



All Fruit - Overview

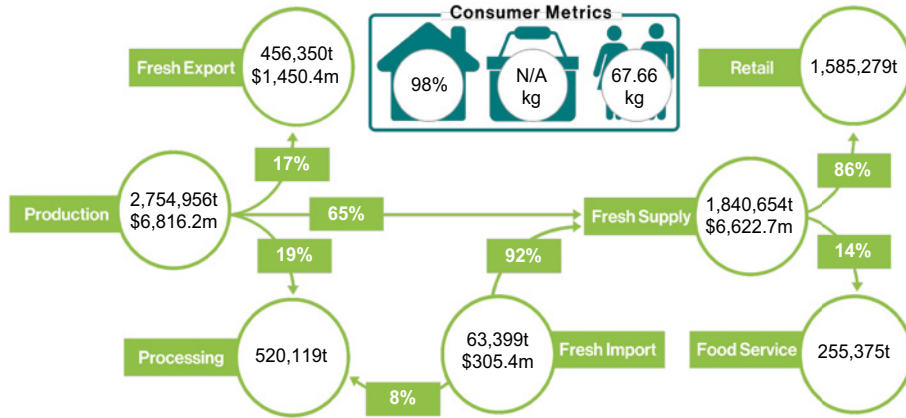


Table of Contents

All Fruit Overview.....	29	Summerfruit Overview.....	141
Apples.....	32	Apricots.....	143
Avocados.....	37	Nectarines/Peaches.....	148
Bananas.....	42	Plums.....	153
Berries Overview.....	46	Table Grapes.....	157
Blueberries.....	48	Dried Grapes.....	162
Rubus Berries.....	53	Prunes.....	166
Strawberries.....	59	Other Dried Tree Fruit.....	170
Cherries.....	64	Canned Fruits.....	174
Citrus Overview.....	69	Olives.....	178
Grapefruit.....	71		
Lemon/Lime.....	76		
Mandarins.....	81		
Oranges.....	86		
Custard Apples.....	91		
Kiwifruit.....	94		
Lychees.....	98		
Mangoes.....	101		
Melons Overview.....	105		
Muskmelons.....	107		
Watermelons.....	112		
Nashi.....	116		
Papaya/Pawpaw.....	120		
Passionfruit.....	125		
Pears.....	128		
Persimmons.....	133		
Pineapples.....	137		

All Fresh Fruit Overview

ALL FRESH FRUIT SUPPLY CHAIN – YEAR ENDING JUNE 2024



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

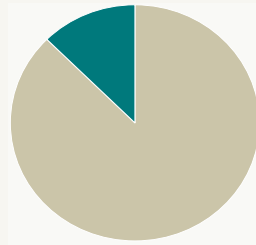
TOTAL PRODUCTION



\$6,816.2m

2,754,956t produced and valued at \$6,816.2m with 19% sent to be processed.

RETAIL VS FOOD SERVICE



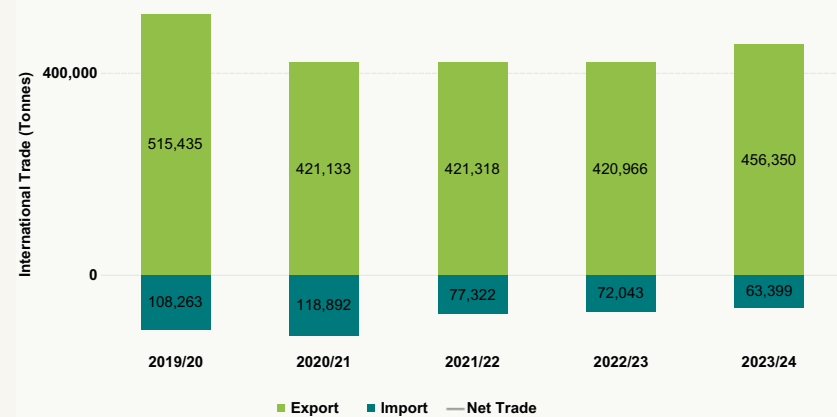
■ Retail 86% ■ Food Service 14%

The fresh supply volume was 1,840,654t, with 1,585,279t distributed into retail and 255,375t into food service.

YEAR ENDING JUNE	2022	2023		2024	
	Value	Value	% YoY	Value	% YoY
Production (t)	2,641,854	2,653,955	<-1%	2,754,956	+4%
Production (\$m)	\$5,615.2	\$6,323.4	+13%	\$6,816.2	+8%
Fresh Export Volume (t)	421,318	420,966	>-1%	456,350	+8%
Fresh Export Value (\$m)	\$1,230.4	\$1,307.9	+6%	\$1,450.4	+11%
Fresh Import Volume (t)	77,322	72,043	-7%	63,399	-12%
Fresh Import Value (\$m)	\$300.9	\$315.4	+5%	\$305.4	-3%
Fresh Supply (t)	1,761,905	1,779,985	+1%	1,840,654	+3%
Fresh Supply Wholesale Value (\$m)	\$5,451.6	\$6,213.9	+14%	\$6,622.7	+7%
Supply per Capita (kg)	67.90	67.76	>-1%	67.66	>-1%
Retail Supply (t)	1,517,835	1,537,979	+1%	1,585,279	+3%
Retail Supply Wholesale Value (\$m)	\$4,722.5	\$5,389.6	+14%	\$5,745.2	+7%
Food Service Supply (t)	244,071	242,006	>-1%	255,375	+6%
Food Service Wholesale Value (\$m)	\$729.1	\$824.3	+13%	\$877.5	+6%

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

ALL FRESH FRUIT INTERNATIONAL TRADE

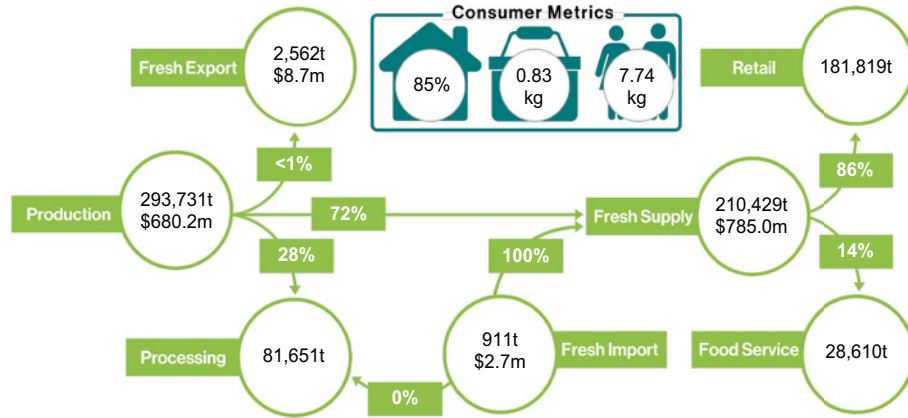


Apples



Fresh Apples Overview

FRESH APPLES SUPPLY CHAIN – YEAR ENDING JUNE 2024



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

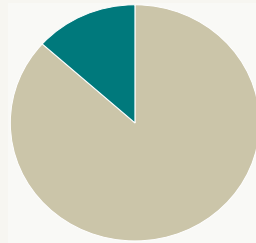
TOTAL PRODUCTION



\$680.2m

293,731t produced and valued at \$680.2m with 28% sent to be processed.

RETAIL VS FOOD SERVICE



■ Retail 86% ■ Food Service 14%

The fresh supply was 210,429t, with 181,819t distributed into retail and 28,610t into food service.

CONSUMER METRICS



85% of Australian households purchased apples, buying an average of 826g per shopping trip.

PER CAPITA CONSUMPTION



7.74kg in 2023/24 based on the volume supplied.

YEAR ENDING JUNE	2022	2023		2024	
	Value	Value	% YoY	Value	% YoY
Production (t)	307,630	285,176	-7%	293,731	+3%
Production (\$m)	\$568.6	\$647.0	+14%	\$680.2	+5%
Fresh Export Volume (t)	3,141	1,650	-47%	2,562	+55%
Fresh Export Value (\$m)	\$7.4	\$4.6	-37%	\$8.7	+87%
Fresh Import Volume (t)	925	1,048	+13%	911	-13%
Fresh Import Value (\$m)	\$2.4	\$2.9	+22%	\$2.7	-6%
Fresh Supply (t)	215,961	205,302	-5%	210,429	+2%
Fresh Supply Wholesale Value (\$m)	\$655.4	\$750.8	+15%	\$785.0	+5%
Supply per Capita (kg)	8.32	7.82	-6%	7.74	>-1%
Retail Supply (t)	187,142	180,089	-4%	181,819	<1%
Retail Supply Wholesale Value (\$m)	\$568.0	\$658.6	+16%	\$678.2	+3%
Food Service Supply (t)	28,820	25,213	-13%	28,610	+13%
Food Service Wholesale Value (\$m)	\$87.5	\$92.2	+5%	\$106.7	+16%

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

Fresh Apples Production

MAJOR PRODUCTION AREAS



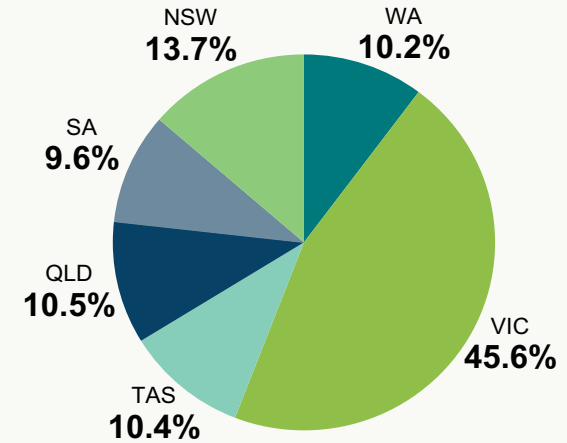
Source: APAL

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 storage technology.

PRODUCTION WINDOW



2023/24 FRESH APPLES PRODUCTION BY STATE



Source: APAL

2023/24 FRESH APPLES SEASONALITY BY STATE

State	Volume (t)	Jul	Aug	Sep	Oct	Nov	Dec	Jan	Feb	Mar	Apr	May	Jun
Victoria	134,082	High	High	High	High	High	High	High	High	High	High	High	High
New South Wales	40,121	High	High	High	High	High	High	High	High	High	High	High	High
Queensland	30,977	High	High	High	High	High	High	High	High	High	High	High	High
Western Australia	30,068	High	High	High	High	High	High	High	High	High	High	High	High
Tasmania	30,408	High	High	High	High	High	High	High	High	High	High	High	High
South Australia	28,074	High	High	High	High	High	High	High	High	High	High	High	High

Availability legend: High Medium Low None

Source: APAL

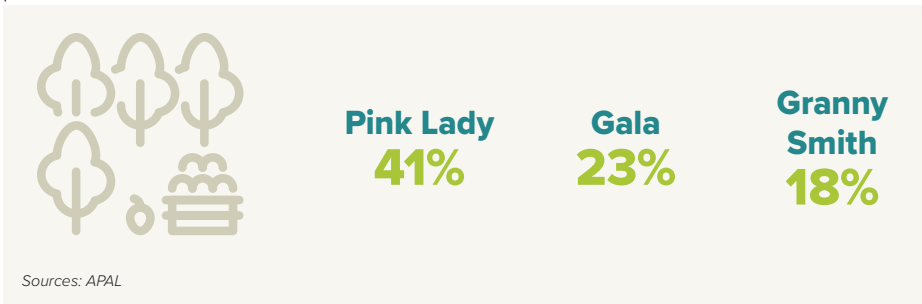
MAIN APPLES VARIETIES

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.



2023/24 FRESH APPLES SEASONALITY BY VARIETY

Variety	Volume (t)	Jul	Aug	Sep	Oct	Nov	Dec	Jan	Feb	Mar	Apr	May	Jun
Pink Lady	86,953	High	Medium	Low	None	None	None	None	None	None	None	None	None
Royal Gala	48,778	High	Medium	Low	None	None	None	None	None	None	None	None	None
Granny Smith	38,174	High	Medium	Low	None	None	None	None	None	None	None	None	None
Sundowner	2,121	High	Medium	Low	None	None	None	None	None	None	None	None	None
Other	36,054	High	Medium	Low	None	None	None	None	None	None	None	None	None
Processing	81,651	High	Medium	Low	None	None	None	None	None	None	None	None	None

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

Sources: APAL

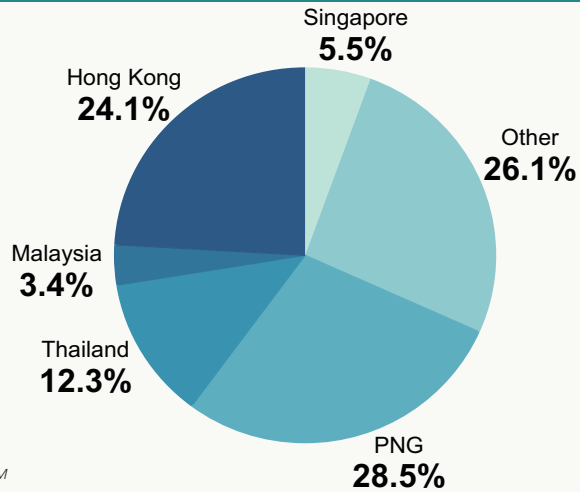
Fresh Apples International Trade

FRESH APPLES INTERNATIONAL TRADE

Australia has traditionally been a net exporter of fresh apples, typically exporting between **1,500-3,500 tonnes** per year. For the year ending June 2024, Australia exported **2,562 tonnes**. The exports and imports over the last five financial years are profiled in the graph below, where imports are counted as negative tonnes.



FRESH APPLES EXPORTS



Source: GTA/TDM

For the year ending June 2024, **28.5%** of exported fresh apples were sent to **Papua New Guinea (PNG)**, as profiled in the chart above.

Exports by State of Production Origin (Tonnes)				Exports by Country (Tonnes)			
Year Ending June	2022	2023	2024	Year Ending June	2022	2023	2024
Victoria	1,969	1,012	1,662	PNG	795	706	729
Western Australia	50	98	321	Hong Kong	334	130	617
Queensland	441	337	223	Thailand	162	162	315
Tasmania	478	127	135	Singapore	96	112	142
New South Wales	191	25	96	Malaysia	12	30	88
Other	12	50	124	Other	1,740	508	670
TOTAL	3,141	1,650	2,562	TOTAL	3,141	1,650	2,562

FRESH APPLES IMPORTS

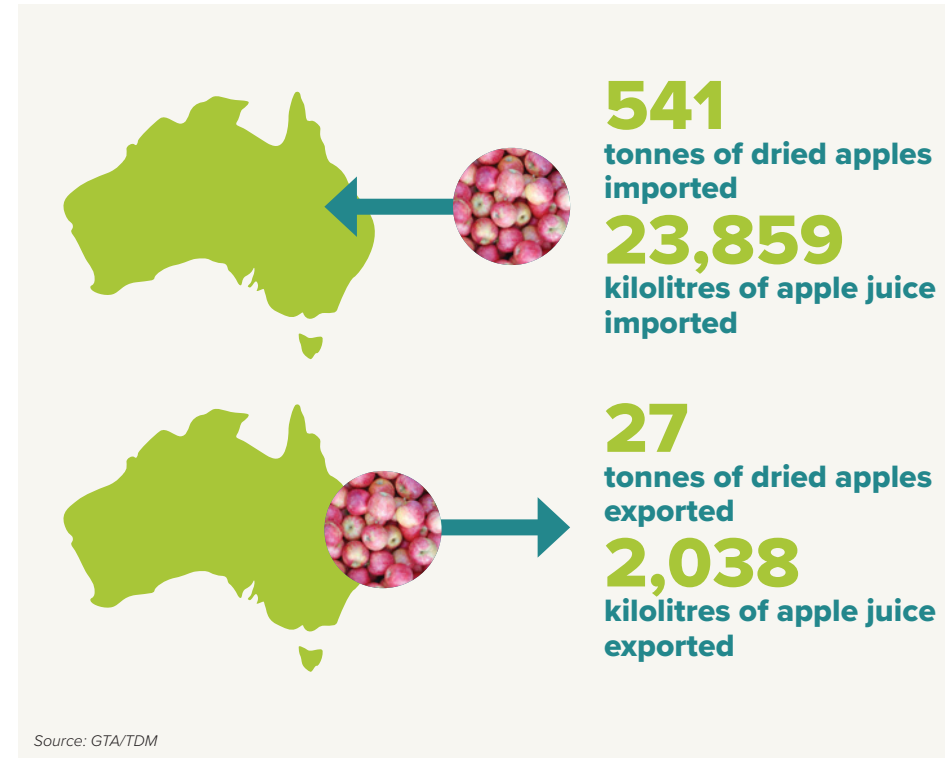
Imports by State Destination (Tonnes)				Imports by Country (Tonnes)			
Year Ending June	2022	2023	2024	Year Ending June	2022	2023	2024
Victoria	563	555	457	China	925	1,048	911
New South Wales	323	387	382	Vietnam	< 0.5	-	< 0.5
Queensland	20	56	57	Other	< 0.5	-	< 0.5
Western Australia	19	50	15	TOTAL	925	1,048	911
Other	-	-	< 0.5				
TOTAL	925	1,048	911				

Source: GTA/TDM

Processed Apples International Trade

2023/24 PROCESSED APPLES INTERNATIONAL TRADE

For the year ending June 2024, an additional **541 tonnes** of dried apples were imported, while **27 tonnes** were exported. Australia also imported **23,859 kilolitres** of apple juice, while exporting **2,038 kilolitres** of apple juice. These volumes have not been included in the fresh imports and exports profiled on page 32.



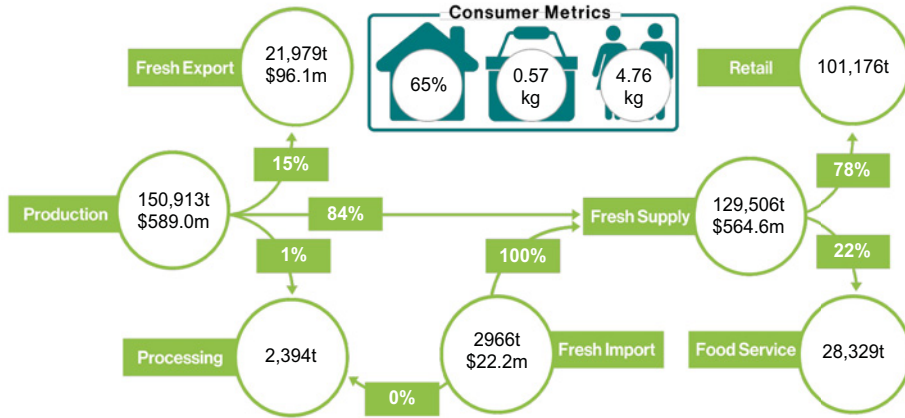
Source: GTA/TDM

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 white pit. 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 2024



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

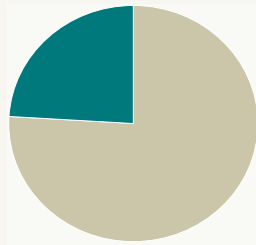
TOTAL PRODUCTION



\$589.0m

150,913t produced and valued at \$589.0m with 1% sent to be processed.

RETAIL VS FOOD SERVICE



■ Retail 78% ■ Food Service 22%

The fresh supply was 129,506t, with 101,176t distributed into retail and 28,329t into food service.

CONSUMER METRICS



65% of Australian households purchased avocados, buying an average of 567g per shopping trip.

PER CAPITA CONSUMPTION



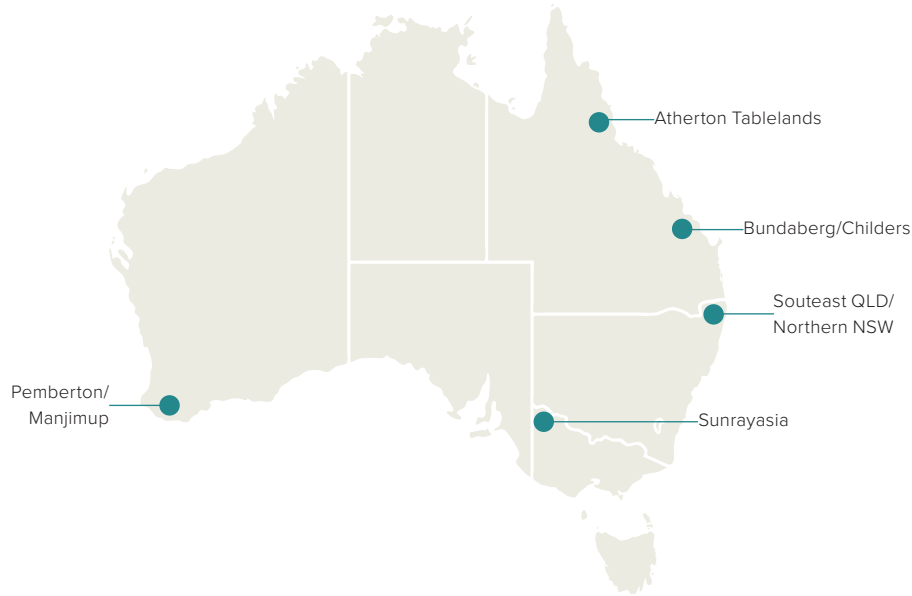
4.76kg in 2023/24 based on the volume supplied.

YEAR ENDING JUNE	2022	2023		2024	
	Value	Value	% YoY	Value	% YoY
Production (t)	122,197	115,385	-6%	150,913	+31%
Production (\$m)	\$363.8	\$560.7	+54%	\$589.0	+5%
Production area (Ha)	-	19,223	-	19,806	+3%
Fresh Export Volume (t)	11,611	10,672	-8%	21,979	>100%
Fresh Export Value (\$m)	\$52.0	\$58.8	+13%	\$96.1	+64%
Fresh Import Volume (t)	12,640	12,896	+2%	2,966	-77%
Fresh Import Value (\$m)	\$43.1	\$58.4	+36%	\$22.2	-62%
Fresh Supply (t)	117,919	112,502	-5%	129,506	+15%
Fresh Supply Wholesale Value (\$m)	\$383.2	\$618.8	+61%	\$564.6	-9%
Supply per Capita (kg)	4.54	4.28	-6%	4.76	+11%
Retail Supply (t)	89,570	85,455	-5%	101,176	+18%
Retail Supply Wholesale Value (\$m)	\$291.1	\$470.0	+61%	\$441.1	-6%
Food Service Supply (t)	28,349	27,047	-5%	28,329	+5%
Food Service Wholesale Value (\$m)	\$92.1	\$148.8	+61%	\$123.5	-17%

Sources: AAL; AC; CFVIWA; GTA/TDM; 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



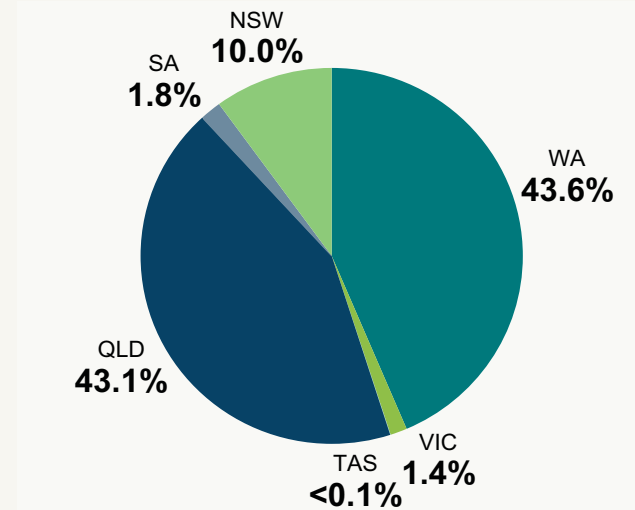
19,806
Ha

PRODUCTION WINDOW



Year-round

2023/24 FRESH AVOCADOS PRODUCTION BY STATE



Source: AAL

2023/24 FRESH AVOCADOS SEASONALITY BY STATE

State	Volume (t)	Jul	Aug	Sep	Oct	Nov	Dec	Jan	Feb	Mar	Apr	May	Jun
Western Australia	65,801	Low	Low	High	High	High	High	Low	Low	Low	None	None	None
Queensland	65,055	Low	Low	Low	None	None	None	None	None	High	High	High	High
New South Wales	15,129	Low	Low	Low	Low	None	None	None	None	None	None	None	None
South Australia	2,719	Low	Low	Low	Low	None	None	None	None	None	None	None	None
Victoria	2,146	Low	Low	Low	Low	None	None	None	None	None	None	None	None
Tasmania	63	Low	Low	Low	Low	None	None	None	None	None	None	None	None

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

Source: AAL; GTA/TDM

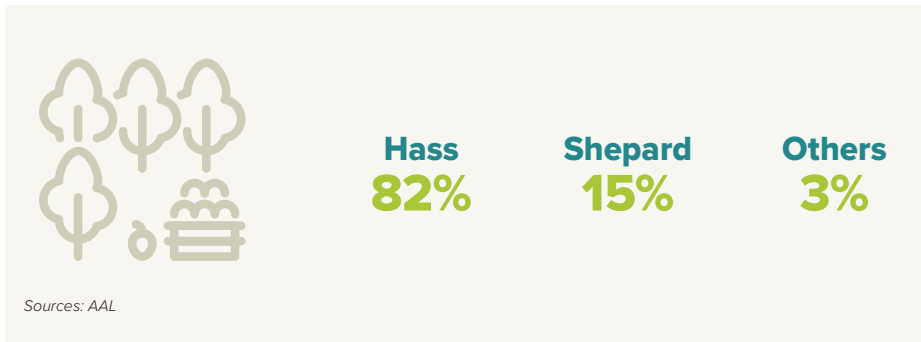
MAIN AVOCADOS VARIETIES

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 avocado accounted for **82%** of fresh production.

Shepard, a light green, pear shaped avocado which does not darken when it ripens. Shepard avocados accounted for **15%** of fresh production.

Other varieties accounted for **3%** of fresh production.



