



2022/23 FRESH ORANGES EXPORTS BY COUNTRY



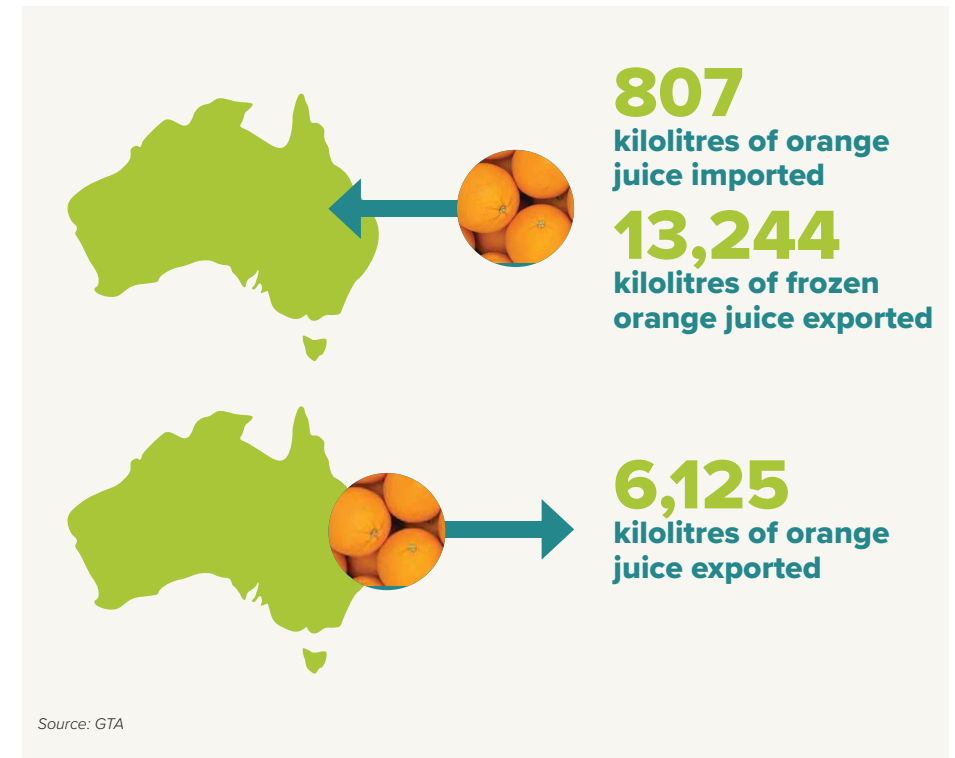
Source: GTA

For the year ending June 2023, **27%** of exported fresh oranges were sent to **Japan**, as profiled in the chart above.

Processed Oranges International Trade

2022/23 PROCESSED ORANGES INTERNATIONAL TRADE

For the year ending June 2023, an additional **13,244 kilolitres** of frozen orange juice was imported. Australia also imported **807 kilolitres** of fresh orange juice while exporting **6,125 kilolitres** of fresh orange juice.



Source: GTA

FRESH ORANGES IMPORTS AND EXPORTS BY STATE

Imports by State Destination (Tonnes)				Exports by State of Production Origin (Tonnes)			
Year Ending June	2021	2022	2023	Year Ending June	2021	2022	2023
New South Wales	6,320	6,617	4,876	Victoria	82,451	77,066	72,806
Victoria	5,513	4,098	3,794	South Australia	57,724	54,669	50,583
Western Australia	2,057	655	948	New South Wales	27,704	24,129	19,272
Queensland	119	24	230	Western Australia	3,449	3,127	2,149
Other	< 0.5	-	-	Queensland	1,065	1,987	1,245
TOTAL	14,009	11,394	9,847	Other	23	75	91
				TOTAL	172,416	161,052	146,146

FRESH ORANGES IMPORTS AND EXPORTS BY COUNTRY

Imports by Country (Tonnes)				Exports by Country (Tonnes)			
Year Ending June	2021	2022	2023	Year Ending June	2021	2022	2023
US	12,768	10,738	9,127	Japan	37,625	37,857	38,761
Egypt	1,166	560	627	Hong Kong	33,587	33,050	25,554
Sri Lanka	-	-	88	China	31,684	23,343	20,061
Iran	2	1	2	Vietnam	7,412	5,944	9,141
New Zealand	< 0.5	-	< 0.5	Sth. Korea	6,326	6,549	7,706
Other	73	95	2	Other	55,782	54,309	44,923
TOTAL	14,009	11,394	9,847	TOTAL	172,416	161,052	146,146

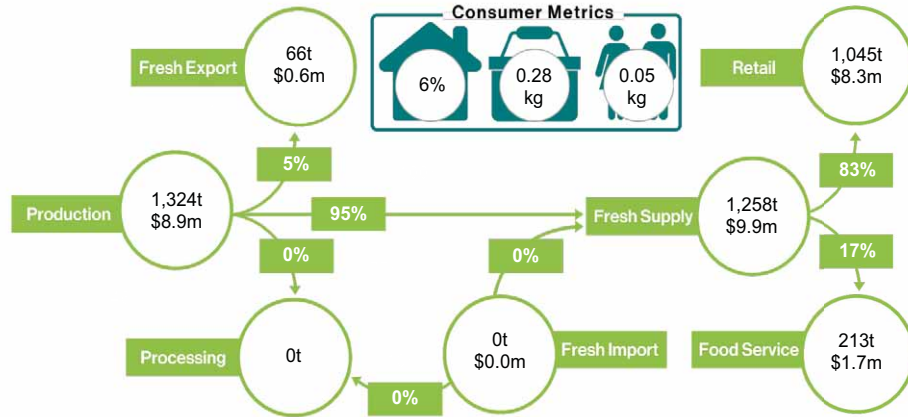
Source: GTA



Custard Apples

Fresh Custard Apples Overview

FRESH CUSTARD APPLES SUPPLY CHAIN – YEAR ENDING JUNE 2023



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

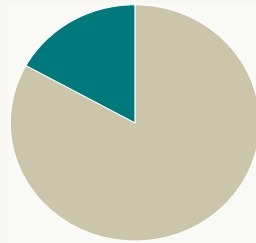
TOTAL PRODUCTION:



\$8.9M

1,324t produced and valued at **\$8.9M**

RETAIL VS FOOD SERVICE:



■ Retail 83% ■ Food Service 17%

The wholesale value of the fresh supply was **\$9.9M**, with **\$8.3M** distributed into retail and **\$1.7M** into food service.

CONSUMER METRICS:



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

PER CAPITA CONSUMPTION:



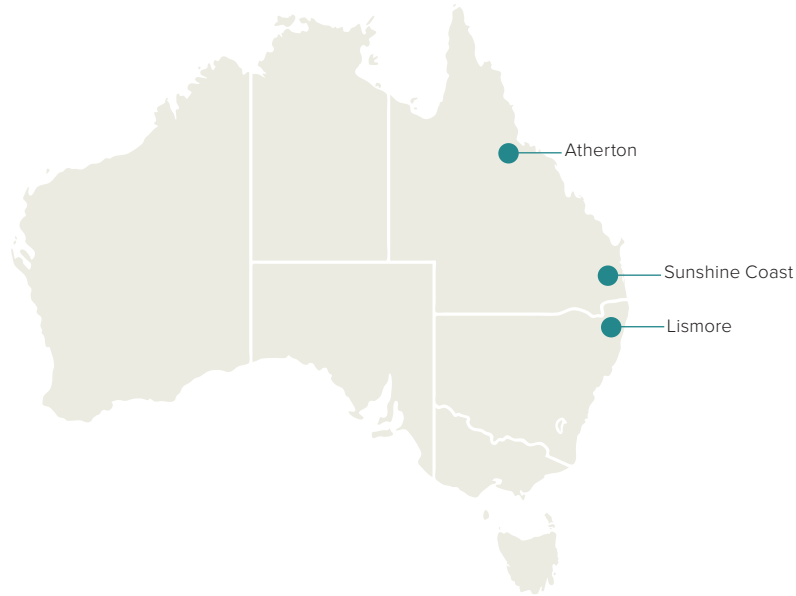
in 2022/23 based on the volume supplied.

YEAR ENDING JUNE	2021	2022		2023	
	Value	Value	% YoY	Value	% YoY
Production (t)	1,836	1,641	-11%	1,324	-19%
Production (\$m)	\$7.8	\$8.4	+7%	\$8.9	+6%
Production area (Ha)	-	-	-	-	-
Fresh Export Volume (t)	92	82	-11%	66	-19%
Fresh Export Value (\$m)	\$0.5	\$0.5	+7%	\$0.6	+6%
Fresh Import Volume (t)	-	-	-	-	-
Fresh Import Value (\$m)	\$-	\$-	-	\$-	-
Fresh Supply (t)	1,744	1,559	-11%	1,258	-19%
Fresh Supply Wholesale Value (\$m)	\$8.7	\$9.3	+7%	\$9.9	+6%
Supply per Capita (kg)	0.07	0.06	-11%	0.05	-20%
Retail Supply (t)	1,454	1,295	-11%	1,045	-19%
Retail Supply Wholesale Value (\$m)	\$7.3	\$7.8	+7%	\$8.3	+6%
Food Service Supply (t)	291	264	-9%	213	-19%
Food Service Wholesale Value (\$m)	\$1.5	\$1.6	+9%	\$1.7	+6%

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

Fresh Custard Apples Production

MAJOR PRODUCTION AREAS



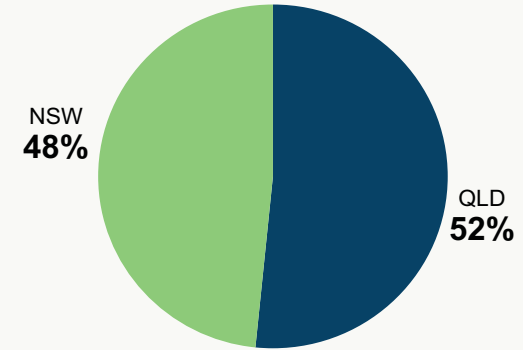
Source: CAA

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.

PRODUCTION WINDOW:



2022/23 FRESH CUSTARD APPLE PRODUCTION BY STATE



Source: CAA

2022/23 FRESH CUSTARD APPLE SEASONALITY BY STATE

State	Volume (t)	Value (\$m)	Jul	Aug	Sep	Oct	Nov	Dec	Jan	Feb	Mar	Apr	May	Jun
Queensland	683	\$4.6	High	High	Medium	None	None	None	Low	Low	Medium	Medium	Medium	Medium
New South Wales	641	\$4.3	High	High	Medium	Medium	None	None	None	None	None	Low	Low	Medium

Availability legend: High (Dark Blue), Medium (Light Green), Low (Yellow-Green), None (Grey)

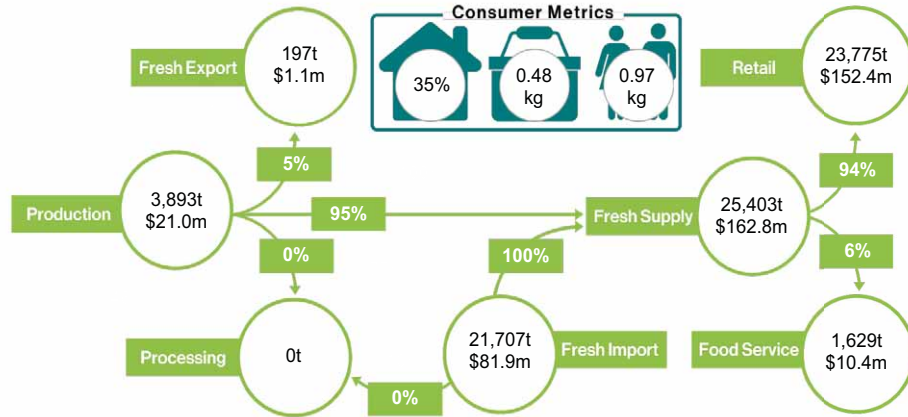
Source: CAA



Kiwifruit

Fresh Kiwifruit Overview

FRESH KIWIFRUIT SUPPLY CHAIN – YEAR ENDING JUNE 2023



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

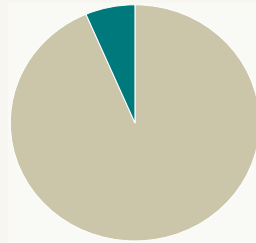
TOTAL PRODUCTION:



\$21.0M

3,893t produced and valued at **\$21M**

RETAIL VS FOOD SERVICE:



■ Retail 94% ■ Food Service 6%

The wholesale value of the fresh supply was **\$162.8M**, with **\$152.4M** distributed into retail and **\$10.4M** into food service.

CONSUMER METRICS:



35% of Australian households purchased kiwifruit, buying an average of **477g** per shopping trip.

PER CAPITA CONSUMPTION:



in 2022/23 based on the volume supplied.

YEAR ENDING JUNE	2021	2022		2023	
	Value	Value	% YoY	Value	% YoY
Production (t)	6,933	6,903	>-1%	3,893	-44%
Production (\$m)	\$24.4	\$24.8	+2%	\$21.0	-15%
Production area (Ha)	-	-	-	-	-
Fresh Export Volume (t)	727	353	-51%	197	-44%
Fresh Export Value (\$m)	\$4.3	\$2.0	-54%	\$1.1	-46%
Fresh Import Volume (t)	23,725	23,001	-3%	21,707	-6%
Fresh Import Value (\$m)	\$74.8	\$71.6	-4%	\$81.9	+14%
Fresh Supply (t)	29,930	29,551	-1%	25,403	-14%
Fresh Supply Wholesale Value (\$m)	\$117.6	\$122.5	+4%	\$162.8	+33%
Supply per Capita (kg)	1.16	1.14	-2%	0.97	-15%
Retail Supply (t)	28,025	27,656	-1%	23,775	-14%
Retail Supply Wholesale Value (\$m)	\$110.1	\$114.7	+4%	\$152.4	+33%
Food Service Supply (t)	1,906	1,894	>-1%	1,629	-14%
Food Service Wholesale Value (\$m)	\$7.5	\$7.9	+5%	\$10.4	+33%

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

Fresh Kiwifruit Production

MAJOR PRODUCTION AREAS



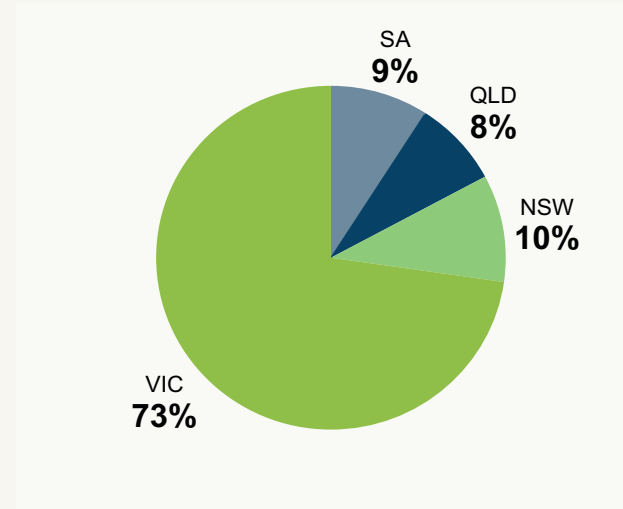
Source: (Freshlogic Analysis)

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:



2022/23 FRESH KIWIFRUIT PRODUCTION BY STATE



Source: (Freshlogic Analysis)

2022/23 FRESH KIWIFRUIT SEASONALITY BY STATE

State	Volume (t)	Value (\$m)	Jul	Aug	Sep	Oct	Nov	Dec	Jan	Feb	Mar	Apr	May	Jun
Victoria	2,831	\$15.3	Low	Low	None	None	None	None	None	None	None	High	High	Medium
New South Wales	393	\$2.1	Low	None	None	None	None	None	None	None	Medium	Medium	Medium	Medium
South Australia	354	\$1.9	Low	None	None	None	None	None	None	None	None	None	Medium	Medium
Queensland	315	\$1.7	Low	None	None	None	None	None	None	None	Medium	Medium	Medium	Medium

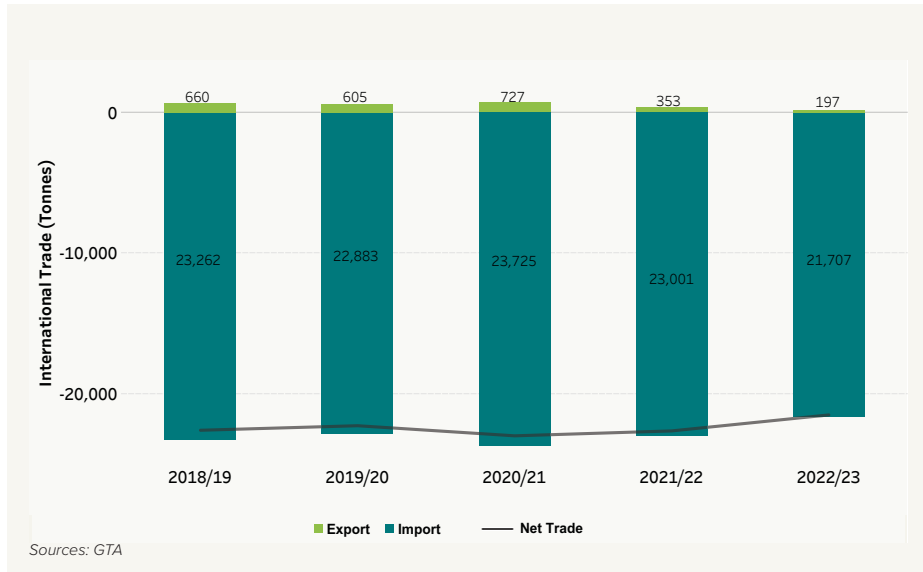
Availability legend: High (Dark Blue), Medium (Green), Low (Light Green), None (Grey)

Source: (Freshlogic Analysis)

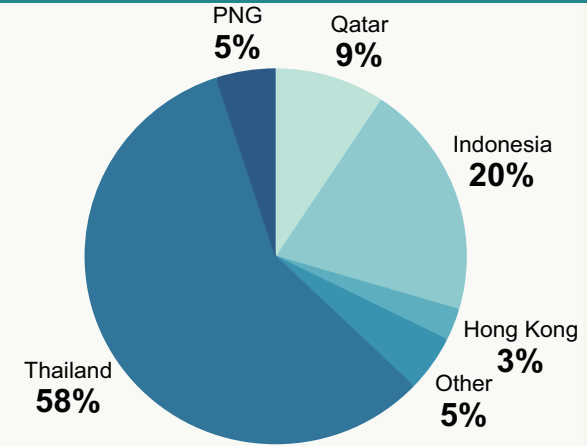
Fresh Kiwifruit International Trade

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 2023, Australia imported **21,707 tonnes**. The exports and imports over the last five financial years are profiled in the graph below, where imports are counted as negative tonnes.



2022/23 FRESH KIWIFRUIT EXPORTS BY COUNTRY



Source: GTA

For the year ending June 2023, **58%** of exported fresh kiwifruit were sent to **Thailand**, 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	2021	2022	2023	Year Ending June	2021	2022	2023
New South Wales	10,612	9,815	10,504	Victoria	287	204	161
Victoria	8,032	7,728	6,492	Queensland	58	35	12
Queensland	2,621	3,256	2,744	New South Wales	71	8	4
Western Australia	2,191	1,730	1,497	Western Australia	< 0.5	-	< 0.5
South Australia	269	472	470	Tasmania	-	-	< 0.5
TOTAL	23,725	23,001	21,707	Other	312	106	20
				TOTAL	727	353	197

FRESH KIWIFRUIT IMPORTS AND EXPORTS BY COUNTRY

Imports by Country (Tonnes)				Exports by Country (Tonnes)			
Year Ending June	2021	2022	2023	Year Ending June	2021	2022	2023
New Zealand	18,275	20,753	18,093	Thailand	42	14	114
US	35	2,247	3,614	Indonesia	< 0.5	39	40
Italy	5,393	-	-	Qatar	102	24	18
France	21	-	-	PNG	16	11	10
Other	23	-	-	Hong Kong	242	62	5
TOTAL	23,725	23,001	21,707	Other	325	203	10
				TOTAL	727	353	197

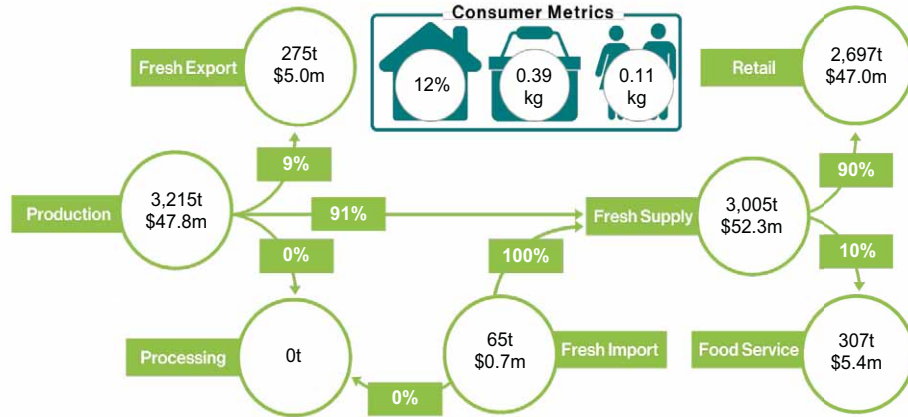
Source: GTA



Lychees

Fresh Lychees Overview

FRESH LYCHEES SUPPLY CHAIN – YEAR ENDING JUNE 2023



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

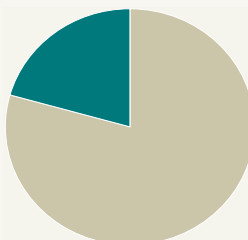
TOTAL PRODUCTION:



\$47.8M

3,215t produced and valued at **\$47.8M**


RETAIL VS FOOD SERVICE:



■ Retail 90% ■ Food Service 10%

The wholesale value of the fresh supply was **\$52.3M**, with **\$47M** distributed into retail and **\$5.4M** into food service.

CONSUMER METRICS:



12%

12% of Australian households purchased lychees, buying an average of **389g** per shopping trip.

PER CAPITA CONSUMPTION:

0.11kg 

in 2022/23 based on the volume supplied.

YEAR ENDING JUNE	2021	2022		2023	
	Value	Value	% YoY	Value	% YoY
Production (t)	2,283	2,072	-9%	3,215	+55%
Production (\$m)	\$32.0	\$41.9	+31%	\$47.8	+14%
Production area (Ha)	-	-	-	-	-
Fresh Export Volume (t)	417	386	-8%	275	-29%
Fresh Export Value (\$m)	\$7.2	\$9.5	+33%	\$5.0	-47%
Fresh Import Volume (t)	75	107	+42%	65	-39%
Fresh Import Value (\$m)	\$0.9	\$1.3	+44%	\$0.7	-45%
Fresh Supply (t)	1,941	1,793	-8%	3,005	+68%
Fresh Supply Wholesale Value (\$m)	\$31.7	\$42.2	+33%	\$52.3	+24%
Supply per Capita (kg)	0.08	0.07	-8%	0.11	+66%
Retail Supply (t)	1,742	1,610	-8%	2,697	+68%
Retail Supply Wholesale Value (\$m)	\$28.4	\$37.9	+33%	\$47.0	+24%
Food Service Supply (t)	199	184	-8%	307	+68%
Food Service Wholesale Value (\$m)	\$3.2	\$4.3	+33%	\$5.4	+24%

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

Fresh Lychees Production

MAJOR PRODUCTION AREAS



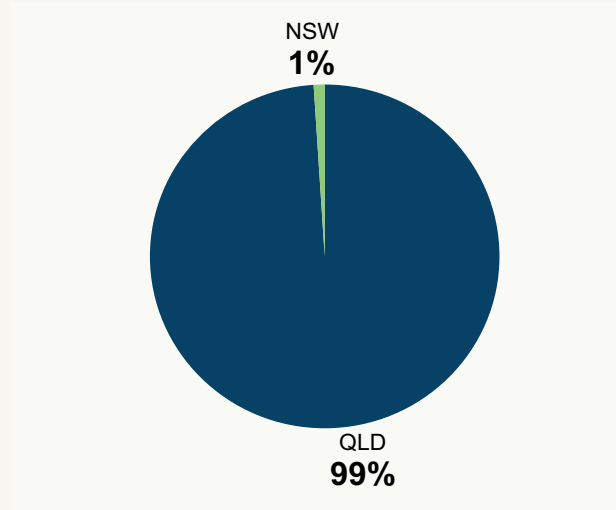
Source: ALGA

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

PRODUCTION WINDOW:



2022/23 FRESH LYCHEES PRODUCTION BY STATE



Source: ALGA

2022/23 FRESH LYCHEES SEASONALITY BY STATE

State	Volume (t)	Value (\$m)	Jul	Aug	Sep	Oct	Nov	Dec	Jan	Feb	Mar	Apr	May	Jun
Queensland	3,183	\$47.3					Low	High	High	High	Medium			
New South Wales	32	\$0.5							Low	Medium	High			

Availability legend: High (Dark Teal), Medium (Light Teal), Low (Yellow-Green), None (Light Grey)

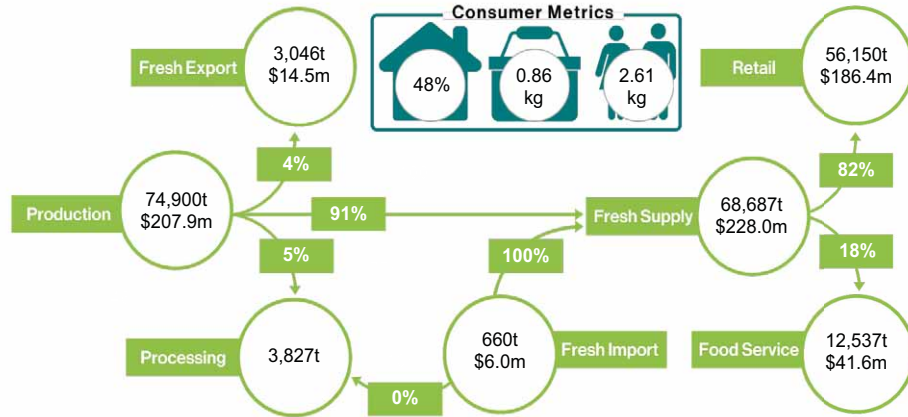
Source: ALGA

Mangoes



Fresh Mangoes Overview

FRESH MANGOES SUPPLY CHAIN – YEAR ENDING JUNE 2023



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

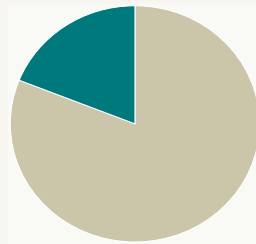
TOTAL PRODUCTION:



\$207.9M

74,900t produced and valued at **\$207.9M** with 5% sent to be processed.

RETAIL VS FOOD SERVICE:



■ Retail 82% ■ Food Service 18%

The wholesale value of the fresh supply was **\$228M**, with **\$186.4M** distributed into retail and **\$41.6M** into food service.

CONSUMER METRICS:



48% of Australian households purchased mangoes, buying an average of **860g** per shopping trip.

PER CAPITA CONSUMPTION:



in 2022/23 based on the volume supplied.

YEAR ENDING JUNE	2021	2022		2023	
	Value	Value	% YoY	Value	% YoY
Production (t)	62,300	68,600	+10%	74,900	+9%
Production (\$m)	\$201.0	\$217.9	+8%	\$207.9	-5%
Production area (Ha)	-	-	-	15,931	-
Fresh Export Volume (t)	4,479	4,747	+6%	3,046	-36%
Fresh Export Value (\$m)	\$25.0	\$26.3	+5%	\$14.5	-45%
Fresh Import Volume (t)	1,007	726	-28%	660	-9%
Fresh Import Value (\$m)	\$6.7	\$5.7	-15%	\$6.0	+4%
Fresh Supply (t)	55,861	61,065	+9%	68,687	+12%
Fresh Supply Wholesale Value (\$m)	\$211.2	\$228.3	+8%	\$228.0	>-1%
Supply per Capita (kg)	2.17	2.35	+8%	2.61	+11%
Retail Supply (t)	45,976	49,485	+8%	56,150	+13%
Retail Supply Wholesale Value (\$m)	\$173.8	\$185.0	+6%	\$186.4	<1%
Food Service Supply (t)	9,885	11,580	+17%	12,537	+8%
Food Service Wholesale Value (\$m)	\$37.4	\$43.3	+16%	\$41.6	-4%

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 AREA:



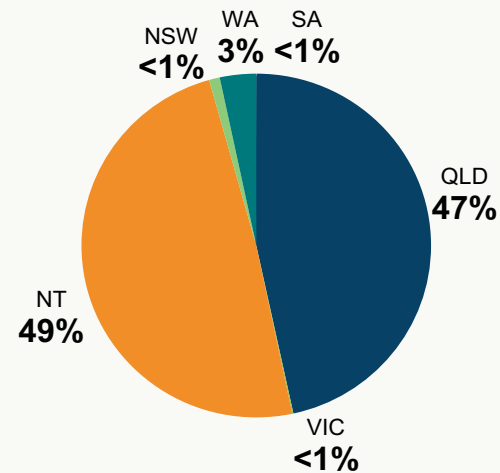
15,931
Ha

PRODUCTION WINDOW:



Jul-Mar

2022/23 FRESH MANGOES PRODUCTION BY STATE



Source: AMIA

2022/23 FRESH MANGOES SEASONALITY BY STATE

State	Area (ha)	Volume (t)	Value (\$m)	Jul	Aug	Sep	Oct	Nov	Dec	Jan	Feb	Mar	Apr	May	Jun
Northern Territory	6,616	36,675	\$101.8	High	Medium	Low	High	Medium	Low	None	None	None	None	None	None
Queensland	8,103	34,883	\$96.8	None	None	None	High	Medium	High	High	Medium	Low	None	None	None
Western Australia	991	2,501	\$6.9	None	None	None	High	Medium	Low	None	None	None	None	None	None
New South Wales	199	740	\$2.1	None	None	None	None	None	None	High	Medium	None	None	None	None
Victoria	18	73	\$0.2	None	None	None	None	None	None	High	Medium	None	None	None	None
South Australia	5	28	\$0.1	None	None	None	High	Medium	Low	None	None	None	None	None	None

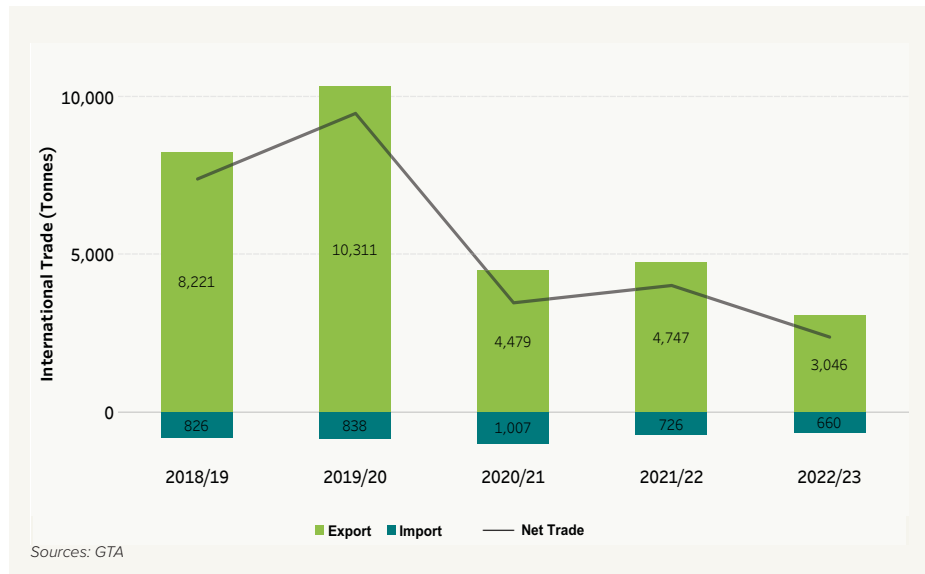
Availability legend: High Medium Low None

Source: AMIA

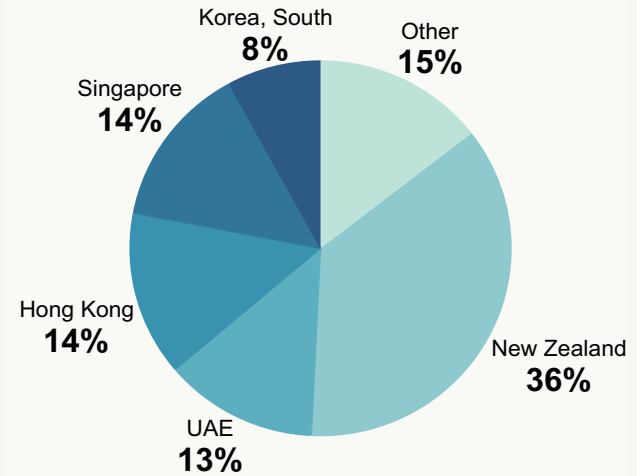
Fresh Mangoes International Trade

FRESH MANGOES INTERNATIONAL TRADE

Australia is a net exporter of fresh mangoes, with exports growing in recent years. For the year ending June 2023, Australia exported **3,046 tonnes**. The exports and imports over the last five financial years are profiled in the graph below, where imports are counted as negative tonnes.



2022/23 FRESH MANGOES EXPORTS BY COUNTRY



Source: GTA

For the year ending June 2023, **36%** 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	2021	2022	2023	Year Ending June	2021	2022	2023
New South Wales	470	403	322	Queensland	3384	3587	2302
Victoria	268	227	171	New South Wales	516	547	351
Western Australia	222	49	112	Northern Territory	411	436	280
Queensland	40	33	45	Victoria	162	171	110
South Australia	4	3	8	Western Australia	5	5	3
Other	3	11	2	Other	2	2	1
TOTAL	1007	726	660	TOTAL	4479	4747	3046

FRESH MANGOES IMPORTS AND EXPORTS BY COUNTRY

Imports by Country (Tonnes)				Exports by Country (Tonnes)			
Year Ending June	2021	2022	2023	Year Ending June	2021	2022	2023
Vietnam	201	53	131	New Zealand	1,050	2,273	1,105
Thailand	268	289	126	Hong Kong	582	408	433
Mexico	116	73	100	Singapore	982	1,735	427
Pakistan	108	59	71	UAE	473	322	397
India	108	86	68	Sth. Korea	397	8	243
Other	205	168	165	Other	995	1	442
TOTAL	1007	726	660	TOTAL	4,479	4,747	3,046

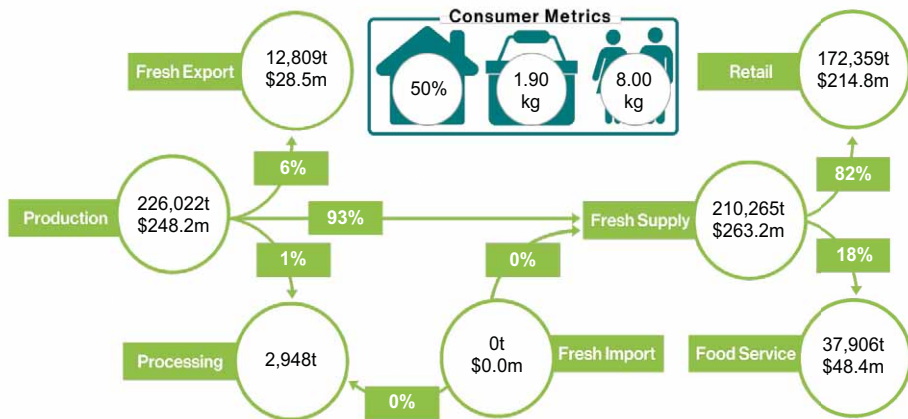
Source: GTA



Melons - Overview

Fresh Melons Overview

FRESH MELONS SUPPLY CHAIN – YEAR ENDING JUNE 2023



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

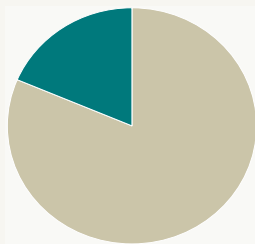
TOTAL PRODUCTION:



\$248.2M

226,022t produced and valued at **\$248.2M** with 1% sent to be processed.

RETAIL VS FOOD SERVICE:



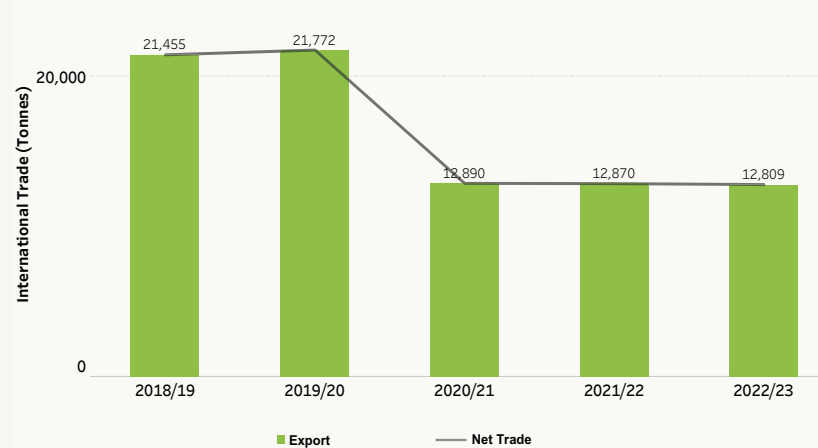
■ Retail 82% ■ Food Service 18%

The wholesale value of the fresh supply was **\$263.2M**, with **\$214.8M** distributed into retail and **\$48.4M** into food service.

YEAR ENDING JUNE	2021	2022		2023	
	Value	Value	% YoY	Value	% YoY
Production (t)	262,393	242,466	-8%	226,022	-7%
Production (\$m)	\$239.6	\$248.2	+4%	\$248.2	<1%
Production area (Ha)	-	-	-	-	-
Fresh Export Volume (t)	12,890	12,870	>-1%	12,809	>-1%
Fresh Export Value (\$m)	\$26.5	\$27.5	+4%	\$28.5	+4%
Fresh Import Volume (t)	-	-	-	-	-
Fresh Import Value (\$m)	\$-	\$-	-	\$-	-
Fresh Supply (t)	246,248	226,691	-8%	210,265	-7%
Fresh Supply Wholesale Value (\$m)	\$255.1	\$264.2	+4%	\$263.2	>-1%
Supply per Capita (kg)	9.56	8.74	-9%	8.00	-8%
Retail Supply (t)	203,358	184,557	-9%	172,359	-7%
Retail Supply Wholesale Value (\$m)	\$210.0	\$214.4	+2%	\$214.8	<1%
Food Service Supply (t)	42,890	42,134	-2%	37,906	-10%
Food Service Wholesale Value (\$m)	\$45.1	\$49.8	+10%	\$48.4	-3%

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

FRESH MELONS INTERNATIONAL TRADE

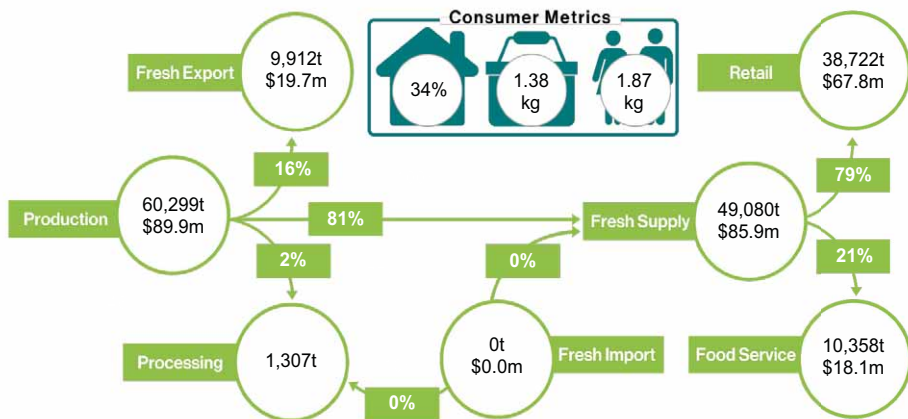




Melons - Muskmelons

Fresh Muskmelons Overview

FRESH MUSKMELONS SUPPLY CHAIN – YEAR ENDING JUNE 2023



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

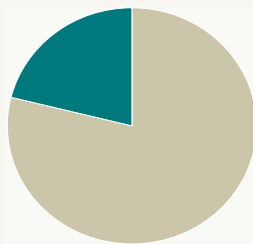
TOTAL PRODUCTION:



\$89.9M

60,299t produced and valued at **\$89.9M** with 2% sent to be processed.

RETAIL VS FOOD SERVICE:



■ Retail 79% ■ Food Service 21%

The wholesale value of the fresh supply was **\$85.9M**, with **\$67.8M** distributed into retail and **\$18.1M** into food service.

CONSUMER METRICS:



34% of Australian households purchased muskmelons, buying an average of **1.38kg** per shopping trip.

PER CAPITA CONSUMPTION:



1.87kg in 2022/23 based on the volume supplied.

YEAR ENDING JUNE	2021	2022		2023	
	Value	Value	% YoY	Value	% YoY
Production (t)	67,598	57,801	-14%	60,299	+4%
Production (\$m)	\$84.1	\$81.1	-3%	\$89.9	+11%
Production area (Ha)	-	-	-	-	-
Fresh Export Volume (t)	10,806	10,336	-4%	9,912	-4%
Fresh Export Value (\$m)	\$21.0	\$20.6	-2%	\$19.7	-4%
Fresh Import Volume (t)	-	-	-	-	-
Fresh Import Value (\$m)	\$-	\$-	-	\$-	-
Fresh Supply (t)	55,466	46,276	-17%	49,080	+6%
Fresh Supply Wholesale Value (\$m)	\$77.7	\$74.7	-4%	\$85.9	+15%
Supply per Capita (kg)	2.15	1.78	-17%	1.87	+5%
Retail Supply (t)	44,373	36,509	-18%	38,722	+6%
Retail Supply Wholesale Value (\$m)	\$62.2	\$59.0	-5%	\$67.8	+15%
Food Service Supply (t)	11,093	9,766	-12%	10,358	+6%
Food Service Wholesale Value (\$m)	\$15.5	\$15.8	+1%	\$18.1	+15%

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

Fresh Muskmelons Production

MAJOR PRODUCTION AREAS



Source: MA

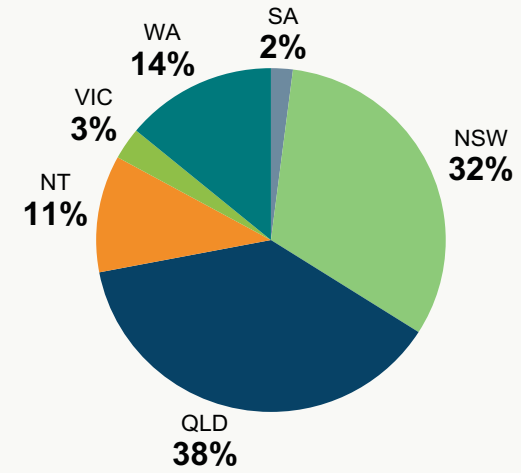
Muskmelons include **rockmelons** and **honeydew melons**. Production occurs across most states of Australia.

PRODUCTION WINDOW:



Year-round

2022/23 FRESH MUSKMELONS PRODUCTION BY STATE



Source: MA

2022/23 FRESH MUSKMELONS SEASONALITY BY STATE

State	Volume (t)	Value (\$m)	Jul	Aug	Sep	Oct	Nov	Dec	Jan	Feb	Mar	Apr	May	Jun
Queensland	22,914	\$34.2	None	Low	Medium	Medium	High	Medium	Medium	Medium	None	Medium	Medium	None
New South Wales	19,296	\$28.8	None	None	None	None	None	None	Medium	High	High	Medium	None	None
Western Australia	8,442	\$12.6	Medium	High	High	Medium	None	None	None	None	None	None	Medium	Medium
Northern Territory	6,633	\$9.9	High	High	Medium	Medium	Medium	Medium	None	None	None	Medium	Medium	Medium
South Australia	1,206	\$1.8	None	None	None	None	None	None	Medium	Medium	Medium	None	None	None
Victoria	1,809	\$2.7	None	None	None	None	None	None	Medium	Medium	Medium	None	None	None

Availability legend: High (Dark Blue), Medium (Light Green), Low (Light Yellow), None (Light Blue)

Source: MA

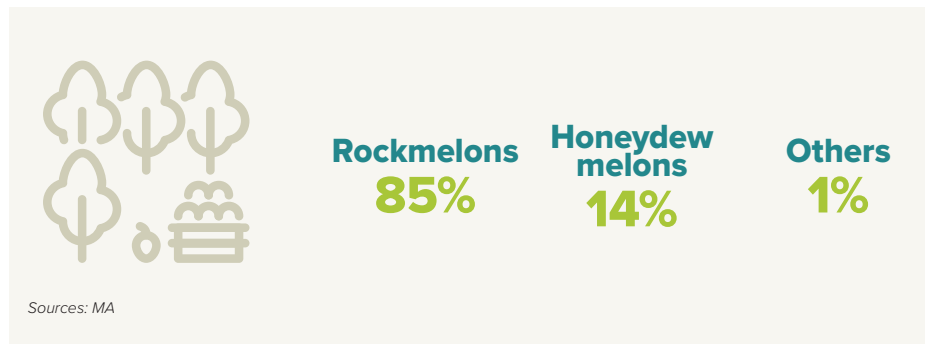
MAIN MUSKMELONS VARIETIES

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 2023.

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.



2022/23 FRESH MUSKMELONS SEASONALITY BY VARIETY

Variety	Volume (t)	Jul	Aug	Sep	Oct	Nov	Dec	Jan	Feb	Mar	Apr	May	Jun
Rockmelons	51,254	Low	Medium	Medium	Medium	Medium	Medium	Medium	High	High	Medium	Medium	Medium
Honeydew	8,442	Medium	Medium	Medium	Medium	Low	Low	Low	Low	Low	Low	Low	Low
Piel de Sapo	603	None	None	None	None	None	None	None	Low	Low	Low	None	None

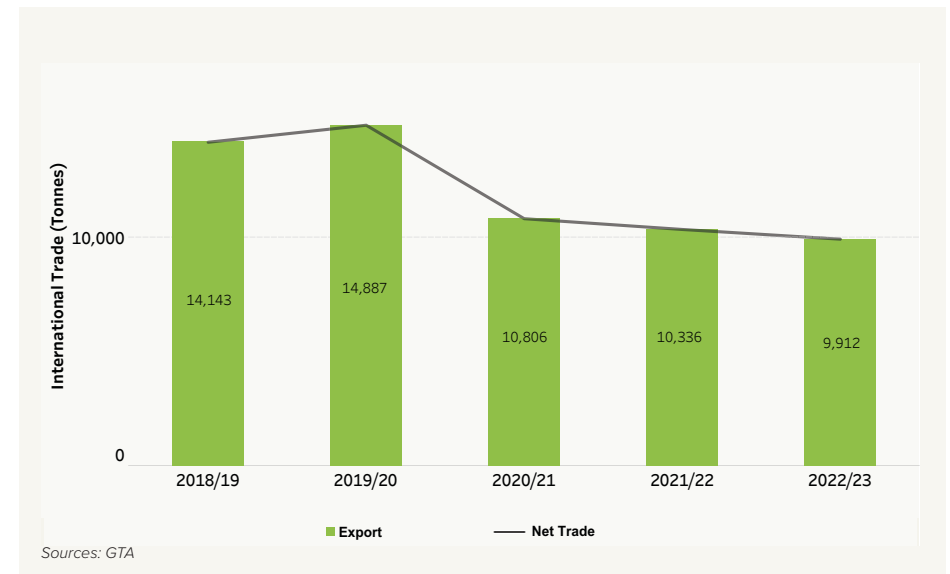
Availability legend: High Medium Low None

Sources: BA

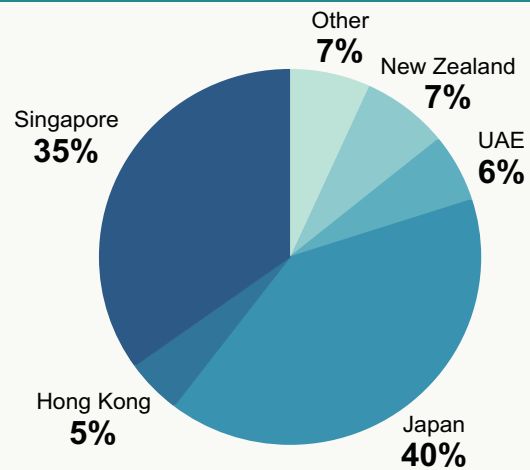
Fresh Muskmelons International Trade

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 2023, Australia exported **9,912 tonnes**. The exports and imports over the last five financial years are profiled in the graph below, where imports are counted as negative tonnes.



2022/23 FRESH MUSKMELONS EXPORTS BY COUNTRY



Source: GTA

For the year ending June 2023, **40%** of exported fresh muskmelons were sent to **Japan**, as profiled in the chart above.

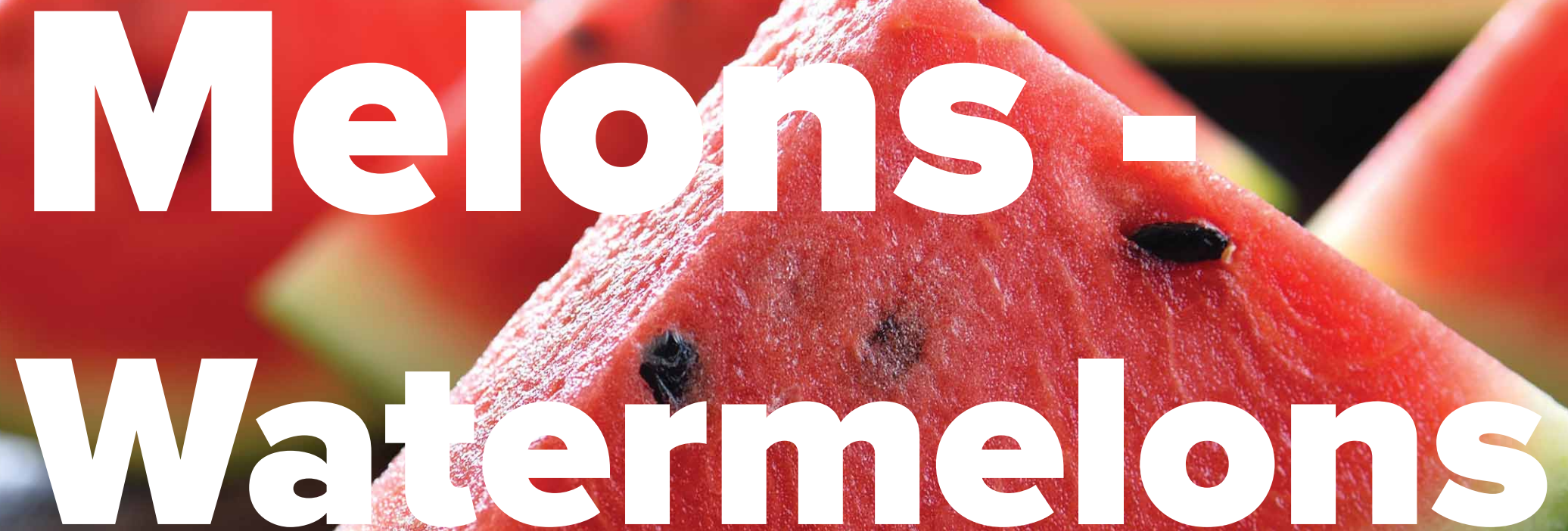
FRESH MUSKMELONS IMPORTS AND EXPORTS BY STATE

Exports by State of Production Origin (Tonnes)			
Year Ending June	2021	2022	2023
Queensland	5,788	5,983	5,607
Western Australia	2,565	1,139	2,399
New South Wales	1,794	2,532	1,391
Northern Territory	18	89	271
Victoria	237	390	235
Other	404	202	10
TOTAL	10,806	10,336	9,912

FRESH MUSKMELONS IMPORTS AND EXPORTS BY COUNTRY

Exports by Country (Tonnes)			
Year Ending June	2021	2022	2023
Japan	4,436	3,398	4,000
Singapore	4,224	3,826	3,452
New Zealand	160	920	732
UAE	529	612	583
Hong Kong	531	803	473
Other	926	777	672
TOTAL	10,806	10,336	9,912

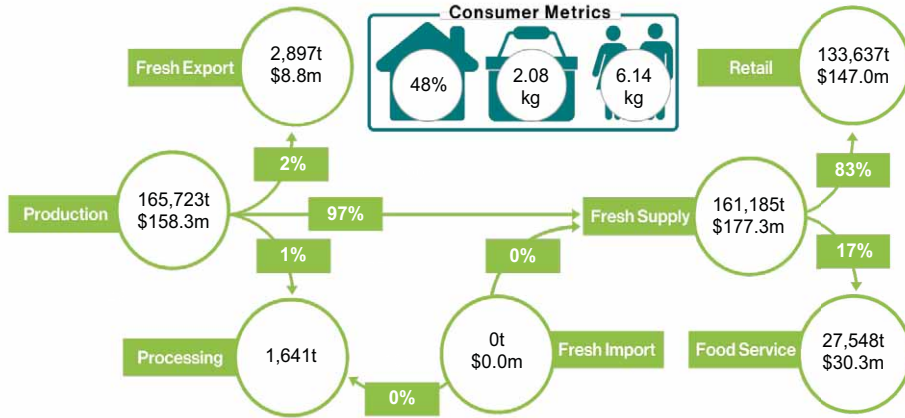
Source: GTA

A close-up photograph of several triangular slices of watermelon. The slices are arranged in a slightly overlapping manner, showing the bright red, juicy flesh and the dark green rind. The lighting is bright, highlighting the texture of the watermelon. The background is softly blurred, focusing attention on the slices in the foreground.