2023/24 FRESH AVOCADOS SEASONALITY BY VARIETY

Variety	Volume (t)	Jul	Aug	Sep	Oct	Nov	Dec	Jan	Feb	Mar	Apr	May	Jun
Hass	123,941	Medium	Medium	High	High	High	Medium	Low	Low	None	Low	Low	Low
Shepard	22,888	None	None	None	None	None	None	None	Low	High	Medium	None	None
Other	4,084	High	Medium	Medium	Medium	None	None	None	None	Low	Low	Low	Low

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

Sources: AAL

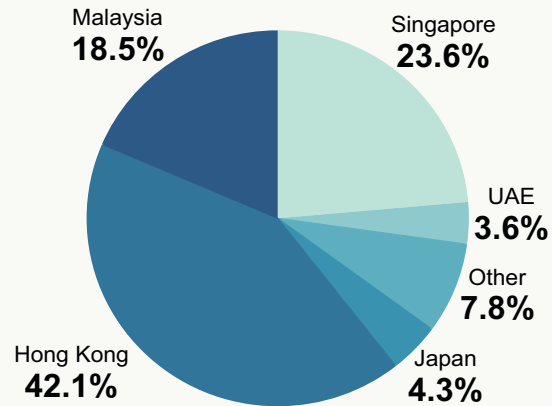
Fresh Avocados International Trade

FRESH AVOCADOS INTERNATIONAL TRADE

Australia has increased the exports recently of fresh avocados. For the year ending June 2024, Australia imported **2,966 tonnes**, and exported **21,979 tonnes**. The exports and imports over the last five financial years are profiled in the graph below, where imports are counted as negative tonnes.



FRESH AVOCADOS EXPORTS



Source: GTA/TDM

For the year ending June 2024, **42.1%** of exported fresh avocados were sent to **Hong Kong**, as profiled in the chart above.

Exports by State of Production Origin (Tonnes)				Exports by Country (Tonnes)			
Year Ending June	2022	2023	2024	Year Ending June	2022	2023	2024
Queensland	5,537	7,204	8,709	Hong Kong	5,358	5,074	9,244
Western Australia	2,653	1,210	7,818	Singapore	3,580	3,397	5,188
New South Wales	2,195	1,527	3,141	Malaysia	2,254	1,745	4,075
Victoria	926	461	1,774	Japan	106	277	954
South Australia	280	267	536	UAE	98	22	793
Other	20	2	1	Other	215	157	1,725
TOTAL	11,611	10,672	21,979	TOTAL	11,611	10,672	21,979

FRESH AVOCADOS IMPORTS

Imports by State Destination (Tonnes)				Imports by Country (Tonnes)			
Year Ending June	2022	2023	2024	Year Ending June	2022	2023	2024
New South Wales	7,180	7,070	1,639	New Zealand	12,598	12,029	2,966
Victoria	818	1,850	872	Chile	42	868	-
Queensland	4,643	3,976	454	TOTAL	12,640	12,896	2,966
TOTAL	12,640	12,896	2,966				

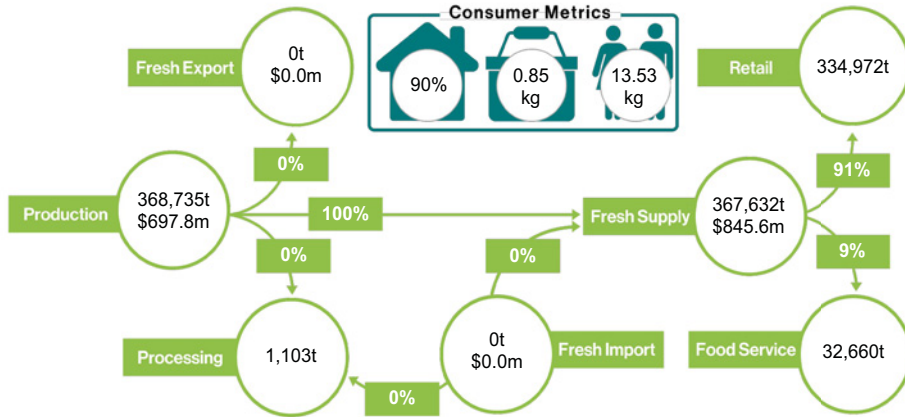
Source: GTA/TDM

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

Bananas

Fresh Bananas Overview

FRESH BANANAS SUPPLY CHAIN – YEAR ENDING JUNE 2024



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

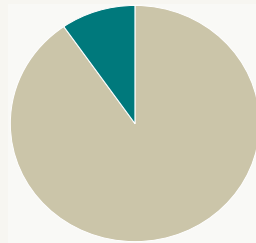
TOTAL PRODUCTION



\$697.8m

368,735t produced and valued at \$697.8m.

RETAIL VS FOOD SERVICE



■ Retail 91% ■ Food Service 9%

The fresh supply was 367,632t, with 334,972t distributed into retail and 32,660t into food service.

CONSUMER METRICS



90% of Australian households purchased bananas, buying an average of 847g per shopping trip.

PER CAPITA CONSUMPTION



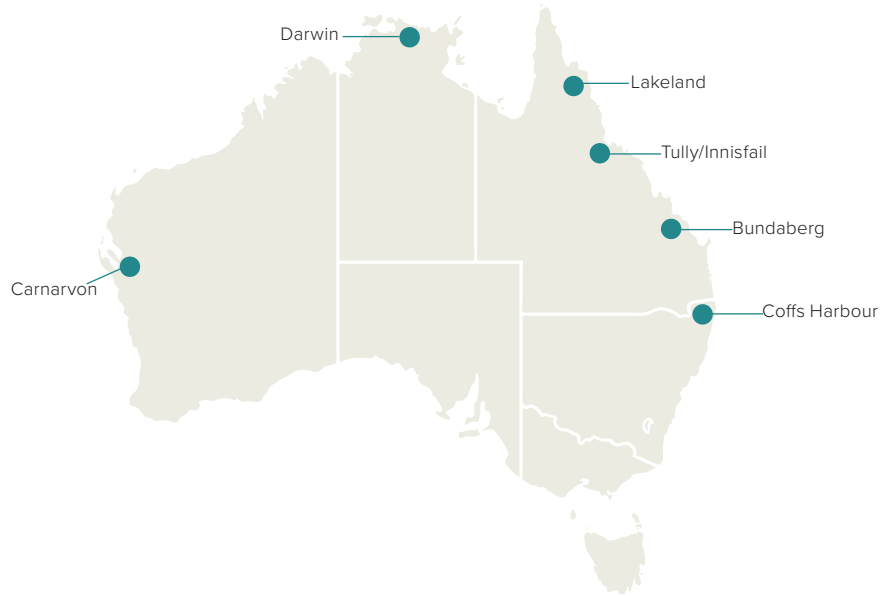
13.53kg in 2023/24 based on the volume supplied.

YEAR ENDING JUNE	2022	2023		2024	
	Value	Value	% YoY	Value	% YoY
Production (t)	374,033	374,251	<1%	368,735	-1%
Production (\$m)	\$501.6	\$583.3	+16%	\$697.8	+20%
Production area (Ha)	-	13,670	-	13,551	>-1%
Fresh Export Volume (t)	-	-	-	-	-
Fresh Export Value (\$m)	\$-	\$-	-	\$-	-
Fresh Import Volume (t)	-	-	-	-	-
Fresh Import Value (\$m)	\$-	\$-	-	\$-	-
Fresh Supply (t)	372,914	373,131	<1%	367,632	-1%
Fresh Supply Wholesale Value (\$m)	\$607.8	\$706.9	+16%	\$845.6	+20%
Supply per Capita (kg)	14.37	14.20	-1%	13.53	-5%
Retail Supply (t)	336,869	339,983	<1%	334,972	-1%
Retail Supply Wholesale Value (\$m)	\$549.0	\$644.1	+17%	\$770.4	+20%
Food Service Supply (t)	36,045	33,148	-8%	32,660	-1%
Food Service Wholesale Value (\$m)	\$58.7	\$62.8	+7%	\$75.1	+20%

Sources: ABCG; ABS; AC; CFVIWA; GTA/TDM; 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 AREA



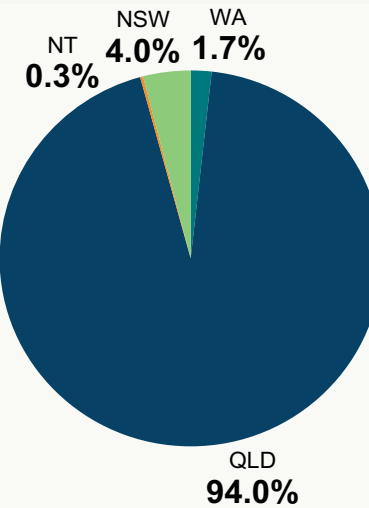
13,551
Ha

PRODUCTION WINDOW



Year-round

2023/24 FRESH BANANAS PRODUCTION BY STATE



Source: ABGC

2023/24 FRESH BANANAS SEASONALITY BY STATE

State	Volume (t)	Jul	Aug	Sep	Oct	Nov	Dec	Jan	Feb	Mar	Apr	May	Jun
Queensland	346,611	High	High	High	High	High	Medium	Medium	Medium	Low	Low	Low	None
New South Wales	14,749	High	Medium	Medium	Medium	Medium	Medium	Medium	Medium	Medium	Medium	Medium	High
Western Australia	6,453	High	High	High	High	Medium	Medium	Medium	Medium	Medium	High	High	High
Northern Territory	922	High	Medium	Medium	Medium	Medium	Medium	Medium	Medium	Medium	Medium	Medium	High

Availability legend: High Medium Low None

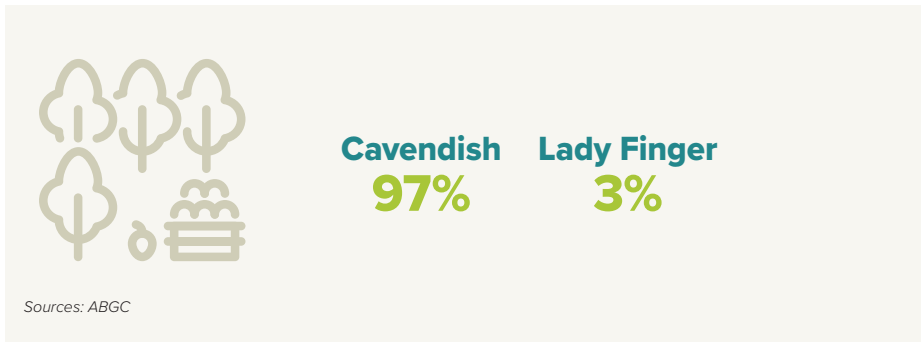
Source: ABGC

MAIN BANANAS VARIETIES

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

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

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



2023/24 FRESH BANANAS SEASONALITY BY VARIETY

Variety	Volume (t)	Jul	Aug	Sep	Oct	Nov	Dec	Jan	Feb	Mar	Apr	May	Jun
Cavendish	357,673	High	High	High	High	High	Medium	Medium	Medium	Medium	Medium	Medium	Medium
Lady Fingers	11,062	Low	Low	Low	Low	Low	Low	Low	Low	Low	Low	Low	Low

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

Sources: ABGC

Processed Bananas International Trade

2023/24 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 2024, **23 tonnes** of dried bananas were imported, while **44 tonnes** was exported.

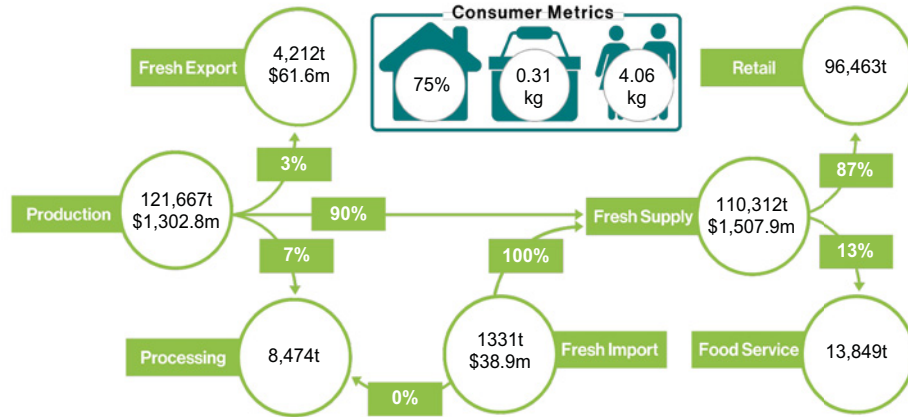




Berries - Overview

Fresh Berries Overview

FRESH BERRIES SUPPLY CHAIN – YEAR ENDING JUNE 2024



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

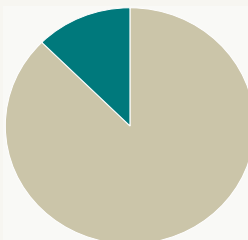
TOTAL PRODUCTION



\$1,302.8m

121,667t produced and valued at **\$1,302.8m** with 7% sent to be processed.

RETAIL VS FOOD SERVICE



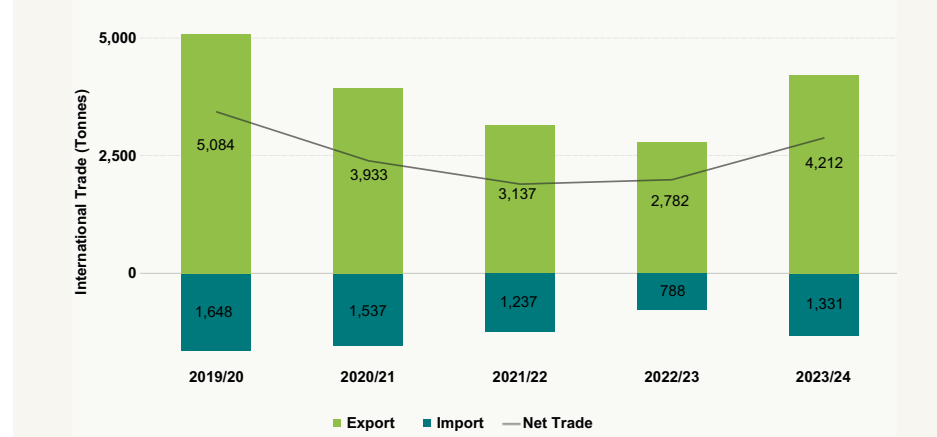
Retail 87% **Food Service 13%**

The fresh supply was **110,312t**, with **96,463t** distributed into retail and **13,849t** into food service.

YEAR ENDING JUNE	2022	2023		2024	
	Value	Value	% YoY	Value	% YoY
Production (t)	97,552	96,816	>-1%	121,667	+26%
Production (\$m)	\$1,029.3	\$1,072.6	+4%	\$1,302.8	+21%
Fresh Export Volume (t)	3,137	2,782	-11%	4,212	+51%
Fresh Export Value (\$m)	\$39.0	\$42.2	+8%	\$61.6	+46%
Fresh Import Volume (t)	1,237	788	-36%	1,331	+69%
Fresh Import Value (\$m)	\$29.1	\$25.2	-13%	\$38.9	+55%
Fresh Supply (t)	88,336	88,140	>-1%	110,312	+25%
Fresh Supply Wholesale Value (\$m)	\$1,208.5	\$1,245.4	+3%	\$1,507.9	+21%
Supply per Capita (kg)	3.40	3.36	-1%	4.06	+21%
Retail Supply (t)	76,872	77,043	<-1%	96,463	+25%
Retail Supply Wholesale Value (\$m)	\$1,057.5	\$1,092.9	+3%	\$1,326.8	+21%
Food Service Supply (t)	11,465	11,098	-3%	13,849	+25%
Food Service Wholesale Value (\$m)	\$150.9	\$152.5	<-1%	\$181.0	+19%

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

FRESH BERRIES INTERNATIONAL TRADE

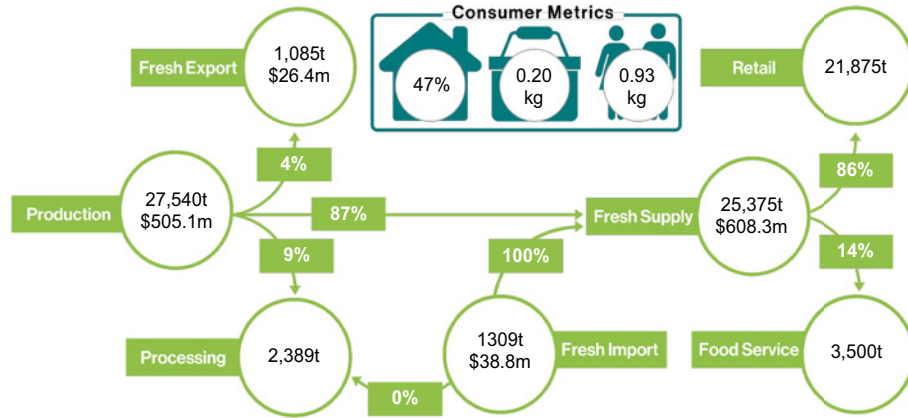




Berries - Blueberries

Fresh Blueberries Overview

FRESH BLUEBERRIES SUPPLY CHAIN – YEAR ENDING JUNE 2024



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

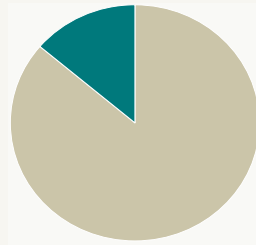
TOTAL PRODUCTION



\$505.1m

27,540t produced and valued at **\$505.1m** with 9% sent to be processed.

RETAIL VS FOOD SERVICE



■ Retail 86% ■ Food Service 14%

The fresh supply was **25,375t**, with **21,875t** distributed into retail and **3,500t** into food service.

CONSUMER METRICS



47% of Australian households purchased blueberries, buying an average of **199g** per shopping trip.

PER CAPITA CONSUMPTION



in 2023/24 based on the volume supplied.

YEAR ENDING JUNE	2022	2023		2024	
	Value	Value	% YoY	Value	% YoY
Production (t)	19,608	20,211	+3%	27,540	+36%
Production (\$m)	\$407.1	\$422.2	+4%	\$505.1	+20%
Fresh Export Volume (t)	517	504	-2%	1,085	>100%
Fresh Export Value (\$m)	\$15.8	\$16.2	+3%	\$26.4	+63%
Fresh Import Volume (t)	1,231	788	-36%	1,309	+66%
Fresh Import Value (\$m)	\$29.0	\$25.2	-13%	\$38.8	+54%
Fresh Supply (t)	18,621	18,742	<1%	25,375	+35%
Fresh Supply Wholesale Value (\$m)	\$503.8	\$509.6	+1%	\$608.3	+19%
Supply per Capita (kg)	0.72	0.71	>-1%	0.93	+31%
Retail Supply (t)	16,053	16,157	<1%	21,875	+35%
Retail Supply Wholesale Value (\$m)	\$434.3	\$439.3	+1%	\$524.4	+19%
Food Service Supply (t)	2,568	2,585	<1%	3,500	+35%
Food Service Wholesale Value (\$m)	\$69.5	\$70.3	+1%	\$83.9	+19%

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

Fresh Blueberries Production

MAJOR PRODUCTION AREAS



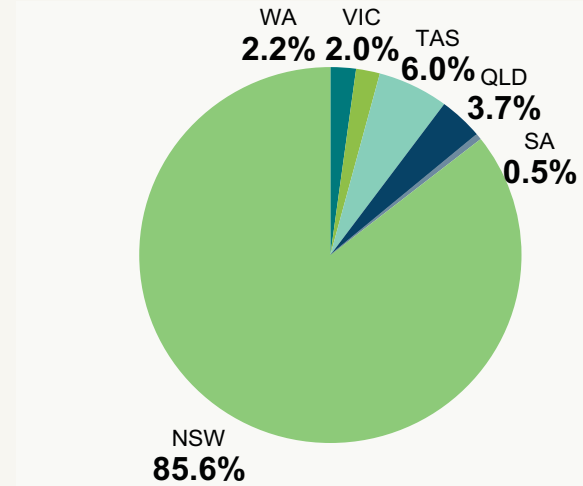
Source: BA

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



2023/24 FRESH BLUEBERRIES PRODUCTION BY STATE



Source: BA

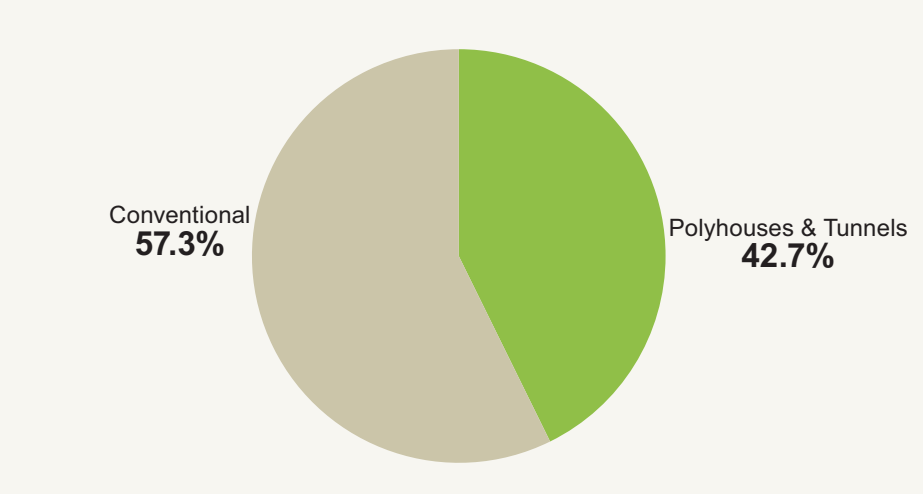
2023/24 FRESH BLUEBERRIES SEASONALITY BY STATE

State	Volume (t)	Jul	Aug	Sep	Oct	Nov	Dec	Jan	Feb	Mar	Apr	May	Jun
New South Wales	23,575	High	High	High	High	High	High	High	Medium	Low	None	None	High
Tasmania	1,652	None	None	None	None	None	None	High	High	High	Medium	None	None
Queensland	1,033	None	None	None	None	None	Low	Low	Low	Low	None	None	None
Western Australia	592	None	Low	Low	High	High	Low	None	None	None	None	None	None
Victoria	551	None	None	None	None	None	Low	High	High	High	Medium	None	None
South Australia	138	None	None	None	None	None	Low	High	High	Medium	Medium	Low	None

Availability legend: High Medium Low None

Source: BA

2023/24 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 42.7%** and **Conventional 57.3%**.

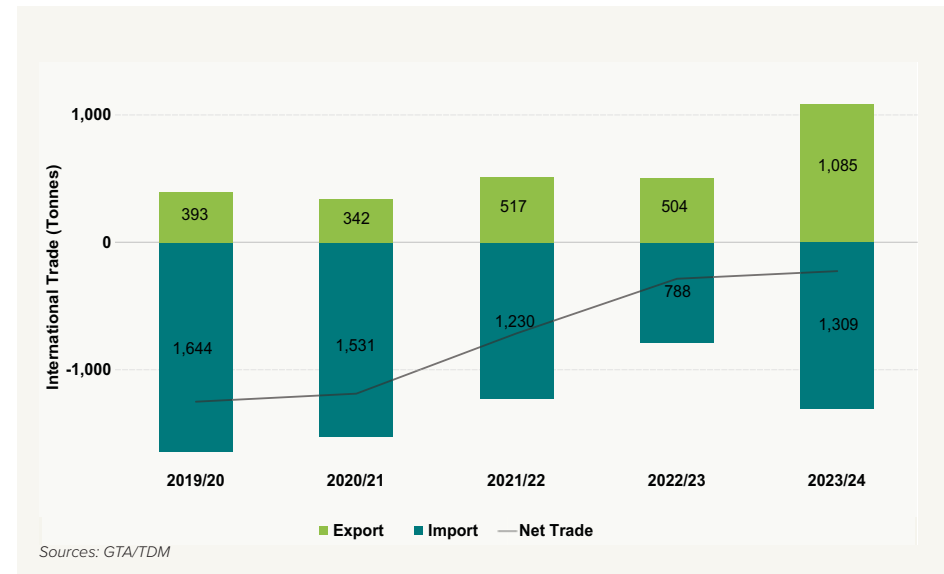
2023/24 FRESH BLUEBERRIES PRODUCTION SYSTEM BY STATE

State	Polyhouses & Tunnels		Conventional	
	Hectares (Ha)	Volume (t)	Hectares (Ha)	Volume (t)
New South Wales	1259	10,071	-	13,504
Victoria	29	235	-	316
Queensland	55	441	-	592
Western Australia	32	253	-	339
South Australia	7	59	-	79
Tasmania	88	706	-	947
Northern Territory	0	0	-	0
Total	1471	11,765	-	15,775

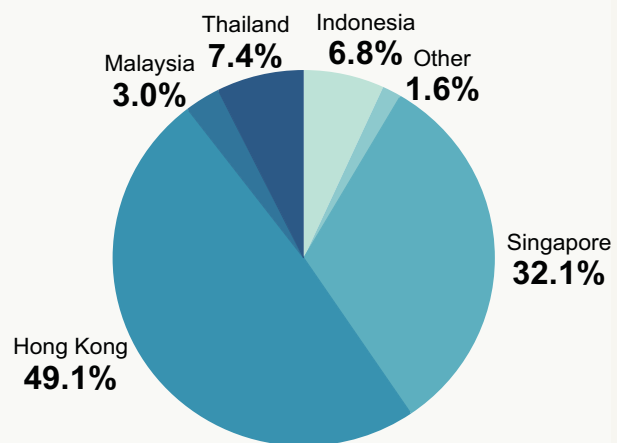
Fresh Blueberries International Trade

FRESH BLUEBERRIES INTERNATIONAL TRADE

Australia has traditionally been a net importer of fresh blueberries, typically importing **700-1,700 tonnes** per year, with the majority of this volume coming from New Zealand. For the year ending June 2024, Australia imported **1,309 tonnes**. The exports and imports over the last five financial years are profiled in the graph below, where imports are counted as negative tonnes.



FRESH BLUEBERRIES EXPORTS



Source: GTA/TDM

For the year ending June 2024, **49.1%** of exported fresh blueberries were sent to **Hong Kong**, as profiled in the chart above.

Exports by State of Production Origin (Tonnes)				Exports by Country (Tonnes)			
Year Ending June	2022	2023	2024	Year Ending June	2022	2023	2024
New South Wales	418	357	966	Hong Kong	283	275	532
Queensland	84	138	61	Singapore	190	142	348
Victoria	12	2	33	Thailand	7	21	80
Western Australia	< 0.5	-	9	Indonesia	29	59	74
South Australia	1	-	8	Malaysia	4	4	33
Other	2	6	7	Other	3	3	18
TOTAL	517	504	1,085	TOTAL	517	504	1,085

FRESH BLUEBERRIES IMPORTS

Imports by Country (Tonnes)				Imports by Country (Tonnes)			
Year Ending June	2022	2023	2024	Year Ending June	2022	2023	2024
New South Wales	587	522	645	New Zealand	1,223	788	1,309
Victoria	179	55	323	Chile	5	-	-
Western Australia	252	195	235	Serbia	2	-	-
Queensland	205	14	106	TOTAL	1,230	788	1,309
South Australia	8	2	-				
Other	-	< 0.5	-				
TOTAL	1,230	788	1,309				

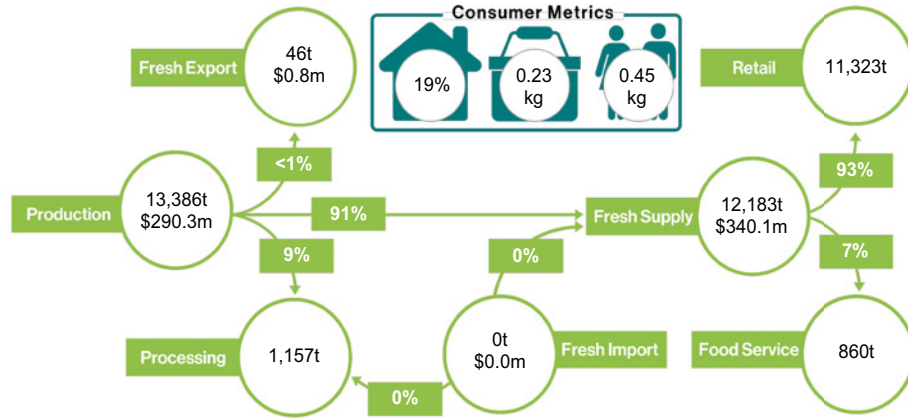
Source: GTA/TDM



Berries - Rubus

Fresh Rubus Berries Overview

FRESH RUBUS BERRIES SUPPLY CHAIN – YEAR ENDING JUNE 2024



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

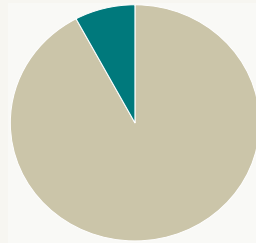
TOTAL PRODUCTION



\$290.3m

13,386t produced and valued at \$290.3m with 9% sent to be processed.

RETAIL VS FOOD SERVICE



■ Retail 93% ■ Food Service 7%

The fresh supply was 12,183t, with 11,323t distributed into retail and 860t into food service.

CONSUMER METRICS



19% of Australian households purchased rubus berries, buying an average of 230g per shopping trip.

PER CAPITA CONSUMPTION



0.45kg in 2023/24 based on the volume supplied.

YEAR ENDING JUNE	2022	2023		2024	
	Value	Value	% YoY	Value	% YoY
Production (t)	9,632	10,781	+12%	13,386	+24%
Production (\$m)	\$205.3	\$221.3	+8%	\$290.3	+31%
Fresh Export Volume (t)	26	9	-65%	46	>100%
Fresh Export Value (\$m)	\$0.5	\$0.3	-38%	\$0.8	>100%
Fresh Import Volume (t)	-	-	-	-	-
Fresh Import Value (\$m)	\$-	\$-	-	\$-	-
Fresh Supply (t)	8,758	9,861	+13%	12,183	+24%
Fresh Supply Wholesale Value (\$m)	\$240.2	\$259.4	+8%	\$340.1	+31%
Supply per Capita (kg)	0.34	0.38	+11%	0.45	+19%
Retail Supply (t)	8,088	9,114	+13%	11,323	+24%
Retail Supply Wholesale Value (\$m)	\$221.4	\$239.4	+8%	\$315.9	+32%
Food Service Supply (t)	670	747	+11%	860	+15%
Food Service Wholesale Value (\$m)	\$18.8	\$20.0	+7%	\$24.1	+20%

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

Fresh Rubus Berries Production

MAJOR PRODUCTION AREAS



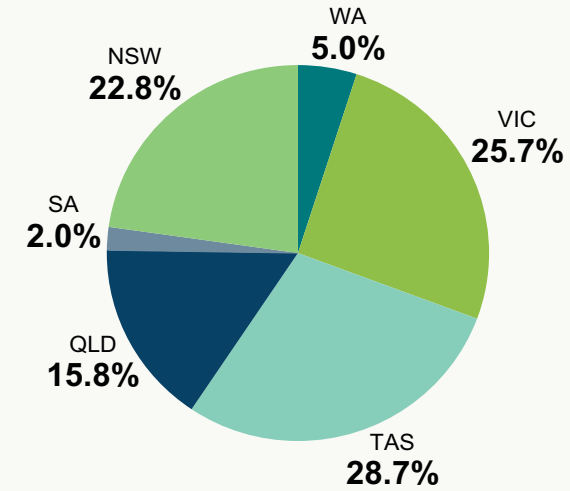
Source: BA

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



2023/24 FRESH RUBUS BERRIES PRODUCTION BY STATE



Source: BA

2023/24 FRESH RUBUS BERRIES SEASONALITY BY STATE

State	Volume (t)	Jul	Aug	Sep	Oct	Nov	Dec	Jan	Feb	Mar	Apr	May	Jun
Tasmania	3,843	None	None	None	None	Low	High	High	High	High	Low	Low	None
Victoria	3,446	None	None	None	Low	High	High	High	High	Medium	Low	None	None
New South Wales	3,048	High	High	High	Medium	Low	Low	Low	Low	Low	High	High	High
Queensland	2,121	High	High	High	Medium	Low	None	None	None	Low	Low	High	High
Western Australia	663	None	None	None	Low	Medium	Medium	Medium	Medium	Medium	None	None	None
South Australia	265	None	None	None	Low	Medium	Medium	Medium	Medium	Medium	None	None	None

Availability legend: High Medium Low None

Source: BA

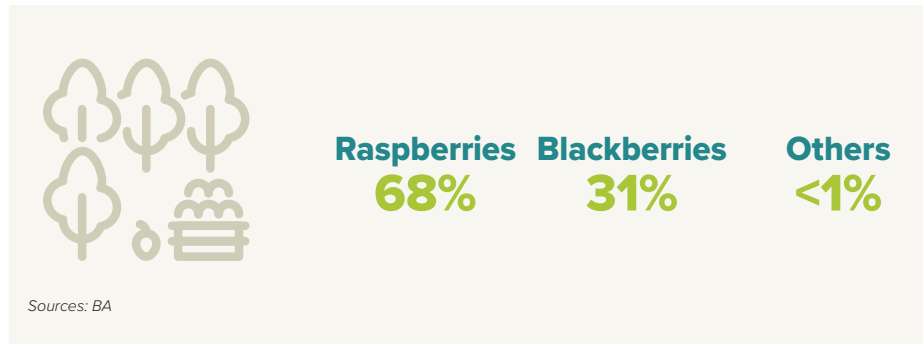
MAIN RUBUS BERRIES TYPES

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

Raspberries, a bright red aggregate fruit with a hollow core. Raspberries accounted for **68%** of fresh production.

Blackberries, a black aggregate fruit with a white core. Blackberries accounted for **31%** of fresh production

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



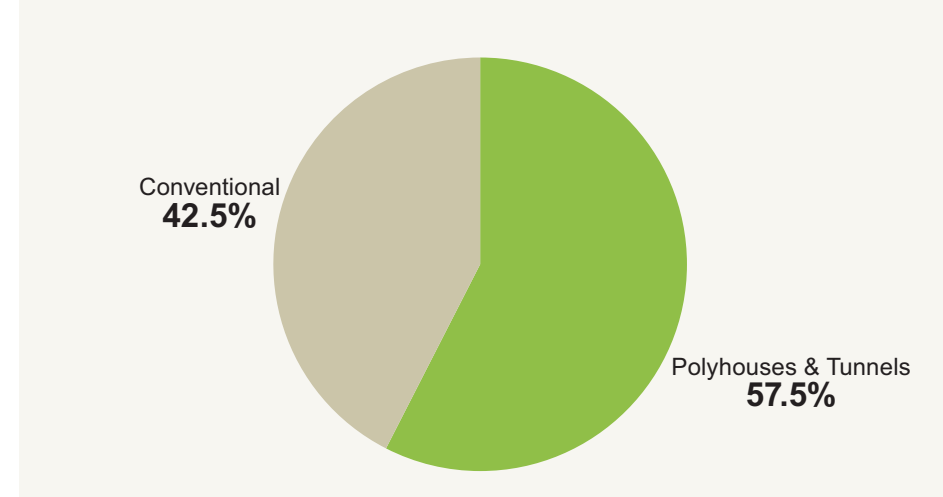
2023/24 FRESH RUBUS BERRIES SEASONALITY BY VARIETY

Variety	Volume (t)	Jul	Aug	Sep	Oct	Nov	Dec	Jan	Feb	Mar	Apr	May	Jun
Raspberries	9,163	High	High	High	Medium	Medium	Medium	Medium	Medium	Medium	Medium	Low	Low
Blackberries	4,163	None	None	None	None	Low	Medium	Medium	Medium	None	None	None	None
Other	60	None	None	None	None	Low	Low	Low	Low	None	None	None	None

Availability legend: High Medium Low None

Source: BA

2023/24 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 57.5%** and **Conventional 42.5%**.

2023/24 FRESH RUBUS BERRIES PRODUCTION SYSTEM BY STATE

State	Polyhouses & Tunnels		Conventional	
	Hectares (Ha)	Volume (t)	Hectares (Ha)	Volume (t)
New South Wales	219	1,753	0	1,295
Victoria	248	1,982	0	1,464
Queensland	152	1,220	0	901
Western Australia	48	381	0	281
South Australia	19	152	0	113
Tasmania	276	2,211	0	1,633
Northern Territory	0	0	0	0
Total	963	7,700	0	5,686

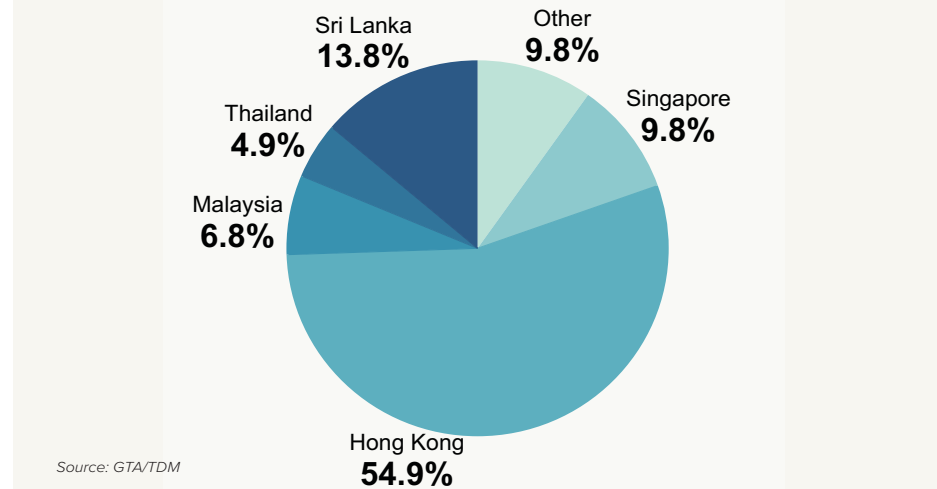
Fresh Rubus Berries International Trade

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.



FRESH RUBUS BERRIES EXPORTS



For the year ending June 2024, **54.9%** of exported fresh rubus berries were sent to **Hong Kong**, as profiled in the chart above.

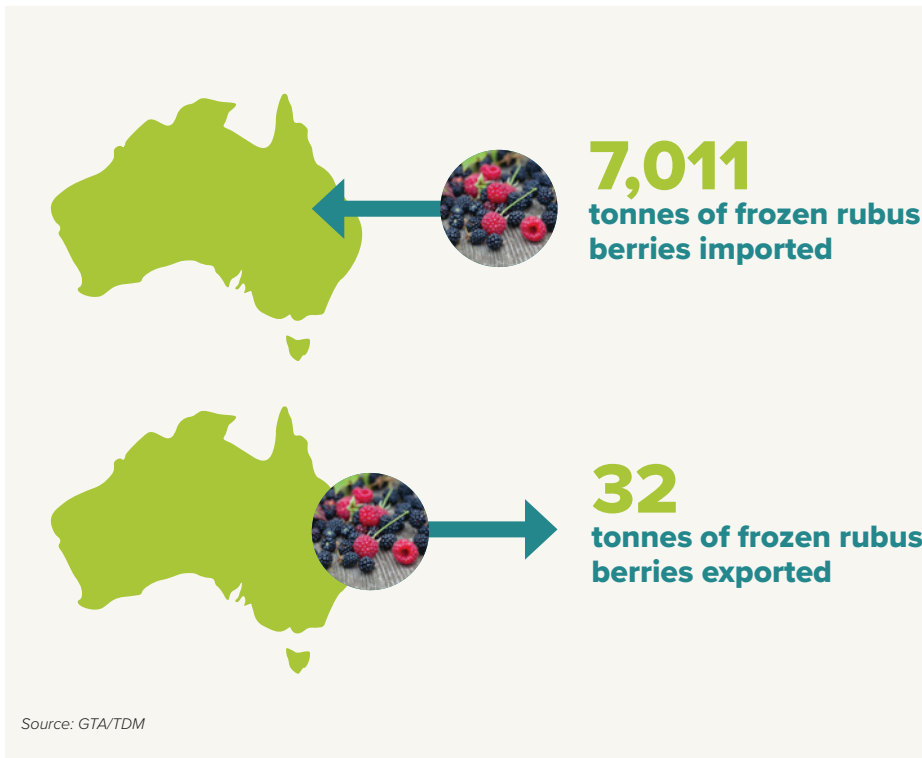
Exports by State of Production Origin (Tonnes)				Exports by Country (Tonnes)			
Year Ending June	2022	2023	2024	Year Ending June	2022	2023	2024
Western Australia	-	-	29	Hong Kong	1	1	25
Victoria	11	4	7	Sri Lanka	8	-	6
New South Wales	10	4	7	Singapore	14	2	5
Queensland	3	1	3	Malaysia	1	< 0.5	3
Tasmania	1	< 0.5	< 0.5	Thailand	-	1	2
Other	1	< 0.5	< 0.5	Other	3	4	5
TOTAL	26	9	46	TOTAL	26	9	46

Source: GTA/TDM

Processed Rubus Berries International Trade

2023/24 PROCESSED RUBUS BERRIES INTERNATIONAL TRADE

For the year ending June 2024, an additional **7,011 tonnes** of frozen rubus berries were imported, while **32 tonnes** were exported.

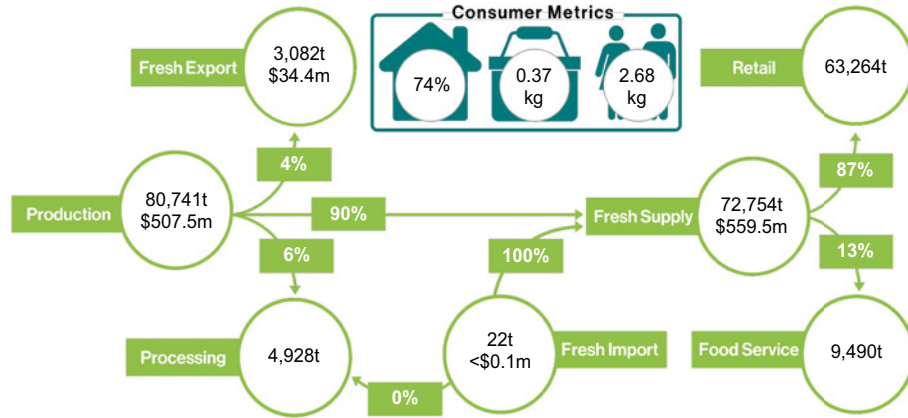




Berries - Strawberries

Fresh Strawberries Overview

FRESH STRAWBERRIES SUPPLY CHAIN – YEAR ENDING JUNE 2024



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

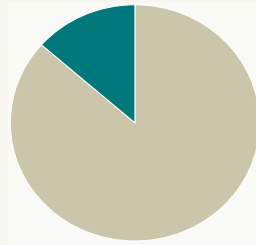
TOTAL PRODUCTION



\$507.5m

80,741t produced and valued at \$507.5m with 6% sent to be processed.

RETAIL VS FOOD SERVICE



■ Retail 87% ■ Food Service 13%

The fresh supply was 72,754t, with 63,264t distributed into retail and 9,490t into food service.

CONSUMER METRICS



74% of Australian households purchased strawberries, buying an average of 365g per shopping trip.

PER CAPITA CONSUMPTION



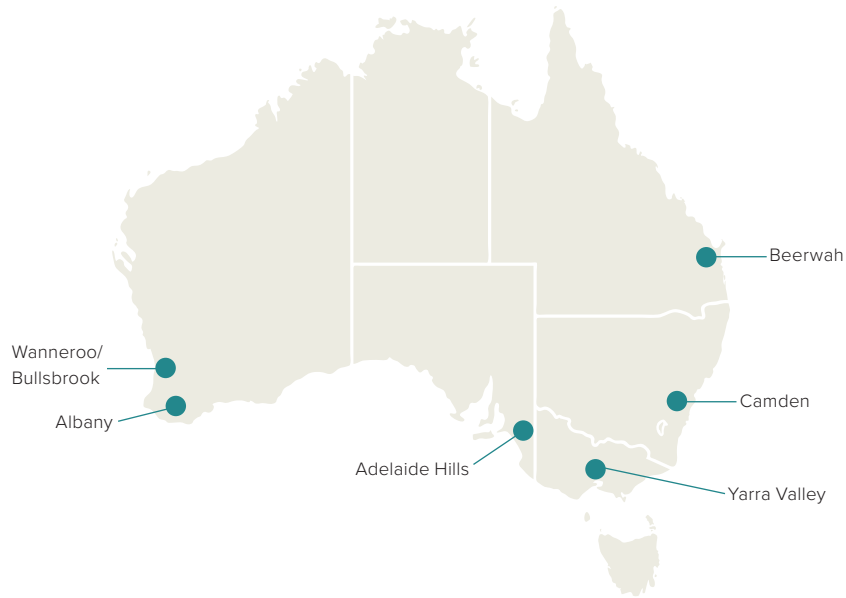
2.68kg in 2023/24 based on the volume supplied.

YEAR ENDING JUNE	2022	2023		2024	
	Value	Value	% YoY	Value	% YoY
Production (t)	68,312	65,824	-4%	80,741	+23%
Production (\$m)	\$416.9	\$429.2	+3%	\$507.5	+18%
Fresh Export Volume (t)	2,595	2,269	-13%	3,082	+36%
Fresh Export Value (\$m)	\$22.8	\$25.7	+13%	\$34.4	+34%
Fresh Import Volume (t)	6	<1	-100%	22	>100%
Fresh Import Value (\$m)	< \$0.1	\$-	-100%	< \$0.1	-
Fresh Supply (t)	60,957	59,537	-2%	72,754	+22%
Fresh Supply Wholesale Value (\$m)	\$464.5	\$476.3	+3%	\$559.5	+17%
Supply per Capita (kg)	2.35	2.27	-4%	2.68	+18%
Retail Supply (t)	52,731	51,771	-2%	63,264	+22%
Retail Supply Wholesale Value (\$m)	\$401.8	\$414.2	+3%	\$486.5	+17%
Food Service Supply (t)	8,226	7,766	-6%	9,490	+22%
Food Service Wholesale Value (\$m)	\$62.7	\$62.1	>-1%	\$73.0	+17%

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

Fresh Strawberries Production

MAJOR PRODUCTION AREAS



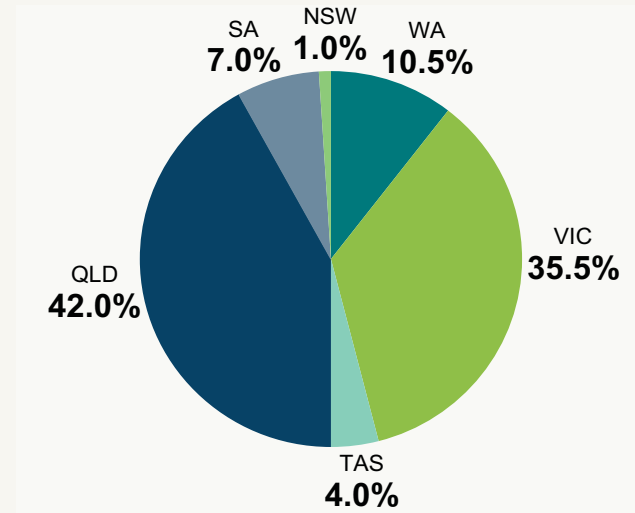
Source: SAI

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

PRODUCTION WINDOW



2023/24 FRESH STRAWBERRIES PRODUCTION BY STATE



Source: SAI

2023/24 FRESH STRAWBERRIES SEASONALITY BY STATE

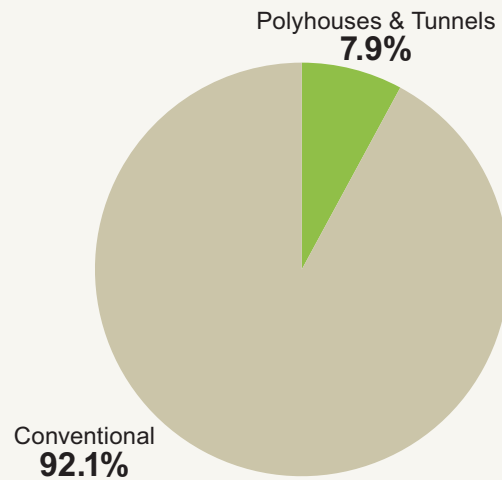
State	Volume (t)	Jul	Aug	Sep	Oct	Nov	Dec	Jan	Feb	Mar	Apr	May	Jun
Queensland	33,911	High	High	High	Medium	Medium	None	None	None	Low	Low	Low	Low
Victoria	28,663	None	None	None	Medium	High	High	High	High	High	Medium	Low	Low
Western Australia	8,478	High	High	High	Medium	Medium	Low	None	None	None	None	None	None
South Australia	5,652	None	Low	Low	Medium	High	High	High	High	High	Medium	Low	Low
Tasmania	3,230	None	None	None	Low	Medium	High	High	Medium	Low	None	None	None
New South Wales	807	None	None	None	Low	Medium	High	High	Medium	Low	None	None	None

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

Source: SAI



2023/24 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 7.9%** and **Conventional 92.1%**.

2023/24 FRESH STRAWBERRIES PRODUCTION SYSTEM BY STATE

State	Polyhouses & Tunnels		Conventional	
	Hectares (Ha)	Volume (t)	Hectares (Ha)	Volume (t)
New South Wales	4	64	-	744
Victoria	151	2,265	-	26,398
Queensland	179	2,680	-	31,231
Western Australia	45	670	-	7,808
South Australia	30	447	-	5,205
Tasmania	17	255	-	2,974
Northern Territory	0	0	0	0
Total	425	6,381	-	74,360

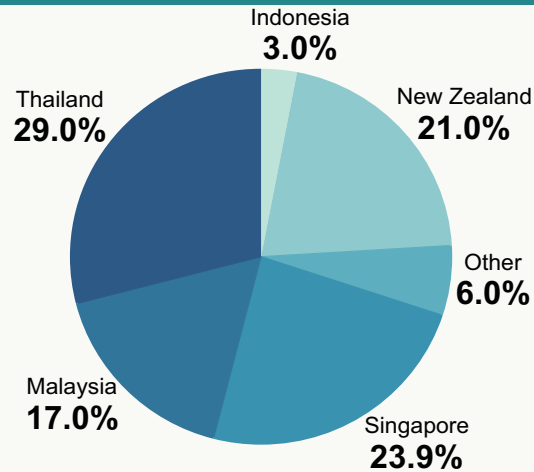
Fresh Strawberries International Trade

FRESH STRAWBERRIES INTERNATIONAL TRADE

Australia has traditionally been a net exporter of fresh strawberries. For the year ending June 2024, Australia exported **3,082 tonnes**. The exports and imports over the last five financial years are profiled in the graph below, where imports are counted as negative tonnes.



FRESH STRAWBERRIES EXPORTS



Source: GTA/TDM

For the year ending June 2024, **29.0%** of exported fresh strawberries were sent to **Thailand**, as profiled in the chart above.

Exports by State of Production Origin (Tonnes)				Exports by Country (Tonnes)			
Year Ending June	2022	2023	2024	Year Ending June	2022	2023	2024
Western Australia	1,890	1,898	2,136	Thailand	682	746	894
Queensland	597	321	702	Singapore	552	617	738
New South Wales	70	7	177	New Zealand	449	296	648
Victoria	29	42	64	Malaysia	429	419	523
South Australia	-	-	2	Indonesia	29	40	93
Other	8	1	-	Other	454	152	186
TOTAL	2,595	2,269	3,082	TOTAL	2,595	2,269	3,082

FRESH STRAWBERRIES IMPORTS

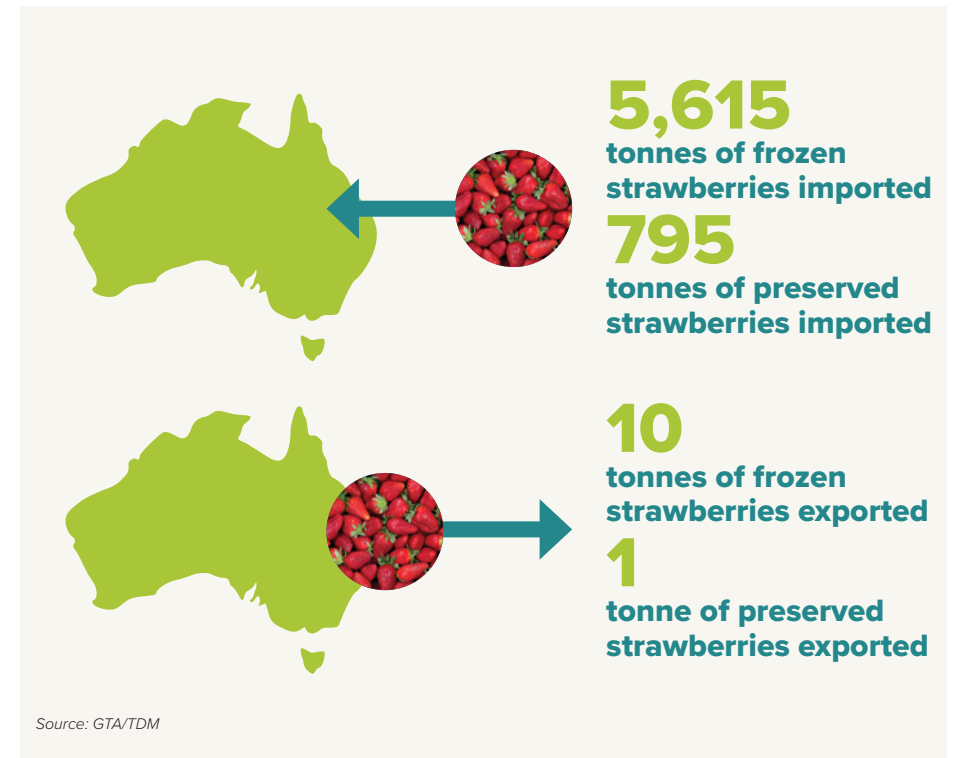
Imports by State Destination (Tonnes)				Imports by Country (Tonnes)			
Year Ending June	2022	2023	2024	Year Ending June	2022	2023	2024
Queensland	1	< 0.5	22	Egypt	-	-	22
New South Wales	1	-	< 0.5	South Korea	1	-	< 0.5
Victoria	5	-	-	India	-	< 0.5	-
Other	-	< 0.5	< 0.5	Spain	5	-	-
TOTAL	6	0	22	Japan	< 0.5	-	-
				Other	< 0.5	< 0.5	< 0.5
				TOTAL	6	0	22

Source: GTA/TDM

Processed Strawberries International Trade

2023/24 PROCESSED STRAWBERRIES INTERNATIONAL TRADE

For the year ending June 2024, an additional **5,615 tonnes** of frozen strawberries were imported, while **10 tonnes** were exported. Australia also imported **795 tonnes** of preserved strawberries, while exporting **one tonne** of preserved strawberries.