Melons - Watermelons

Fresh Watermelons Overview

FRESH WATERMELONS SUPPLY CHAIN – YEAR ENDING JUNE 2023



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

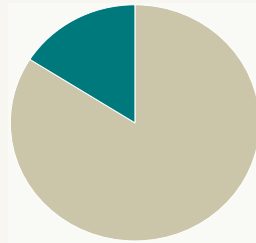
TOTAL PRODUCTION:



\$158.3M

165,723t produced and valued at **\$158.3M** with 1% sent to be processed.

RETAIL VS FOOD SERVICE:



■ Retail 83% ■ Food Service 17%

The wholesale value of the fresh supply was **\$177.3M**, with **\$147M** distributed into retail and **\$30.3M** into food service.

CONSUMER METRICS:



48% of Australian households purchased watermelons, buying an average of **2.08kg** per shopping trip.

PER CAPITA CONSUMPTION:



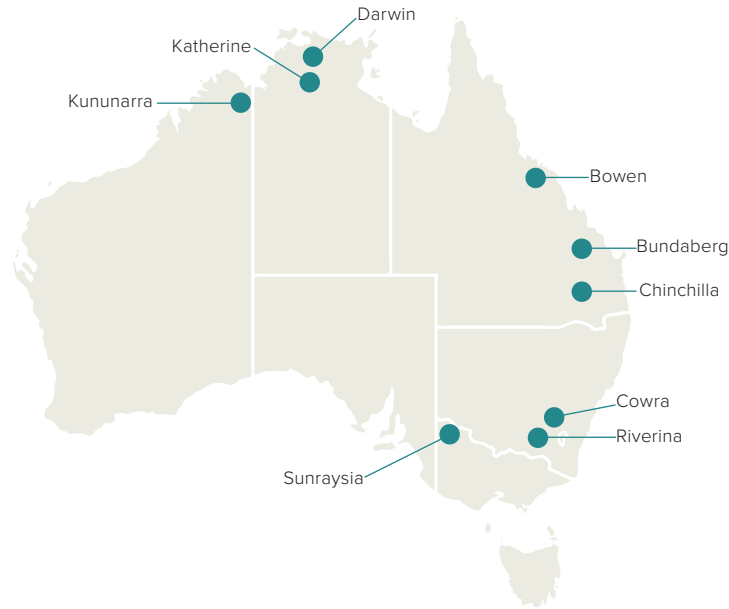
6.14kg in 2022/23 based on the volume supplied.

YEAR ENDING JUNE	2021	2022		2023	
	Value	Value	% YoY	Value	% YoY
Production (t)	194,795	184,665	-5%	165,723	-10%
Production (\$m)	\$155.6	\$167.0	+7%	\$158.3	-5%
Production area (Ha)	-	-	-	-	-
Fresh Export Volume (t)	2,084	2,534	+22%	2,897	+14%
Fresh Export Value (\$m)	\$5.4	\$6.9	+27%	\$8.8	+27%
Fresh Import Volume (t)	-	-	-	-	-
Fresh Import Value (\$m)	\$-	\$-	-	\$-	-
Fresh Supply (t)	190,782	180,416	-5%	161,185	-11%
Fresh Supply Wholesale Value (\$m)	\$177.4	\$189.4	+7%	\$177.3	-6%
Supply per Capita (kg)	7.41	6.95	-6%	6.14	-12%
Retail Supply (t)	158,985	148,048	-7%	133,637	-10%
Retail Supply Wholesale Value (\$m)	\$147.9	\$155.5	+5%	\$147.0	-5%
Food Service Supply (t)	31,797	32,368	+2%	27,548	-15%
Food Service Wholesale Value (\$m)	\$29.6	\$34.0	+15%	\$30.3	-11%

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

Fresh Watermelons Production

MAJOR PRODUCTION AREAS



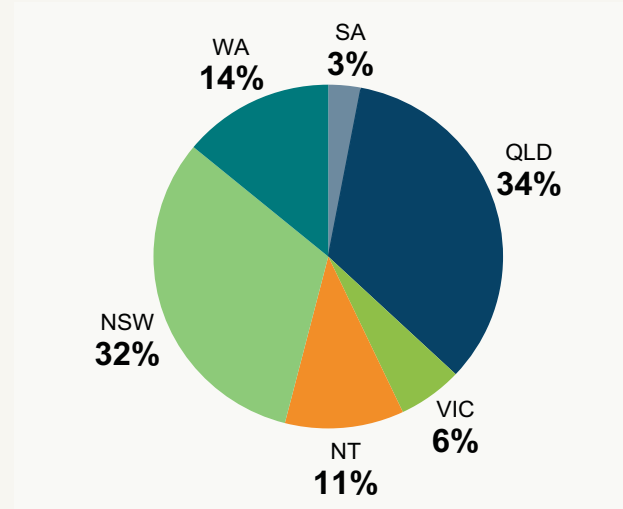
Source: MA

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.

PRODUCTION WINDOW:



2022/23 FRESH WATERMELONS PRODUCTION BY STATE



Source: MA

2022/23 FRESH WATERMELONS SEASONALITY BY STATE

State	Volume (t)	Value (\$m)	Jul	Aug	Sep	Oct	Nov	Dec	Jan	Feb	Mar	Apr	May	Jun
Queensland	56,346	\$53.8	High	High	High	High	High	High	High	High	High	High	High	High
New South Wales	53,031	\$50.7	None	None	None	None	None	None	High	High	High	High	High	High
Western Australia	23,201	\$22.2	High	High	High	High	High	None	None	None	None	None	None	None
Northern Territory	18,230	\$17.4	High	High	High	High	High	None	None	None	None	None	None	None
Victoria	9,943	\$9.5	None	None	None	None	High	High	High	High	High	High	High	High
South Australia	4,972	\$4.7	None	None	None	None	High	High	High	High	High	High	High	High

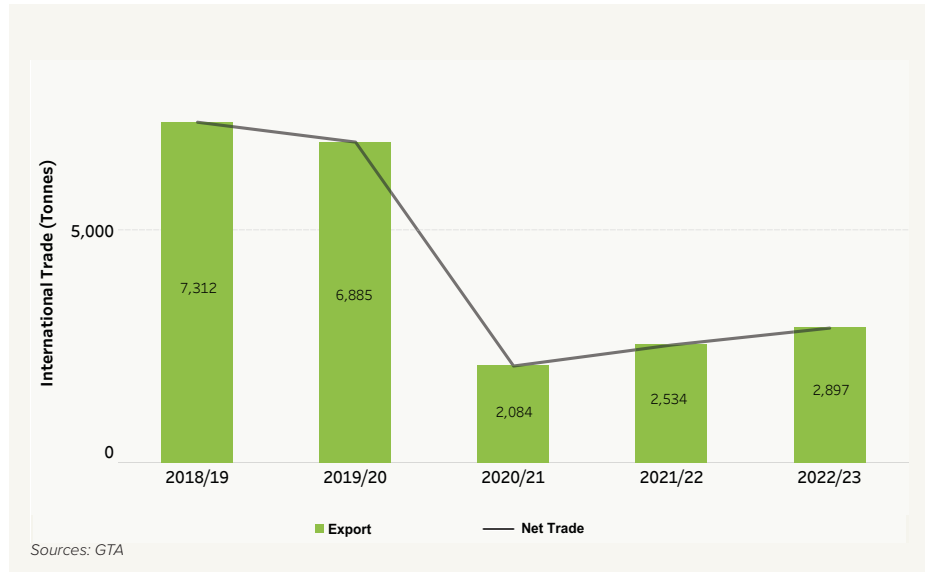
Availability legend: High (Dark Teal), Medium (Light Green), Low (Yellow-Green), None (Light Blue)

Source: MA

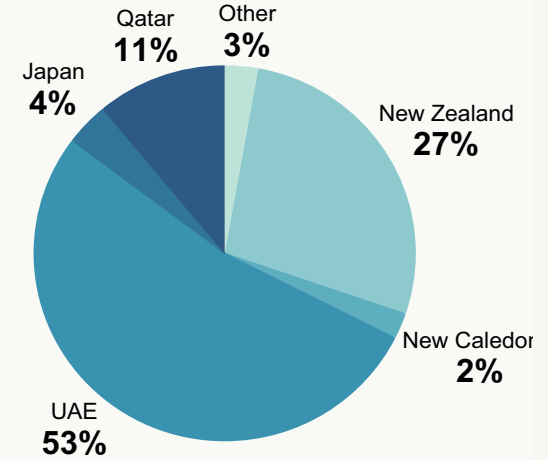
Fresh Watermelons International Trade

FRESH WATERMELONS INTERNATIONAL TRADE

Australia is a net exporter of fresh watermelons. For the year ending June 2023, Australia exported **2,897 tonnes**. The exports and imports over the last five financial years are profiled in the graph below, where imports are counted as negative tonnes.



2022/23 FRESH WATERMELONS EXPORTS BY COUNTRY



Source: GTA

For the year ending June 2023, **53%** of exported fresh watermelons were sent to **United Arab Emirates (UAE)**, as profiled in the chart above.

FRESH WATERMELONS IMPORTS AND EXPORTS BY STATE

Exports by State of Production Origin (Tonnes)			
Year Ending June	2021	2022	2023
Queensland	993	1,598	1,325
New South Wales	521	381	794
Victoria	156	266	474
Western Australia	280	139	131
Northern Territory	102	150	115
Other	31	-	58
TOTAL	2,084	2,534	2,897

FRESH WATERMELONS IMPORTS AND EXPORTS BY COUNTRY

Exports by Country (Tonnes)			
Year Ending June	2021	2022	2023
UAE	822	1,032	1,530
New Zealand	18	961	795
Qatar	667	243	319
Japan	255	168	108
New Caledonia	86	65	65
Other	236	66	81
TOTAL	2,084	2,534	2,897

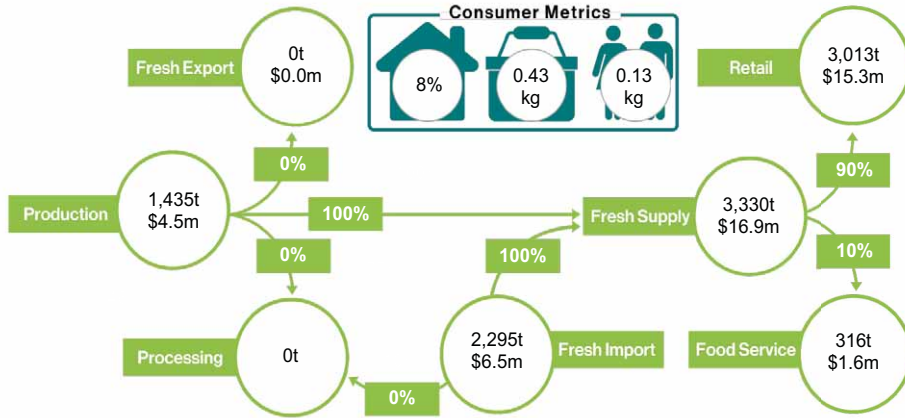
Source: GTA

Nashi



Fresh Nashi Overview

FRESH NASHI SUPPLY CHAIN – YEAR ENDING JUNE 2023



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

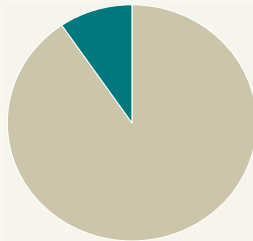
TOTAL PRODUCTION:



\$4.5M

1,435t produced and valued at **\$4.5M**

RETAIL VS FOOD SERVICE:



■ Retail 90% ■ Food Service 10%

The wholesale value of the fresh supply was **\$16.9M**, with **\$15.3M** distributed into retail and **\$1.6M** into food service.

CONSUMER METRICS:



8% of Australian households purchased nashi, buying an average of **434g** per shopping trip.

PER CAPITA CONSUMPTION:



0.13kg in 2022/23 based on the volume supplied.

YEAR ENDING JUNE	2021	2022		2023	
	Value	Value	% YoY	Value	% YoY
Production (t)	1,100	1,551	+41%	1,435	-8%
Production (\$m)	\$4.5	\$6.5	+45%	\$4.5	-31%
Production area (Ha)	-	-	-	-	-
Fresh Export Volume (t)	-	-	-	-	-
Fresh Export Value (\$m)	\$-	\$-	-	\$-	-
Fresh Import Volume (t)	2,215	1,778	-20%	2,295	+29%
Fresh Import Value (\$m)	\$5.2	\$4.7	-11%	\$6.5	+40%
Fresh Supply (t)	3,315	3,330	<1%	3,330	-
Fresh Supply Wholesale Value (\$m)	\$15.9	\$16.4	+3%	\$16.9	+3%
Supply per Capita (kg)	0.13	0.13	>-1%	0.13	-1%
Retail Supply (t)	3,013	3,013	-	3,013	-
Retail Supply Wholesale Value (\$m)	\$14.5	\$14.8	+3%	\$15.3	+3%
Food Service Supply (t)	301	316	+5%	316	-
Food Service Wholesale Value (\$m)	\$1.4	\$1.6	+8%	\$1.6	+3%

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

Fresh Nashi Production

MAJOR PRODUCTION AREAS



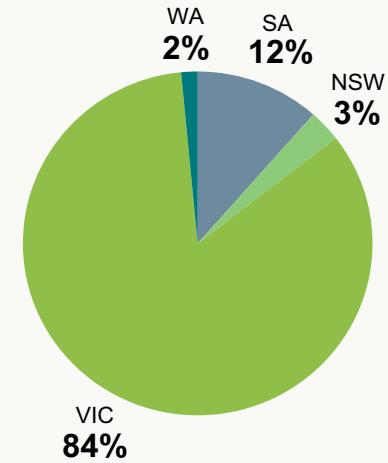
Source: ANGA

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.

PRODUCTION WINDOW:



2022/23 FRESH NASHI PRODUCTION BY STATE



Source: ANGA

2022/23 FRESH NASHI SEASONALITY BY STATE

State	Volume (t)	Value (\$m)	Jul	Aug	Sep	Oct	Nov	Dec	Jan	Feb	Mar	Apr	May	Jun
Victoria	1,205	\$3.7	High	High	High	High	High	High	Medium	Medium	Medium	Medium	Medium	Medium
South Australia	165	\$0.5	High	High	High	High	High	High	Medium	Medium	Medium	Medium	Medium	Medium
New South Wales	43	\$0.1	High	High	High	High	High	Medium	Medium	Medium	Medium	Medium	Medium	Medium
Western Australia	22	\$0.1	High	High	High	Medium	Medium	Medium	Medium	Medium	Medium	Medium	Medium	Medium

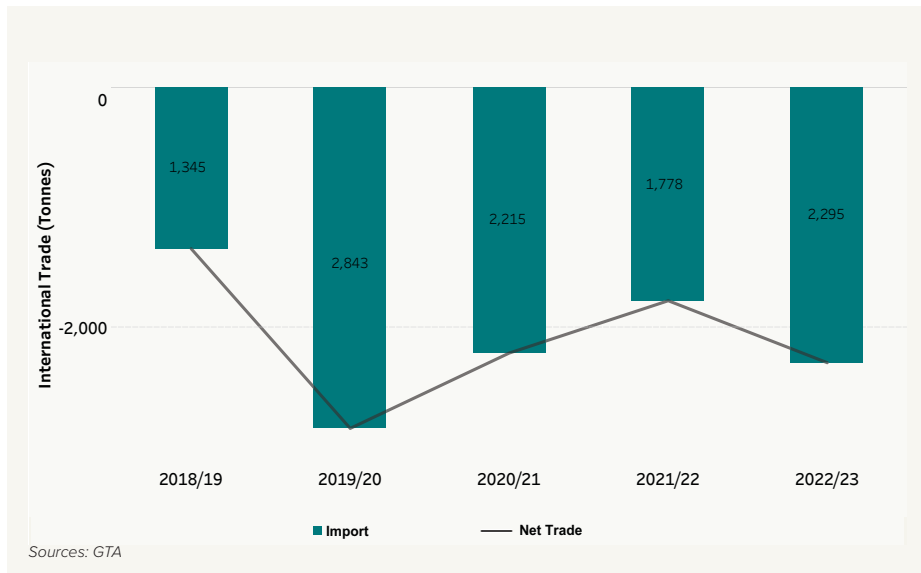
Availability legend: High (Dark Green), Medium (Light Green), Low (Yellow-Green), None (Grey)

Source: ANGA

Fresh Nashi International Trade

FRESH NASHI INTERNATIONAL TRADE

Australia is a net importer of fresh nashi. For the year ending June 2023, Australia imported **2,295 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	2021	2022	2023
Victoria	1,099	819	989
New South Wales	868	672	917
Queensland	152	180	256
Western Australia	96	108	134
TOTAL	2,215	1,778	2,295

FRESH NASHI IMPORTS BY COUNTRY

Imports by Country (Tonnes)			
Year Ending June	2021	2022	2023
China	2,051	1,583	2,017
Sth. Korea	163	196	265
Other	-	-	14
TOTAL	2,215	1,778	2,295

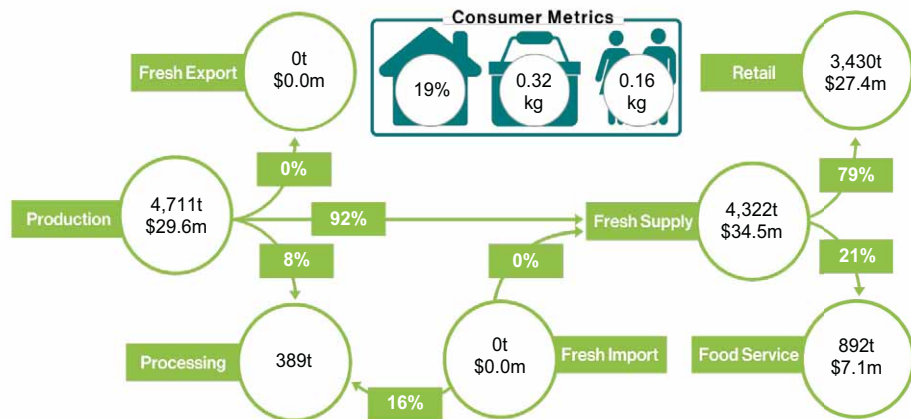
Source: GTA

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

Passionfruit

Fresh Passionfruit Overview

FRESH PASSIONFRUIT SUPPLY CHAIN – YEAR ENDING JUNE 2023



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

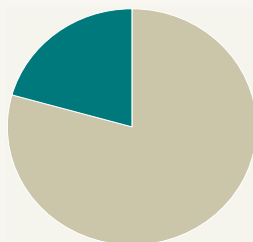
TOTAL PRODUCTION:



\$29.6M

4,711t produced and valued at **\$29.6M** with 8% sent to be processed.

RETAIL VS FOOD SERVICE:



■ Retail 79% ■ Food Service 21%

The wholesale value of the fresh supply was **\$34.5M**, with **\$27.4M** distributed into retail and **\$7.1M** into food service.

CONSUMER METRICS:



19%

19% of Australian households purchased passionfruit, buying an average of **321g** per shopping trip.

PER CAPITA CONSUMPTION:

0.16kg



in 2022/23 based on the volume supplied.

YEAR ENDING JUNE	2021	2022		2023	
	Value	Value	% YoY	Value	% YoY
Production (t)	5,085	4,787	-6%	4,711	-2%
Production (\$m)	\$24.2	\$21.5	-11%	\$29.6	+38%
Production area (Ha)	-	-	-	-	-
Fresh Export Volume (t)	-	-	-	-	-
Fresh Export Value (\$m)	\$-	\$-	-	\$-	-
Fresh Import Volume (t)	-	-	-	-	-
Fresh Import Value (\$m)	\$-	\$-	-	\$-	-
Fresh Supply (t)	4,644	4,392	-5%	4,322	-2%
Fresh Supply Wholesale Value (\$m)	\$28.3	\$25.1	-11%	\$34.5	+38%
Supply per Capita (kg)	0.18	0.17	-6%	0.16	-3%
Retail Supply (t)	3,715	3,486	-6%	3,430	-2%
Retail Supply Wholesale Value (\$m)	\$22.6	\$19.9	-12%	\$27.4	+38%
Food Service Supply (t)	929	906	-2%	892	-2%
Food Service Wholesale Value (\$m)	\$5.7	\$5.2	-9%	\$7.1	+38%

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

Fresh Passionfruit Production

MAJOR PRODUCTION AREAS



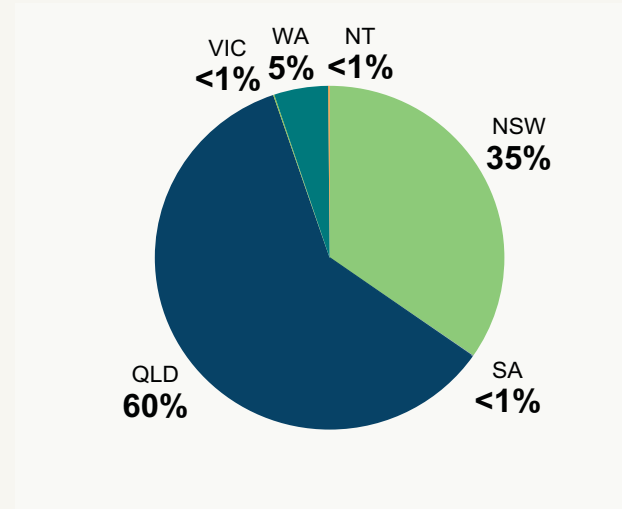
Source: PAI

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:



2022/23 FRESH PASSIONFRUIT PRODUCTION BY STATE



Source: PAI

2022/23 FRESH PASSIONFRUIT SEASONALITY BY STATE

State	Volume (t)	Value (\$m)	Jul	Aug	Sep	Oct	Nov	Dec	Jan	Feb	Mar	Apr	May	Jun
Queensland	2,828	\$17.8	Low	Low	Low	Low	Low	High	High	Medium	Medium	Medium	Medium	Medium
New South Wales	1,633	\$10.3	Low	Low	Low	Low	Low	Low	Low	Low	Low	Low	Low	Low
Western Australia	236	\$1.5	Low	Low	None	None	None	None	None	None	None	Low	Low	Low
Victoria	5	\$0.0	Low	Low	None	None	None	Low	Low	Low	Low	Low	Low	Low
South Australia	5	\$0.0	Low	Low	None	None	None	None	None	None	None	None	Low	Low

Availability legend: High (Dark Blue), Medium (Light Green), Low (Yellow-Green), None (Grey)

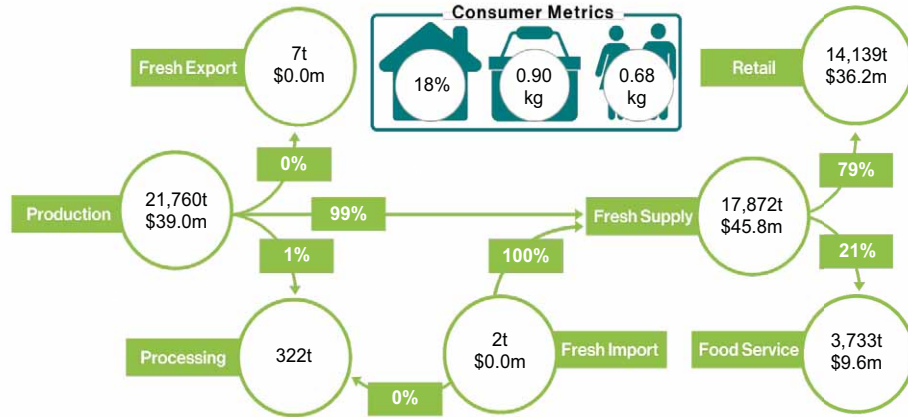
Source: PAI



Papaya/ Pawpaw

Fresh Papaya/Pawpaw Overview

FRESH PAPAYA/PAWPAP SUPPLY CHAIN – YEAR ENDING JUNE 2023



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

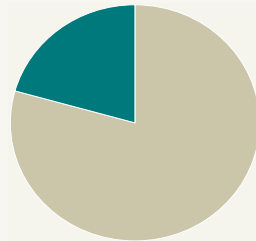
TOTAL PRODUCTION:



\$39.0M

21,760t produced and valued at \$39M with 1% sent to be processed.

RETAIL VS FOOD SERVICE:



■ Retail 79% ■ Food service 21%

The wholesale value of the fresh supply was \$45.8M, with \$36.2M distributed into retail and \$9.6M into food service.

CONSUMER METRICS:



18% of Australian households purchased papaya/pawpaw, buying an average of 900g per shopping trip.

PER CAPITA CONSUMPTION:



0.68kg in 2022/23 based on the volume supplied.

YEAR ENDING JUNE	2021	2022		2023	
	Value	Value	% YoY	Value	% YoY
Production (t)	21,160	19,370	-8%	21,760	+12%
Production (\$m)	\$40.7	\$35.4	-13%	\$39.0	+10%
Production area (Ha)	-	-	-	-	-
Fresh Export Volume (t)	5	2	-60%	7	>100%
Fresh Export Value (\$m)	< \$0.1	< \$0.1	>100%	< \$0.1	-33%
Fresh Import Volume (t)	20	19	-5%	2	-90%
Fresh Import Value (\$m)	\$0.1	\$0.1	<1%	< \$0.1	-82%
Fresh Supply (t)	18,092	16,493	-9%	17,872	+8%
Fresh Supply Wholesale Value (\$m)	\$47.9	\$41.6	-13%	\$45.8	+10%
Supply per Capita (kg)	0.70	0.64	-10%	0.68	+7%
Retail Supply (t)	14,359	13,048	-9%	14,139	+8%
Retail Supply Wholesale Value (\$m)	\$38.0	\$32.9	-13%	\$36.2	+10%
Food Service Supply (t)	3,733	3,445	-8%	3,733	+8%
Food Service Wholesale Value (\$m)	\$9.9	\$8.7	-12%	\$9.6	+10%

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

Fresh Papaya/Pawpaw Production

MAJOR PRODUCTION AREAS



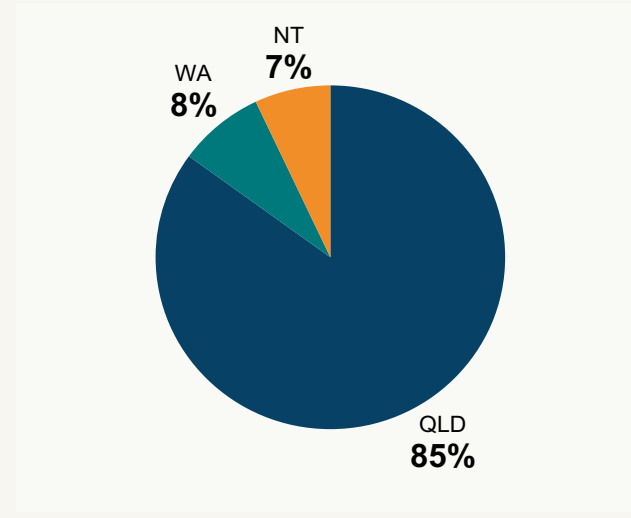
Source: PA

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:



2022/23 FRESH PAPAYA/PAWPAW PRODUCTION BY STATE



Source: PA

2022/23 FRESH PAPAYA/PAWPAW SEASONALITY BY STATE

State	Volume (t)	Value (\$m)	Jul	Aug	Sep	Oct	Nov	Dec	Jan	Feb	Mar	Apr	May	Jun
Queensland	18,496	\$33.1	Low	Low	Low	Low	Low	Low	Low	Low	Low	Low	Low	High
Western Australia	1,741	\$3.1	Low	None	None	None	None	None	Low	Low	Low	Low	Low	Low
Northern Territory	1,523	\$2.7	Low	None	None	None	None	None	Low	Low	Low	Low	Low	Low

Availability legend: High (Dark Blue), Medium (Green), Low (Light Green), None (Grey)

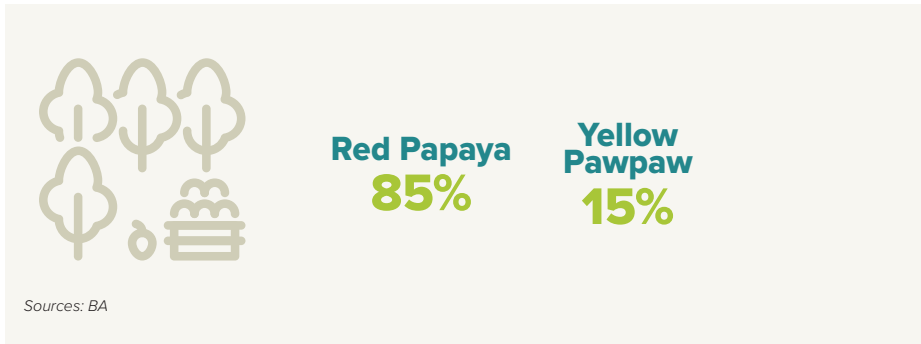
Source: PA

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.



2022/23 FRESH PAPAYA/PAWPAW SEASONALITY BY VARIETY

Variety	Volume (t)	Jul	Aug	Sep	Oct	Nov	Dec	Jan	Feb	Mar	Apr	May	Jun
Papaya	18,496	Medium	Medium	Medium	Medium	Medium	Medium	Medium	Medium	Medium	Medium	Medium	High
Pawpaw	3,264	Medium	Medium	Medium	Medium	Medium	Medium	Medium	Medium	Medium	Medium	High	High

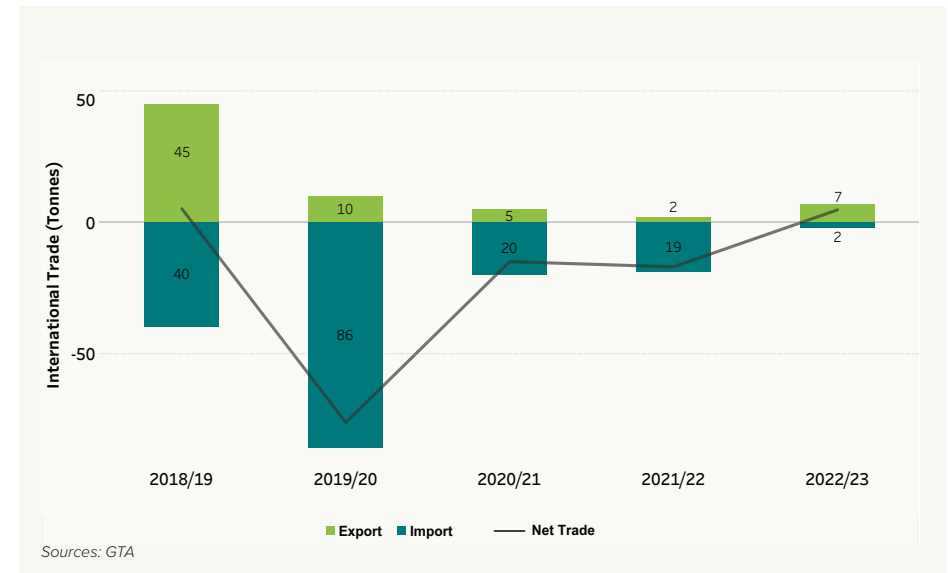
Availability legend: High (Dark Green), Medium (Light Green), Low (Yellow-Green), None (Grey)

Sources: PA

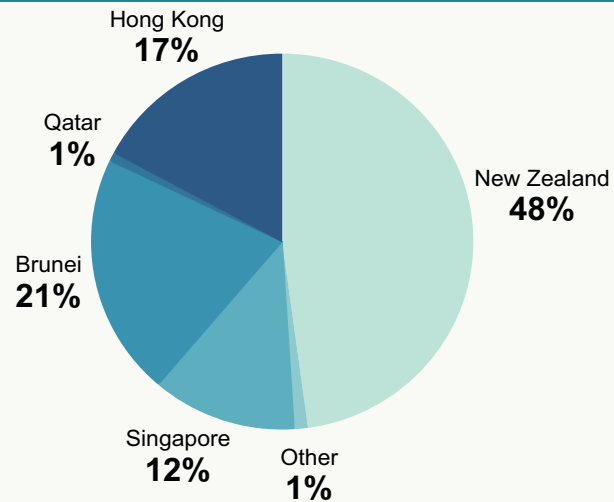
Fresh Papaya/Pawpaw International Trade

FRESH PAPAYA/PAWPAW INTERNATIONAL TRADE

Australia is a net importer of fresh red papaya and yellow pawpaw, typically importing between **20-90 tonnes** per year. For the year ending June 2023, Australia imported **two tonnes**. The export and imports over the last five financial years are profiled in the graph below, where imports are counted as negative tonnes.



2022/23 FRESH PAPAYA/PAWPAW EXPORTS BY COUNTRY



Source: GTA

For the year ending June 2023, **48%** 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	2021	2022	2023	Year Ending June	2021	2022	2023
Victoria	19	19	2	Queensland	3	1	4
New South Wales	1	-	< 0.5	Victoria	< 0.5	1	1
Other	-	-	< 0.5	New South Wales	2	< 0.5	1
TOTAL	20	19	2	Western Australia	-	-	< 0.5
				Northern Territory	< 0.5	< 0.5	-
				Other	< 0.5	< 0.5	< 0.5
				TOTAL	5	2	7

FRESH PAPAYA/PAWPAW IMPORTS AND EXPORTS BY COUNTRY

Imports by Country (Tonnes)				Exports by Country (Tonnes)			
Year Ending June	2021	2022	2023	Year Ending June	2021	2022	2023
Fiji	19	19	2	New Zealand	1	1	3
Sri Lanka	< 0.5	-	< 0.5	Brunei	-	-	1
Vietnam	1	-	-	Hong Kong	1	< 0.5	1
Other	< 0.5	-	< 0.5	Singapore	2	< 0.5	1
TOTAL	20	19	2	Qatar	< 0.5	-	< 0.5
				Other	1	1	< 0.5
				TOTAL	5	2	7

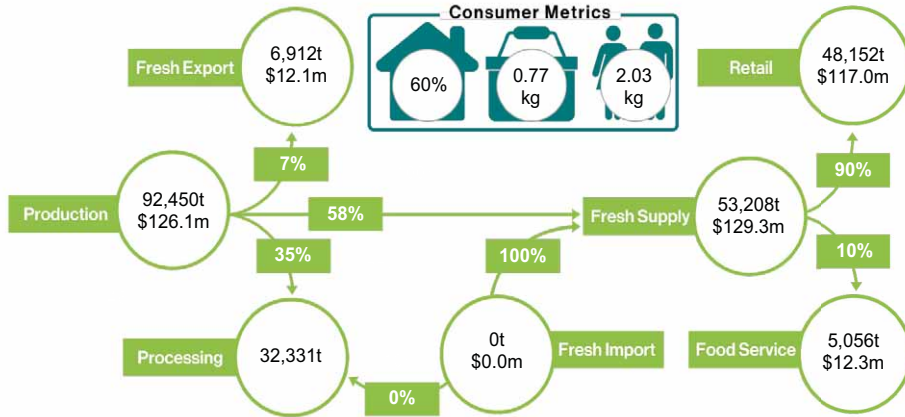
Source: GTA

Pears



Fresh Pears Overview

FRESH PEARS SUPPLY CHAIN – YEAR ENDING JUNE 2023



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

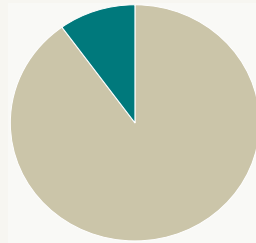
TOTAL PRODUCTION:



\$126.1M

92,450t produced and valued at **\$126.1M** with 35% sent to be processed.

RETAIL VS FOOD SERVICE:



■ Retail 90% ■ Food Service 10%

The wholesale value of the fresh supply was **\$129.3M**, with **\$117M** distributed into retail and **\$12.3M** into food service.

CONSUMER METRICS:



60% of Australian households purchased pears, buying an average of **768g** per shopping trip.

PER CAPITA CONSUMPTION:



in 2022/23 based on the volume supplied.

YEAR ENDING JUNE	2021	2022		2023	
	Value	Value	% YoY	Value	% YoY
Production (t)	124,338	121,955	-2%	92,450	-24%
Production (\$m)	\$140.4	\$131.6	-6%	\$126.1	-4%
Production Trees (000 Trees)	1,354	1,354	-	1,354	-
Fresh Export Volume (t)	8,229	8,743	+6%	6,912	-21%
Fresh Export Value (\$m)	\$13.5	\$14.1	+4%	\$12.1	-14%
Fresh Import Volume (t)	-	-	-	-	-
Fresh Import Value (\$m)	\$-	\$-	-	\$-	-
Fresh Supply (t)	62,943	61,065	-3%	53,208	-13%
Fresh Supply Wholesale Value (\$m)	\$141.1	\$130.9	-7%	\$129.3	-1%
Supply per Capita (kg)	2.44	2.35	-4%	2.03	-14%
Retail Supply (t)	56,706	54,989	-3%	48,152	-12%
Retail Supply Wholesale Value (\$m)	\$127.1	\$117.9	-7%	\$117.0	>-1%
Food Service Supply (t)	6,238	6,076	-3%	5,056	-17%
Food Service Wholesale Value (\$m)	\$14.0	\$13.0	-7%	\$12.3	-6%

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:



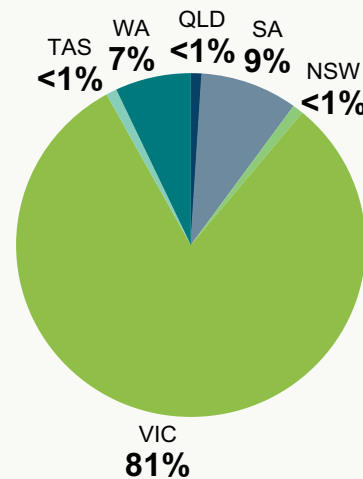
1,354
trees

PRODUCTION WINDOW:



Year-round

2022/23 FRESH PEARS PRODUCTION BY STATE



Source: APAL

2022/23 FRESH PEARS SEASONALITY BY STATE

State	Volume (t)	Value (\$m)	Jul	Aug	Sep	Oct	Nov	Dec	Jan	Feb	Mar	Apr	May	Jun
Victoria	74,885	\$102.1	High	High	High	High	High	High	High	High	High	High	High	High
South Australia	8,321	\$11.3	Low	Low	Low	Low	None	None	None	None	Low	Low	Low	Low
Western Australia	6,472	\$8.8	Low	Low	Low	Low	Low	None	None	High	High	Low	Low	Low
Queensland	925	\$1.3	Low	Low	Low	Low	None	None	None	Low	Low	Low	Low	Low
New South Wales	925	\$1.3	Low	Low	Low	Low	None	None	None	Low	Low	Low	Low	Low
Tasmania	925	\$1.3	Low	Low	Low	None	None	None	None	None	None	Low	Low	Low

Availability legend: High (Dark Green), Medium (Light Green), Low (Yellow-Green), None (Grey)

Source: APAL; GTA

MAIN PEARS VARIETIES

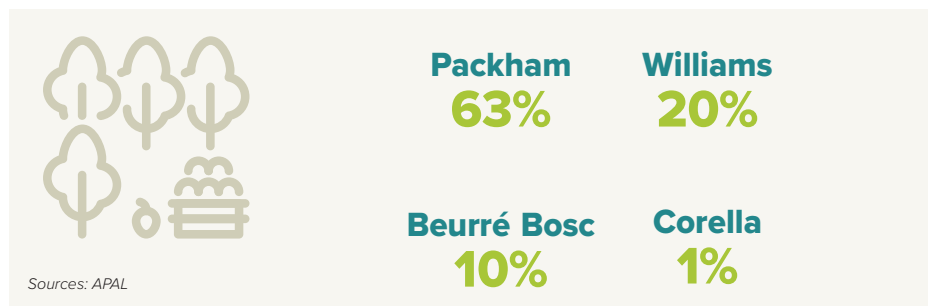
There are number of varieties grown in Australia, production for the fresh market is dominated by three main varieties. These include:

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.



2022/23 FRESH PEARS SEASONALITY BY VARIETY

Variety	Volume (t)	Jul	Aug	Sep	Oct	Nov	Dec	Jan	Feb	Mar	Apr	May	Jun
Packham	37,875	High	High	High	High	High	High	High	High	High	High	High	High
William	12,024	None	None	None	None	None	None	None	None	None	None	None	None
Beurre Bosc	6,012	High	High	High	High	High	High	High	High	High	High	High	High
Corella	601	High	High	High	High	High	High	High	High	High	High	High	High
Others	3,607	High	High	High	High	High	High	High	High	High	High	High	High

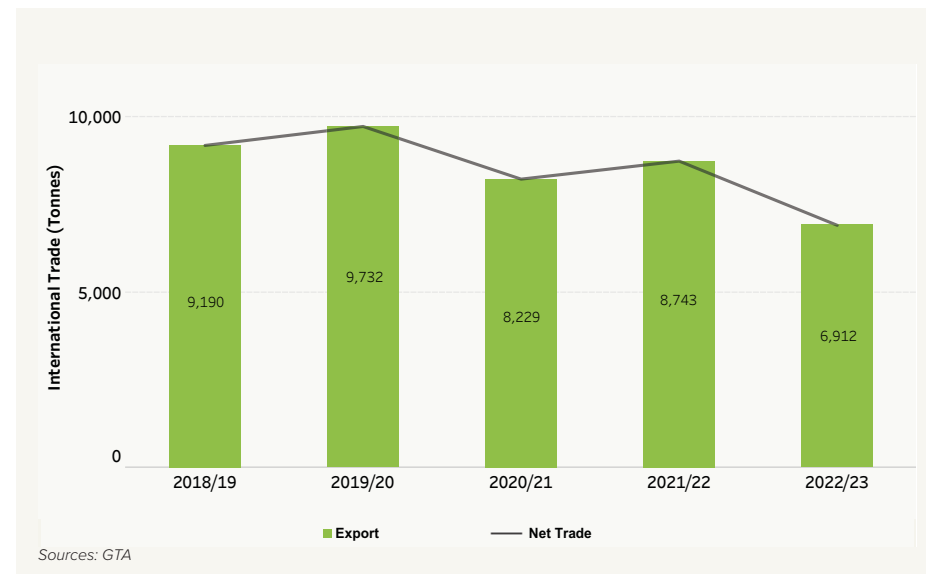
Availability legend: High (Dark Green), Medium (Light Green), Low (Yellow-Green), None (Grey)

Sources: APAL

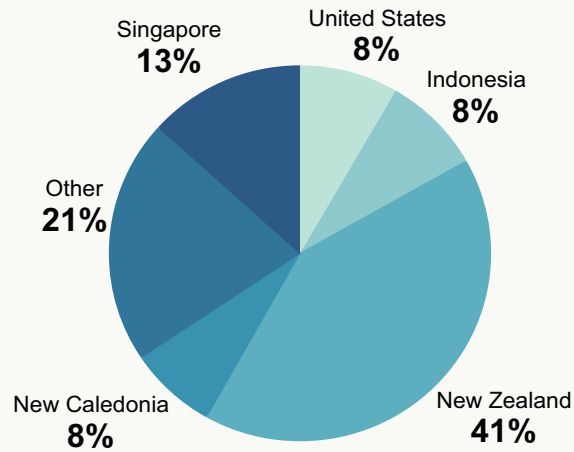
Fresh Pears International Trade

FRESH PEARS INTERNATIONAL TRADE

For the year ending June 2023, Australia exported **6,912 tonnes**. The exports and imports over the last five financial years are profiled in the graph below, where imports are counted as negative tonnes.



2022/23 FRESH PEARS EXPORTS BY COUNTRY



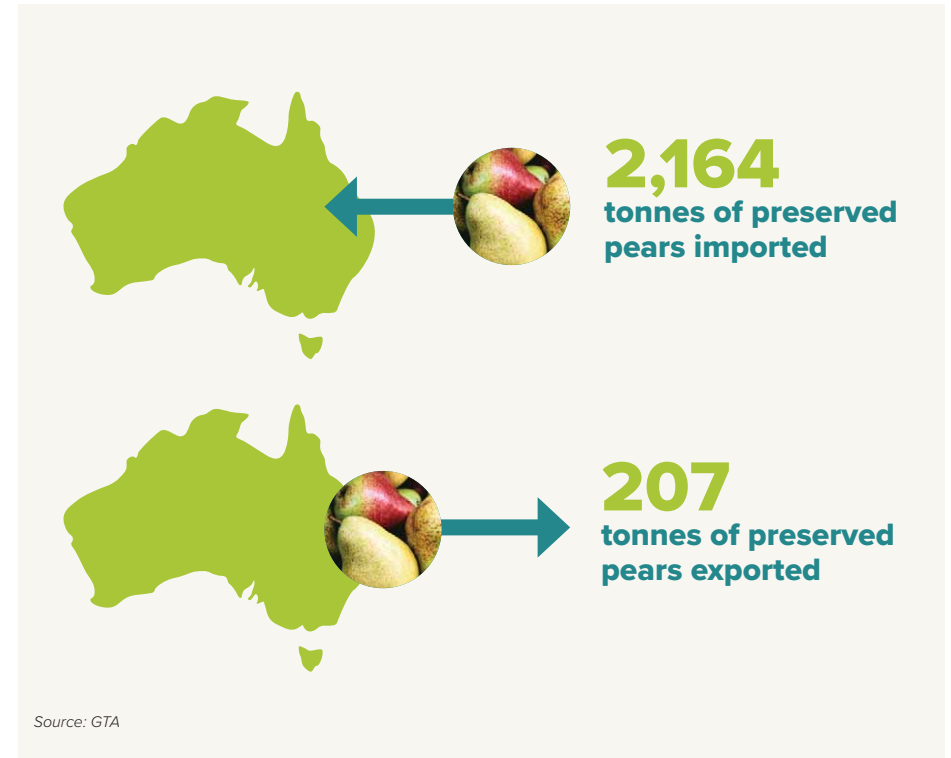
Source: GTA

For the year ending June 2023, **41%** of exported fresh pears were sent to **New Zealand**, as profiled in the chart above.

Processed Pears International Trade

2022/23 PROCESSED PEARS INTERNATIONAL TRADE

For the year ending June 2023, an additional **2,164 tonnes** of preserved pears were imported, while **207 tonnes** was exported.



Source: GTA

FRESH PEARS EXPORTS BY STATE

Exports by State of Production Origin (Tonnes)			
Year Ending June	2021	2022	2023
Victoria	7,935	8,427	6,677
New South Wales	146	163	109
Queensland	118	126	84
Tasmania	< 0.5	13	5
Western Australia	24	14	1
Other	6	< 0.5	35
TOTAL	8,229	8,743	6,912

FRESH PEARS EXPORTS BY COUNTRY

Exports by Country (Tonnes)			
Year Ending June	2021	2022	2023
New Zealand	2,917	3,129	2,857
Singapore	942	1,580	919
Indonesia	757	727	586
US	622	507	576
New Caledonia	520	561	519
Other	2,471	2,238	1,455
TOTAL	8,229	8,743	6,912

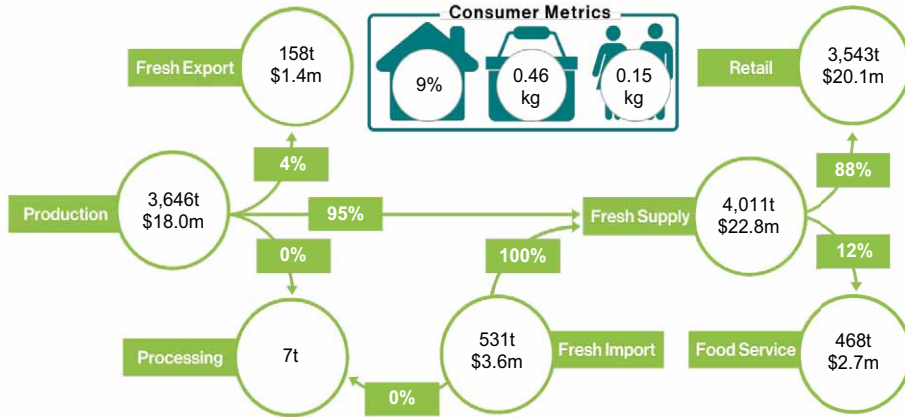
Source: GTA



Persimmons

Fresh Persimmons Overview

FRESH PERSIMMONS SUPPLY CHAIN – YEAR ENDING JUNE 2023



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

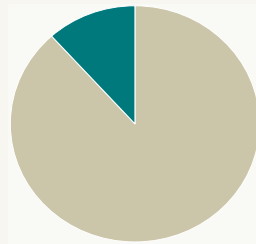
TOTAL PRODUCTION:



\$18M

3,646t produced and valued at **\$18M**

RETAIL VS FOOD SERVICE:



■ Retail 88% ■ Food Service 12%

The wholesale value of the fresh supply was **\$22.8M**, with **\$20.1M** distributed into retail and **\$2.7M** into food service.

CONSUMER METRICS:



9% of Australian households purchased persimmons, buying an average of **455g** per shopping trip.

PER CAPITA CONSUMPTION:



0.15kg in 2022/23 based on the volume supplied.

YEAR ENDING JUNE	2021	2022		2023	
	Value	Value	% YoY	Value	% YoY
Production (t)	3,218	2,848	-11%	3,646	+28%
Production (\$m)	\$12.8	\$14.2	+11%	\$18.0	+26%
Production area (Ha)	-	-	-	-	-
Fresh Export Volume (t)	179	145	-19%	158	+9%
Fresh Export Value (\$m)	\$1.4	\$1.1	-23%	\$1.4	+22%
Fresh Import Volume (t)	325	367	+13%	531	+45%
Fresh Import Value (\$m)	\$2.2	\$2.4	+12%	\$3.6	+48%
Fresh Supply (t)	3,358	3,064	-9%	4,011	+31%
Fresh Supply Wholesale Value (\$m)	\$15.0	\$17.8	+18%	\$22.8	+28%
Supply per Capita (kg)	0.13	0.12	-9%	0.15	+29%
Retail Supply (t)	2,972	2,707	-9%	3,543	+31%
Retail Supply Wholesale Value (\$m)	\$13.3	\$15.7	+18%	\$20.1	+28%
Food Service Supply (t)	386	357	-8%	468	+31%
Food Service Wholesale Value (\$m)	\$1.7	\$2.1	+20%	\$2.7	+28%

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

Fresh Persimmons Production

MAJOR PRODUCTION AREAS



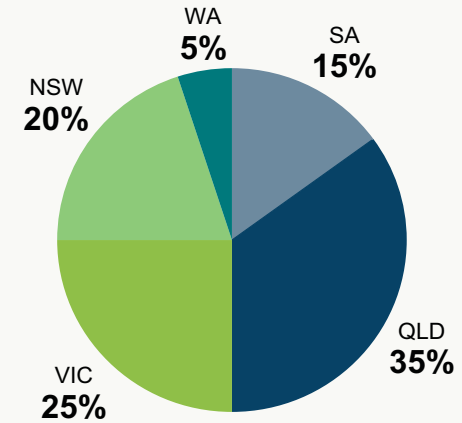
Source: PAus

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.