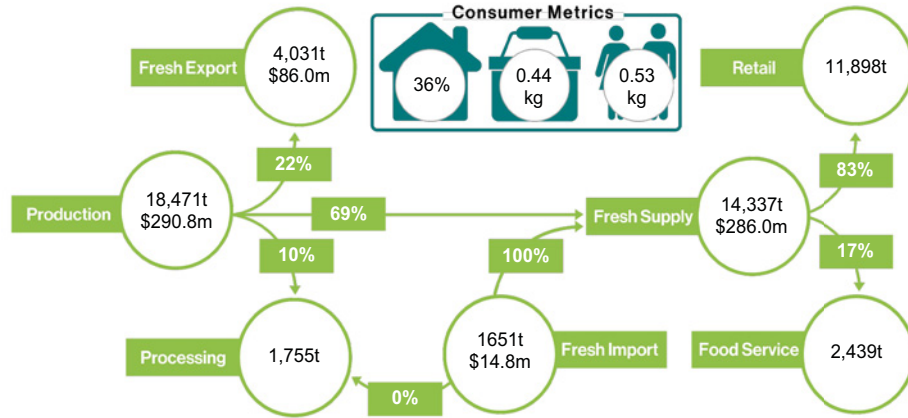
Source: GTA/TDM



Cherries

Fresh Cherries Overview

FRESH CHERRIES SUPPLY CHAIN – YEAR ENDING JUNE 2024



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

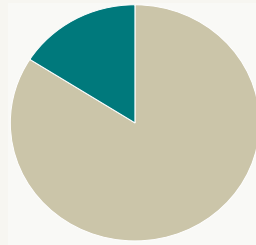
TOTAL PRODUCTION



\$290.8m

18,471t produced and valued at **\$290.8m** with 10% sent to be processed.

RETAIL VS FOOD SERVICE



■ Retail 83% ■ Food Service 17%

The fresh supply was **14,337t**, with **11,898t** distributed into retail and **2,439t** into food service.

CONSUMER METRICS



36% of Australian households purchased cherries, buying an average of **438g** per shopping trip.

PER CAPITA CONSUMPTION



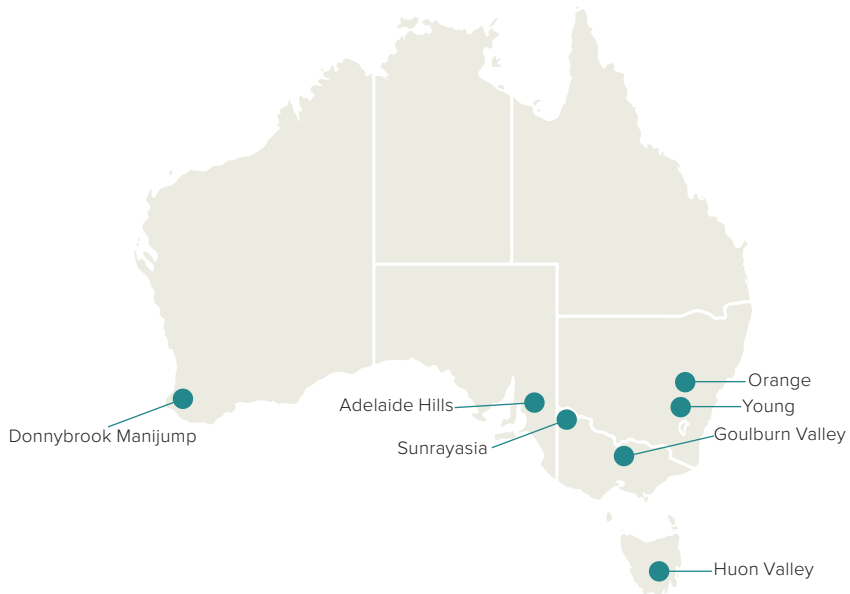
in 2023/24 based on the volume supplied.

YEAR ENDING JUNE	2022	2023		2024	
	Value	Value	% YoY	Value	% YoY
Production (t)	17,403	15,114	-13%	18,471	+22%
Production (\$m)	\$226.5	\$262.6	+16%	\$290.8	+11%
Fresh Export Volume (t)	3,885	2,879	-26%	4,031	+40%
Fresh Export Value (\$m)	\$74.5	\$67.0	-10%	\$86.0	+28%
Fresh Import Volume (t)	1,147	932	-19%	1,651	+77%
Fresh Import Value (\$m)	\$11.2	\$10.0	-11%	\$14.8	+49%
Fresh Supply (t)	13,083	11,730	-10%	14,337	+22%
Fresh Supply Wholesale Value (\$m)	\$208.1	\$259.7	+25%	\$286.0	+10%
Supply per Capita (kg)	0.50	0.45	-11%	0.53	+18%
Retail Supply (t)	10,994	9,734	-11%	11,898	+22%
Retail Supply Wholesale Value (\$m)	\$174.8	\$215.5	+23%	\$237.3	+10%
Food Service Supply (t)	2,089	1,996	-4%	2,439	+22%
Food Service Wholesale Value (\$m)	\$33.2	\$44.2	+33%	\$48.7	+10%

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

Fresh Cherries Production

MAJOR PRODUCTION AREAS



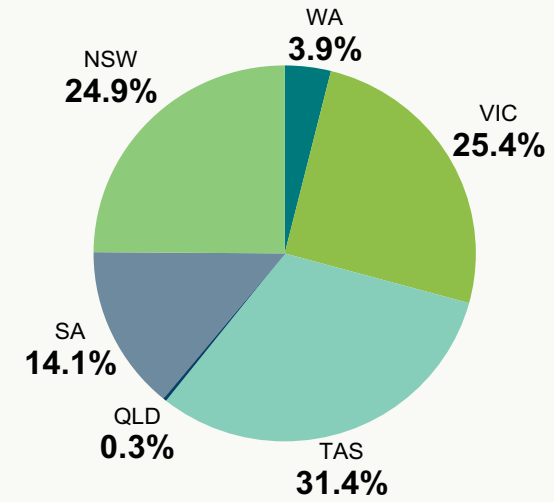
Source: CGAI

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

PRODUCTION WINDOW



2023/24 FRESH CHERRIES PRODUCTION BY STATE



Source: CGAI

2023/24 FRESH CHERRIES SEASONALITY BY STATE

State	Volume (t)	Jul	Aug	Sep	Oct	Nov	Dec	Jan	Feb	Mar	Apr	May	Jun
Tasmania	5,802						Low	High	Medium				
Victoria	4,688					Low	High	High	Medium				
New South Wales	4,597				Low	High	High	Medium					
South Australia	2,610				Low	High	High	Medium					
Western Australia	717					Low	Medium	High	Low				
Queensland	58				Low	Medium	High	High	Low				

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

Source: CGAI

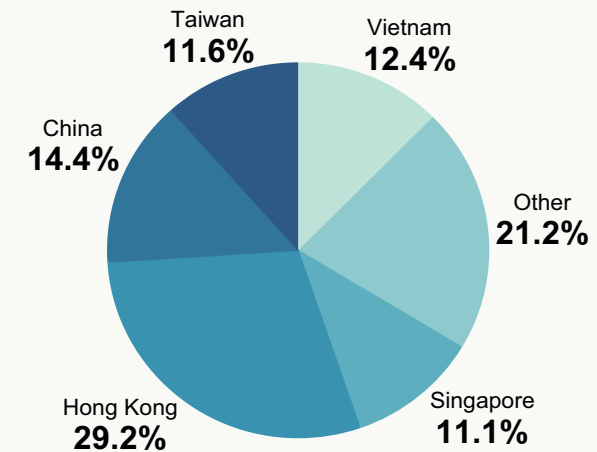
Fresh Cherries International Trade

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 2024, Australia imported **1,651 tonnes** of fresh cherries, primarily from the United States, and exported **4,031 tonnes**. The exports and imports over the last five financial years are profiled in the graph below, where imports are counted as negative tonnes.



FRESH CHERRIES EXPORTS



Source: GTA/TDM

For the year ending June 2024, **29.2%** of exported fresh cherries were sent to **Hong Kong**, as profiled in the chart above.

Exports by State of Production Origin (Tonnes)				Exports by Country (Tonnes)			
Year Ending June	2022	2023	2024	Year Ending June	2022	2023	2024
Tasmania	2,265	1,977	2,152	Hong Kong	1,040	954	1,178
Victoria	1,054	629	1,418	China	278	246	582
New South Wales	313	155	279	Vietnam	792	497	501
South Australia	198	101	124	Taiwan	459	301	467
Queensland	55	13	51	Singapore	498	301	448
Other	< 0.5	4	7	Other	818	581	854
TOTAL	3,885	2,879	4,031	TOTAL	3,885	2,879	4,031

FRESH CHERRIES IMPORTS

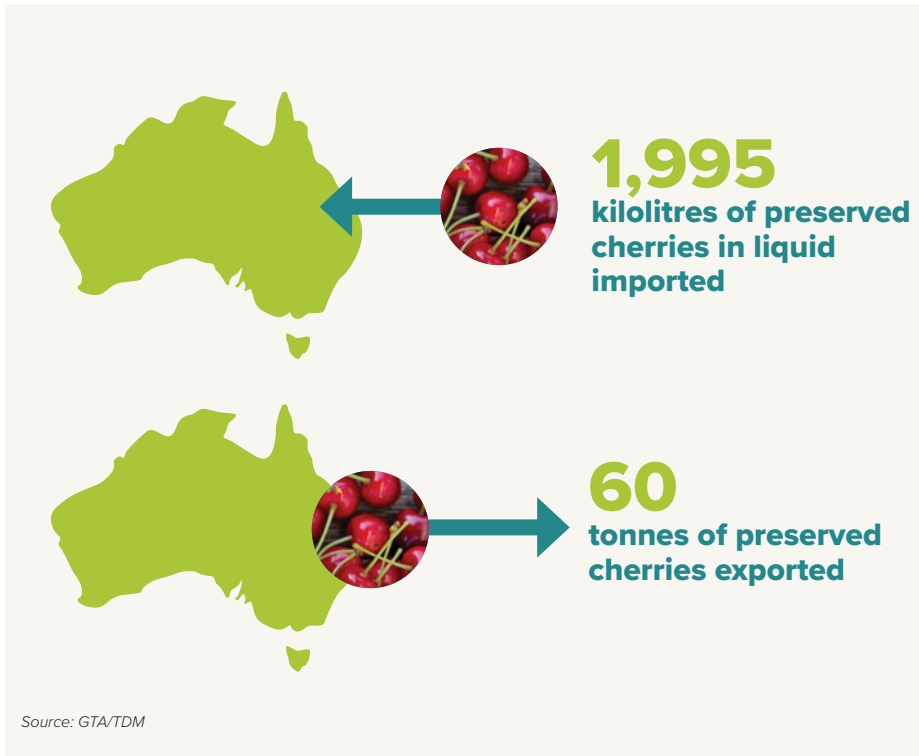
Imports by State Destination (Tonnes)				Imports by Country (Tonnes)			
Year Ending June	2022	2023	2024	Year Ending June	2022	2023	2024
New South Wales	743	519	1,032	US	1,147	931	1,651
Victoria	225	298	410	UAE	-	< 0.5	-
Western Australia	98	83	197	TOTAL	1,147	932	1,651
Queensland	80	31	12				
Other	< 0.5	-	-				
TOTAL	1,147	932	1,651				

Source: GTA/TDM

Processed Cherries International Trade

2023/24 PROCESSED CHERRIES INTERNATIONAL TRADE

For the year ending June 2024, an additional **1,995 kilolitres** of preserved cherries in liquid were imported, while **60 tonnes** of preserved cherries were exported.

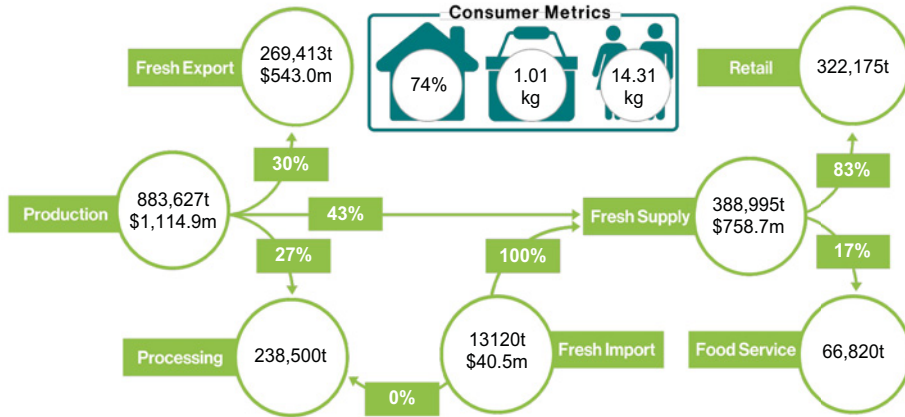




Citrus - Overview

Fresh Citrus Overview

FRESH CITRUS SUPPLY CHAIN – YEAR ENDING JUNE 2024



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

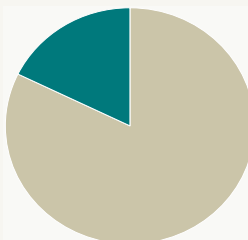
TOTAL PRODUCTION



\$1,114.9m

883,627t produced and valued at **\$1,114.9m** with 27% sent to be processed.

RETAIL VS FOOD SERVICE



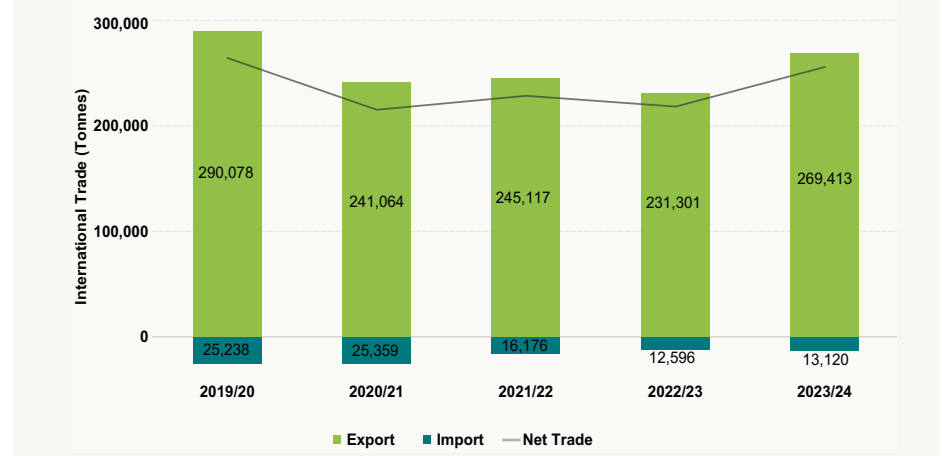
Retail 83% **Food Service 17%**

The fresh supply was **388,995t**, with **322,175t** distributed into retail and **66,820t** into food service.

YEAR ENDING JUNE	2022	2023		2024	
	Value	Value	% YoY	Value	% YoY
Production (t)	766,857	815,750	+6%	883,627	+8%
Production (\$m)	\$913.7	\$977.1	+7%	\$1,114.9	+14%
Production area (Ha)	23,177	24,197	+4%	25,533	+6%
Fresh Export Volume (t)	245,117	231,301	-6%	269,413	+16%
Fresh Export Value (\$m)	\$454.6	\$441.1	-3%	\$543.0	+23%
Fresh Import Volume (t)	16,176	12,596	-22%	13,120	+4%
Fresh Import Value (\$m)	\$44.1	\$35.9	-19%	\$40.5	+13%
Fresh Supply (t)	311,042	370,986	+19%	388,995	+5%
Fresh Supply Wholesale Value (\$m)	\$617.0	\$699.8	+13%	\$758.7	+8%
Supply per Capita (kg)	11.99	14.12	+18%	14.31	+1%
Retail Supply (t)	258,457	306,907	+19%	322,175	+5%
Retail Supply Wholesale Value (\$m)	\$507.4	\$575.3	+13%	\$623.1	+8%
Food Service Supply (t)	52,585	64,080	+22%	66,820	+4%
Food Service Wholesale Value (\$m)	\$109.6	\$124.5	+14%	\$135.6	+9%

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

FRESH CITRUS INTERNATIONAL TRADE

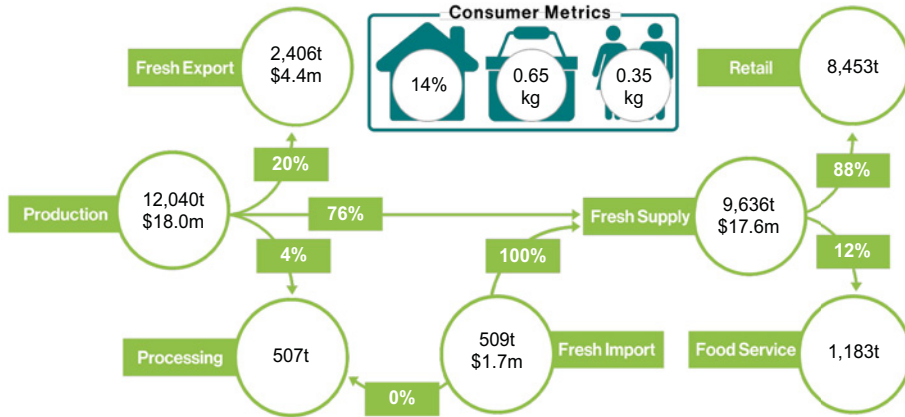




Citrus - Grapefruit

Fresh Grapefruit Overview

FRESH GRAPEFRUIT SUPPLY CHAIN – YEAR ENDING JUNE 2024



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

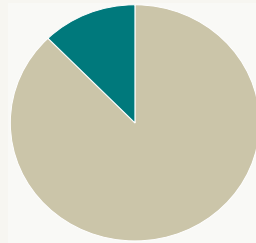
TOTAL PRODUCTION



\$18.0m

12,040t produced and valued at **\$18.0m** with 4% sent to be processed.

RETAIL VS FOOD SERVICE



■ Retail 88% ■ Food Service 12%

The fresh supply was **9,636t**, with **8,453t** distributed into retail and **1,183t** into food service.

CONSUMER METRICS



14% of Australian households purchased grapefruit, buying an average of **647g** per shopping trip.

PER CAPITA CONSUMPTION



in 2023/24 based on the volume supplied.

YEAR ENDING JUNE	2022	2023		2024	
	Value	Value	% YoY	Value	% YoY
Production (t)	11,190	9,030	-19%	12,040	+33%
Production (\$m)	\$17.7	\$16.0	-10%	\$18.0	+12%
Production area (Ha)	278	311	+12%	379	+22%
Fresh Export Volume (t)	1,468	1,621	+10%	2,406	+48%
Fresh Export Value (\$m)	\$2.4	\$2.7	+13%	\$4.4	+62%
Fresh Import Volume (t)	982	575	-41%	509	-11%
Fresh Import Value (\$m)	\$2.6	\$1.7	-36%	\$1.7	+1%
Fresh Supply (t)	10,233	7,604	-26%	9,636	+27%
Fresh Supply Wholesale Value (\$m)	\$20.3	\$17.3	-15%	\$17.6	+2%
Supply per Capita (kg)	0.39	0.29	-27%	0.35	+22%
Retail Supply (t)	8,976	6,675	-26%	8,453	+27%
Retail Supply Wholesale Value (\$m)	\$17.8	\$15.2	-15%	\$15.4	+2%
Food Service Supply (t)	1,257	928	-26%	1,183	+28%
Food Service Wholesale Value (\$m)	\$2.5	\$2.1	-15%	\$2.2	+2%

Sources: AC, Citrus Australia (CA) CFVIWA; GTA/TDM; 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



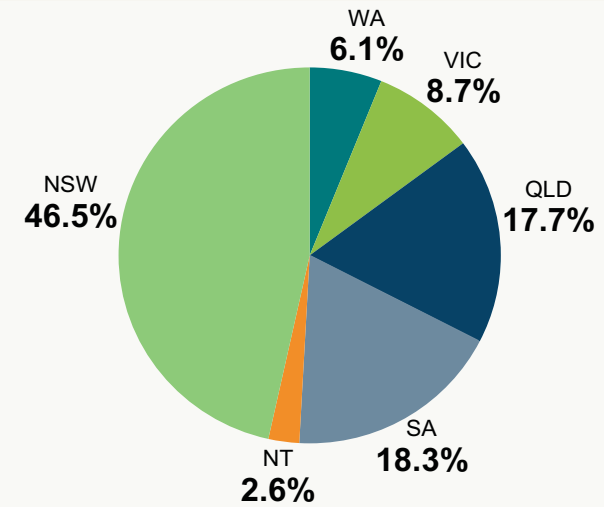
379
Ha

PRODUCTION WINDOW



Feb-Dec

2023/24 FRESH GRAPEFRUIT PRODUCTION BY STATE



Source: CA

2023/24 FRESH GRAPEFRUIT SEASONALITY BY STATE

State	Volume (t)	Jul	Aug	Sep	Oct	Nov	Dec	Jan	Feb	Mar	Apr	May	Jun
New South Wales	5,600	High	High	Medium	Low	None	None	None	None	None	None	None	None
South Australia	2,205	High	High	Medium	Low	None	None	None	None	None	None	None	High
Queensland	2,135	None	High	High	Medium	Low	None	None	None	None	None	None	None
Victoria	1,050	High	High	Medium	Low	None	None	None	None	None	None	None	High
Western Australia	735	None	None	None	None	None	None	None	None	None	None	None	None
Northern Territory	315	None	None	None	None	None	None	None	None	None	None	None	None

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

Source: CA

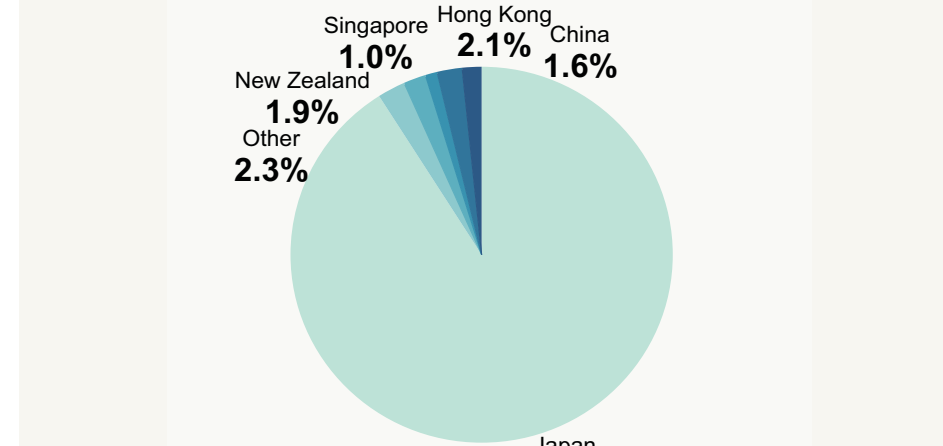
Fresh Grapefruit International Trade

FRESH GRAPEFRUIT INTERNATIONAL TRADE

Australia has traditionally been a net exporter of fresh grapefruit, typically exporting **1,500-2,400 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.



FRESH GRAPEFRUIT EXPORTS



Source: GTA/TDM

For the year ending June 2024, **91.0%** of exported fresh grapefruit were sent to **Japan**, as profiled in the chart above.

Exports by State of Production Origin (Tonnes)				Exports by Country (Tonnes)			
Year Ending June	2022	2023	2024	Year Ending June	2022	2023	2024
South Australia	794	553	1,376	Japan	971	807	2,190
Victoria	218	204	557	Hong Kong	95	150	51
New South Wales	450	860	382	New Zealand	26	54	46
Queensland	5	5	91	China	51	-	39
Northern Territory	< 0.5	-	-	Singapore	3	2	24
Other	< 0.5	-	-	Other	321	609	56
TOTAL	1,468	1,621	2,406	TOTAL	1,468	1,621	2,406

FRESH GRAPEFRUIT IMPORTS

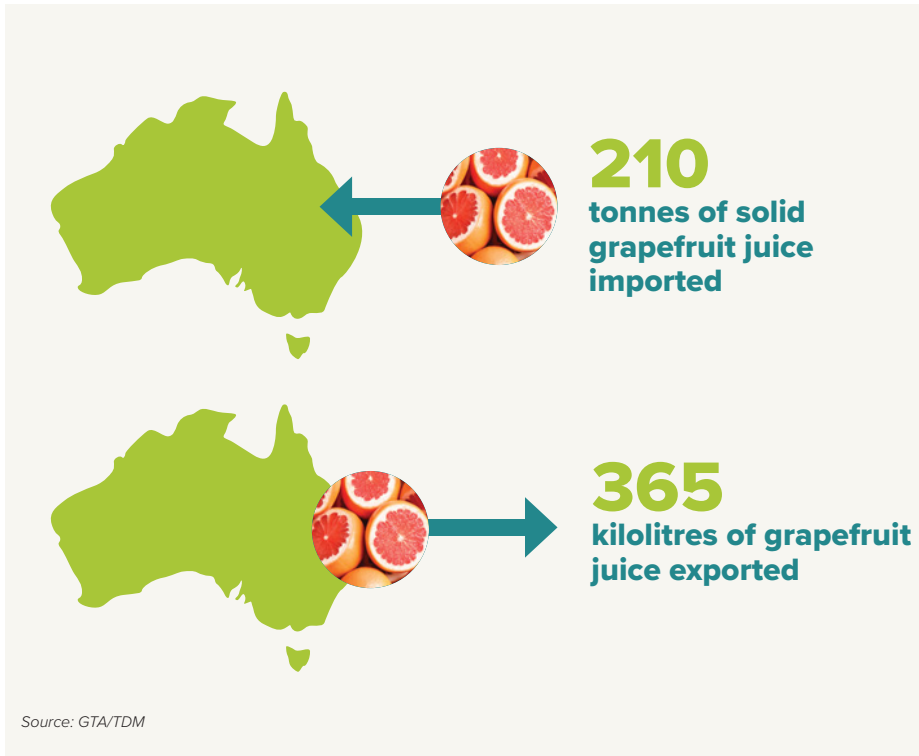
Imports by State Destination (Tonnes)				Imports by Country (Tonnes)			
Year Ending June	2022	2023	2024	Year Ending June	2022	2023	2024
Victoria	554	160	204	Israel	189	333	249
Queensland	-	61	159	US	692	217	242
Western Australia	116	106	79	Egypt	56	24	18
New South Wales	299	248	67	China	-	-	< 0.5
South Australia	12	-	-	Iran	< 0.5	1	< 0.5
TOTAL	982	575	509	Other	46	< 0.5	< 0.5
				TOTAL	982	575	509

Source: GTA/TDM

Processed Grapefruit International Trade

2023/24 PROCESSED GRAPEFRUIT INTERNATIONAL TRADE

For the year ending June 2024, an additional **210 tonnes** of solid grapefruit juice were imported, while **365 kilolitres** of grapefruit juice were exported.