PRODUCTION WINDOW:



2022/23 FRESH PERSIMMONS PRODUCTION BY STATE



Source: PAus

2022/23 FRESH PERSIMMONS SEASONALITY BY STATE

State	Volume (t)	Value (\$m)	Jul	Aug	Sep	Oct	Nov	Dec	Jan	Feb	Mar	Apr	May	Jun
Queensland	1,276	\$6.3								Low	High	Medium	Medium	
Victoria	911	\$4.5									Low	Medium	Medium	Low
New South Wales	729	\$3.6									Low	Medium	Medium	Low
South Australia	547	\$2.7									Low	Medium	Medium	None
Western Australia	182	\$0.9									Low	Medium	Medium	Low

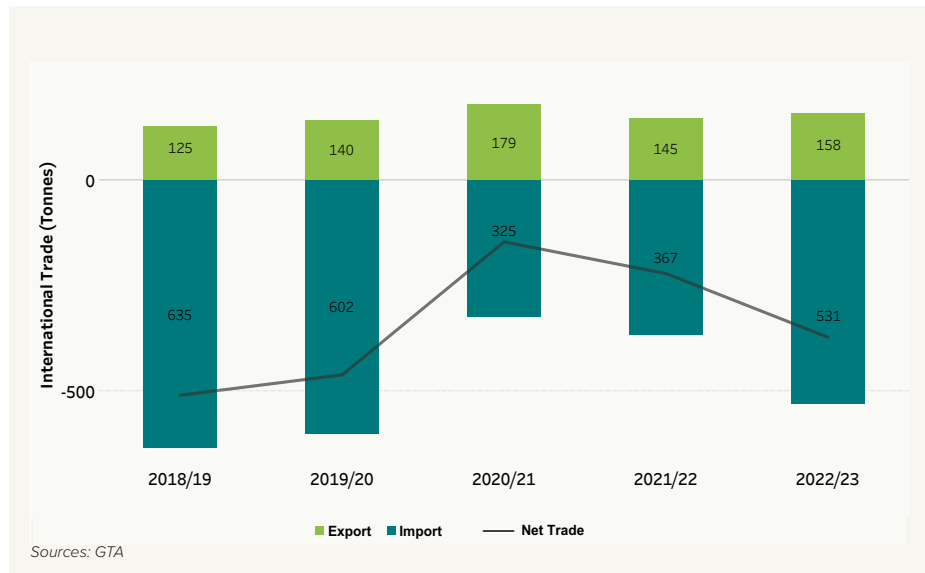
Availability legend: High (Dark Green), Medium (Light Green), Low (Yellow-Green), None (Grey)

Source: PAus

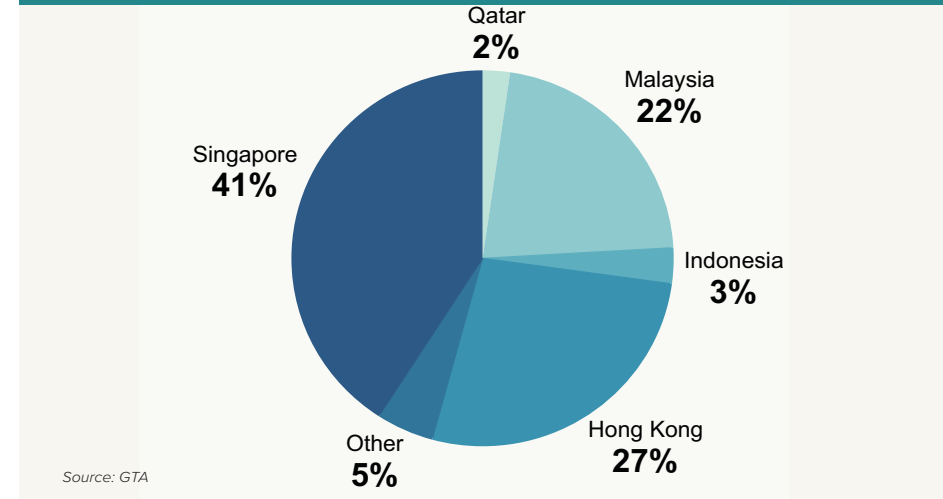
Fresh Persimmons International Trade

FRESH PERSIMMONS INTERNATIONAL TRADE

There is a small amount of international trade of persimmons, typically with more imports than exports. For the year ending 2023, Australia exported **158 tonnes**. The export and imports over the last five financial years are profiled in the graph below, where imports are counted as negative tonnes.



2022/23 FRESH PERSIMMONS EXPORTS BY COUNTRY



For the year ending June 2023, **41%** 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	2021	2022	2023	Year Ending June	2021	2022	2023
New South Wales	264	310	488	South Australia	78	74	82
Victoria	6	16	43	New South Wales	11	10	31
Western Australia	55	41	-	Queensland	47	8	27
TOTAL	325	367	531	Victoria	41	51	15
				Western Australia	-	2	3
				Other	2	< 0.5	-
				TOTAL	179	145	158

FRESH PERSIMMONS IMPORTS AND EXPORTS BY COUNTRY

Imports by Country (Tonnes)				Exports by Country (Tonnes)			
Year Ending June	2021	2022	2023	Year Ending June	2021	2022	2023
New Zealand	321	367	528	Singapore	67	50	65
China	-	-	3	Hong Kong	22	36	43
Sth. Korea	4	-	-	Malaysia	63	41	35
TOTAL	325	367	531	Indonesia	5	7	5
				Qatar	9	5	4
				Other	12	7	8
				TOTAL	179	145	158

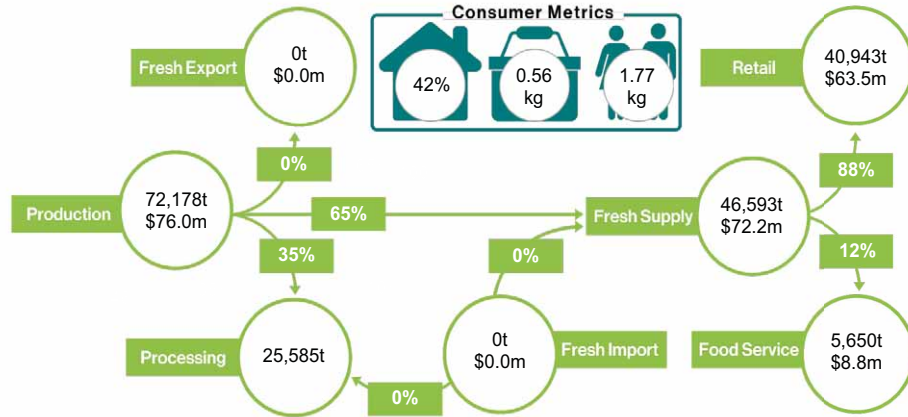
Source: GTA



Pineapples

Fresh Pineapples Overview

FRESH PINEAPPLES SUPPLY CHAIN – YEAR ENDING JUNE 2023



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

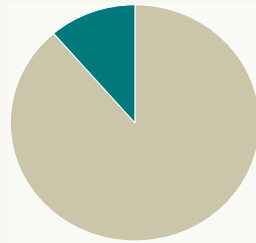
TOTAL PRODUCTION:



\$76M

72,178t produced and valued at **\$76M** with 35% sent to be processed.

RETAIL VS FOOD SERVICE:



■ Retail 88% ■ Food Service 12%

The wholesale value of the fresh supply was **\$72.7M**, with **\$63.5M** distributed into retail and **\$8.8M** into food service.

CONSUMER METRICS:



42% of Australian households purchased pineapples, buying an average of **559g** per shopping trip.

PER CAPITA CONSUMPTION:



in 2022/23 based on the volume supplied.

YEAR ENDING JUNE	2021	2022		2023	
	Value	Value	% YoY	Value	% YoY
Production (t)	71,084	74,653	+5%	72,178	-3%
Production (\$m)	\$46.8	\$66.7	+42%	\$76.0	+14%
Production area (Ha)	2,170	2,170	-	2,170	-
Fresh Export Volume (t)	-	-	-	-	-
Fresh Export Value (\$m)	\$-	\$-	-	\$-	-
Fresh Import Volume (t)	-	-	-	-	-
Fresh Import Value (\$m)	\$-	\$-	-	\$-	-
Fresh Supply (t)	46,920	49,799	+6%	46,593	-6%
Fresh Supply Wholesale Value (\$m)	\$44.0	\$61.2	+39%	\$72.2	+18%
Supply per Capita (kg)	1.82	1.92	+5%	1.77	-8%
Retail Supply (t)	41,303	44,266	+7%	40,943	-8%
Retail Supply Wholesale Value (\$m)	\$38.7	\$54.4	+40%	\$63.5	+17%
Food Service Supply (t)	5,617	5,533	-1%	5,650	+2%
Food Service Wholesale Value (\$m)	\$5.3	\$6.8	+29%	\$8.8	+29%

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. **35%** of pineapples grown in Australia in 2023 were sent to be processed, with the majority of this volume either tinned or juiced.

PRODUCTION AREA:



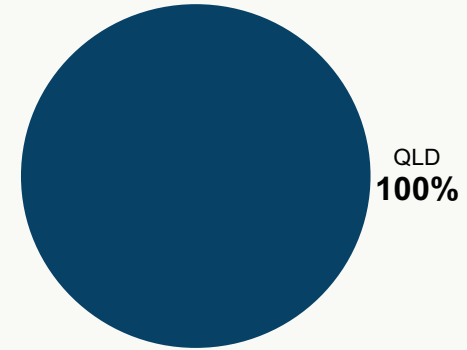
2,170
Ha

PRODUCTION WINDOW:



Year-round

2022/23 FRESH PINEAPPLES PRODUCTION BY STATE



Source: QDAF

2022/23 FRESH PINEAPPLES SEASONALITY BY STATE

State	Volume (t)	Value (\$m)	Jul	Aug	Sep	Oct	Nov	Dec	Jan	Feb	Mar	Apr	May	Jun
Queensland	72,178	\$76.0	Low	Low	High	High	High	Medium	Medium	Medium	High	High	High	Low

Availability legend: High Medium Low None

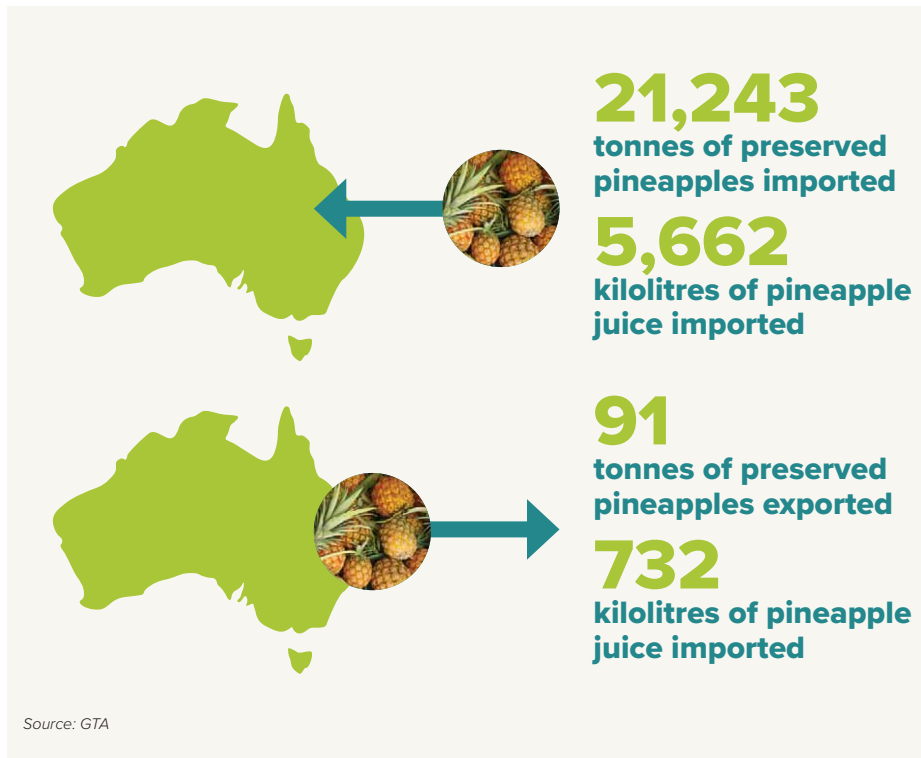
Source: Freshlogic Analysis; QDAF



Processed Pineapples International Trade

2022/23 PROCESSED PINEAPPLES INTERNATIONAL TRADE

For the year ending June 2023, an additional **21,243 tonnes** of preserved pineapples were imported, while **91 tonnes** were exported. Australia also imported **5,662 kilolitres** of pineapple juice, while exporting **732 kilolitres** of pineapple juice.

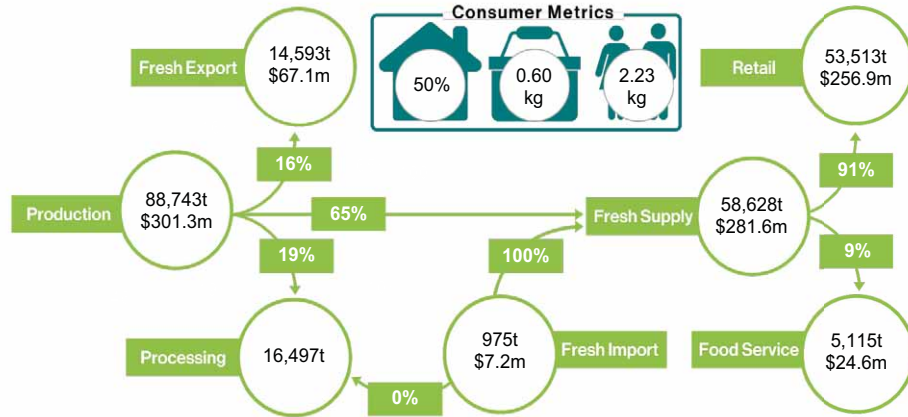




Summerfruit - Overview

Fresh Summerfruit Overview

FRESH SUMMERFRUIT SUPPLY CHAIN – YEAR ENDING JUNE 2023



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

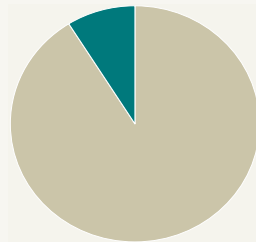
TOTAL PRODUCTION:



\$301.3M

88,743t produced and valued at \$301.3M with 19% sent to be processed.

RETAIL VS FOOD SERVICE:



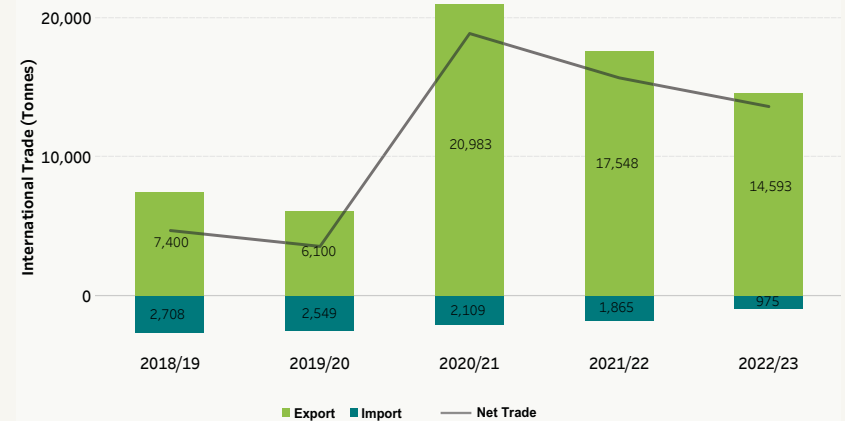
■ Retail 91% ■ Food Service 9%

The wholesale value of the fresh supply was \$281.6M, with \$256.9M distributed into retail and \$24.6M into food service.

YEAR ENDING JUNE	2021	2022		2023	
	Value	Value	% YoY	Value	% YoY
Production (t)	124,857	116,330	-7%	88,743	-24%
Production (\$m)	\$338.9	\$337.9	>-1%	\$301.3	-11%
Production area (Ha)	-	-	-	-	-
Fresh Export Volume (t)	20,983	17,548	-16%	14,593	-17%
Fresh Export Value (\$m)	\$92.1	\$79.6	-14%	\$67.1	-16%
Fresh Import Volume (t)	2,109	1,865	-12%	975	-48%
Fresh Import Value (\$m)	\$12.8	\$12.3	-4%	\$7.2	-42%
Fresh Supply (t)	81,723	78,252	-4%	58,628	-25%
Fresh Supply Wholesale Value (\$m)	\$301.7	\$313.0	+4%	\$281.6	-10%
Supply per Capita (kg)	3.17	3.02	-5%	2.23	-26%
Retail Supply (t)	74,616	71,407	-4%	53,513	-25%
Retail Supply Wholesale Value (\$m)	\$274.7	\$285.2	+4%	\$256.9	-10%
Food Service Supply (t)	7,107	6,844	-4%	5,115	-25%
Food Service Wholesale Value (\$m)	\$27.0	\$27.8	+3%	\$24.6	-11%

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

FRESH SUMMERFRUIT INTERNATIONAL TRADE

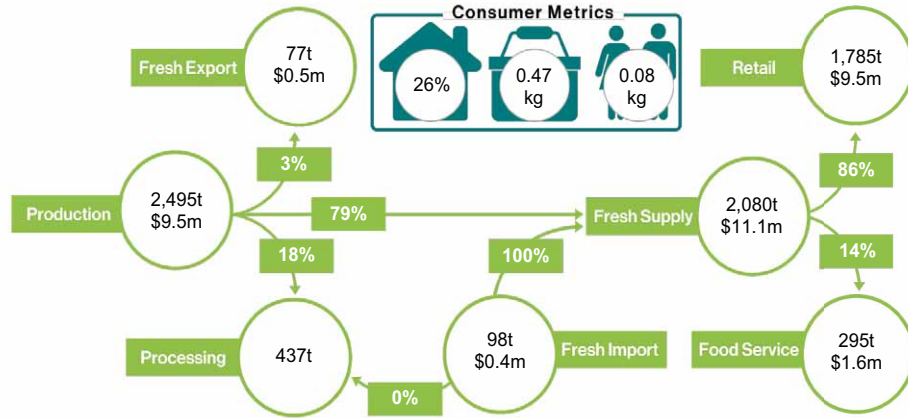




Summerfruit - Apricots

Fresh Apricots Overview

FRESH APRICOTS SUPPLY CHAIN – YEAR ENDING JUNE 2023



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

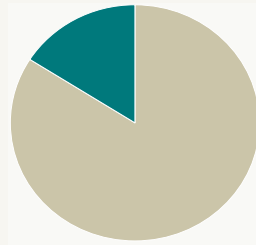
TOTAL PRODUCTION:



\$9.5M

2,495t produced and valued at **\$9.5M** with 18% sent to be processed.

RETAIL VS FOOD SERVICE:



■ Retail 86% ■ Food Service 14%

The wholesale value of the fresh supply was **\$11.1M**, with **\$9.5M** distributed into retail and **\$1.6M** into food service.

CONSUMER METRICS:



26% of Australian households purchased apricots, buying an average of **467g** per shopping trip.

PER CAPITA CONSUMPTION:



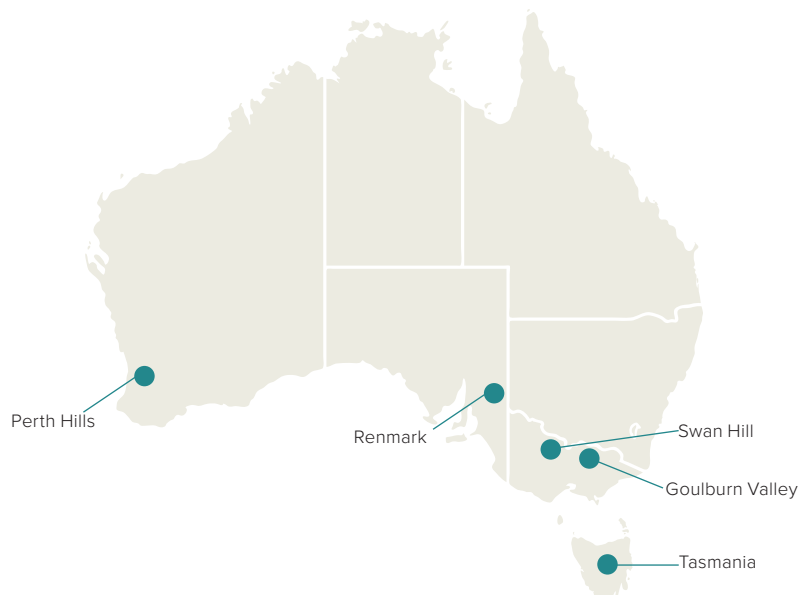
in 2022/23 based on the volume supplied.

YEAR ENDING JUNE	2021	2022		2023	
	Value	Value	% YoY	Value	% YoY
Production (t)	6,136	3,448	-44%	2,495	-28%
Production (\$m)	\$25.3	\$15.2	-40%	\$9.5	-37%
Production area (Ha)	-	-	-	-	-
Fresh Export Volume (t)	414	264	-36%	77	-71%
Fresh Export Value (\$m)	\$2.4	\$1.7	-30%	\$0.5	-70%
Fresh Import Volume (t)	122	153	+25%	98	-36%
Fresh Import Value (\$m)	\$0.7	\$1.0	+46%	\$0.4	-61%
Fresh Supply (t)	4,769	2,732	-43%	2,080	-24%
Fresh Supply Wholesale Value (\$m)	\$27.6	\$16.8	-39%	\$11.1	-34%
Supply per Capita (kg)	0.19	0.11	-43%	0.08	-25%
Retail Supply (t)	4,111	2,345	-43%	1,785	-24%
Retail Supply Wholesale Value (\$m)	\$23.8	\$14.4	-39%	\$9.5	-34%
Food Service Supply (t)	658	387	-41%	295	-24%
Food Service Wholesale Value (\$m)	\$3.8	\$2.4	-37%	\$1.6	-34%

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

Fresh Apricots Production

MAJOR PRODUCTION AREAS



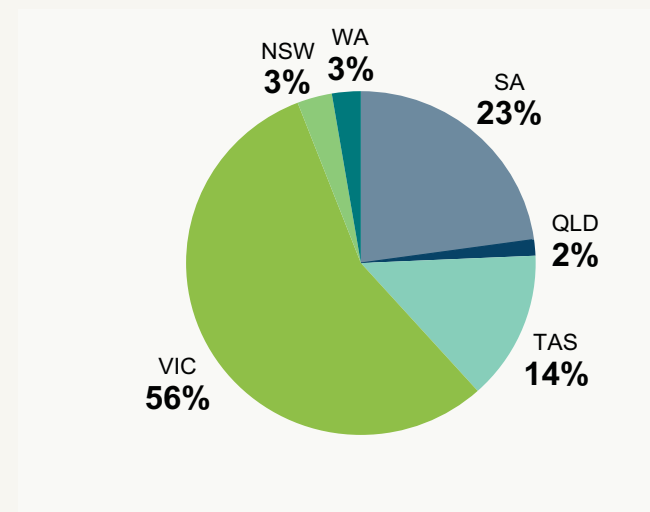
Source: SAL

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.

PRODUCTION WINDOW:



2022/23 FRESH APRICOTS PRODUCTION BY STATE



Source: SAL

2022/23 FRESH APRICOTS SEASONALITY BY STATE

State	Volume (t)	Value (\$m)	Jul	Aug	Sep	Oct	Nov	Dec	Jan	Feb	Mar	Apr	May	Jun
Victoria	1,391	\$5.3					High	High	High	High	Medium			
South Australia	569	\$2.2					High	High	Medium	Medium				
Tasmania	351	\$1.3					Medium	Medium	Medium	Medium				
New South Wales	81	\$0.3					Medium	Medium	High	Medium				
Western Australia	66	\$0.3					Medium	Medium	High	Medium				
Queensland	38	\$0.1					Medium	Medium	Medium	Medium				

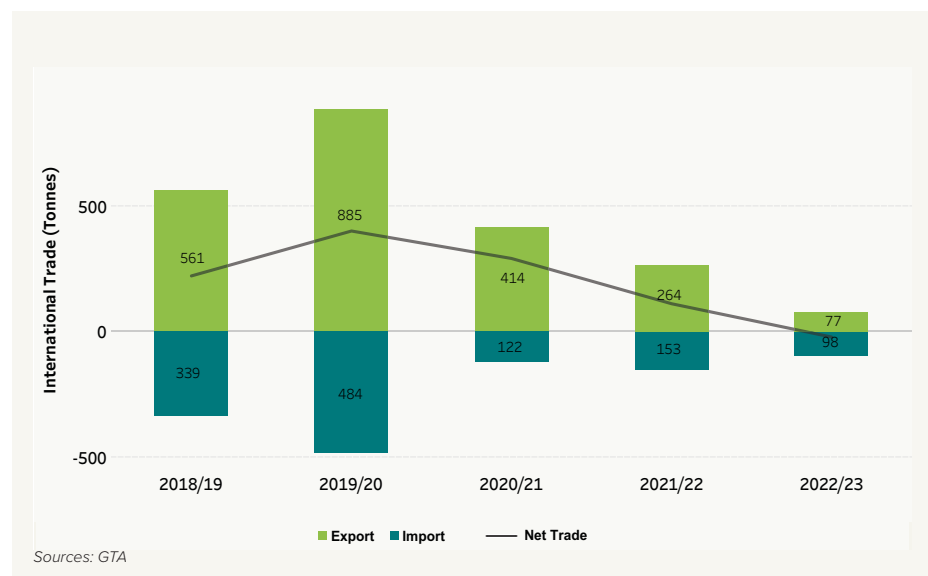
Availability legend: High Medium Low None

Source: SAL

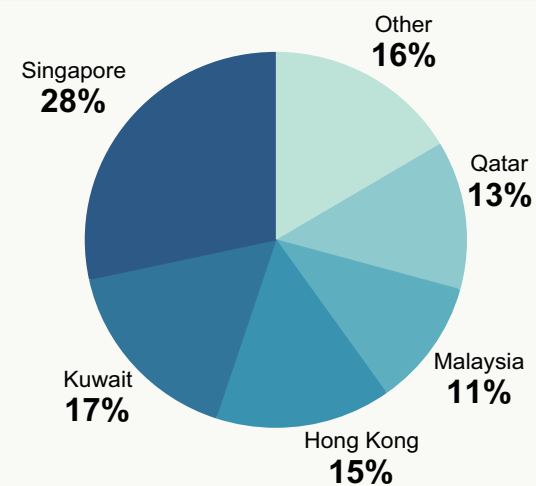
Fresh Apricots International Trade

FRESH APRICOTS INTERNATIONAL TRADE

Australia is a net exporter of fresh apricots. For the year ending June 2023, Australia exported **77 tonnes**. The exports and imports over the last five financial years are profiled in the graph below, where imports are counted as negative tonnes.