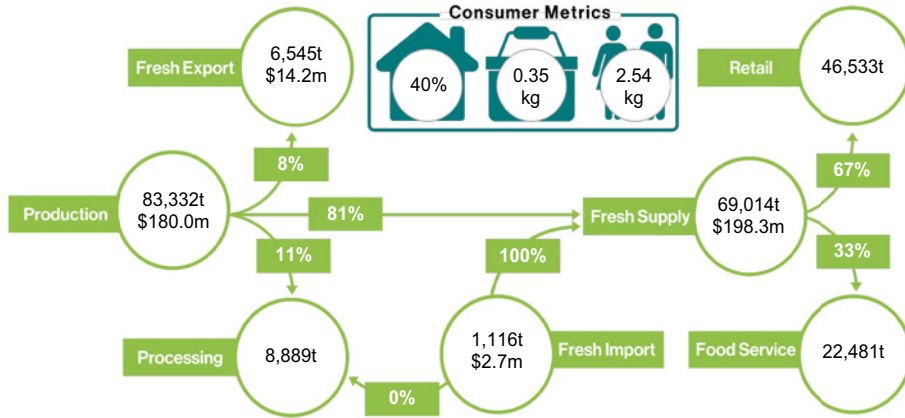




Citrus - Lemon/Lime

Fresh Lemon/Lime Overview

FRESH LEMON/LIME SUPPLY CHAIN – YEAR ENDING JUNE 2024



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

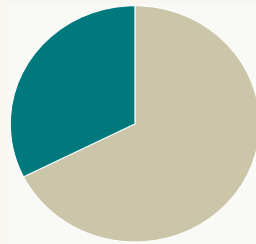
TOTAL PRODUCTION



\$180.0m

83,332t produced and valued at **\$180.0m** with 11% sent to be processed.

RETAIL VS FOOD SERVICE



■ Retail 67% ■ Food Service 33%

The fresh supply was, with **69,014t** distributed into retail and **22,481t** into food service.

CONSUMER METRICS



40% of Australian households purchased lemon/lime, buying an average of **351g** per shopping trip.

PER CAPITA CONSUMPTION



2.54kg in 2023/24 based on the volume supplied.

YEAR ENDING JUNE	2022	2023		2024	
	Value	Value	% YoY	Value	% YoY
Production (t)	66,004	73,120	+11%	83,332	+14%
Production (\$m)	\$138.3	\$153.7	+11%	\$180.0	+17%
Production area (Ha)	1,835	2,248	+23%	2,379	+6%
Fresh Export Volume (t)	4,678	3,907	-16%	6,545	+68%
Fresh Export Value (\$m)	\$8.2	\$6.9	-15%	\$14.2	>100%
Fresh Import Volume (t)	1,615	736	-54%	1,116	+52%
Fresh Import Value (\$m)	\$4.0	\$1.9	-54%	\$2.7	+47%
Fresh Supply (t)	55,801	62,411	+12%	69,014	+11%
Fresh Supply Wholesale Value (\$m)	\$157.0	\$173.9	+11%	\$198.3	+14%
Supply per Capita (kg)	2.15	2.38	+10%	2.54	+7%
Retail Supply (t)	37,635	42,050	+12%	46,533	+11%
Retail Supply Wholesale Value (\$m)	\$106.1	\$117.5	+11%	\$134.0	+14%
Food Service Supply (t)	18,166	20,361	+12%	22,481	+10%
Food Service Wholesale Value (\$m)	\$50.9	\$56.4	+11%	\$64.3	+14%

Sources: AC; Citrus Australia (CA); CFVIWA; GTA/TDM; 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



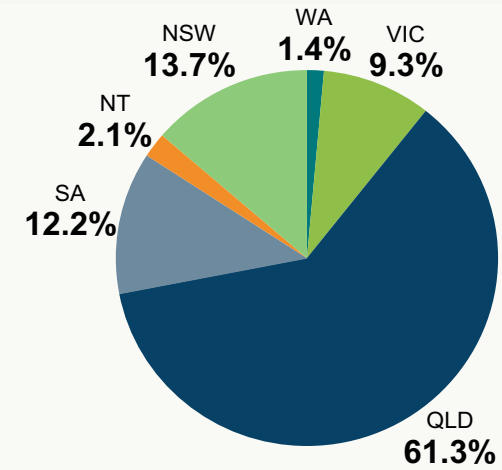
2,379
Ha

PRODUCTION WINDOW



Jan-Nov

2023/24 FRESH LEMON/LIME PRODUCTION BY STATE



Source: CA

2023/24 FRESH LEMON/LIME SEASONALITY BY STATE

State	Volume (t)	Jul	Aug	Sep	Oct	Nov	Dec	Jan	Feb	Mar	Apr	May	Jun
Queensland	51,078	High	High	Medium	Medium	None	None	Low	Low	Low	Low	Low	High
New South Wales	11,391	High	High	Medium	Medium	None	None	Low	Low	Low	Low	High	High
South Australia	10,186	None	Low	Medium	Medium	Medium	None	None	None	None	None	None	None
Victoria	7,710	Low	Medium	Medium	Medium	None	None	None	None	None	None	None	Low
Northern Territory	1,787	Medium	Medium	Medium	Medium	None	None	None	None	Low	Low	Low	Medium
Western Australia	1,180	High	Medium	Medium	Medium	None	None	Low	Low	Low	Low	Low	High

Availability legend: High Medium Low None

Source: CA

MAIN LEMON/LIME VARIETIES



Lemons
65%

Limes
35%

Sources: CA

2023/24 FRESH LEMON/LIME SEASONALITY BY VARIETY

Variety	Volume (t)	Jul	Aug	Sep	Oct	Nov	Dec	Jan	Feb	Mar	Apr	May	Jun
Lemons	54,500	High	Medium	Low	Low	None	None	None	Low	Medium	Medium	Medium	High
Limes	28,832	None	None	Low	Low	Low	Low	Low	Low	High	Medium	Low	None

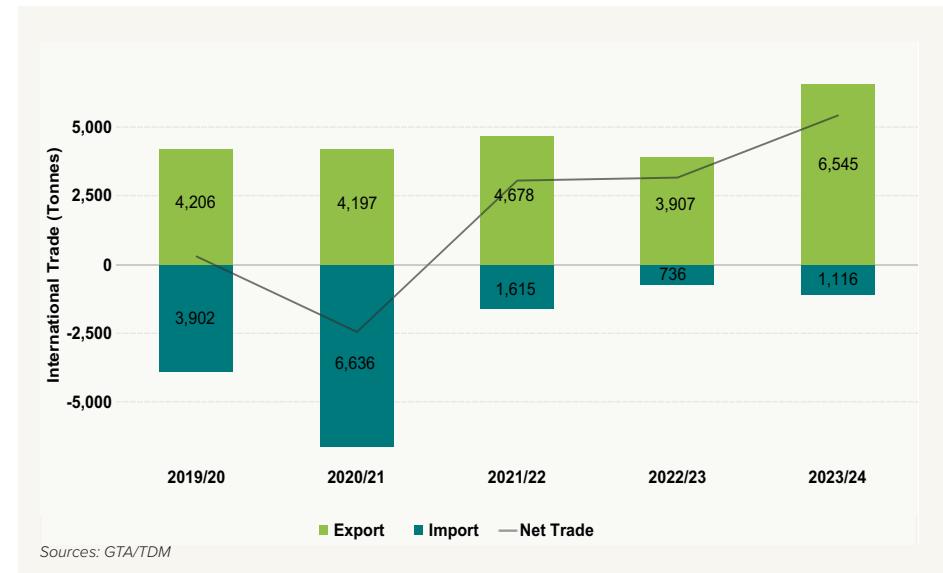
Availability legend: High Medium Low None

Sources: CA

Fresh Lemon/Lime International Trade

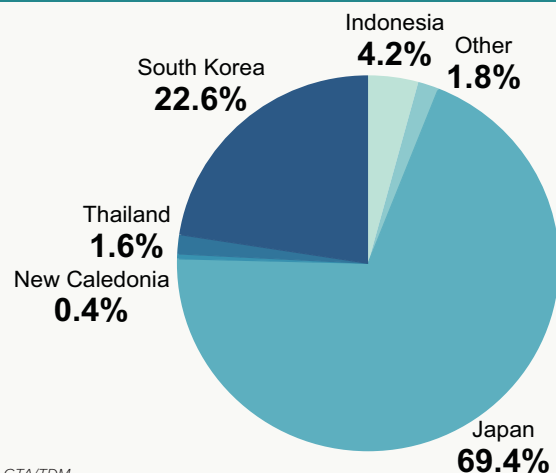
FRESH LEMON/LIME INTERNATIONAL TRADE

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



Sources: GTA/TDM

FRESH LEMON/LIME EXPORTS



Source: GTA/TDM

For the year ending June 2024, **69.4%** of exported fresh lemon/lime were sent to **Japan**, as profiled in the chart above.

Exports by State of Production Origin (Tonnes)				Exports by Country (Tonnes)			
Year Ending June	2022	2023	2024	Year Ending June	2022	2023	2024
South Australia	2,045	2,169	3,309	Japan	1,062	1,899	4,542
Queensland	593	1,021	1,468	South Korea	129	222	1,476
New South Wales	709	385	1,318	Indonesia	2,076	1,328	277
Victoria	1,326	332	447	Thailand	32	148	107
Western Australia	3	< 0.5	3	New Caledonia	64	64	28
Other	1	< 0.5	< 0.5	Other	1,314	248	115
TOTAL	4,678	3,907	6,545	TOTAL	4,678	3,907	6,545

FRESH LEMON/LIME IMPORTS

Imports by State Destination (Tonnes)				Imports by Country (Tonnes)			
Year Ending June	2022	2023	2024	Year Ending June	2022	2023	2024
New South Wales	634	78	425	Egypt	658	345	735
Victoria	604	347	404	US	878	387	331
Western Australia	377	312	238	Spain	73	-	48
Queensland	-	-	49	Iran	2	1	1
TOTAL	1,615	736	1,116	UAE	4	3	1
				Other	< 0.5	< 0.5	1
				TOTAL	1,615	736	1,116

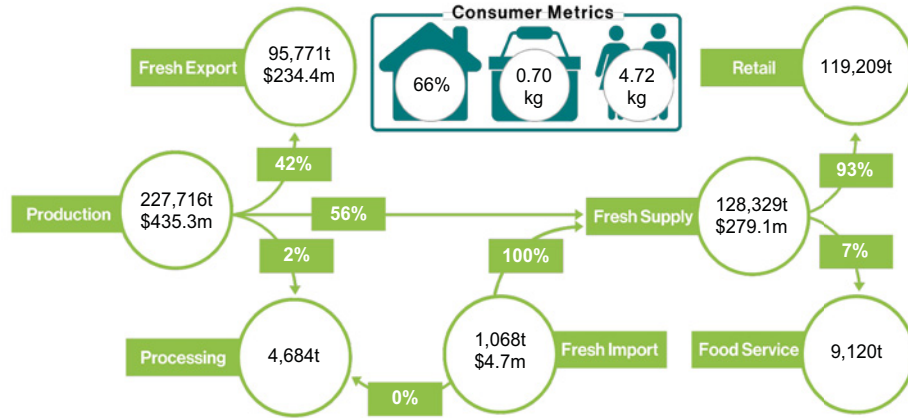
Source: GTA/TDM



Citrus - Mandarins

Fresh Mandarins Overview

FRESH MANDARINS SUPPLY CHAIN – YEAR ENDING JUNE 2024



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

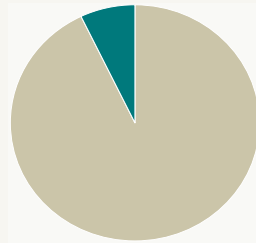
TOTAL PRODUCTION



\$435.3m

227,716t produced and valued at \$435.3m with 2% sent to be processed.

RETAIL VS FOOD SERVICE



■ Retail 93% ■ Food Service 7%

The fresh supply was 128,329t, with 119,209t distributed into retail and 9,120t into food service.

CONSUMER METRICS



66% of Australian households purchased mandarins, buying an average of 696g per shopping trip.

PER CAPITA CONSUMPTION



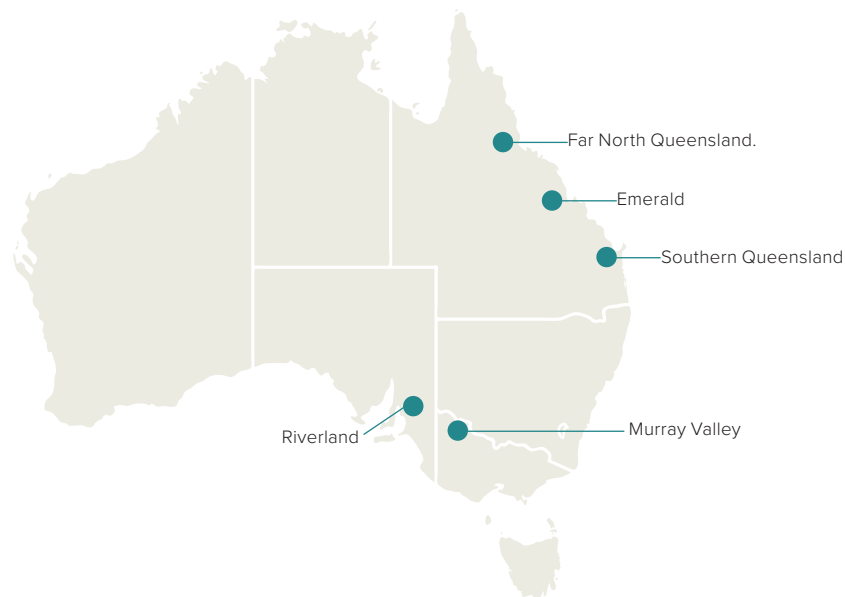
4.72kg in 2023/24 based on the volume supplied.

YEAR ENDING JUNE	2022	2023		2024	
	Value	Value	% YoY	Value	% YoY
Production (t)	183,590	198,415	+8%	227,716	+15%
Production (\$m)	\$336.4	\$368.3	+9%	\$435.3	+18%
Production area (Ha)	5,699	6,118	+7%	6,622	+8%
Fresh Export Volume (t)	77,694	79,412	+2%	95,771	+21%
Fresh Export Value (\$m)	\$183.3	\$184.6	<1%	\$234.4	+27%
Fresh Import Volume (t)	2,183	1,433	-34%	1,068	-26%
Fresh Import Value (\$m)	\$8.8	\$6.3	-29%	\$4.7	-25%
Fresh Supply (t)	104,303	116,355	+12%	128,329	+10%
Fresh Supply Wholesale Value (\$m)	\$216.4	\$251.0	+16%	\$279.1	+11%
Supply per Capita (kg)	4.02	4.43	+10%	4.72	+7%
Retail Supply (t)	96,891	108,086	+12%	119,209	+10%
Retail Supply Wholesale Value (\$m)	\$201.0	\$233.2	+16%	\$259.2	+11%
Food Service Supply (t)	7,412	8,269	+12%	9,120	+10%
Food Service Wholesale Value (\$m)	\$15.4	\$17.8	+16%	\$19.8	+11%

Sources: AC; Citrus Australia (CA); CFVIWA; GTA/TDM; 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



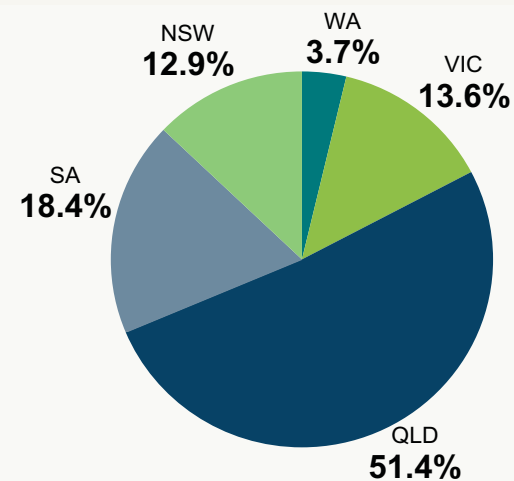
6,622
Ha

PRODUCTION WINDOW



Mar-Oct

2023/24 FRESH MANDARINS PRODUCTION BY STATE



Source: CA

2023/24 FRESH MANDARINS SEASONALITY BY STATE

State	Volume (t)	Jul	Aug	Sep	Oct	Nov	Dec	Jan	Feb	Mar	Apr	May	Jun
Queensland	116,970	High	High	Medium	Low	None	None	None	None	None	None	None	None
South Australia	41,971	High	High	Medium	None	None	None	None	None	None	None	None	None
Victoria	30,938	High	High	Medium	None	None	None	None	None	None	None	None	None
New South Wales	29,368	Medium	High	High	Medium	None	None	None	None	None	None	None	None
Western Australia	8,470	High	Medium	Medium	Low	None	None	None	None	None	None	None	None

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

Source: CA

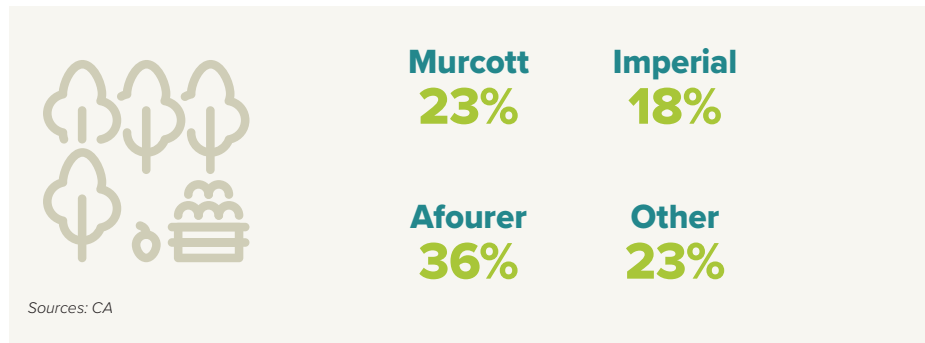
MAIN MANDARINS VARIETIES

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**, **Low Seeded Murcott**, **Honey Bee** and **Royal Honey Murcott**). Murcott mandarins accounted for **23%** production.

Imperial mandarins, an early season domestic variety, with easy to peel rind and low seed count. Imperial mandarins accounted for **18%** of production of fresh production for the year ending June 2024.

W.Mucott/Afourer includes seeded and seedless varieties, has a deep orange rind and lots of flavour. Afourer mandarins , accounted for **36%** of production.



2023/24 FRESH MANDARINS SEASONALITY BY VARIETY

Variety	Volume (t)	Jul	Aug	Sep	Oct	Nov	Dec	Jan	Feb	Mar	Apr	May	Jun
Murcott	51,297	High	Medium	Low	Low	None	None	None	None	None	None	None	None
Imperial	40,146	High	High	Medium	None	None	None	None	None	Low	Medium	High	High
Afourer	80,292	High	Medium	Medium	None	None	None	None	None	None	Low	Medium	High
Processing	4,684	Medium	Medium	Medium	Medium	None	None	None	None	Low	Medium	Medium	Medium
Others	51,297	Medium	Medium	Medium	Medium	Medium	None	None	None	Low	Medium	Medium	Medium

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

Sources: CA

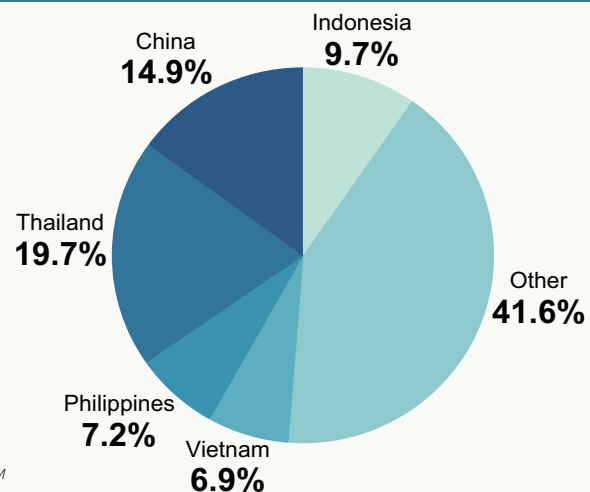
Fresh Mandarins International Trade

FRESH MANDARINS INTERNATIONAL TRADE

Australia is a net exporter of fresh mandarins, over the last three years an average of **80,000+ tonnes** were exported per year. For the year ending June 2024, Australia exported **95,771 tonnes**. The exports and imports over the last five financial years are profiled in the graph below, where imports are counted as negative tonnes.



FRESH MANDARINS EXPORTS



Source: GTA/TDM

For the year ending June 2024, **19.7%** of exported fresh mandarins were sent to **Thailand**, as profiled in the chart above.

Exports by State of Production Origin (Tonnes)				Exports by Country (Tonnes)			
Year Ending June	2022	2023	2024	Year Ending June	2022	2023	2024
Queensland	45,283	47,868	59,322	Thailand	12,645	14,205	18,850
Victoria	13,062	16,022	19,365	China	17,032	17,313	14,310
South Australia	16,209	12,880	13,345	Indonesia	5,111	7,124	9,246
New South Wales	2,575	2,327	3,276	Philippines	8,287	7,100	6,907
Western Australia	559	146	463	Vietnam	2,423	6,046	6,614
Other	6	170	1	Other	32,195	27,624	39,844
TOTAL	77,694	79,412	95,771	TOTAL	77,694	79,412	95,771

FRESH MANDARINS IMPORTS

Imports by State Destination (Tonnes)				Imports by Country (Tonnes)			
Year Ending June	2022	2023	2024	Year Ending June	2022	2023	2024
New South Wales	957	714	511	US	1,481	1,135	751
Western Australia	493	287	327	Egypt	562	279	293
Victoria	723	405	226	New Zealand	3	1	2
Queensland	9	28	3	Vietnam	-	-	1
South Australia	-	< 0.5	< 0.5	Israel	39	18	-
Other	< 0.5	< 0.5	< 0.5	Other	98	< 0.5	21
TOTAL	2,183	1,433	1,068	TOTAL	2,183	1,433	1,068

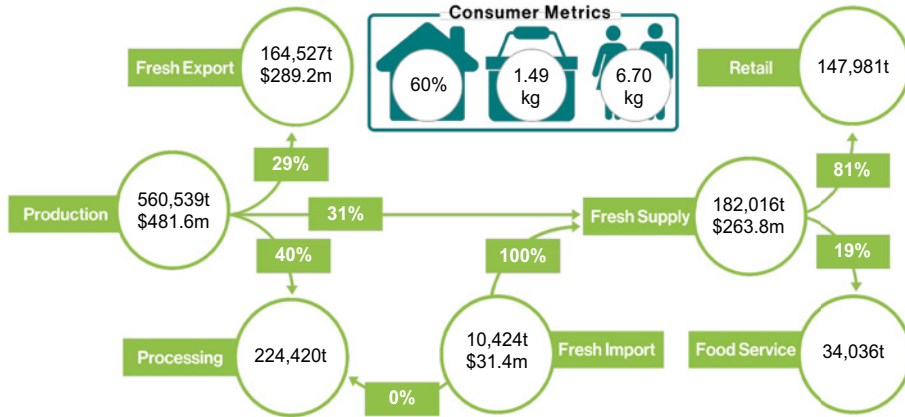
Source: GTA/TDM



Citrus - Oranges

Fresh Oranges Overview

FRESH ORANGES SUPPLY CHAIN – YEAR ENDING JUNE 2024



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

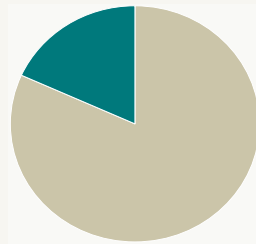
TOTAL PRODUCTION



\$481.6m

560,539t produced and valued at \$481.6m with 40% sent to be processed.

RETAIL VS FOOD SERVICE



■ Retail 81% ■ Food Service 19%

The fresh supply was 182,016t, with 147,981 distributed into retail and 34,036t into food service.

CONSUMER METRICS



60% of Australian households purchased oranges, buying an average of 1.49kg per shopping trip.

PER CAPITA CONSUMPTION



in 2023/24 based on the volume supplied.