2022/23 FRESH APRICOTS EXPORTS BY COUNTRY



Source: GTA

For the year ending June 2023, **28%** of exported fresh apricots were sent to **Singapore**, 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	2021	2022	2023	Year Ending June	2021	2022	2023
New South Wales	46	67	36	Victoria	362	210	60
Western Australia	43	50	25	Queensland	3	12	9
Queensland	6	4	18	New South Wales	44	41	6
Victoria	27	32	18	South Australia	1	1	1
Other	< 0.5	-	-	Tasmania	1	-	-
TOTAL	122	153	98	Other	3	-	< 0.5
				TOTAL	414	264	77

FRESH APRICOTS IMPORTS AND EXPORTS BY COUNTRY

Imports by Country (Tonnes)				Exports by Country (Tonnes)			
Year Ending June	2021	2022	2023	Year Ending June	2021	2022	2023
South Africa	-	-	74	Singapore	43	37	22
New Zealand	108	149	16	Kuwait	64	18	13
US	14	1	9	Hong Kong	28	29	11
Syria	-	3	-	Qatar	56	20	10
Turkey	1	-	-	Malaysia	25	12	8
Other	< 0.5	-	-	Other	197	149	13
TOTAL	122	153	98	TOTAL	414	264	77

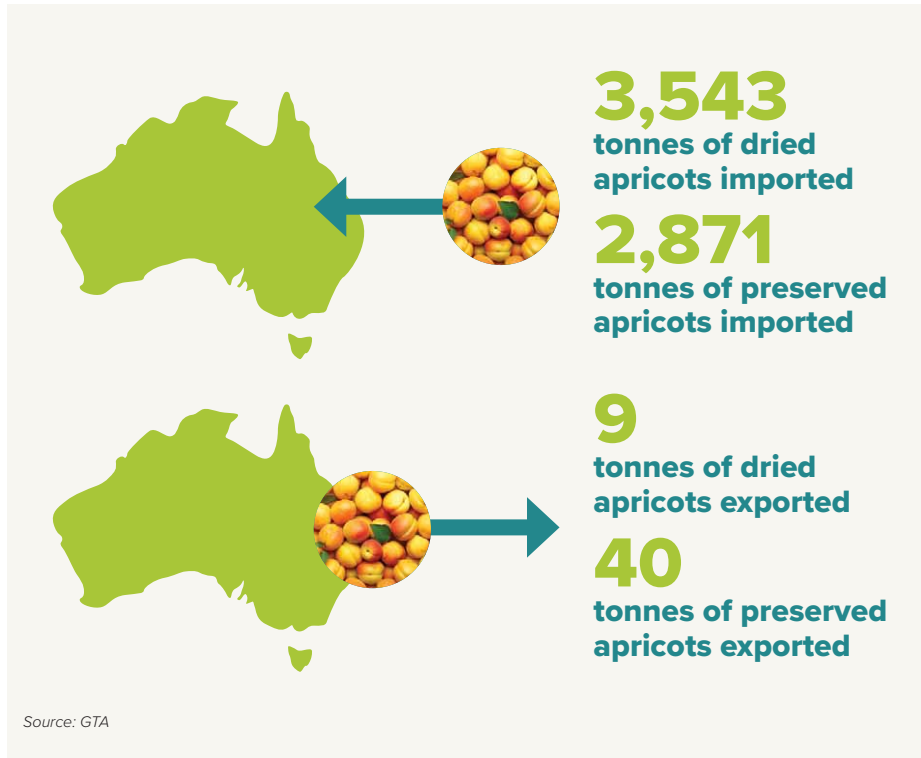
Source: GTA

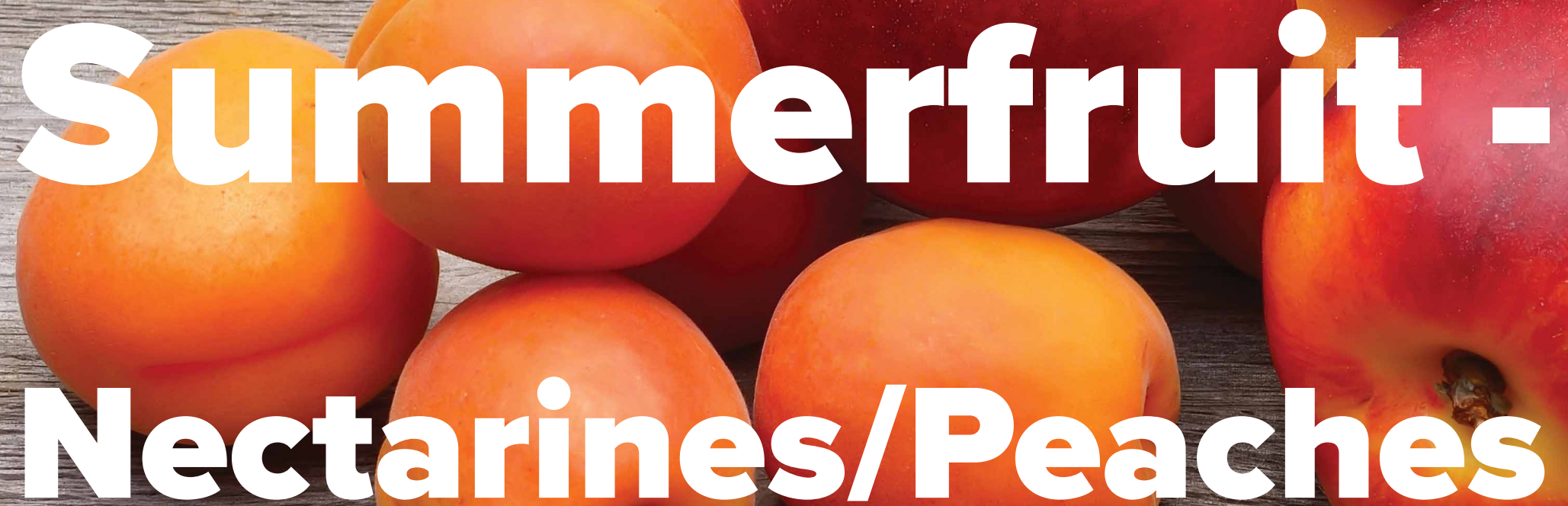


Processed Apricots International Trade

2022/23 PROCESSED APRICOTS INTERNATIONAL TRADE

For the year ending June 2023, an additional **3,543 tonnes** of dried apricots and **2,871 tonnes** of preserved apricots were imported, while **9 tonnes** of dried apricots and **40 tonnes** of preserved apricots were exported.

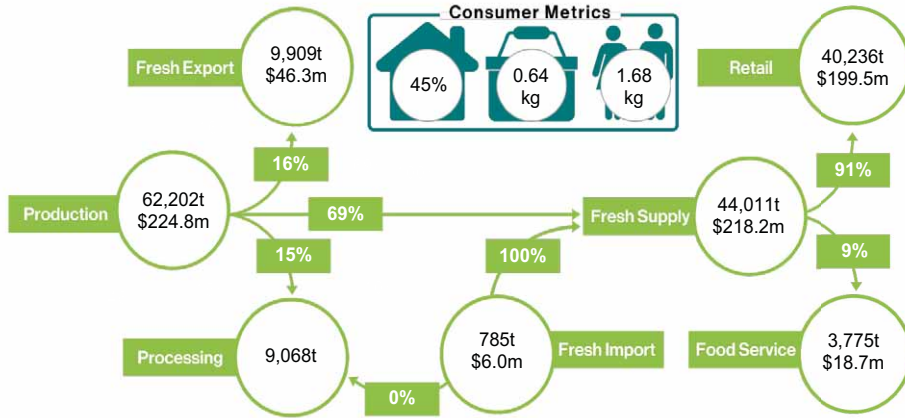




Summerfruit - Nectarines/Peaches

Fresh Nectarines/Peaches Overview

FRESH NECTARINES/PEACHES SUPPLY CHAIN – YEAR ENDING JUNE 2023



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

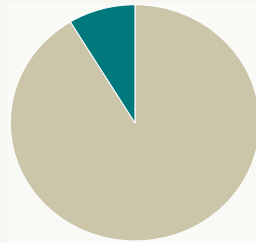
TOTAL PRODUCTION:



\$224.8M

62,202t produced and valued at **\$224.8M** with 15% sent to be processed.

RETAIL VS FOOD SERVICE:



■ Retail 91% ■ Food Service 9%

The wholesale value of the fresh supply was **\$218.2M**, with **\$199.5M** distributed into retail and **\$18.7M** into food service.

CONSUMER METRICS:



45% of Australian households purchased nectarines/peaches, buying an average of **635g** per shopping trip.

PER CAPITA CONSUMPTION:



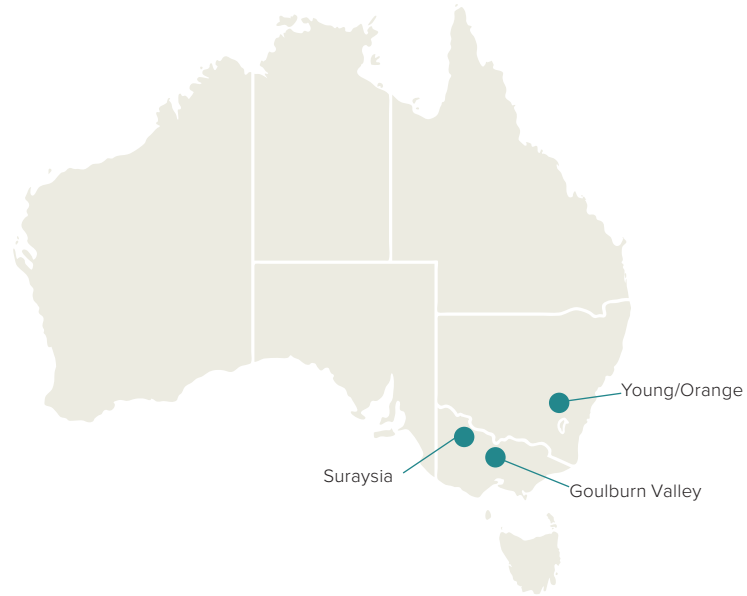
1.68kg in 2022/23 based on the volume supplied.

YEAR ENDING JUNE	2021	2022		2023	
	Value	Value	% YoY	Value	% YoY
Production (t)	85,798	81,084	-5%	62,202	-23%
Production (\$m)	\$236.1	\$244.1	+3%	\$224.8	-8%
Producing Trees (000 Trees)	-	-	-	-	-
Fresh Export Volume (t)	13,187	11,179	-15%	9,909	-11%
Fresh Export Value (\$m)	\$59.4	\$52.0	-12%	\$46.3	-11%
Fresh Import Volume (t)	1,594	1,487	-7%	785	-47%
Fresh Import Value (\$m)	\$9.9	\$9.8	-1%	\$6.0	-39%
Fresh Supply (t)	60,593	58,848	-3%	44,011	-25%
Fresh Supply Wholesale Value (\$m)	\$219.2	\$236.3	+8%	\$218.2	-8%
Supply per Capita (kg)	2.35	2.27	-4%	1.68	-26%
Retail Supply (t)	55,495	53,781	-3%	40,236	-25%
Retail Supply Wholesale Value (\$m)	\$200.5	\$215.8	+8%	\$199.5	-8%
Food Service Supply (t)	5,098	5,067	>-1%	3,775	-26%
Food Service Wholesale Value (\$m)	\$18.7	\$20.4	+10%	\$18.7	-9%

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

Fresh Nectarines/Peaches Production

MAJOR PRODUCTION AREAS



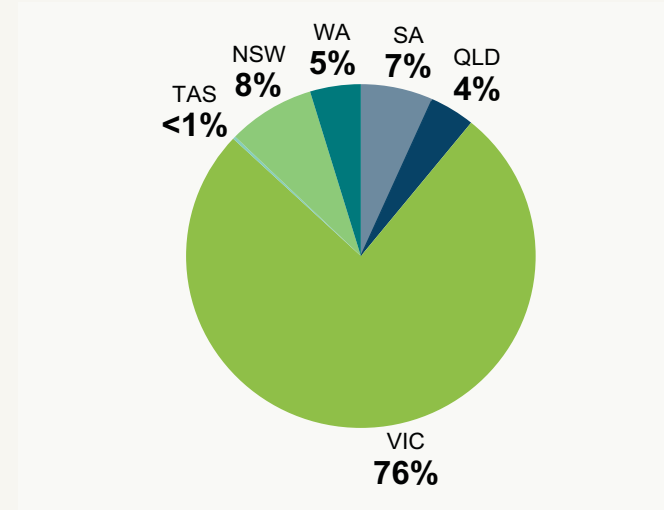
Source: SAL

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

PRODUCTION WINDOW:



2022/23 FRESH NECTARINES/PEACHES PRODUCTION BY STATE



Source: SAL

2022/23 FRESH NECTARINES/PEACHES SEASONALITY BY STATE

State	Volume (t)	Value (\$m)	Jul	Aug	Sep	Oct	Nov	Dec	Jan	Feb	Mar	Apr	May	Jun
Victoria	47,192	\$168.9				Low	Low	Low	High	High	Low	Low	Low	
New South Wales	5,093	\$19.0					Low	Low	High	Low	Low	Low	Low	
South Australia	4,152	\$14.8				Low	Low	Low	Low	Low	Low	Low	Low	
Western Australia	2,967	\$11.4				Low	Low	Low	Low	Low	Low	Low	Low	
Queensland	2,634	\$10.0				Low	Low	High	High	Low	Low	Low	Low	
Tasmania	164	\$0.7					Low	Low	Low	Low	Low	Low	Low	

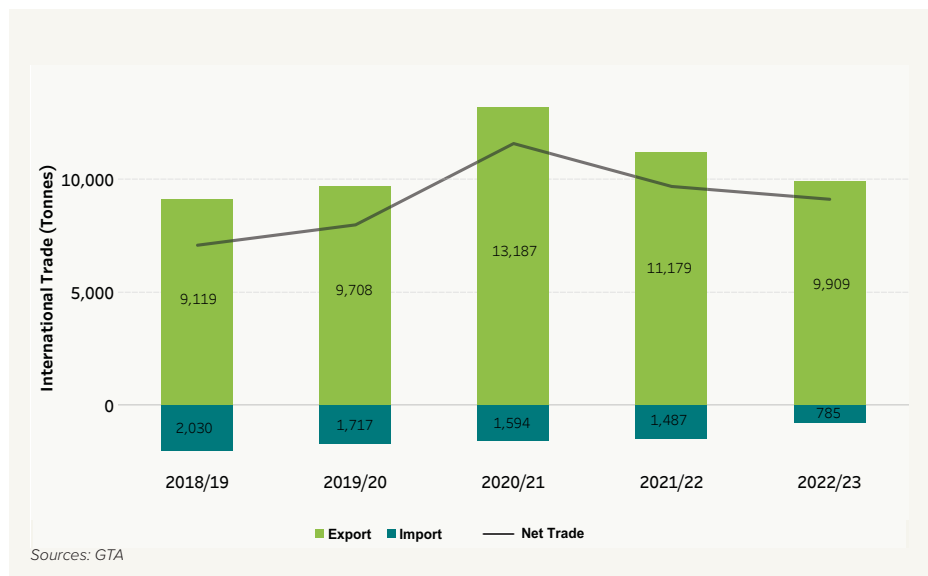
Availability legend: High (Dark Teal), Medium (Light Green), Low (Yellow-Green), None (Light Blue)

Source: SAL

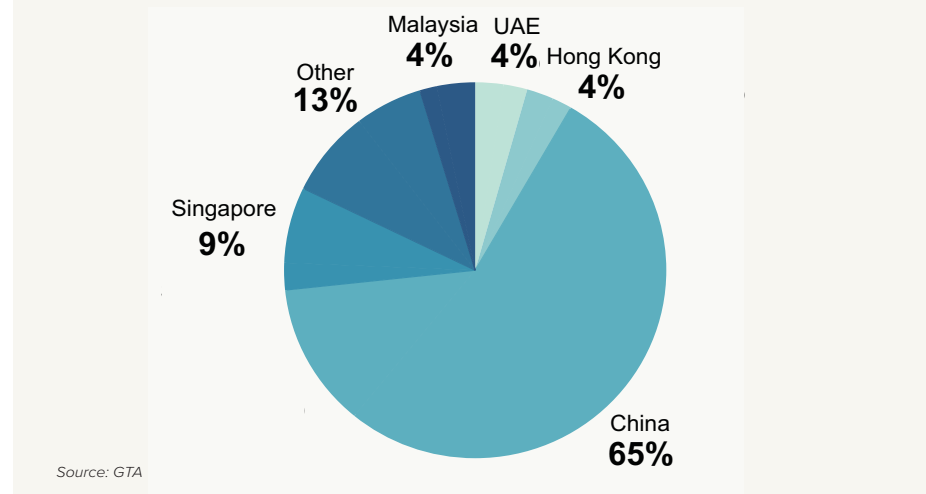
Fresh Nectarines/Peaches International Trade

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 2023, Australia exported **9,909 tonnes**. The exports and imports over the last five financial years are profiled in the graph below, where imports are counted as negative tonnes.



2022/23 FRESH NECTARINES/PEACHES EXPORTS BY COUNTRY



For the year ending June 2023, **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	2021	2022	2023	Year Ending June	2021	2022	2023
New South Wales	1030	826	506	Victoria	12172	9945	8261
Western Australia	253	258	117	Queensland	46	153	74
Queensland	16	99	8	New South Wales	744	443	965
Victoria	295	304	155	South Australia	221	629	562
Other	< 0.5	0	0	Tasmania	1	1	1
TOTAL	1594	1487	785	Other	3	8	46
				TOTAL	13187	11179	9909

FRESH NECTARINES/PEACHES IMPORTS AND EXPORTS BY COUNTRY

Imports by Country (Tonnes)				Exports by Country (Tonnes)			
Year Ending June	2021	2022	2023	Year Ending June	2021	2022	2023
US	1,583	1,453	785	Singapore	1250	990	835
China	-	35	-	Kuwait	136	369	151
New Zealand	11	-	-	Hong Kong	951	443	528
Other	< 0.5	-0	-	Qatar	192	261	187
TOTAL	1,594	1,487	785	Malaysia	369	358	414
				Other	10288	8759	7793
				TOTAL	13187	11179	9909

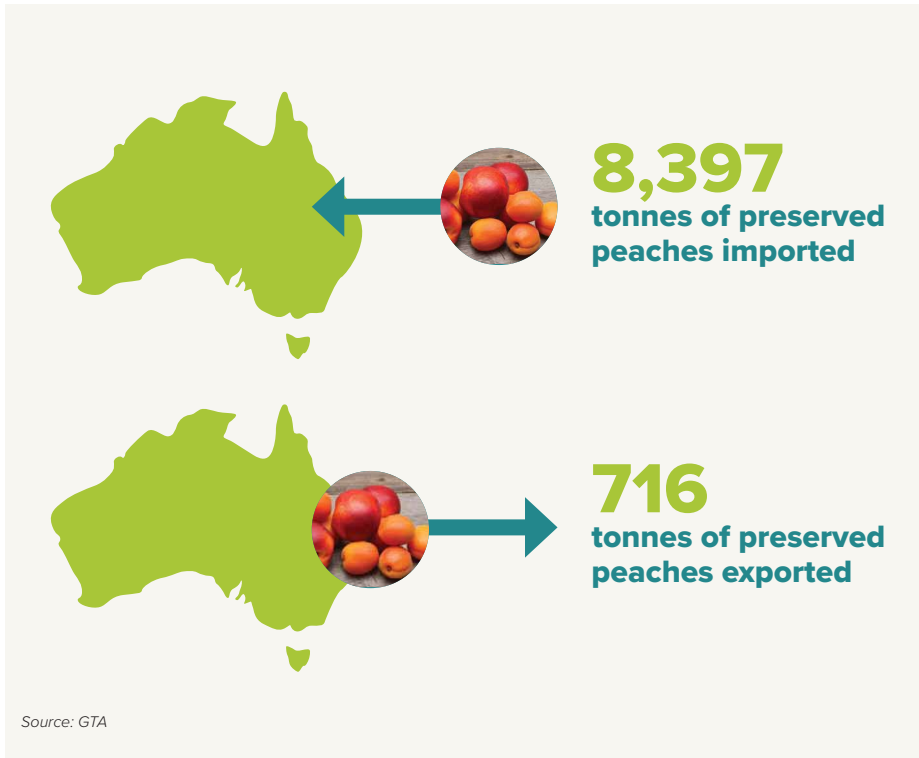
Source: GTA



Processed Nectarines/Peaches International Trade

2022/23 PROCESSED NECTARINES/PEACHES INTERNATIONAL TRADE

For the year ending June 2023, an additional **8,397 tonnes** of preserved peaches were imported, while **716 tonnes** of preserved peaches were exported.

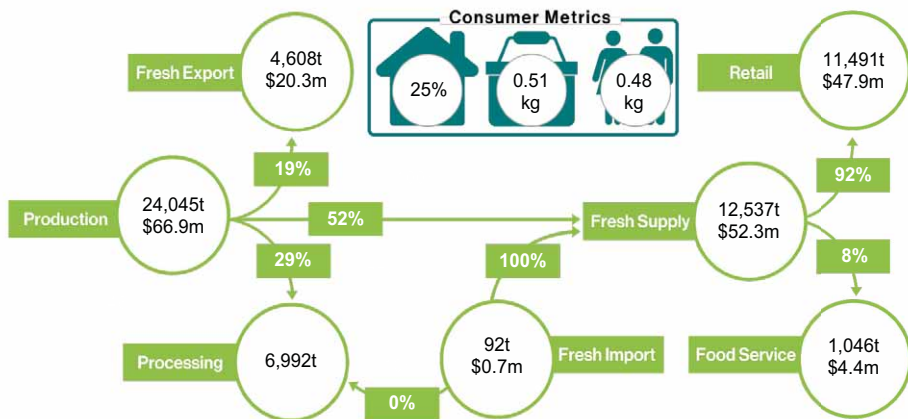




Summerfruit - Plums

Fresh Plums Overview

FRESH PLUMS SUPPLY CHAIN – YEAR ENDING JUNE 2023



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

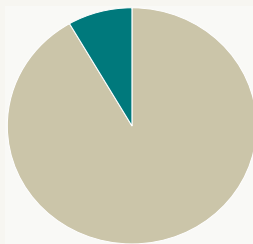
TOTAL PRODUCTION:



\$66.9M

24,045t produced and valued at **\$66.9M** with 29% sent to be processed.

RETAIL VS FOOD SERVICE:



■ Retail 92% ■ Food Service 8%

The wholesale value of the fresh supply was **\$52.3M**, with **\$47.9M** distributed into retail and **\$4.4M** into food service.

CONSUMER METRICS:



25% of Australian households purchased plums, buying an average of **512g** per shopping trip.

PER CAPITA CONSUMPTION:



in 2022/23 based on the volume supplied.

YEAR ENDING JUNE	2021	2022		2023	
	Value	Value	% YoY	Value	% YoY
Production (t)	32,924	31,798	-3%	24,045	-24%
Production (\$m)	\$77.6	\$78.6	+1%	\$66.9	-15%
Production area (Ha)	-	-	-	-	-
Fresh Export Volume (t)	7,383	6,105	-17%	4,608	-25%
Fresh Export Value (\$m)	\$30.4	\$25.9	-15%	\$20.3	-22%
Fresh Import Volume (t)	393	225	-43%	92	-59%
Fresh Import Value (\$m)	\$2.2	\$1.5	-31%	\$0.7	-51%
Fresh Supply (t)	16,360	16,672	+2%	12,537	-25%
Fresh Supply Wholesale Value (\$m)	\$55.0	\$60.0	+9%	\$52.3	-13%
Supply per Capita (kg)	0.64	0.64	+1%	0.48	-26%
Retail Supply (t)	15,009	15,281	+2%	11,491	-25%
Retail Supply Wholesale Value (\$m)	\$50.5	\$55.0	+9%	\$47.9	-13%
Food Service Supply (t)	1,351	1,391	+3%	1,046	-25%
Food Service Wholesale Value (\$m)	\$4.5	\$5.0	+10%	\$4.4	-13%

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

Fresh Plums Production

MAJOR PRODUCTION AREAS



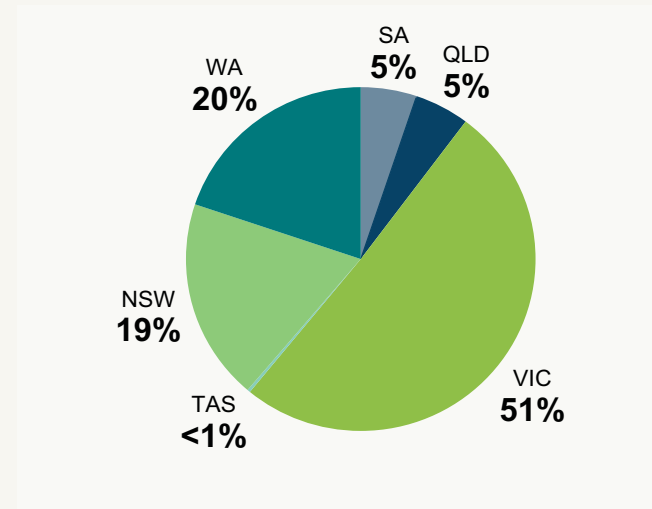
Source: SAL

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

PRODUCTION WINDOW:



2022/23 FRESH PLUMS PRODUCTION BY STATE



Source: SAL

2022/23 FRESH PLUMS SEASONALITY BY STATE

State	Volume (t)	Value (\$m)	Jul	Aug	Sep	Oct	Nov	Dec	Jan	Feb	Mar	Apr	May	Jun
Victoria	12,198	\$34.0					High	High	High	High	High	High	High	
Western Australia	4,771	\$13.3					High	High	High	High	High	High		
New South Wales	4,551	\$12.7					High	High	High	High	High	High		
South Australia	1,241	\$3.5					High	High	High	High	High	High		
Queensland	1,217	\$3.4					High	High	High	High	High	High		
Tasmania	67	\$0.2							High	High	High	High		

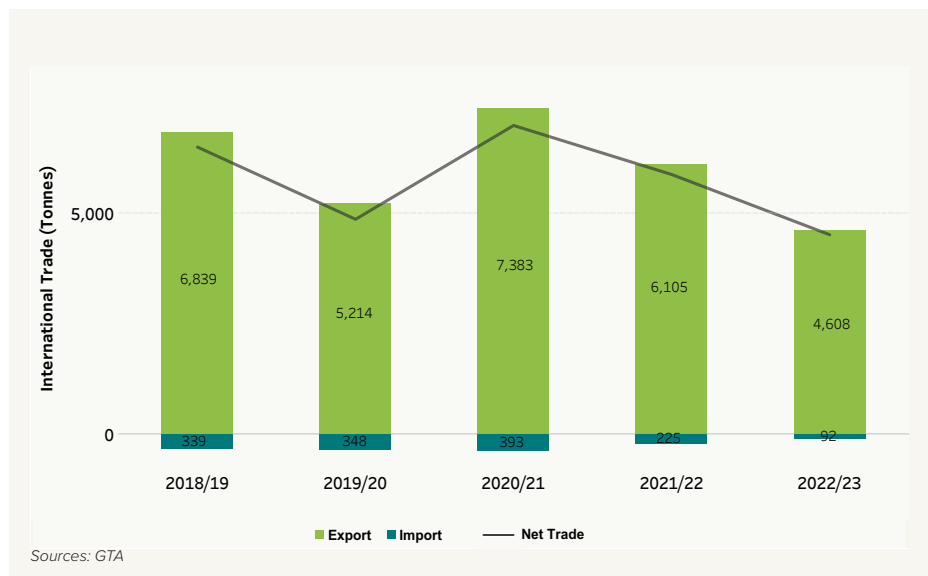
Availability legend: High Medium Low None

Source: SAL

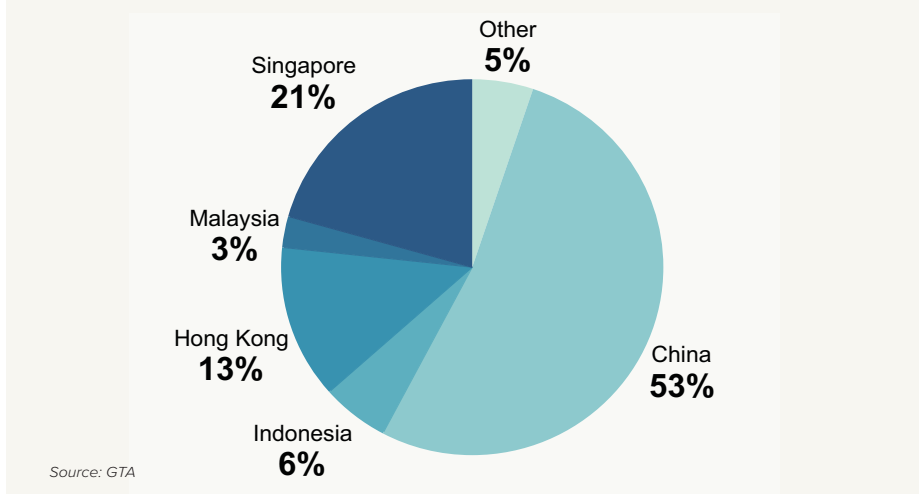
Fresh Plums International Trade

FRESH PLUMS INTERNATIONAL TRADE

Australia is a net exporter of fresh plums, with exports growing in recent years. For the year ending June 2023, Australia exported **4,608 tonnes**. The exports and imports over the last five financial years are profiled in the graph below, where imports are counted as negative tonnes.