YEAR ENDING JUNE	2022	2023		2024	
	Value	Value	% YoY	Value	% YoY
Production (t)	506,072	535,185	+6%	560,539	+5%
Production (\$m)	\$421.3	\$439.1	+4%	\$481.6	+10%
Production area (Ha)	15,365	15,520	+1%	16,153	+4%
Fresh Export Volume (t)	161,052	146,146	-9%	164,527	+13%
Fresh Export Value (\$m)	\$260.2	\$246.4	-5%	\$289.2	+17%
Fresh Import Volume (t)	11,394	9,847	-14%	10,424	+6%
Fresh Import Value (\$m)	\$28.7	\$26.1	-9%	\$31.4	+21%
Fresh Supply (t)	140,705	184,617	+31%	182,016	-1%
Fresh Supply Wholesale Value (\$m)	\$223.4	\$257.6	+15%	\$263.8	+2%
Supply per Capita (kg)	5.42	7.03	+30%	6.70	-5%
Retail Supply (t)	114,955	150,095	+31%	147,981	-1%
Retail Supply Wholesale Value (\$m)	\$182.5	\$209.4	+15%	\$214.4	+2%
Food Service Supply (t)	25,750	34,522	+34%	34,036	-1%
Food Service Wholesale Value (\$m)	\$40.9	\$48.2	+18%	\$49.3	+2%

Sources: AC, Citrus Australia (CA); CFVIWA; GTA/TDM; 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



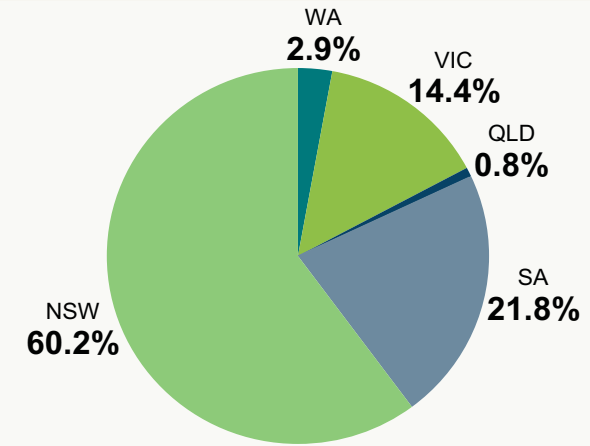
16,153
Ha

PRODUCTION WINDOW



Year-round

2023/24 FRESH ORANGES PRODUCTION BY STATE



Source: CA

2023/24 FRESH ORANGES SEASONALITY BY STATE

State	Volume (t)	Jul	Aug	Sep	Oct	Nov	Dec	Jan	Feb	Mar	Apr	May	Jun
New South Wales	337,260	High	High	High	Medium	Medium	Medium	Medium	Medium	Low	Low	Low	Low
South Australia	122,183	Medium	Medium	High	Medium	Medium	None	None	None	None	None	Low	Low
Victoria	80,465	Medium	High	High	Medium	Medium	Medium	None	None	None	None	Low	Low
Western Australia	16,081	Medium	High	Medium	Medium	Medium	None	None	None	None	None	Low	Low
Queensland	4,550	Medium	Medium	Medium	Medium	Medium	Medium	None	None	None	None	Low	Low

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 **66%** of the production sent to the fresh market.

Valencia oranges, are harvested during the summer months and primarily used for juicing. While accounting for 34% of fresh orange production, valencias contributed the majority of processed orange production in 2023/24.



2023/24 FRESH ORANGES SEASONALITY BY VARIETY

Variety	Volume (t)	Jul	Aug	Sep	Oct	Nov	Dec	Jan	Feb	Mar	Apr	May	Jun
Navel	369,956	High	High	High	Medium	Medium	None	None	None	None	Low	Low	Low
Valencia	190,583	None	None	Low	Low	Low	High	High	High	High	None	None	None

Availability legend: High Medium Low None

Sources: CA

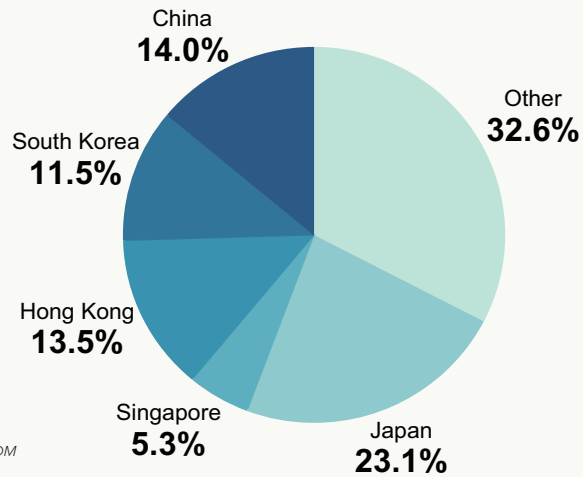
Fresh Oranges International Trade

FRESH ORANGES INTERNATIONAL TRADE

Australia is a net exporter of fresh oranges, with volumes over the last three years averaging **155,000+ tonnes** per year. For the year ending June 2024, Australia exported **164,527 tonnes**. The exports and imports over the last five financial years are profiled in the graph below, where imports are counted as negative tonnes.



FRESH ORANGES EXPORTS



Source: GTA/TDM

For the year ending June 2024, **23.1%** of exported fresh oranges were sent to **Japan**, as profiled in the chart above.

Exports by State of Production Origin (Tonnes)				Exports by Country (Tonnes)			
Year Ending June	2022	2023	2024	Year Ending June	2022	2023	2024
Victoria	77,066	72,806	74,906	Japan	37,857	38,761	38,013
South Australia	54,669	50,583	51,545	China	23,343	20,061	22,955
New South Wales	24,129	19,272	33,936	Hong Kong	33,050	25,554	22,225
Western Australia	3,127	2,149	3,126	Sth. Korea	6,549	7,706	18,921
Queensland	1,987	1,245	1,015	Singapore	9,002	7,206	8,744
Other	75	91	< 0.5	Other	51,251	46,857	53,668
TOTAL	161,052	146,146	164,527	TOTAL	161,052	146,146	164,527

FRESH ORANGES IMPORTS

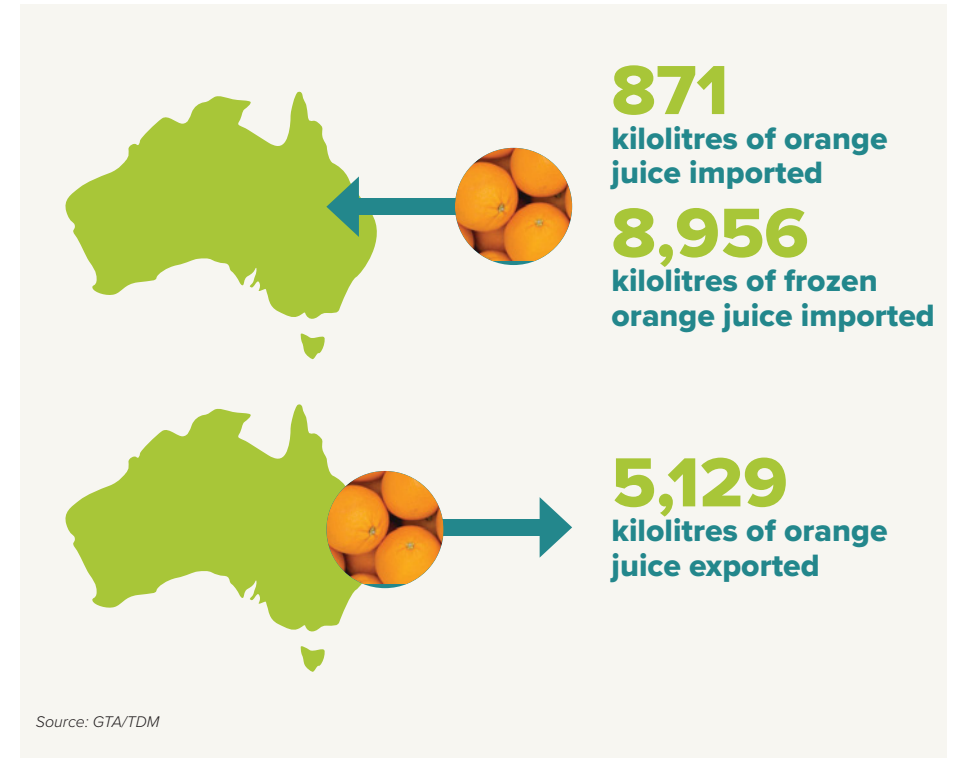
Imports by State Destination (Tonnes)				Imports by Country (Tonnes)			
Year Ending June	2022	2023	2024	Year Ending June	2022	2023	2024
New South Wales	6,617	4,876	5,733	US	10,738	9,127	9,619
Victoria	4,098	3,794	3,540	Egypt	560	627	660
Western Australia	655	948	902	Sri Lanka	-	88	79
Queensland	24	230	206	Israel	-	-	20
South Australia	-	-	44	Iran	1	2	1
Other	-	-	< 0.5	Other	95	2	46
TOTAL	11,394	9,847	10,424	TOTAL	11,394	9,847	10,424

Source: GTA/TDM

Processed Oranges International Trade

2023/24 PROCESSED ORANGES INTERNATIONAL TRADE

For the year ending June 2024, an additional **8,956 kilolitres** of frozen orange juice was imported. Australia also imported **871 kilolitres** of fresh orange juice while exporting **5,129 kilolitres** of fresh orange juice.



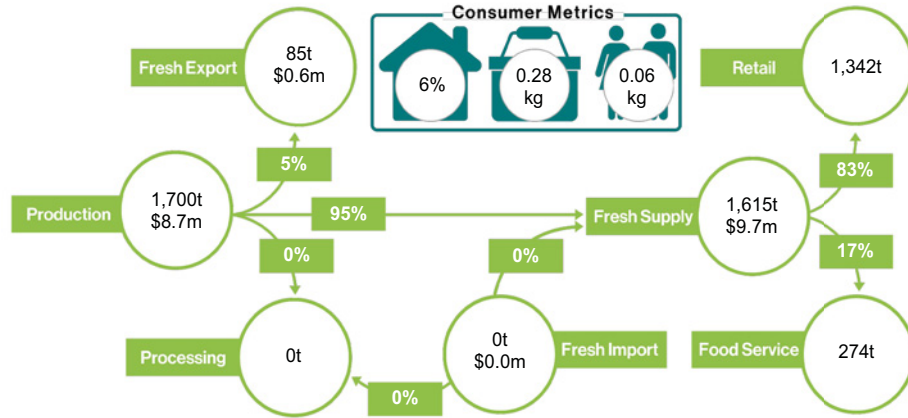
Source: GTA/TDM



Custard Apples

Fresh Custard Apples Overview

FRESH CUSTARD APPLES SUPPLY CHAIN – YEAR ENDING JUNE 2024



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

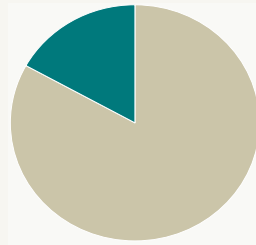
TOTAL PRODUCTION



\$8.7m

1,700t produced and valued at \$8.7m.

RETAIL VS FOOD SERVICE



■ Retail 83% ■ Food Service 17%

The fresh supply was 1,615t, with 1,342t distributed into retail and 274t into food service.

CONSUMER METRICS



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

PER CAPITA CONSUMPTION



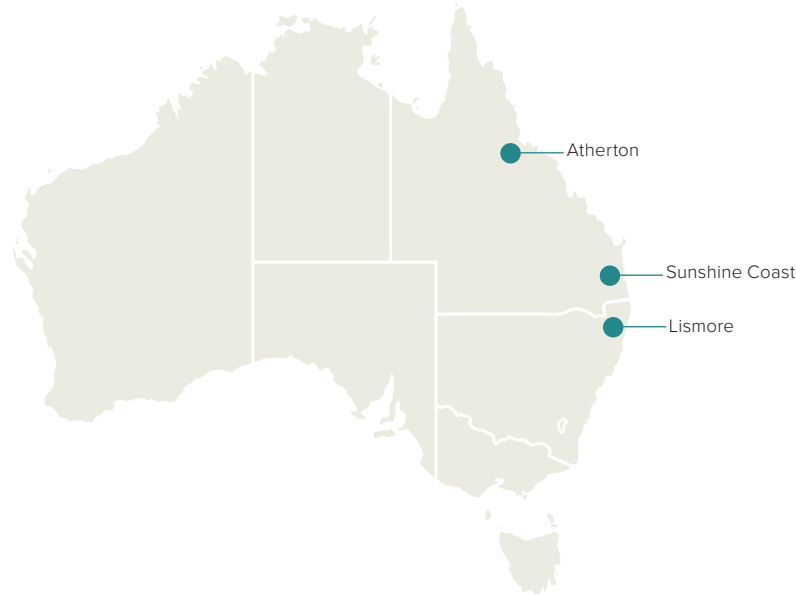
0.06kg in 2023/24 based on the volume supplied.

YEAR ENDING JUNE	2022	2023		2024	
	Value	Value	% YoY	Value	% YoY
Production (t)	1,641	1,324	-19%	1,700	+28%
Production (\$m)	\$8.4	\$8.9	+6%	\$8.7	-2%
Fresh Export Volume (t)	82	66	-19%	85	+28%
Fresh Export Value (\$m)	\$0.5	\$0.6	+6%	\$0.6	-2%
Fresh Import Volume (t)	-	-	-	-	-
Fresh Import Value (\$m)	\$-	\$-	-	\$-	-
Fresh Supply (t)	1,559	1,258	-19%	1,615	+28%
Fresh Supply Wholesale Value (\$m)	\$9.3	\$9.9	+6%	\$9.7	-2%
Supply per Capita (kg)	0.06	0.05	-20%	0.06	+24%
Retail Supply (t)	1,295	1,045	-19%	1,342	+28%
Retail Supply Wholesale Value (\$m)	\$7.8	\$8.3	+6%	\$8.1	-2%
Food Service Supply (t)	264	213	-19%	274	+28%
Food Service Wholesale Value (\$m)	\$1.6	\$1.7	+6%	\$1.6	-2%

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

Fresh Custard Apples Production

MAJOR PRODUCTION AREAS



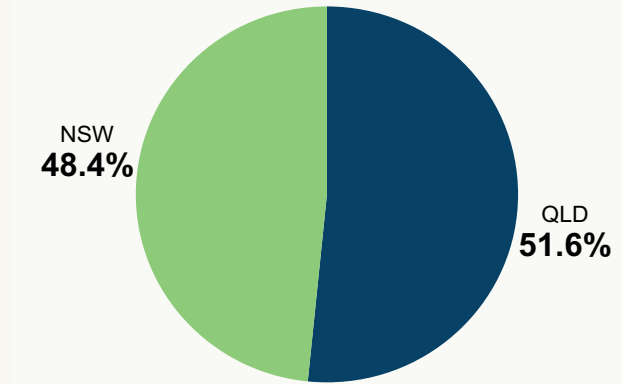
Source: CAA

Custard apple production occurs in Queensland and northern New South Wales. Australian imports and exports of custard apples are negligible. Notably, the predominant custard apple variety grown in Australia is the atemoya, a unique variety.

PRODUCTION WINDOW



2023/24 FRESH CUSTARD APPLES PRODUCTION BY STATE



Source: CAA

2023/24 FRESH CUSTARD APPLES SEASONALITY BY STATE

State	Volume (t)	Jul	Aug	Sep	Oct	Nov	Dec	Jan	Feb	Mar	Apr	May	Jun
Queensland	878	High	Medium	Low	None	None	None	Low	Medium	High	High	High	High
New South Wales	823	High	Medium	Medium	Medium	None	None	None	None	None	Low	Medium	High

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

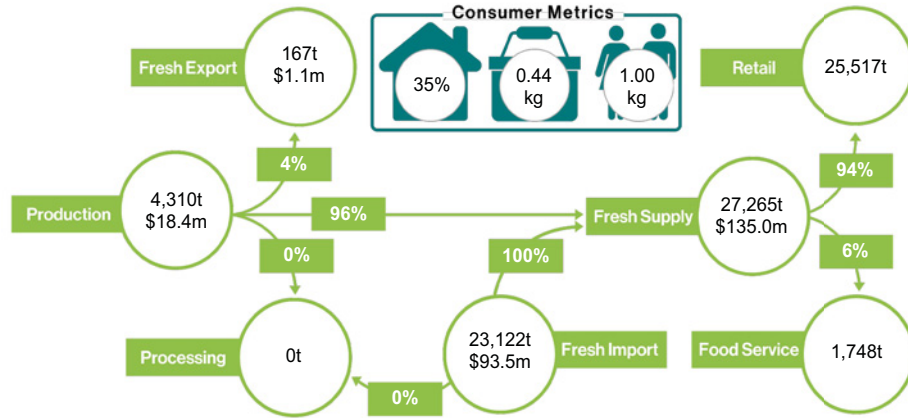
Source: CAA



Kiwifruit

Fresh Kiwifruit Overview

FRESH KIWIFRUIT SUPPLY CHAIN – YEAR ENDING JUNE 2024



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

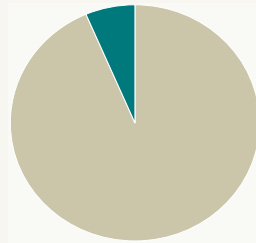
TOTAL PRODUCTION



\$18.4m

4,310t produced and valued at **\$18.4m**.

RETAIL VS FOOD SERVICE



■ Retail 94% ■ Food Service 6%

The fresh supply was **27,265t**, with **25,517t** distributed into retail and **1,748t** into food service.

CONSUMER METRICS



35% of Australian households purchased kiwifruit, buying an average of **444g** per shopping trip.

PER CAPITA CONSUMPTION



1.00kg in 2023/24 based on the volume supplied.

YEAR ENDING JUNE	2022	2023		2024	
	Value	Value	% YoY	Value	% YoY
Production (t)	6,903	3,893	-44%	4,310	+11%
Production (\$m)	\$24.8	\$21.0	-15%	\$18.4	-13%
Fresh Export Volume (t)	353	197	-44%	167	-16%
Fresh Export Value (\$m)	\$2.0	\$1.1	-46%	\$1.1	-
Fresh Import Volume (t)	23,001	21,707	-6%	23,122	+7%
Fresh Import Value (\$m)	\$71.6	\$81.9	+14%	\$93.5	+14%
Fresh Supply (t)	29,551	25,403	-14%	27,265	+7%
Fresh Supply Wholesale Value (\$m)	\$122.5	\$162.8	+33%	\$135.0	-17%
Supply per Capita (kg)	1.14	0.97	-15%	1.00	+4%
Retail Supply (t)	27,656	23,774	-14%	25,517	+7%
Retail Supply Wholesale Value (\$m)	\$114.7	\$152.4	+33%	\$126.4	-17%
Food Service Supply (t)	1,894	1,629	-14%	1,748	+7%
Food Service Wholesale Value (\$m)	\$7.9	\$10.4	+33%	\$8.7	-17%

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

Fresh Kiwifruit Production

MAJOR PRODUCTION AREAS



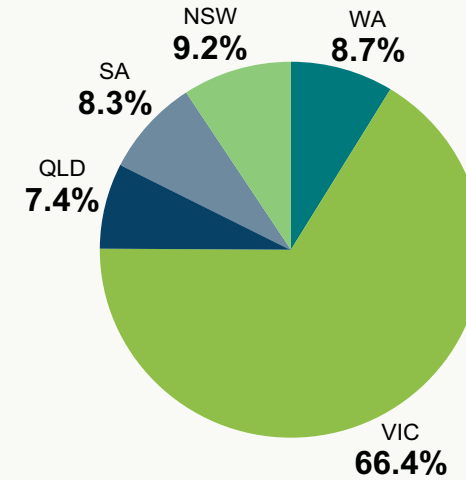
Source: (Freshlogic Analysis)

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



2023/24 FRESH KIWIFRUIT PRODUCTION BY STATE



Source: (Freshlogic Analysis)

2023/24 FRESH KIWIFRUIT SEASONALITY BY STATE

State	Volume (t)	Jul	Aug	Sep	Oct	Nov	Dec	Jan	Feb	Mar	Apr	May	Jun
Victoria	2,862	Low	Low	None	None	None	None	None	None	None	High	High	Low
New South Wales	398	Low	None	None	None	None	None	None	None	Low	Low	Low	Low
Western Australia	375	Low	None	None	None	None	None	None	None	None	Low	Low	Low
South Australia	358	Low	None	None	None	None	None	None	None	None	None	Low	Low
Queensland	318	Low	None	None	None	None	None	None	None	Low	Low	Low	Low

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

Source: (Freshlogic Analysis)

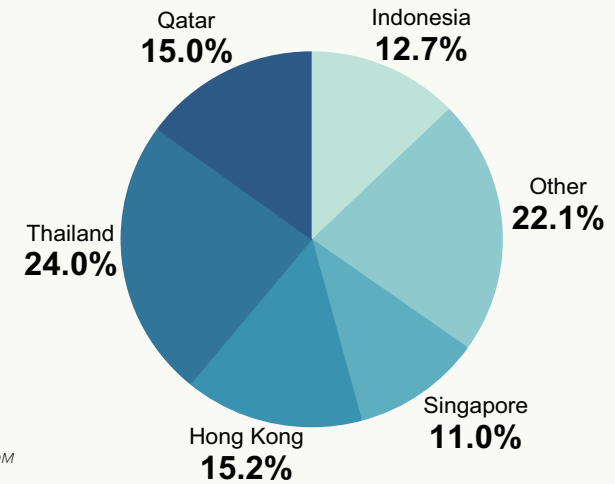
Fresh Kiwifruit International Trade

FRESH KIWIFRUIT INTERNATIONAL TRADE

Australia is a net importer of fresh kiwifruit, typically importing between **21,000-24,000 tonnes** per year. For the year ending June 2024, Australia imported **23,122 tonnes**. The exports and imports over the last five financial years are profiled in the graph below, where imports are counted as negative tonnes.



FRESH KIWIFRUIT EXPORTS



Source: GTA/TDM

For the year ending June 2024, **24.0%** of exported fresh kiwifruit were sent to **Thailand**, as profiled in the chart above.

Exports by State of Production Origin (Tonnes)			
Year Ending June	2022	2023	2024
Victoria	204	161	106
Queensland	35	12	22
Western Australia	-	< 0.5	16
New South Wales	8	4	4
Tasmania	-	< 0.5	< 0.5
Other	106	20	18
TOTAL	353	197	167

Exports by Country (Tonnes)			
Year Ending June	2022	2023	2024
Thailand	14	114	40
Hong Kong	62	5	25
Qatar	24	18	25
Indonesia	39	40	21
Singapore	2	1	18
Other	212	19	37
TOTAL	353	197	167

FRESH KIWIFRUIT IMPORTS

Imports by State Destination (Tonnes)			
Year Ending June	2022	2023	2024
New South Wales	9,815	10,504	10,161
Victoria	7,728	6,492	7,055
Queensland	3,256	2,744	3,177
Western Australia	1,730	1,497	2,001
South Australia	472	470	728
TOTAL	23,001	21,707	23,122

Imports by Country (Tonnes)			
Year Ending June	2022	2023	2024
New Zealand	20,753	18,093	19,879
US	2,247	3,614	3,243
Other	-	< 0.5	-
TOTAL	23,001	21,707	23,122

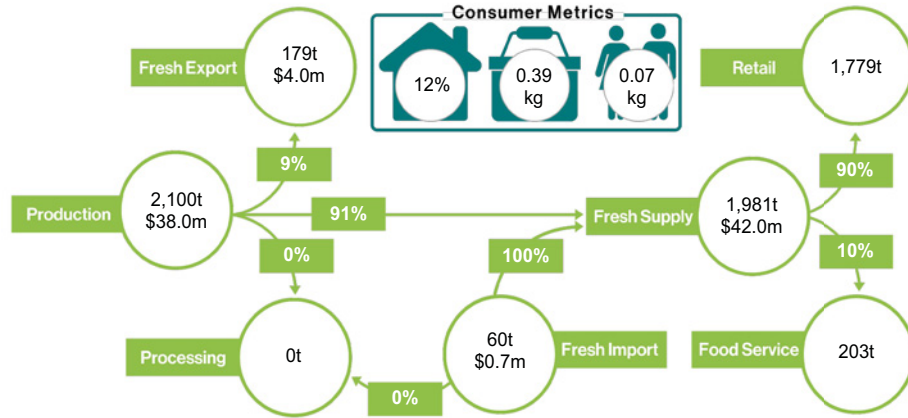
Source: GTA/TDM



Lychees

Fresh Lychees Overview

FRESH LYCHEES SUPPLY CHAIN – YEAR ENDING JUNE 2024



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

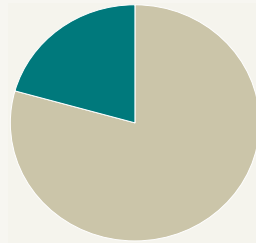
TOTAL PRODUCTION



\$38.0m

2,100t produced and valued at \$38.0m.

RETAIL VS FOOD SERVICE



■ Retail 90% ■ Food Service 10%

The fresh supply was **1,981t**, with **1,779t** distributed into retail and **203t** into food service.

CONSUMER METRICS



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

PER CAPITA CONSUMPTION



in 2023/24 based on the volume supplied.

YEAR ENDING JUNE	2022	2023		2024	
	Value	Value	% YoY	Value	% YoY
Production (t)	2,072	3,215	+55%	2,100	-35%
Production (\$m)	\$41.9	\$47.8	+14%	\$38.0	-21%
Fresh Export Volume (t)	386	275	-29%	179	-35%
Fresh Export Value (\$m)	\$9.5	\$5.0	-47%	\$4.0	-21%
Fresh Import Volume (t)	107	65	-39%	60	-7%
Fresh Import Value (\$m)	\$1.3	\$0.7	-45%	\$0.7	-
Fresh Supply (t)	1,793	3,005	+68%	1,981	-34%
Fresh Supply Wholesale Value (\$m)	\$42.2	\$52.3	+24%	\$42.0	-20%
Supply per Capita (kg)	0.07	0.11	+66%	0.07	-36%
Retail Supply (t)	1,610	2,697	+68%	1,779	-34%
Retail Supply Wholesale Value (\$m)	\$37.9	\$47.0	+24%	\$37.7	-20%
Food Service Supply (t)	184	307	+68%	203	-34%
Food Service Wholesale Value (\$m)	\$4.3	\$5.4	+24%	\$4.3	-20%

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

Fresh Lychees Production

MAJOR PRODUCTION AREAS



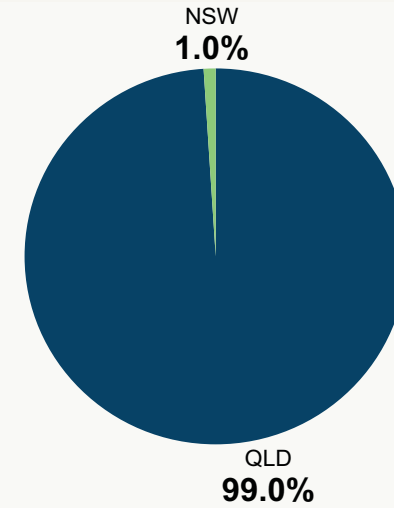
Source: ALGA

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

PRODUCTION WINDOW



2023/24 FRESH LYCHEES PRODUCTION BY STATE



Source: ALGA

2023/24 FRESH LYCHEES SEASONALITY BY STATE

State	Volume (t)	Jul	Aug	Sep	Oct	Nov	Dec	Jan	Feb	Mar	Apr	May	Jun
Queensland	2,079					Low	High	High	High	Low			
New South Wales	21							Low	Medium	High			

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

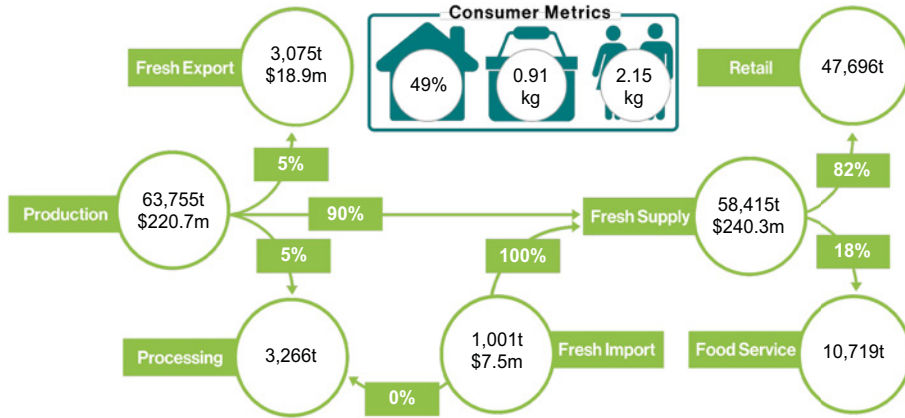
Source: ALGA



Mangoes

Fresh Mangoes Overview

FRESH MANGOES SUPPLY CHAIN – YEAR ENDING JUNE 2024



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

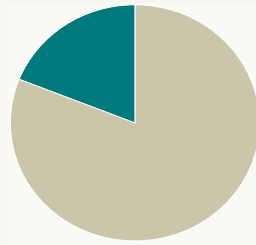
TOTAL PRODUCTION



\$220.7m

63,755t produced and valued at \$220.7m with 5% sent to be processed.