2022/23 FRESH PLUMS EXPORTS BY COUNTRY



For the year ending June 2023, **53%** 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	2021	2022	2023	Year Ending June	2021	2022	2023
New South Wales	243	153	73	Victoria	6,029	5,136	3,167
Western Australia	51	37	18	New South Wales	934	795	1,072
Queensland	-	22	-	Western Australia	330	83	255
Victoria	98	13	-	Queensland	8	28	108
Other	-	< 0.5	< 0.5	Tasmania	< 0.5	-	5
TOTAL	393	225	92	Other	81	64	1
				TOTAL	7,383	6,105	4,608

FRESH PLUMS IMPORTS AND EXPORTS BY COUNTRY

Imports by Country (Tonnes)				Exports by Country (Tonnes)			
Year Ending June	2021	2022	2023	Year Ending June	2021	2022	2023
US	392	222	92	China	4,356	4,378	2,424
Afghanistan	< 0.5	3	-	Singapore	849	713	950
India	1	-	-	Hong Kong	707	409	610
Pakistan	< 0.5	-	-	Indonesia	469	212	263
Other	1	-	-	Malaysia	248	141	124
TOTAL	393	225	92	Other	754	252	237
				TOTAL	7,383	6,105	4,608

Source: GTA


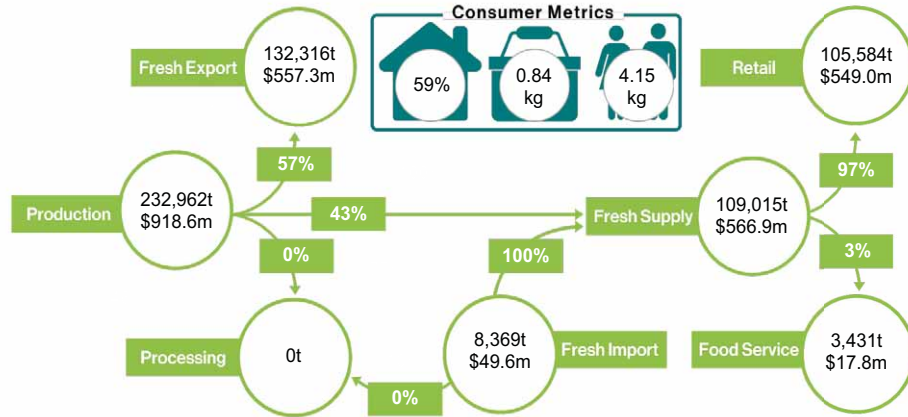


Table Grapes

Fresh Table Grapes Overview

FRESH TABLE GRAPES SUPPLY CHAIN – YEAR ENDING JUNE 2023



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

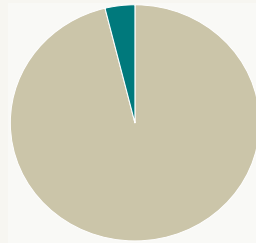
TOTAL PRODUCTION:



\$918.6M

232,962t produced and valued at **\$918.6M**

RETAIL VS FOOD SERVICE:



■ Retail 97% ■ Food Service 3%

The wholesale value of the fresh supply was **\$566.9M**, with **\$549M** distributed into retail and **\$17.8M** into food service.

CONSUMER METRICS:



59% of Australian households purchased table grapes, buying an average of **844g** per shopping trip.

PER CAPITA CONSUMPTION:



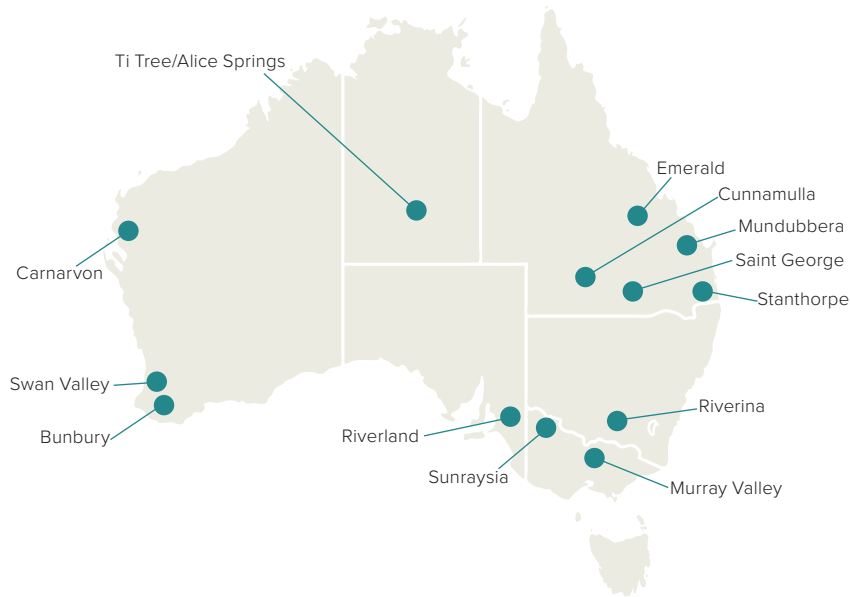
in 2022/23 based on the volume supplied.

YEAR ENDING JUNE	2021	2022		2023	
	Value	Value	% YoY	Value	% YoY
Production (t)	198,389	195,925	-1%	232,962	+19%
Production (\$m)	\$631.8	\$722.2	+14%	\$918.6	+27%
Production area (Ha)	25,000	25,000	-	25,000	-
Fresh Export Volume (t)	120,725	108,204	-10%	132,316	+22%
Fresh Export Value (\$m)	\$460.8	\$440.0	-4%	\$557.3	+27%
Fresh Import Volume (t)	12,033	9,105	-24%	8,369	-8%
Fresh Import Value (\$m)	\$58.9	\$49.6	-16%	\$49.6	>-1%
Fresh Supply (t)	89,697	96,826	+8%	109,015	+13%
Fresh Supply Wholesale Value (\$m)	\$326.3	\$452.1	+39%	\$566.9	+25%
Supply per Capita (kg)	3.48	3.73	+7%	4.15	+11%
Retail Supply (t)	85,425	93,102	+9%	105,584	+13%
Retail Supply Wholesale Value (\$m)	\$310.8	\$434.7	+40%	\$549.0	+26%
Food Service Supply (t)	4,271	3,724	-13%	3,431	-8%
Food Service Wholesale Value (\$m)	\$15.5	\$17.4	+12%	\$17.8	+3%

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:



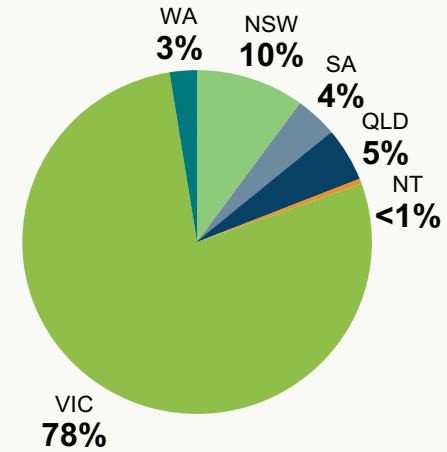
25,000
Ha

PRODUCTION WINDOW:



Nov-May

2022/23 FRESH TABLE GRAPES PRODUCTION BY STATE



Source: ATGA

2022/23 FRESH TABLE GRAPES SEASONALITY BY STATE

State	Volume (t)	Value (\$m)	Jul	Aug	Sep	Oct	Nov	Dec	Jan	Feb	Mar	Apr	May	Jun
Victoria	181,710	\$716.5					High	High	High	High	High	High	High	
New South Wales	23,296	\$91.9					Medium	Medium	Medium	Medium	Medium	Medium	Medium	
Queensland	11,648	\$45.9					Medium	Medium	Medium	Medium	Medium	Medium	Medium	
South Australia	9,318	\$36.7					None	High	High	High	High	High	High	
Western Australia	5,847	\$23.1					None	None	None	None	None	None	None	
Northern Territory	1,142	\$4.5					None	None	None	None	None	None	None	

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 2023.

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



2022/23 FRESH TABLE GRAPES SEASONALITY BY VARIETY

Variety	Volume (t)	Jul	Aug	Sep	Oct	Nov	Dec	Jan	Feb	Mar	Apr	May	Jun
White - Thompson	58,240							High	High	High	High	Low	
Red - Crimson	44,263							High	High	High	Low	Low	
White - Menindee	30,285					Low	Low	High	Low				
Red - Flame	13,978					Low	Low	Low					
Red - Globe	11,648							Low	Low	Low	Low	Low	
Black	9,281						Low	Low	Low				
Other	65,267							High	High	High	Low	Low	

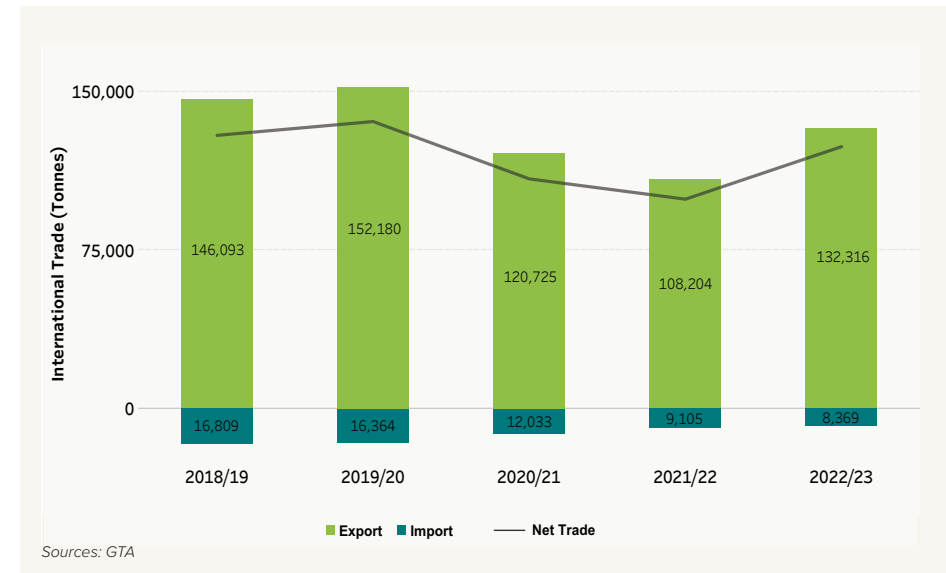
Availability legend: High Medium Low None

Sources: CA

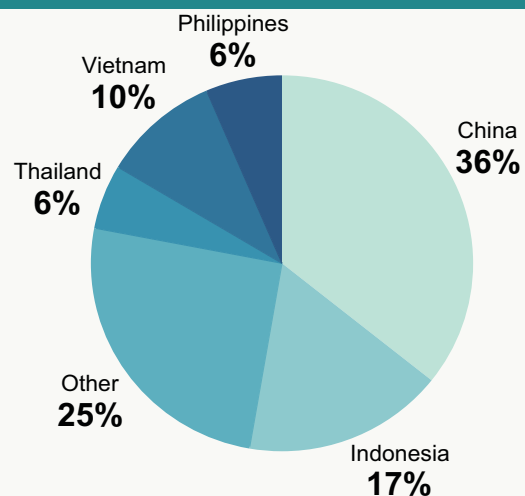
Fresh Table Grapes International Trade

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 2023, Australia exported **132,316 tonnes**. The exports and imports over the last five financial years are profiled in the graph below, where imports are counted as negative tonnes.



2022/23 FRESH TABLE GRAPES EXPORTS BY COUNTRY



Source: GTI

For the year ending June 2023, **36%** 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	2021	2022	2023	Year Ending June	2021	2022	2023
New South Wales	4,882	5,007	5,001	Victoria	107,742	96,768	119,166
Victoria	6,186	2,944	2,360	New South Wales	8,861	9,013	11,112
Western Australia	779	981	953	Western Australia	103	961	1,386
Queensland	20	109	54	Queensland	3,746	1,172	416
South Australia	166	65	-	South Australia	137	289	165
TOTAL	12,033	9,105	8,369	Other	137	< 0.5	70
				TOTAL	120,725	108,204	132,316

FRESH TABLE GRAPES IMPORTS AND EXPORTS BY COUNTRY

Imports by Country (Tonnes)				Exports by Country (Tonnes)			
Year Ending June	2021	2022	2023	Year Ending June	2021	2022	2023
US	11,306	8,612	7,967	China	43,013	26,392	47,234
Mexico	663	435	293	Indonesia	16,594	20,048	22,544
China	55	42	76	Vietnam	7,018	13,129	13,202
Sth. Korea	8	16	15	Philippines	8,446	8,473	8,539
UAE	-	-	< 0.5	Thailand	6,314	7,757	7,343
Other	-	< 0.5	18	Other	39,340	32,404	33,454
TOTAL	12,033	9,105	8,369	TOTAL	120,725	108,204	132,316

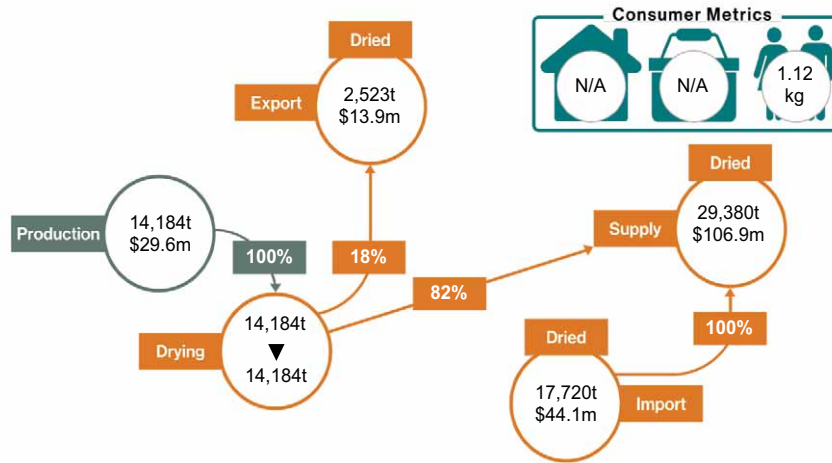
Source: GTA



Dried Grapes

Dried Grapes Overview

DRIED GRAPES SUPPLY CHAIN – YEAR ENDING JUNE 2023



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

YEAR ENDING JUNE	2021	2022		2023	
	Value	Value	% YoY	Value	% YoY
Dried Production (t)	13,037	9,917	-24%	14,184	+43%
Production (\$m)	\$25.3	\$19.8	-22%	\$29.6	+49%
Production area (Ha)	3,257	3,257	-	3,257	-
Dried Export Volume (t)	4,702	3,367	-28%	2,523	-25%
Dried Export Value (\$m)	\$24.1	\$17.8	-26%	\$13.9	-22%
Dried Import Volume (t)	20,060	19,720	-2%	17,720	-10%
Dried Import Value (\$m)	\$51.2	\$48.2	-6%	\$44.1	-8%
Dried Supply (t)	28,395	26,269	-7%	29,380	+12%
Dried Supply Wholesale Value (\$m)	\$96.9	\$85.6	-12%	\$106.9	+25%
Supply per Capita (kg)	1.10	1.01	-8%	1.12	+10%

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

TOTAL PRODUCTION:



\$29.6M

14,184t produced and valued at \$29.6M with 100% of production going through the drying process.

PER CAPITA CONSUMPTION:



1.12kg

in 2022/23 based on the volume supplied.

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:



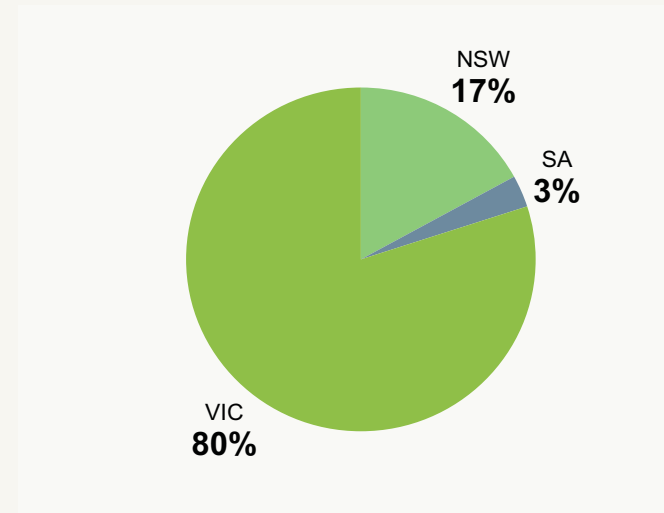
3,257
Ha

PRODUCTION WINDOW:



Feb-Apr

2022/23 DRIED GRAPES PRODUCTION BY STATE



Source: DFA

2022/23 DRIED GRAPES SEASONALITY BY STATE

State	Volume (t)	Value (\$m)	Jul	Aug	Sep	Oct	Nov	Dec	Jan	Feb	Mar	Apr	May	Jun
Victoria	11,347	\$23.7								High	Medium	Low		
New South Wales	2,411	\$5.0								Medium	Medium	Low		
South Australia	426	\$0.9								Medium	Medium	Low		

Availability legend: High Medium Low None

Source: DFA

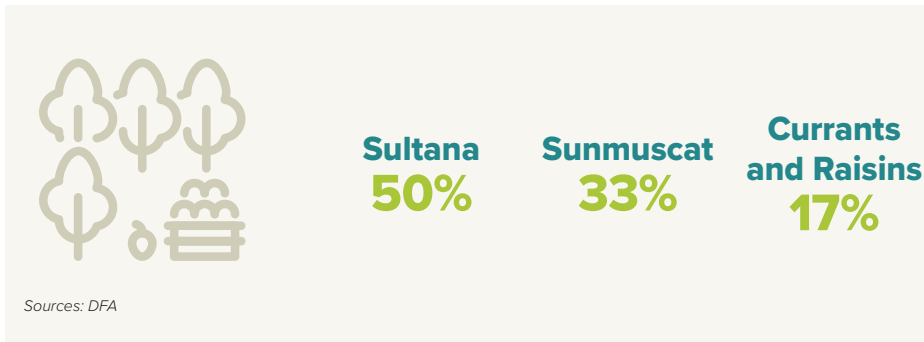
MAIN DRIED GRAPES VARIETIES

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:

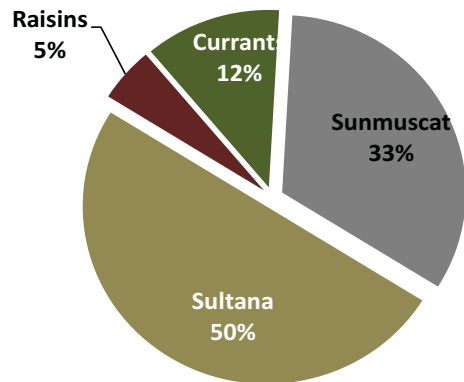
Sultana, which are the most commonly dried grape variety in Australia. These dried grapes accounted for **50%** of production.

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.



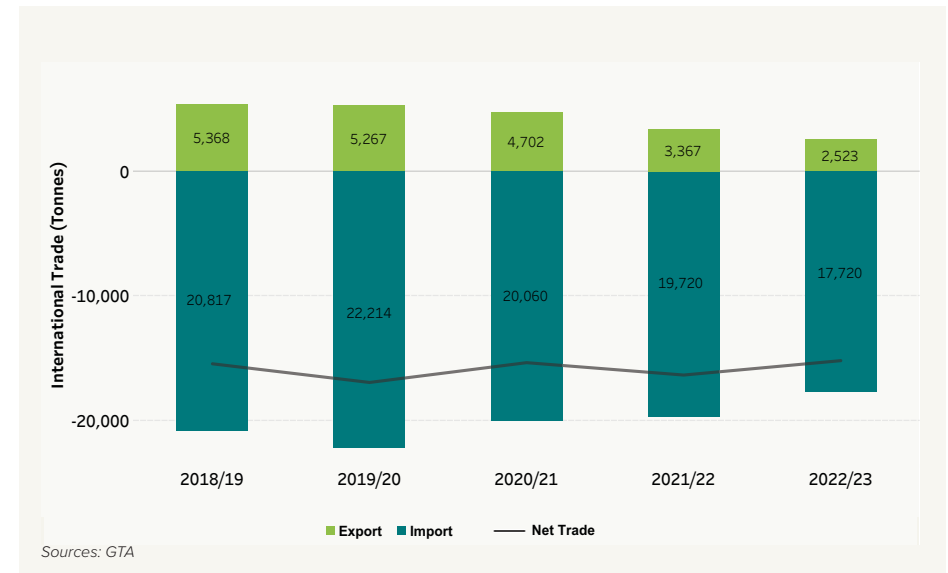
2022/23 MAIN DRIED GRAPES BY VARIETY



Processed Dried Grapes International Trade

PROCESSED DRIED GRAPES INTERNATIONAL TRADE

For the year ending June 2023, Australia imported **17,720 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.

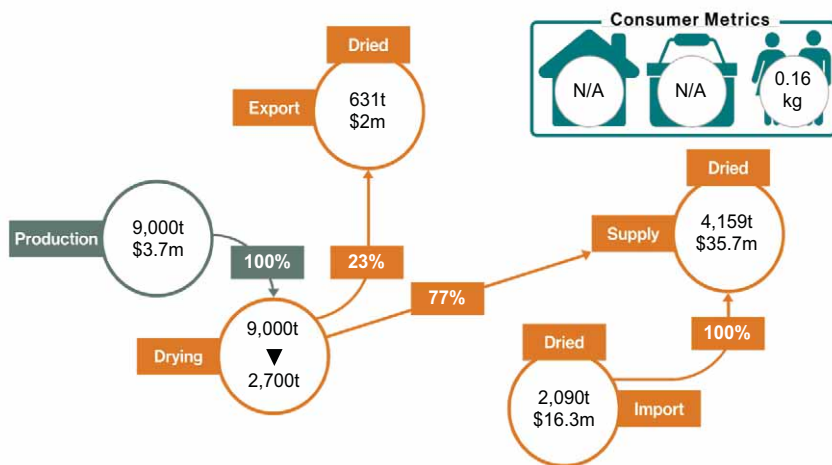


Prunes



Prunes Overview

PRUNES SUPPLY CHAIN – YEAR ENDING JUNE 2023



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

YEAR ENDING JUNE	2021	2022		2023	
	Value	Value	% YoY	Value	% YoY
Dried Production (t)	2,117	1,829	-14%	2,700	+48%
Production (\$m)	\$6.2	\$2.8	-55%	\$3.7	+30%
Production area (Ha)	-	-	-	-	-
Dried Export Volume (t)	12	807	>100%	631	-22%
Dried Export Value (\$m)	< \$0.1	\$2.9	>100%	\$2.0	-31%
Dried Import Volume (t)	2,404	2,072	-14%	2,090	<1%
Dried Import Value (\$m)	\$10.5	\$13.7	+31%	\$16.3	+19%
Dried Supply (t)	4,509	3,094	-31%	4,159	+34%
Dried Supply Wholesale Value (\$m)	\$21.6	\$22.5	+4%	\$35.7	+59%
Supply per Capita (kg)	0.18	0.12	-32%	0.16	+33%

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

TOTAL PRODUCTION:



\$3.7M

9,000t produced and valued at \$3.7M with 100% of production going through the drying process.

PER CAPITA CONSUMPTION:



0.16kg

in 2022/23 based on the volume supplied.

Prunes Production

MAJOR PRODUCTION AREAS



Source: DFA

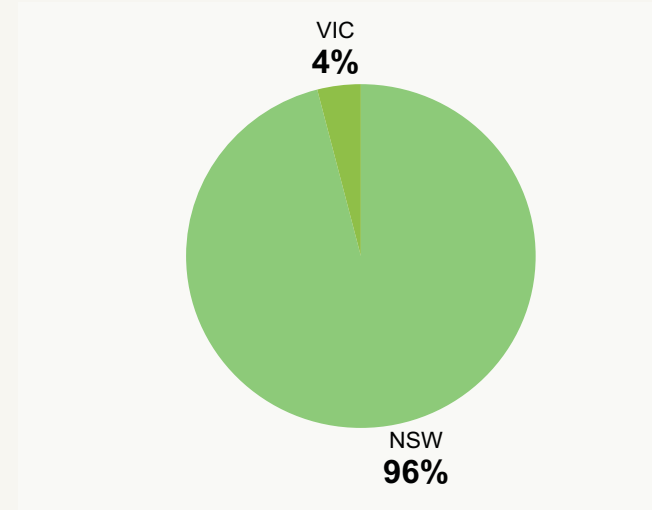
Plums grown for drying are predominantly grown in New South Wales and Victoria, with Griffith being the major producing area.

PRODUCTION WINDOW:



Nov-May

2022/23 PRUNES PRODUCTION BY STATE



Source: DFA

2022/23 PRUNES SEASONALITY BY STATE

State	Volume (t)	Value (\$m)	Jul	Aug	Sep	Oct	Nov	Dec	Jan	Feb	Mar	Apr	May	Jun
New South Wales	8,640	\$3.5					Low	Low	High	High	Medium	Medium	Low	
Victoria	360	\$0.1						Low	Low	Low	Low	Low		

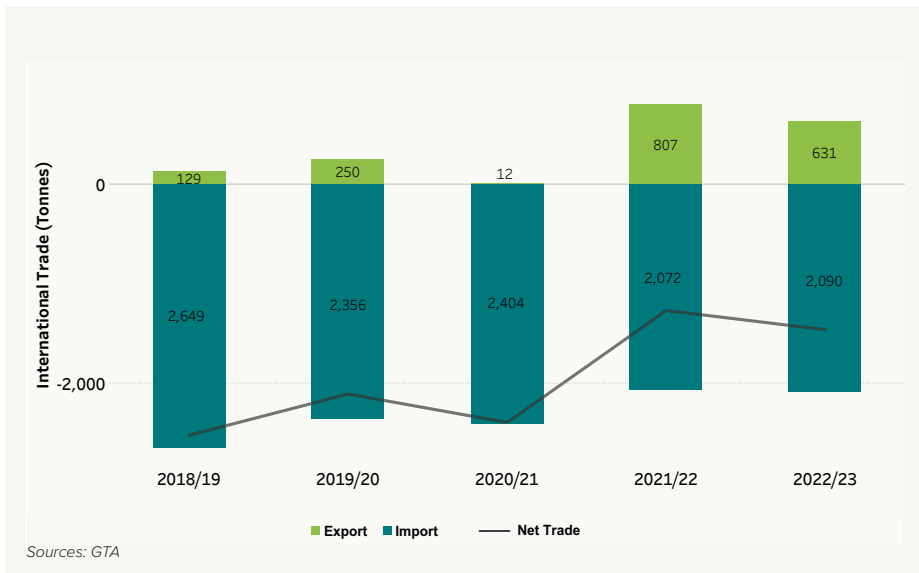
Availability legend: High (Dark Green), Medium (Light Green), Low (Yellow-Green), None (Grey)

Source: DFA

Prunes International Trade

PRUNES INTERNATIONAL TRADE

For the year ending June 2023, Australia imported **2,090 tonnes** and exported **631 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.

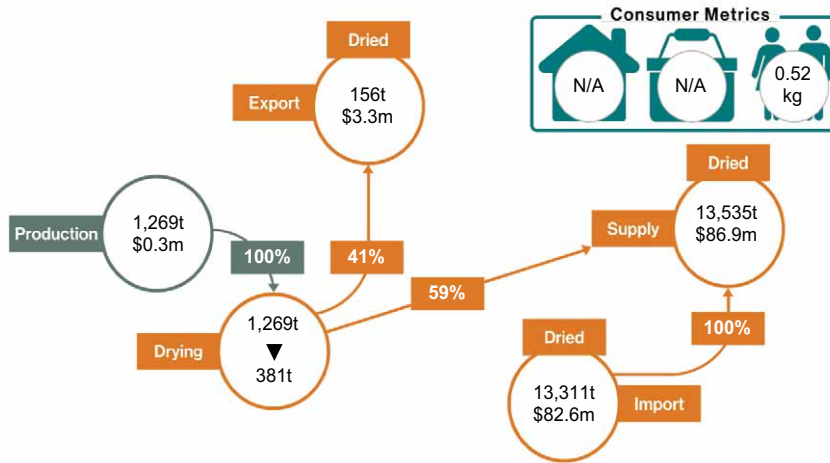




Other Dried Tree Fruit

Other Dried Tree Fruit Overview

OTHER DRIED TREE FRUIT SUPPLY CHAIN – YEAR ENDING JUNE 2023



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

YEAR ENDING JUNE	2021	2022		2023	
	Value	Value	% YoY	Value	% YoY
Dried Production (t)	610	529	-13%	381	-28%
Production (\$m)	\$0.6	\$0.5	-16%	\$0.3	-27%
Production area (Ha)	-	-	-	-	-
Dried Export Volume (t)	190	220	+15%	156	-29%
Dried Export Value (\$m)	\$3.6	\$3.2	-12%	\$3.3	+4%
Dried Import Volume (t)	16,102	14,313	-11%	13,311	-7%
Dried Import Value (\$m)	\$68.9	\$70.9	+3%	\$82.6	+17%
Dried Supply (t)	16,521	14,622	-11%	13,535	-7%
Dried Supply Wholesale Value (\$m)	\$76.1	\$74.9	-2%	\$86.9	+16%
Supply per Capita (kg)	0.64	0.56	-12%	0.52	-9%

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

TOTAL PRODUCTION:



\$0.3M

1,269t produced and valued at **\$0.3M** with **100%** of production going through the drying process.

PER CAPITA CONSUMPTION:



0.52kg

in 2022/23 based on the volume supplied.



Dried Tree Fruit Production

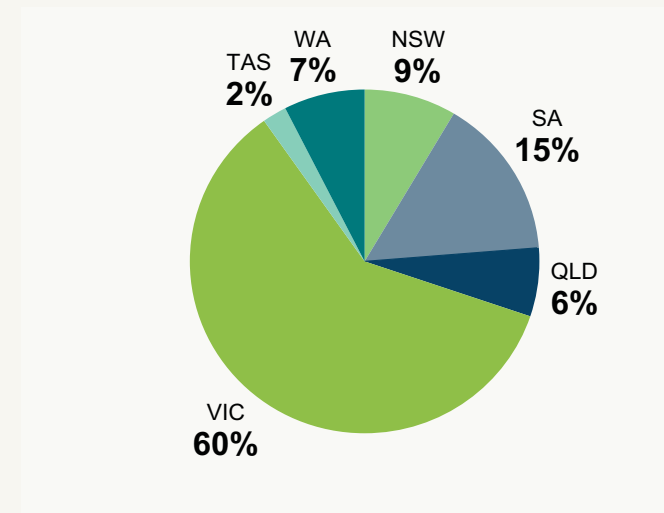
MAJOR PRODUCTION AREAS



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.

2022/23 DRIED TREE FRUIT PRODUCTION BY STATE



Source: DFA

MAIN DRIED TREE FRUIT VARIETIES

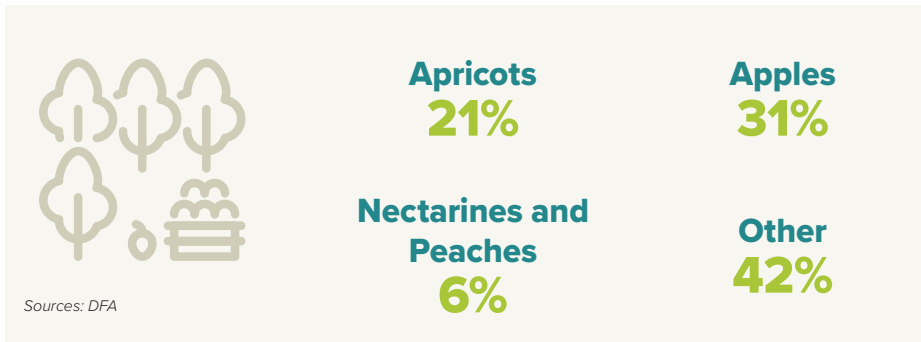
There are a number of tree fruits grown for drying in Australia which can be broadly grouped into main types. These are:

Apricots, accounted for **21%** of production.

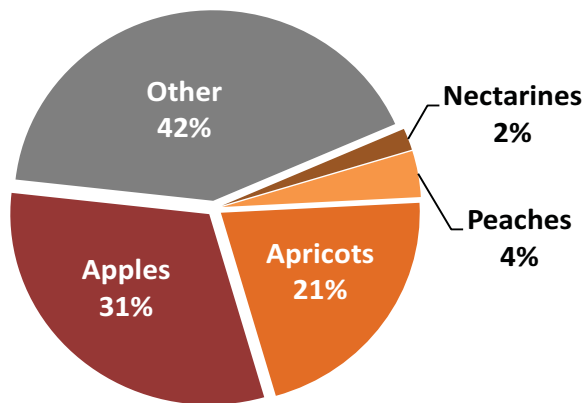
Apples, grown for drying accounted for **31%** production.

Nectarines and **Peaches**, accounted for **6%** of production.

Other fruits grown for drying, including Pineapples, Mandarins and Pears, accounted for **42%** of production.



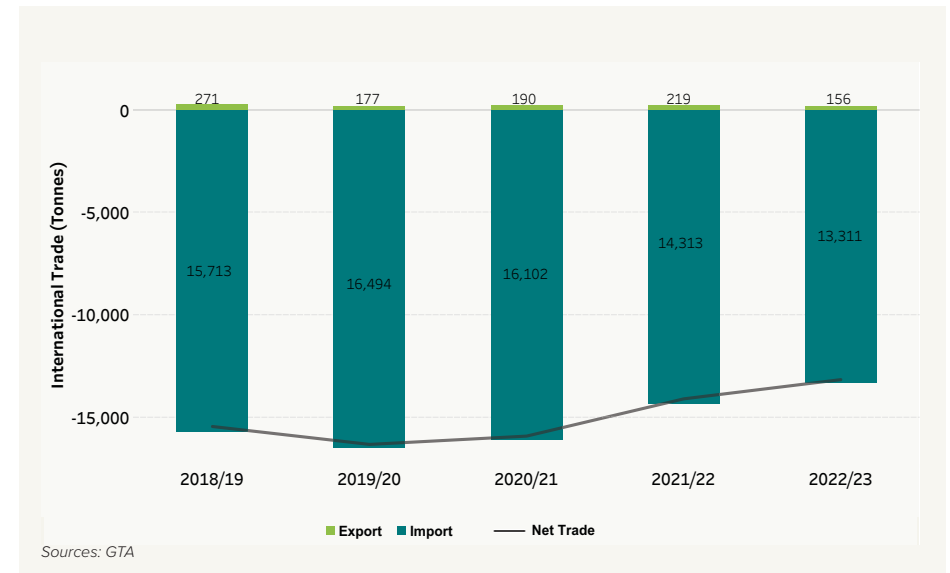
2022/23 MAIN DRIED TREE FRUIT BY VARIETY



Processed Dried Tree Fruit International Trade

PROCESSED DRIED TREE FRUIT INTERNATIONAL TRADE

For the year ending June 2023, Australia imported **13,311 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.

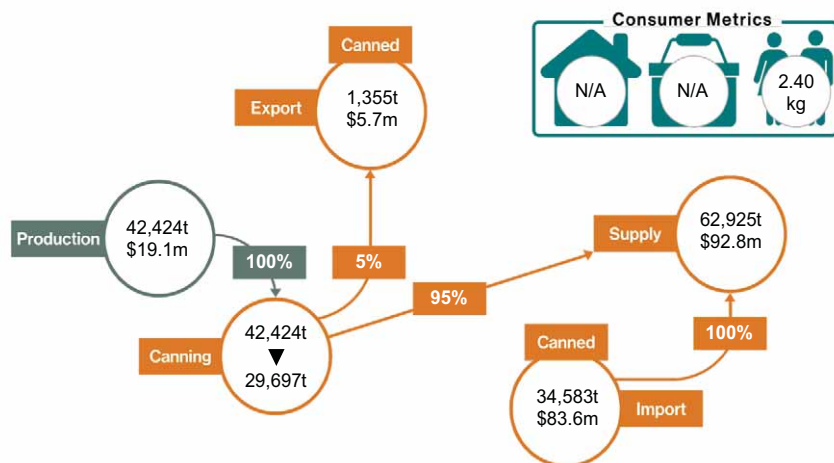




Canned Fruits

Canned Fruits Overview

CANNED FRUITS SUPPLY CHAIN – YEAR ENDING JUNE 2023



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

TOTAL PRODUCTION:



\$19.1M

42,424t produced and valued at \$19.1M with 100% of produced sent to canning process resulting in 29,697t of canned product.

PER CAPITA CONSUMPTION:



2.40kg

in 2022/23 based on the volume supplied.

YEAR ENDING JUNE	2020	2021		2022	
	Value	Value	%YoY	Value	%YoY
Canned Production (t)	36,000	35,706	>-1%	29,697	-17%
Production (\$m)	\$17.2	\$20.9	+22%	\$19.1	-8%
Production area (Ha)	-	-	-	-	-
Canned Export Volume (t)	673	1,590	>100%	1,355	-15%
Canned Export Value (\$m)	\$4.0	\$6.4	+62%	\$5.7	-11%
Canned Import Volume (t)	35,489	36,382	+3%	34,583	-5%
Canned Import Value (\$m)	\$69.2	\$76.8	+11%	\$83.6	+9%
Canned Supply (t)	70,816	70,498	>-1%	62,925	-11%
Supply Wholesale Value (\$m)	\$145.4	\$99.0	-32%	\$92.8	-6%
Supply per Capita (kg)	2.75	2.72	-1%	2.40	-12%

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

Canned Fruits Production

MAJOR PRODUCTION AREAS



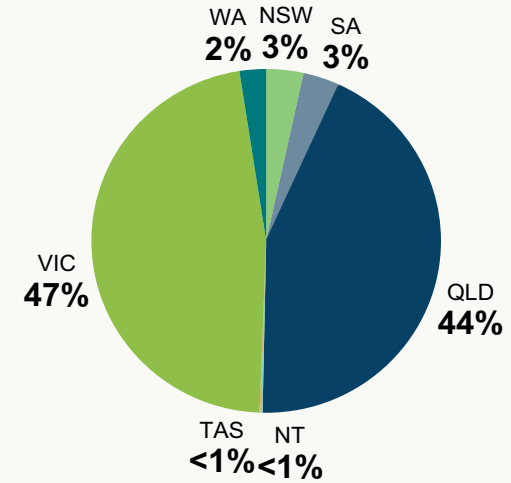
Source: (Freshlogic Analysis)

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.

PRODUCTION WINDOW:



2022/23 CANNED FRUITS PRODUCTION BY STATE



Source: (Freshlogic Analysis)

2022/23 CANNED FRUITS SEASONALITY BY STATE

State	Volume (t)	Value (\$m)	Jul	Aug	Sep	Oct	Nov	Dec	Jan	Feb	Mar	Apr	May	Jun
Victoria	19,917	\$9.0				Low	Low	High	High	High	High	Medium	Low	
Queensland	18,469	\$8.3				Low	Low	High	High	High	Medium	Low		
New South Wales	1,455	\$0.7				Low	Low	Medium	Medium	Medium	Medium	Low		
South Australia	1,433	\$0.6				Low	Low	Medium	Medium	Medium	Medium	Low		
Western Australia	1,037	\$0.5				Low	Low	Medium	Medium	Medium	Medium	Low		
Tasmania	89	\$0.0				Low	Low	Medium	Medium	Medium	Medium	Low		
Northern Territory	25	\$0.0							Low	Low	Low			

Availability legend: High (Dark Blue), Medium (Green), Low (Light Green), None (Grey)

Source: (Freshlogic Analysis)

MAIN CANNED FRUITS PRODUCTS

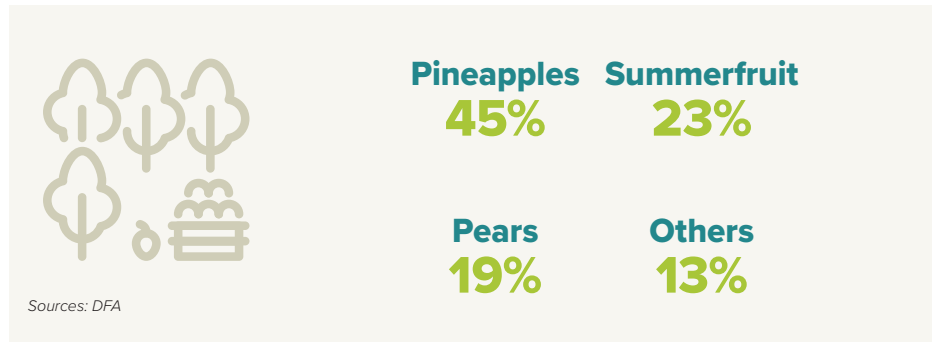
There are a number of categories of tree fruits grown for canning in Australia, consisting mainly of three types for the year ending June 2023. These include:

Pineapples, accounting for **45%** of canned fruit processing this year.

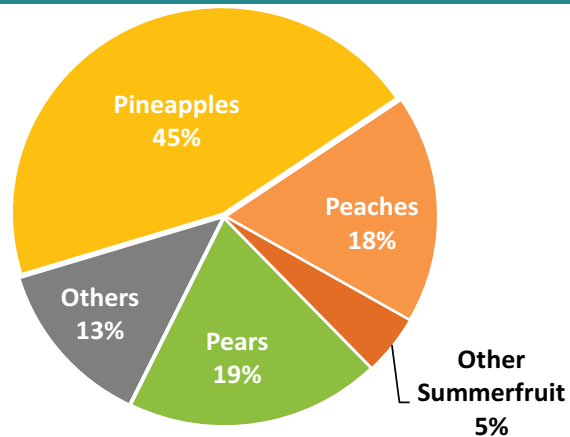
Summerfruit including **peaches, apricots** and **plums** from the Goulburn region accounting for **23%** of canned fruit production.

Pears, accounted for **19%** of the fruit grown for canning in Australia.

Other fruits, accounted for **13%** of the remaining canned fruit.



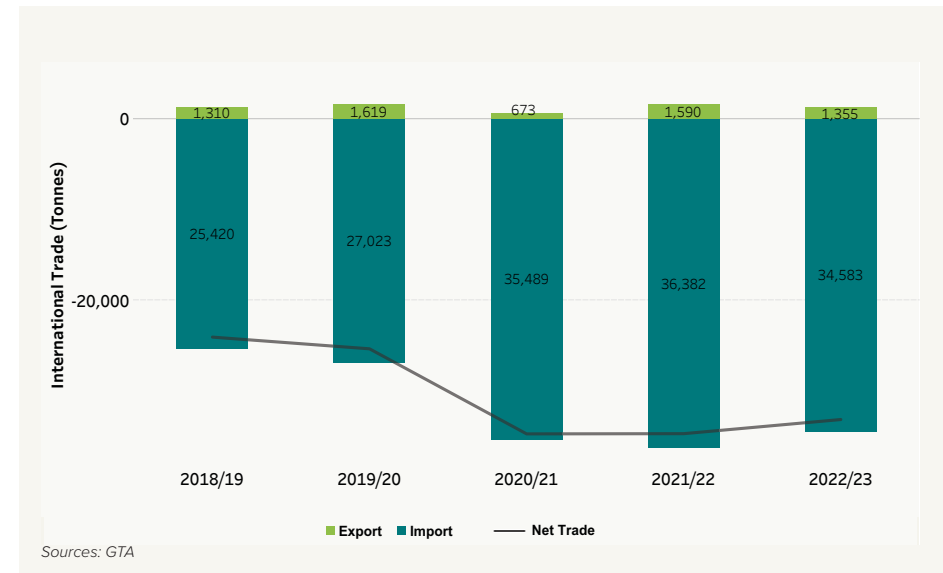
2022/23 MAIN CANNED FRUITS BY VARIETY



Processed Canned Fruits International Trade

PROCESSED CANNED FRUITS INTERNATIONAL TRADE

For the year ending June 2023, Australia imported **34,583 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.

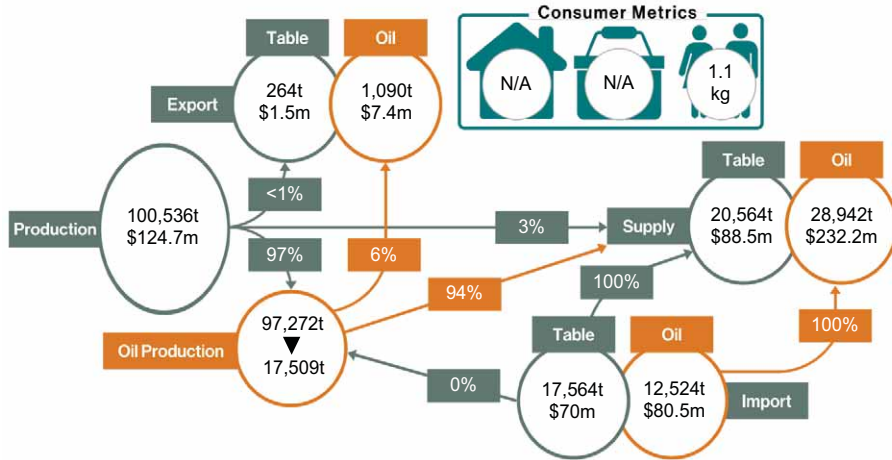


Olives



Olives Overview

OLIVE OIL/TABLE OLIVE SUPPLY CHAIN – YEAR ENDING JUNE 2023



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

YEAR ENDING JUNE	2021	2022		2023	
	Value	Value	% YoY	Value	% YoY
Production (t)	130,000	77,000	-41%	100,536	+31%
Production (\$m)	\$161.2	\$95.5	-41%	\$124.7	+31%
Production area (Ha)	21,250	-	-	33,595	-
Olive Oil Export Volume (t)	2,063	1,760	-15%	1,090	-38%
Olive Oil Export Value (\$m)	\$14.2	\$12.8	-10%	\$7.4	-43%
Olive Oil Import Volume (t)	37,201	22,165	-40%	12,524	-43%
Olive Oil Import Value (\$m)	\$175.8	\$114.2	-35%	\$80.5	-30%
Olive Oil Supply (t)	55,816	32,453	-42%	28,942	-11%
Olive Oil Wholesale Value (\$m)	\$320.6	\$201.5	-37%	\$232.2	+15%
Oil Consumption per Capita (kg)	2.17	1.25	-42%	1.10	-12%

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

TOTAL PRODUCTION:



\$124.7M

100,536t produced and valued at \$124.7M with 97% of produced sent to oil production resulting in 17,509t of olive oil.

PER CAPITA CONSUMPTION:

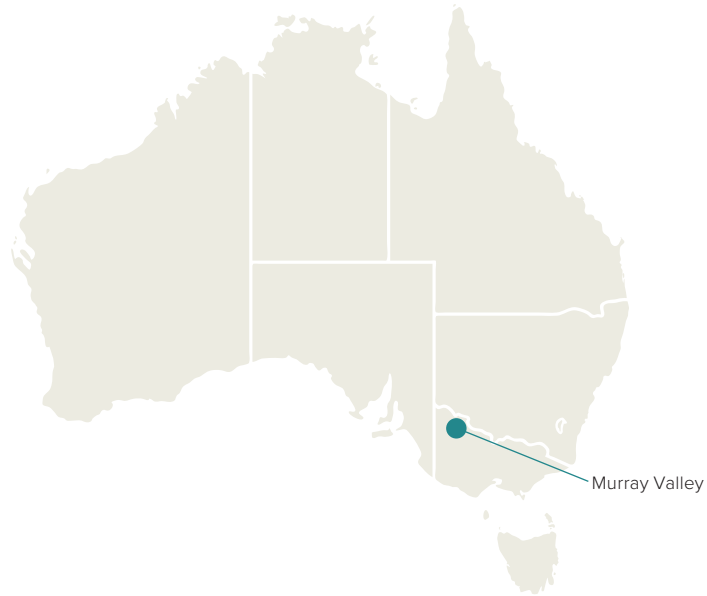


1.1kg

in 2022/23 based on the volume supplied.

Olives Production

MAJOR PRODUCTION AREAS



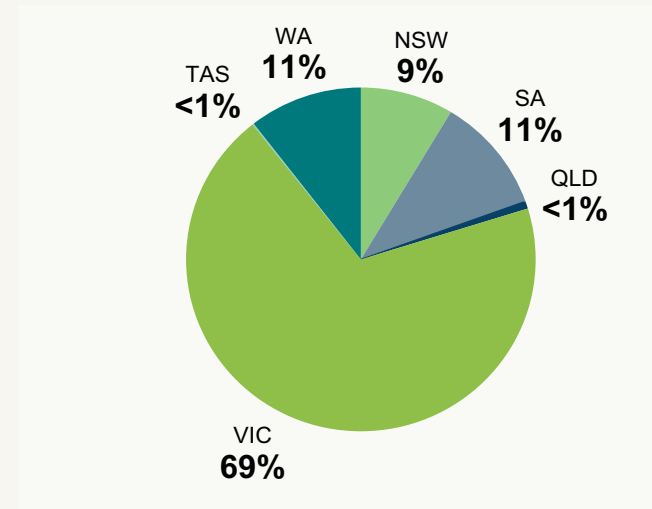
Source: AOA

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:



2022/23 OLIVES PRODUCTION BY STATE



Source: AOA

2022/23 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	69,521	\$86.2	High	Medium	Low	None	None	None	None	None	None	None	None	None
South Australia	6,145	10,958	\$13.6	None	None	None	None	None	None	None	None	None	None	None	None
Western Australia	5,860	10,556	\$13.1	None	None	None	None	None	None	None	None	None	None	None	None
New South Wales	6,132	8,646	\$10.7	None	None	None	None	None	None	None	None	None	None	None	None
Queensland	2,938	724	\$0.9	None	None	None	None	None	None	None	None	None	None	None	None
Tasmania	194	131	\$0.2	High	Medium	Low	None	None	None	None	None	None	None	None	None

Availability legend: High Medium Low None

Source: AOA

Olive Oil International Trade

OLIVE OIL INTERNATIONAL TRADE

For the year ending June 2023, Australia imported **12,524 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.