RETAIL VS FOOD SERVICE



■ Retail 82% ■ Food Service 18%

The fresh supply was 58,415t, with 47,696t distributed into retail and 10,719t into food service.

CONSUMER METRICS



49% of Australian households purchased mangoes, buying an average of 907g per shopping trip.

PER CAPITA CONSUMPTION



2.15kg in 2023/24 based on the volume supplied.

YEAR ENDING JUNE	2022	2023		2024	
	Value	Value	% YoY	Value	% YoY
Production (t)	68,600	74,900	+9%	63,755	-15%
Production (\$m)	\$217.9	\$207.9	-5%	\$220.7	+6%
Production area (Ha)	-	15,931	-	15,931	-
Fresh Export Volume (t)	4,747	3,046	-36%	3,075	<1%
Fresh Export Value (\$m)	\$26.3	\$14.5	-45%	\$18.9	+31%
Fresh Import Volume (t)	726	660	-9%	1,001	+52%
Fresh Import Value (\$m)	\$5.7	\$6.0	+4%	\$7.5	+26%
Fresh Supply (t)	61,065	68,687	+12%	58,415	-15%
Fresh Supply Wholesale Value (\$m)	\$228.3	\$228.0	>-1%	\$240.3	+5%
Supply per Capita (kg)	2.35	2.61	+11%	2.15	-18%
Retail Supply (t)	49,485	56,150	+13%	47,696	-15%
Retail Supply Wholesale Value (\$m)	\$185.0	\$186.4	<1%	\$196.2	+5%
Food Service Supply (t)	11,580	12,537	+8%	10,719	-14%
Food Service Wholesale Value (\$m)	\$43.3	\$41.6	-4%	\$44.1	+6%

Note : The production area remains unchanged as the latest data is not yet available.

Sources: AMIA; AC; CFVIWA; GTA/TDM; 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



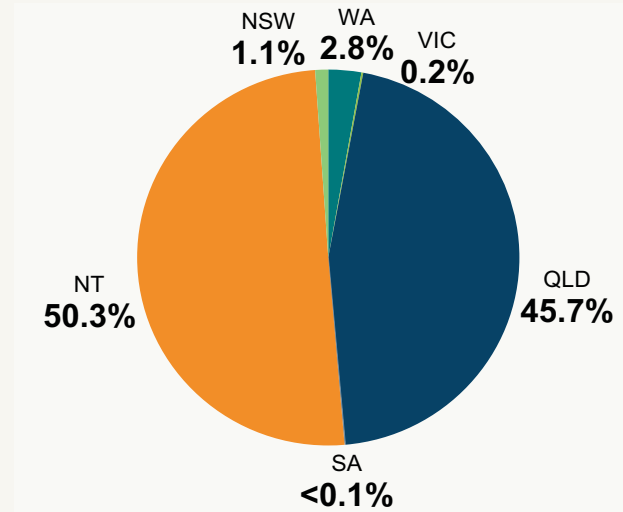
15,931
Ha

PRODUCTION WINDOW



Jul-Mar

2023/24 FRESH MANGOES PRODUCTION BY STATE



Source: AMIA

2023/24 FRESH MANGOES SEASONALITY BY STATE

State	Volume (t)	Jul	Aug	Sep	Oct	Nov	Dec	Jan	Feb	Mar	Apr	May	Jun
Northern Territory	32,049	Low	Low	Low	High	High	Low						
Queensland	29,114				Low	Low	High	High	Low	Low			
Western Australia	1,763				Low	High	Low	Low					
New South Wales	692							Low	Low				
Victoria	99							Low	Low				
South Australia	38				Low	Low	Low						

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

Source: AMIA

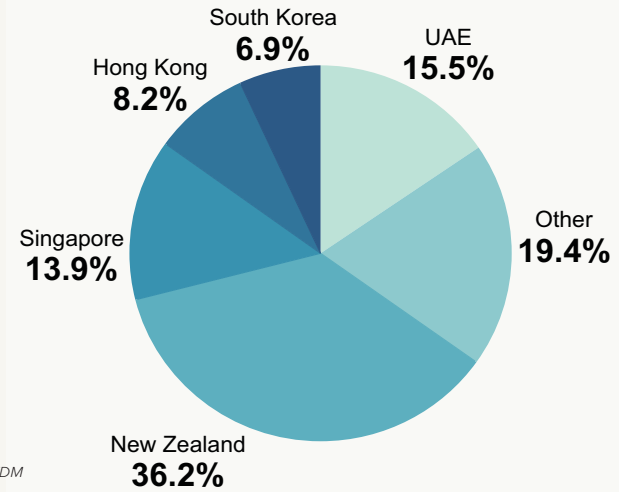
Fresh Mangoes International Trade

FRESH MANGOES INTERNATIONAL TRADE

Australia is a net exporter of fresh mangoes. For the year ending June 2024, Australia exported **3,075 tonnes**. The exports and imports over the last five financial years are profiled in the graph below, where imports are counted as negative tonnes.



FRESH MANGOES EXPORTS



Source: GTA/TDM

For the year ending June 2024, **36.2%** of exported fresh mangoes were sent to **New Zealand**, as profiled in the chart above.

Exports by State of Production Origin (Tonnes)				Exports by Country (Tonnes)			
Year Ending June	2022	2023	2024	Year Ending June	2022	2023	2024
Queensland	3,587	2,302	2,332	New Zealand	2,273	1,105	1,113
New South Wales	547	351	408	UAE	322	397	476
Northern Territory	436	280	227	Singapore	1,735	427	427
Victoria	171	110	96	Hong Kong	408	433	251
Western Australia	5	3	10	South Korea	8	243	212
Other	2	1	2	Other	1	442	595
TOTAL	4,747	3,046	3,075	TOTAL	4,747	3,046	3,075

FRESH MANGOES IMPORTS

Imports by State Destination (Tonnes)				Imports by Country (Tonnes)			
Year Ending June	2022	2023	2024	Year Ending June	2022	2023	2024
Victoria	227	171	323	Vietnam	53	131	344
New South Wales	403	322	314	Thailand	289	126	182
Western Australia	49	112	284	Mexico	73	100	150
Queensland	33	45	53	India	86	68	105
South Australia	3	8	27	Pakistan	59	71	98
Other	11	2	-	Other	168	165	122
TOTAL	726	660	1,001	TOTAL	726	660	1,001

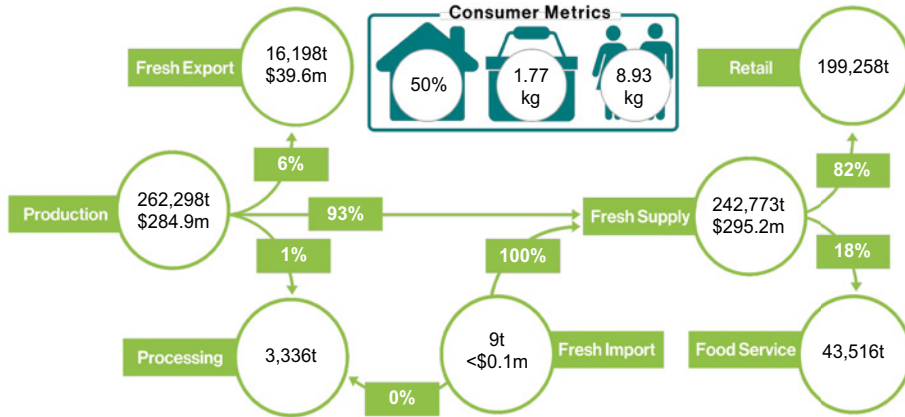
Source: GTA/TDM



Melons - Overview

Fresh Melons Overview

FRESH MELONS SUPPLY CHAIN – YEAR ENDING JUNE 2024



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

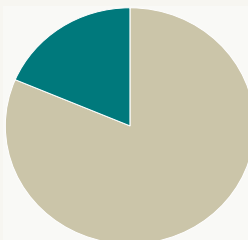
TOTAL PRODUCTION



\$284.9m

262,298t produced and valued at \$284.9m with 1% sent to be processed.

RETAIL VS FOOD SERVICE



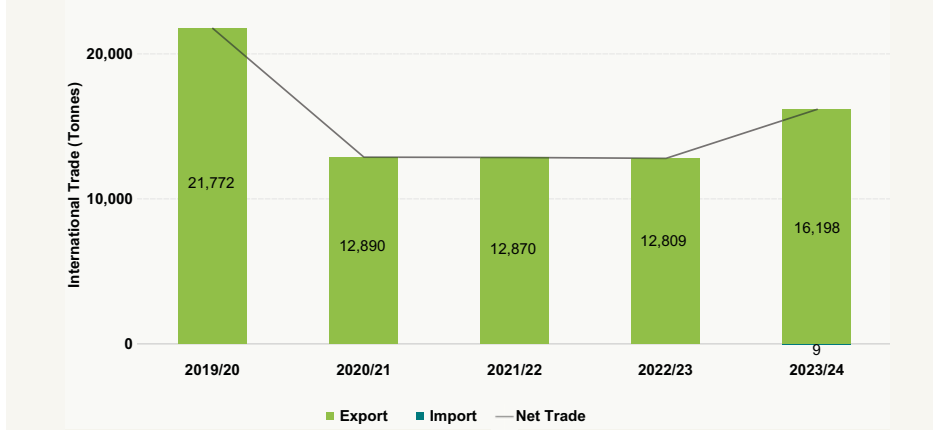
■ Retail 82% ■ Food Service 18%

The fresh supply was 242,773t, with 199,258t distributed into retail and 43,516t into food service.

YEAR ENDING JUNE	2022	2023		2024	
	Value	Value	% YoY	Value	% YoY
Production (t)	242,466	226,022	-7%	262,298	+16%
Production (\$m)	\$248.2	\$248.2	<1%	\$284.9	+15%
Fresh Export Volume (t)	12,870	12,809	>-1%	16,198	+26%
Fresh Export Value (\$m)	\$27.5	\$28.5	+4%	\$39.6	+39%
Fresh Import Volume (t)	-	-	-	9	-
Fresh Import Value (\$m)	\$-	\$-	-	< \$0.1	-
Fresh Supply (t)	226,691	210,265	-7%	242,773	+15%
Fresh Supply Wholesale Value (\$m)	\$264.2	\$263.2	>-1%	\$295.2	+12%
Supply per Capita (kg)	8.74	8.00	-8%	8.93	+12%
Retail Supply (t)	184,557	172,359	-7%	199,258	+16%
Retail Supply Wholesale Value (\$m)	\$214.4	\$214.8	<1%	\$240.9	+12%
Food Service Supply (t)	42,134	37,906	-10%	43,516	+15%
Food Service Wholesale Value (\$m)	\$49.8	\$48.4	-3%	\$54.3	+12%

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

FRESH MELONS INTERNATIONAL TRADE

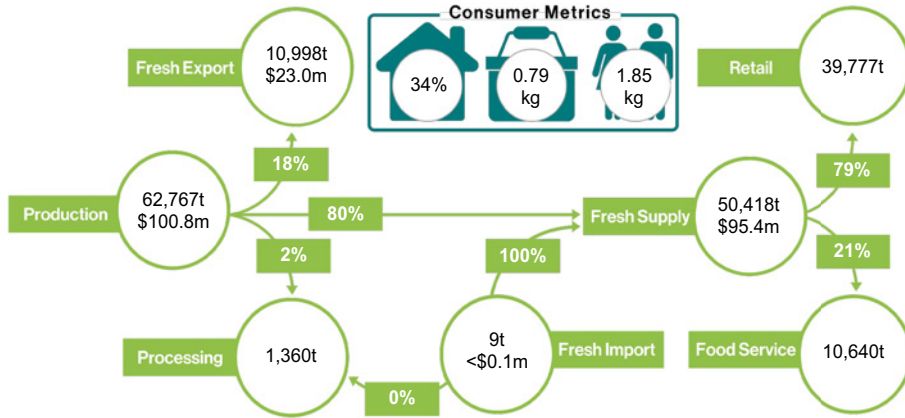




Melons - Muskmelons

Fresh Muskmelons Overview

FRESH MUSKMELONS SUPPLY CHAIN – YEAR ENDING JUNE 2024



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

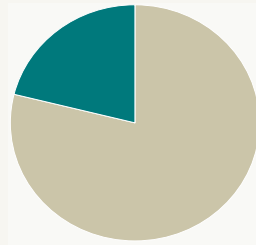
TOTAL PRODUCTION



\$100.8m

62,776t produced and valued at \$100.8m with 2% sent to be processed.

RETAIL VS FOOD SERVICE



■ Retail 79% ■ Food Service 21%

The fresh supply was 50,418t, with 39,777t distributed into retail and 10,640t into food service.

CONSUMER METRICS



34% of Australian households purchased muskmelons, buying an average of 786g per shopping trip.

PER CAPITA CONSUMPTION



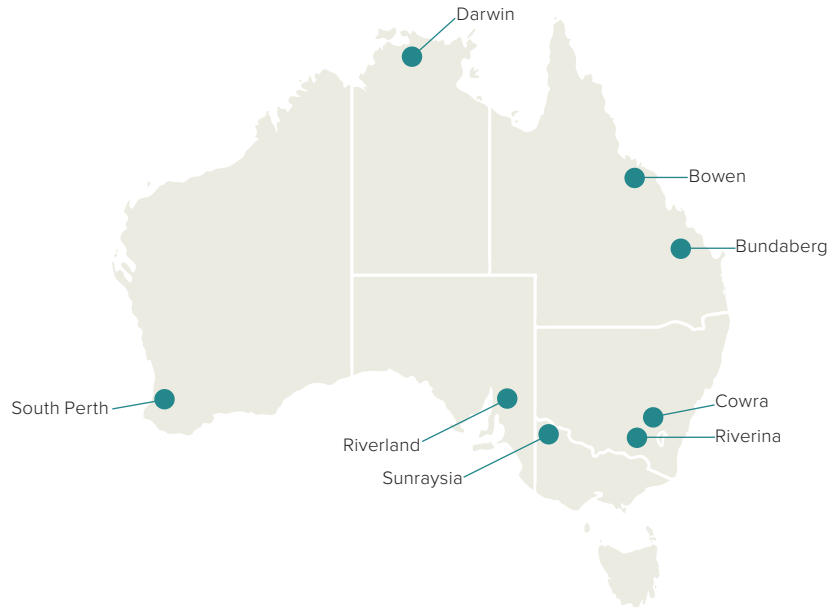
1.85kg in 2023/24 based on the volume supplied.

YEAR ENDING JUNE	2022	2023		2024	
	Value	Value	% YoY	Value	% YoY
Production (t)	57,801	60,299	+4%	62,776	+4%
Production (\$m)	\$81.1	\$89.9	+11%	\$100.8	+12%
Fresh Export Volume (t)	10,336	9,912	-4%	10,998	+11%
Fresh Export Value (\$m)	\$20.6	\$19.7	-4%	\$23.0	+17%
Fresh Import Volume (t)	-	-	-	9	-
Fresh Import Value (\$m)	\$-	\$-	-	< \$0.1	-
Fresh Supply (t)	46,276	49,080	+6%	50,418	+3%
Fresh Supply Wholesale Value (\$m)	\$74.7	\$85.9	+15%	\$95.4	+11%
Supply per Capita (kg)	1.78	1.87	+5%	1.85	>-1%
Retail Supply (t)	36,509	38,722	+6%	39,777	+3%
Retail Supply Wholesale Value (\$m)	\$59.0	\$67.8	+15%	\$75.2	+11%
Food Service Supply (t)	9,766	10,358	+6%	10,640	+3%
Food Service Wholesale Value (\$m)	\$15.8	\$18.1	+15%	\$20.1	+11%

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

Fresh Muskmelons Production

MAJOR PRODUCTION AREAS



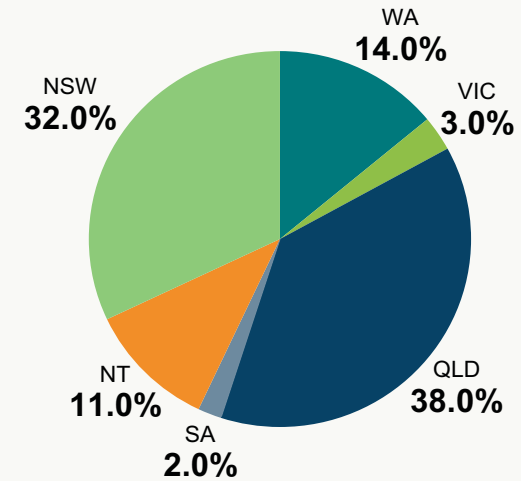
Source: MA

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

PRODUCTION WINDOW



2023/24 FRESH MUSKMELONS PRODUCTION BY STATE



Source: MA

2023/24 FRESH MUSKMELONS SEASONALITY BY STATE

State	Volume (t)	Jul	Aug	Sep	Oct	Nov	Dec	Jan	Feb	Mar	Apr	May	Jun
Queensland	23,855	None	Low	Medium	Medium	High	Medium	Low	Low	None	Low	Low	None
New South Wales	20,088	None	None	None	None	None	None	Low	High	High	Medium	None	None
Western Australia	8,789	Low	High	High	Low	None	None	None	None	None	None	Low	Medium
Northern Territory	6,905	High	High	Medium	Medium	Medium	Medium	None	None	None	Low	Low	Medium
Victoria	1,883	None	None	None	None	None	None	Low	Medium	Medium	Medium	None	None
South Australia	1,256	None	None	None	None	None	None	Low	Low	Low	Low	None	None

Availability legend: High Medium Low None

Source: MA

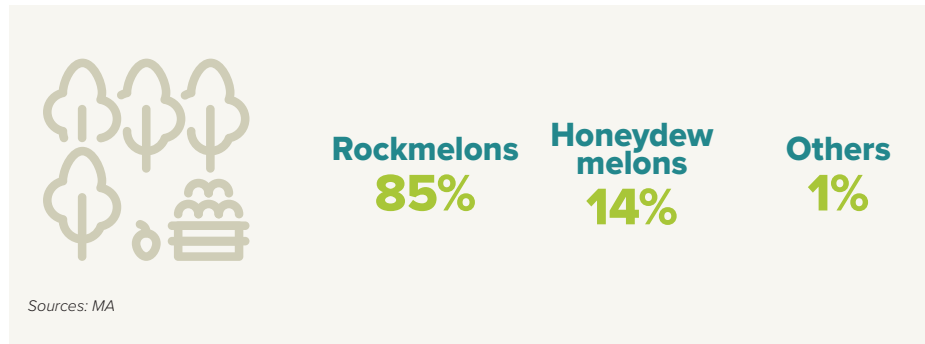
MAIN MUSKMELONS VARIETIES

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

Rockmelons, a round melon with netted greyish-green skin and an orange flesh. Rockmelons accounted for **85%** of fresh production for the year June 2024.

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 which accounted for **1%** of fresh production.



2023/24 FRESH MUSKMELONS SEASONALITY BY VARIETY

Variety	Volume (t)	Jul	Aug	Sep	Oct	Nov	Dec	Jan	Feb	Mar	Apr	May	Jun
Rockmelons	53,359	Low	Medium	Medium	Medium	Medium	Medium	Medium	High	High	Medium	Medium	Medium
Honeydew	8,789	Medium	Medium	Medium	Medium	Low	Low	Low	Low	Low	Low	Low	Low
Piel de Sapo	628	None	None	None	None	None	None	None	None	None	None	None	None

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

Sources: BA

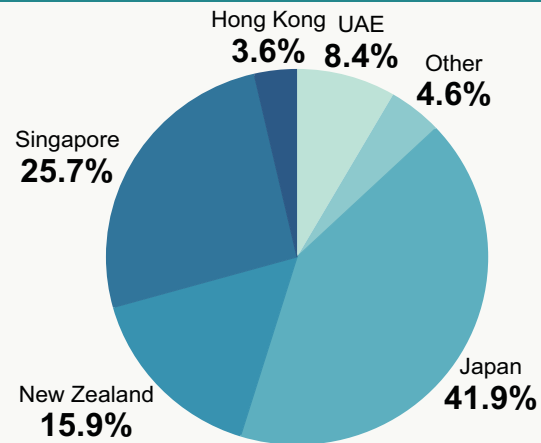
Fresh Muskmelons International Trade

FRESH MUSKMELONS INTERNATIONAL TRADE

Australia is a net exporter of fresh muskmelons, typically exporting between **10,000-15,000 tonnes** per year. For the year ending June 2024, Australia exported **10,998 tonnes**. The exports and imports over the last five financial years are profiled in the graph below.



FRESH MUSKMELONS EXPORTS



Source: GTA/TDM


For the year ending June 2024, **41.9%** of exported fresh muskmelons were sent to **Japan**, as profiled in the chart above.

Exports by State of Production Origin (Tonnes)				Exports by Country (Tonnes)			
Year Ending June	2022	2023	2024	Year Ending June	2022	2023	2024
Queensland	5,983	5,607	6,749	Japan	3,398	4,000	4,603
Western Australia	1,139	2,399	2,121	Singapore	3,826	3,452	2,830
New South Wales	2,532	1,391	1,319	New Zealand	920	732	1,745
Victoria	390	235	482	UAE	612	583	921
Northern Territory	89	271	249	Hong Kong	803	473	396
Other	202	10	76	Other	777	672	503
TOTAL	10,336	9,912	10,998	TOTAL	10,336	9,912	10,998

FRESH MUSKMELONS IMPORTS

Imports by state destination (Tonnes)				Imports by Country (Tonnes)			
Year Ending June	2022	2023	2024	Year Ending June	2022	2023	2024
New South Wales	-	-	7	Sth. Korea	-	-	9
Queensland	-	-	1	TOTAL	-	-	9
Victoria	-	-	1				
Western Australia	-	-	1				
Other	-	-	< 0.5				
TOTAL	-	-	9				

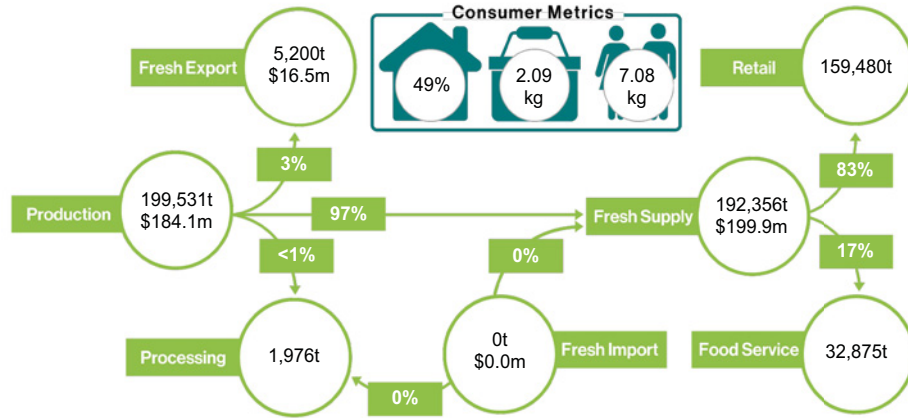
Source: GTA/TDM

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, oval-shaped seeds. The green rind is visible at the edges of the slices. The background is softly blurred, focusing attention on the texture and color of the watermelon.

Melons - Watermelons

Fresh Watermelons Overview

FRESH WATERMELONS SUPPLY CHAIN – YEAR ENDING JUNE 2024



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

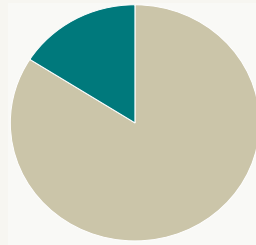
TOTAL PRODUCTION



\$184.1m

199,531t produced and valued at **\$184.1m** with <1% sent to be processed.

RETAIL VS FOOD SERVICE



■ Retail 83% ■ Food Service 17%

The fresh supply was **192,356t**, with **159,480t** distributed into retail and **32,875t** into food service.

CONSUMER METRICS



49% of Australian households purchased watermelons, buying an average of **2.09kg** per shopping trip.

PER CAPITA CONSUMPTION



in 2023/24 based on the volume supplied.

YEAR ENDING JUNE	2022	2023		2024	
	Value	Value	% YoY	Value	% YoY
Production (t)	184,665	165,723	-10%	199,531	+20%
Production (\$m)	\$167.0	\$158.3	-5%	\$184.1	+16%
Fresh Export Volume (t)	2,534	2,897	+14%	5,200	+79%
Fresh Export Value (\$m)	\$6.9	\$8.8	+27%	\$16.5	+88%
Fresh Import Volume (t)	-	-	-	-	-
Fresh Import Value (\$m)	\$-	\$-	-	\$-	-
Fresh Supply (t)	180,416	161,185	-11%	192,356	+19%
Fresh Supply Wholesale Value (\$m)	\$189.4	\$177.3	-6%	\$199.9	+13%
Supply per Capita (kg)	6.95	6.14	-12%	7.08	+15%
Retail Supply (t)	148,048	133,637	-10%	159,480	+19%
Retail Supply Wholesale Value (\$m)	\$155.5	\$147.0	-5%	\$165.7	+13%
Food Service Supply (t)	32,368	27,548	-15%	32,875	+19%
Food Service Wholesale Value (\$m)	\$34.0	\$30.3	-11%	\$34.2	+13%

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

Fresh Watermelons Production

MAJOR PRODUCTION AREAS



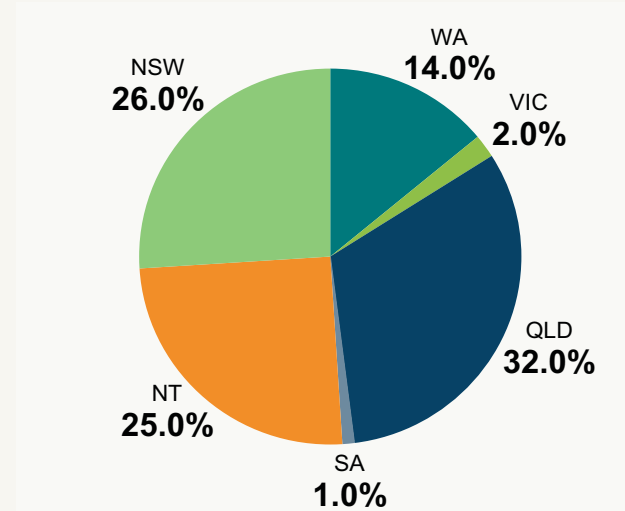
Source: MA

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



2023/24 FRESH WATERMELONS PRODUCTION BY STATE



Source: MA

2023/24 FRESH WATERMELONS SEASONALITY BY STATE

State	Volume (t)	Jul	Aug	Sep	Oct	Nov	Dec	Jan	Feb	Mar	Apr	May	Jun
Queensland	63,850	High	High	High	High	High	High	High	High	High	High	High	High
New South Wales	51,878	None	None	None	None	None	None	High	High	High	High	High	High
Northern Territory	49,883	High	High	High	High	High	None	None	None	None	None	High	High
Western Australia	27,934	High	High	High	High	High	None	None	None	None	None	High	High
Victoria	3,991	None	None	None	None	High	High	High	High	High	High	High	High
South Australia	1,995	None	None	None	None	High	High	High	High	High	High	High	High

Availability legend: High Medium Low None

Source: MA

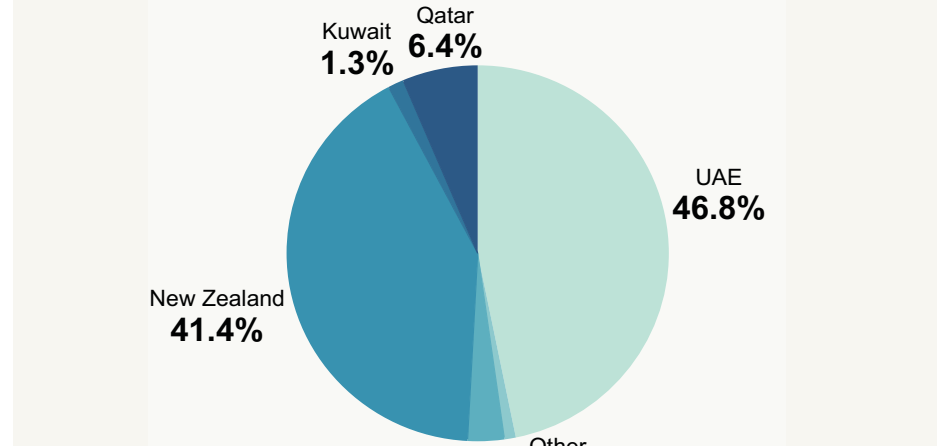
Fresh Watermelons International Trade

FRESH WATERMELONS INTERNATIONAL TRADE

Australia is a net exporter of fresh watermelons. For the year ending June 2024, Australia exported **5,200 tonnes**. The exports and imports over the last five financial years are profiled in the graph below.



FRESH WATERMELONS EXPORTS



Source: GTA/TDM

For the year ending June 2024, **46.8%** of exported fresh watermelons were sent to **United Arab Emirates (UAE)**, as profiled in the chart above.

Exports by State of Production Origin (Tonnes)				Exports by Country (Tonnes)			
Year Ending June	2022	2023	2024	Year Ending June	2022	2023	2024
Queensland	1,598	1,325	3,379	UAE	1,032	1,530	2,434
Northern Territory	150	115	744	New Zealand	961	795	2,154
New South Wales	381	794	515	Qatar	243	319	332
Victoria	266	474	444	Japan	168	108	160
Western Australia	139	131	116	Kuwait	24	44	70
Other	-	58	2	Other	107	101	50
TOTAL	2,534	2,897	5,200	TOTAL	2,534	2,897	5,200

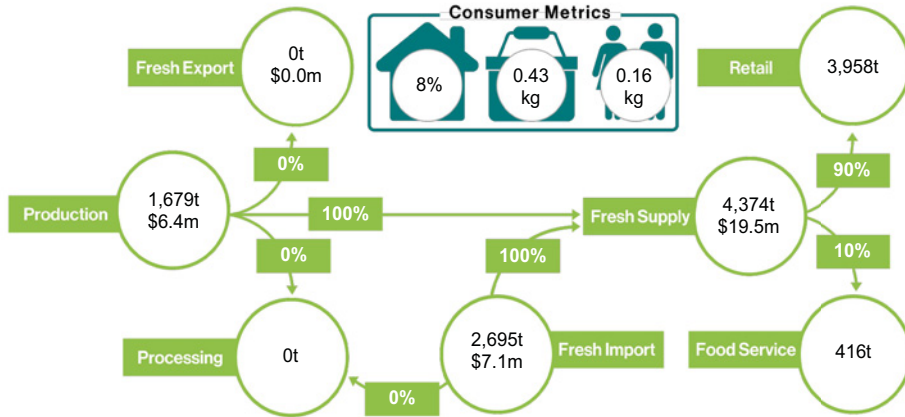
Source: GTA/TDM

Nashi



Fresh Nashi Overview

FRESH NASHI SUPPLY CHAIN – YEAR ENDING JUNE 2024



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

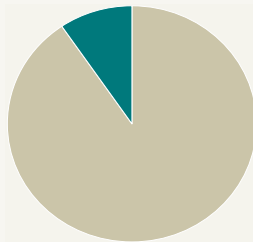
TOTAL PRODUCTION



\$6.4m

1,679t produced and valued at \$6.4m.

RETAIL VS FOOD SERVICE



■ Retail 90% ■ Food Service 10%

The fresh supply was **4,374t**, with **3,958t** distributed into retail and **416t** into food service.

CONSUMER METRICS



8%

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

PER CAPITA CONSUMPTION

0.16kg 

in 2023/24 based on the volume supplied.

YEAR ENDING JUNE	2022	2023		2024	
	Value	Value	% YoY	Value	% YoY
Production (t)	1,551	1,435	-7%	1,679	+17%
Production (\$m)	\$6.5	\$5.7	-13%	\$6.4	+12%
Fresh Export Volume (t)	-	-	-	-	-
Fresh Export Value (\$m)	\$-	\$-	-	\$-	-
Fresh Import Volume (t)	1,778	2,295	+29%	2,695	+17%
Fresh Import Value (\$m)	\$4.7	\$6.5	+40%	\$7.1	+9%
Fresh Supply (t)	3,330	3,730	+12%	4,374	+17%
Fresh Supply Wholesale Value (\$m)	\$16.4	\$17.3	+6%	\$19.5	+12%
Supply per Capita (kg)	0.13	0.14	+11%	0.16	+13%
Retail Supply (t)	3,013	3,376	+12%	3,958	+17%
Retail Supply Wholesale Value (\$m)	\$14.8	\$15.7	+6%	\$17.6	+12%
Food Service Supply (t)	316	354	+12%	416	+17%
Food Service Wholesale Value (\$m)	\$1.6	\$1.6	+6%	\$1.9	+12%

Note : This category has had an update on previous editions to ensure the most accurate and up-to-date figures are presented. Nashi includes clear skin, red skin, honey & duck (ya) pears.

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

Fresh Nashi Production

MAJOR PRODUCTION AREAS



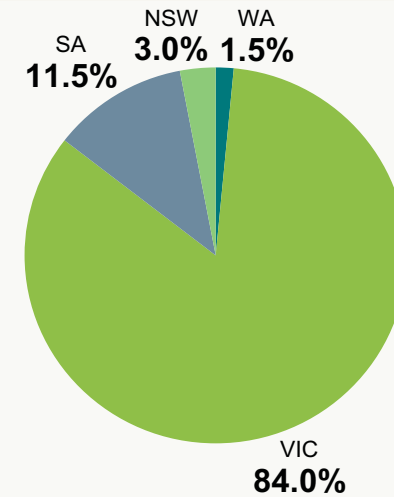
Source: ANGA

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

PRODUCTION WINDOW



2023/24 FRESH NASHI PRODUCTION BY STATE



Source: ANGA

2023/24 FRESH NASHI SEASONALITY BY STATE

State	Volume (t)	Jul	Aug	Sep	Oct	Nov	Dec	Jan	Feb	Mar	Apr	May	Jun
Victoria	1,410	High	High	High	High	High	High	None	Low	Low	Low	Low	Low
South Australia	193	High	High	High	High	High	High	None	None	Low	Low	Low	Low
New South Wales	50	High	High	High	High	High	High	None	None	Low	Low	Low	Low
Western Australia	25	High	High	High	None	None	None	None	None	None	None	None	Low

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 2024, Australia imported **2,695 tonnes**. The exports and imports over the last five financial years are profiled in the graph below, where imports are counted as negative tonnes.



FRESH NASHI IMPORTS

Imports by State Destination (Tonnes)				Imports by Country (Tonnes)			
Year Ending June	2022	2023	2024	Year Ending June	2022	2023	2024
New South Wales	672	917	1,327	China	1,583	2,017	2,461
Victoria	819	989	1,077	Sth. Korea	196	265	234
Western Australia	108	134	175	Other	-	14	0
Queensland	180	256	117	TOTAL	1,778	2,295	2,695
TOTAL	1,778	2,295	2,695				

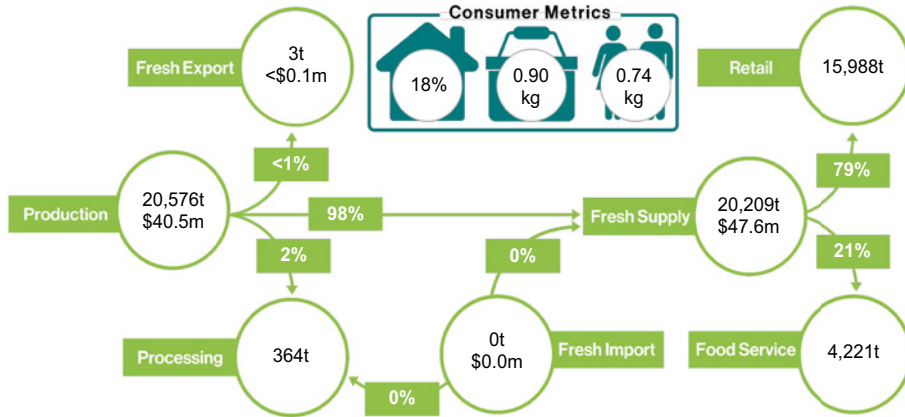
Source: GTA/TDM



Papaya/ Pawpaw

Fresh Papaya/Pawpaw Overview

FRESH PAPAYA/PAWPAP SUPPLY CHAIN – YEAR ENDING JUNE 2024



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

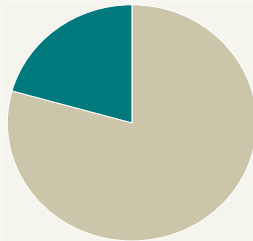
TOTAL PRODUCTION



\$40.5m

20,576t produced and valued at **\$40.5m** with 2% sent to be processed.

RETAIL VS FOOD SERVICE



■ Retail 79% ■ Food service 21%

The fresh supply was **20,209t**, with **15,988t** distributed into retail and **4,221t** into food service.

CONSUMER METRICS



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

PER CAPITA CONSUMPTION



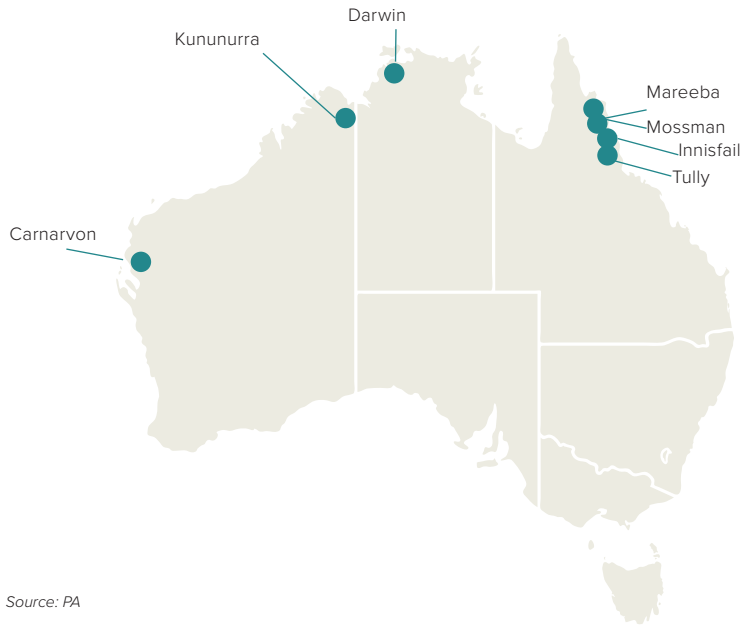
in 2023/24 based on the volume supplied.

YEAR ENDING JUNE	2022	2023		2024	
	Value	Value	% YoY	Value	% YoY
Production (t)	19,370	21,760	+12%	20,576	-5%
Production (\$m)	\$35.4	\$39.0	+10%	\$40.5	+4%
Fresh Export Volume (t)	2	7	>100%	3	-58%
Fresh Export Value (\$m)	< \$0.1	< \$0.1	-33%	< \$0.1	-
Fresh Import Volume (t)	19	2	-90%	-	-100%
Fresh Import Value (\$m)	\$0.1	< \$0.1	-82%	\$-	-100%
Fresh Supply (t)	16,493	21,370	+30%	20,209	-5%
Fresh Supply Wholesale Value (\$m)	\$41.6	\$45.8	+10%	\$47.6	+4%
Supply per Capita (kg)	0.64	0.81	+28%	0.74	-9%
Retail Supply (t)	13,048	16,907	+30%	15,988	-5%
Retail Supply Wholesale Value (\$m)	\$32.9	\$36.2	+10%	\$37.7	+4%
Food Service Supply (t)	3,445	4,463	+30%	4,221	-5%
Food Service Wholesale Value (\$m)	\$8.7	\$9.6	+10%	\$9.9	+4%

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

Fresh Papaya/Pawpaw Production

MAJOR PRODUCTION AREAS



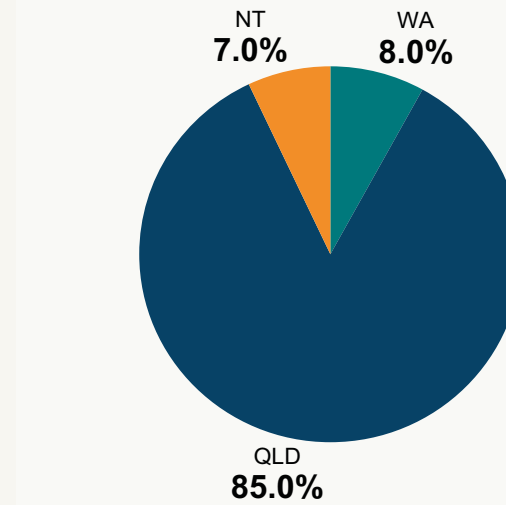
Source: PA

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



2023/24 FRESH PAPAAYA/PAWPAW PRODUCTION BY STATE



Source: PA

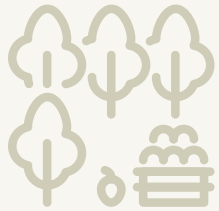
2023/24 FRESH PAPAAYA/PAWPAW SEASONALITY BY STATE

State	Volume (t)	Jul	Aug	Sep	Oct	Nov	Dec	Jan	Feb	Mar	Apr	May	Jun
Queensland	17,489	Low	Low	Low	Low	High	High	Medium	Medium	Medium	Medium	Medium	Medium
Western Australia	1,646	Low	None	None	None	None	None	Low	Low	Low	Low	Low	Low
Northern Territory	1,440	Low	None	None	None	None	None	Low	Low	Low	Low	Low	Low

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

Source: PA

MAIN PAPAYA/PAWPAW CATEGORIES



Red Papaya
85%

Yellow Pawpaw
15%

Sources: BA

2023/24 FRESH PAPAYA/PAWPAW SEASONALITY BY VARIETY

Variety	Volume (t)	Jul	Aug	Sep	Oct	Nov	Dec	Jan	Feb	Mar	Apr	May	Jun
Papaya	17,489	Low	Low	Low	Low	High	High	Medium	Medium	Medium	Medium	Medium	Medium
Pawpaw	3,086	Low	Low	Low	Low	Low	High	Medium	Medium	Medium	Medium	Medium	Medium

Availability legend: High Medium Low None

Sources: PA

Fresh Papaya/Pawpaw International Trade

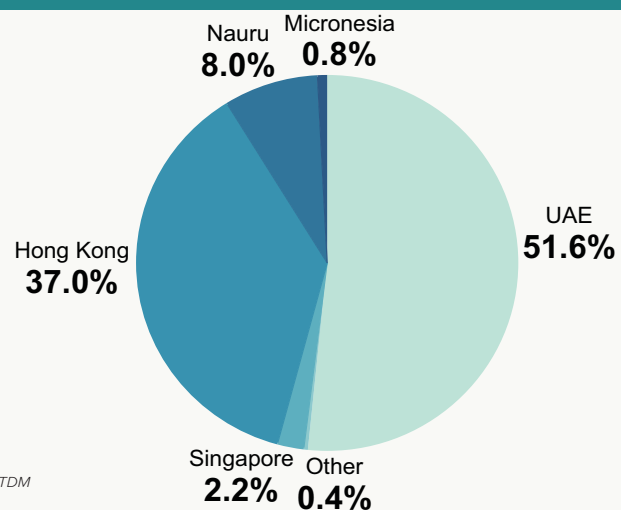
FRESH PAPAYA/PAWPAW INTERNATIONAL TRADE

For the year ending June 2024, Australia exported **three tonnes**. The export and imports over the last five financial years are profiled in the graph below, where imports are counted as negative tonnes.



Sources: GTA/TDM

FRESH PAPAYA/PAWPAW EXPORTS



Source: GTA/TDM

For the year ending June 2024, **51.6%** of exported fresh papaya/pawpaw were sent to **United Arab Emirates (UAE)**, as profiled in the chart above.

Exports by State of Production Origin (Tonnes)				Exports by Country (Tonnes)			
Year Ending June	2022	2023	2024	Year Ending June	2022	2023	2024
Queensland	1	4	2	UAE	-	-	1
Victoria	1	1	< 0.5	Hong Kong	< 0.5	1	1
New South Wales	< 0.5	1	-	Nauru	-	< 0.5	< 0.5
Western Australia	-	< 0.5	-	Singapore	< 0.5	1	< 0.5
Northern Territory	< 0.5	-	-	Micronesia	-	-	< 0.5
Other	< 0.5	< 0.5	< 0.5	Other	2	5	< 0.5
TOTAL	2	7	3	TOTAL	2	7	3

FRESH PAPAYA/PAWPAW IMPORTS

Imports by State Destination (Tonnes)				Imports by Country (Tonnes)			
Year Ending June	2022	2023	2024	Year Ending June	2022	2023	2024
Victoria	19	2	-	Fiji	19	2	-
New South Wales	-	< 0.5	-	Sri Lanka	-	< 0.5	-
Other	-	< 0.5	-	Other	-	< 0.5	-
TOTAL	19	2	-	TOTAL	19	2	-

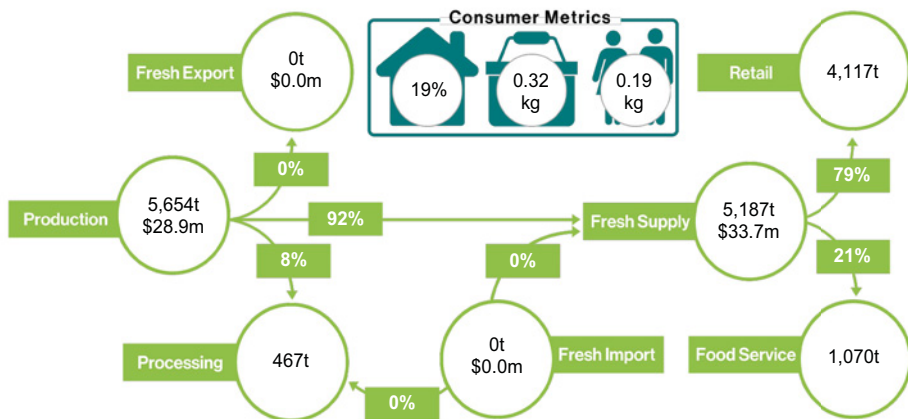
Source: GTA/TDM

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 2024



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

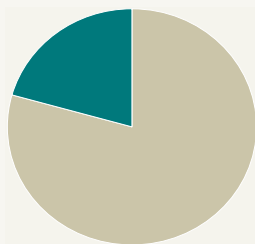
TOTAL PRODUCTION



\$28.9m

5,654t produced and valued at **\$28.9m** with 8% sent to be processed.

RETAIL VS FOOD SERVICE



■ Retail 79% ■ Food Service 21%

The fresh supply was **5,187t**, with **4,117t** distributed into retail and **1,070t** into food service.

CONSUMER METRICS



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

PER CAPITA CONSUMPTION



0.19kg in 2023/24 based on the volume supplied.

YEAR ENDING JUNE	2022	2023		2024	
	Value	Value	% YoY	Value	% YoY
Production (t)	4,787	4,711	-2%	5,654	+20%
Production (\$m)	\$21.5	\$29.6	+38%	\$28.9	-2%
Fresh Export Volume (t)	-	-	-	-	-
Fresh Export Value (\$m)	\$-	\$-	-	\$-	-
Fresh Import Volume (t)	-	-	-	-	-
Fresh Import Value (\$m)	\$-	\$-	-	\$-	-
Fresh Supply (t)	4,392	4,322	-2%	5,187	+20%
Fresh Supply Wholesale Value (\$m)	\$25.1	\$34.5	+38%	\$33.7	-2%
Supply per Capita (kg)	0.17	0.16	-3%	0.19	+16%
Retail Supply (t)	3,486	3,430	-2%	4,117	+20%
Retail Supply Wholesale Value (\$m)	\$19.9	\$27.4	+38%	\$26.8	-2%
Food Service Supply (t)	906	892	-2%	1,070	+20%
Food Service Wholesale Value (\$m)	\$5.2	\$7.1	+38%	\$7.0	-2%

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

Fresh Passionfruit Production

MAJOR PRODUCTION AREAS



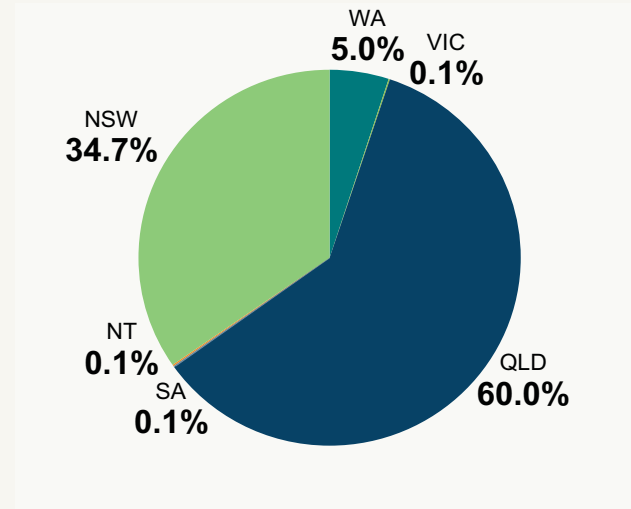
Source: PAI

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



2023/24 FRESH PASSIONFRUIT PRODUCTION BY STATE



Source: PAI

2023/24 FRESH PASSIONFRUIT SEASONALITY BY STATE

State	Volume (t)	Jul	Aug	Sep	Oct	Nov	Dec	Jan	Feb	Mar	Apr	May	Jun
Queensland	3,394	High	High	Medium	Medium	Medium	High	High	Medium	Medium	Medium	Medium	Medium
New South Wales	1,959	High	High	Medium	Medium	Medium	Medium	Medium	Medium	Medium	Medium	Medium	Medium
Western Australia	283	High	High	None	None	None	None	None	None	None	None	Low	Low
Northern Territory	7	High	High	None	None	None	None	None	None	None	None	None	Low
Victoria	6	High	High	None	None	None	High	High	High	High	High	High	High
South Australia	6	High	High	None	None	None	None	None	None	None	None	None	Low

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

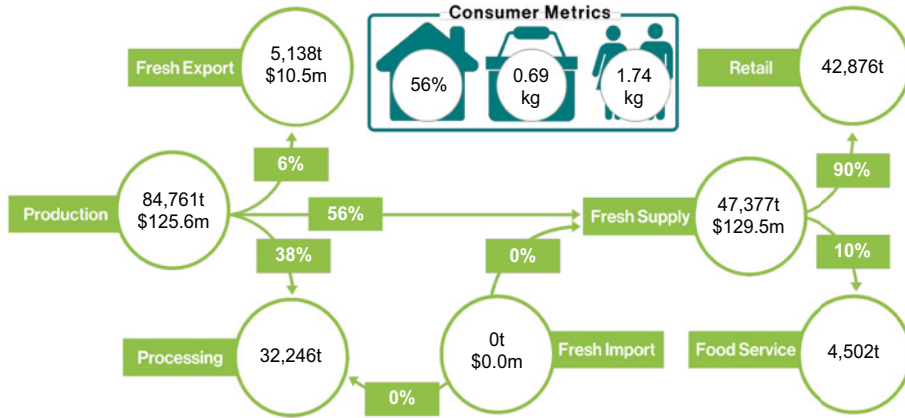
Source: PAI

Pears



Fresh Pears Overview

FRESH PEARS SUPPLY CHAIN – YEAR ENDING JUNE 2024



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

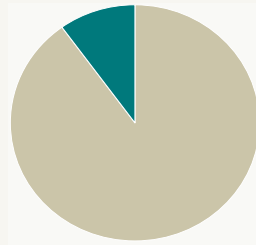
TOTAL PRODUCTION



\$125.6m

84,761t produced and valued at \$125.6m with 38% sent to be processed.

RETAIL VS FOOD SERVICE



■ Retail 90% ■ Food Service 10%

The fresh supply was 47,377t, with 42,876t distributed into retail and 4,502t into food service.

CONSUMER METRICS



56% of Australian households purchased pears, buying an average of 686g per shopping trip.

PER CAPITA CONSUMPTION



1.74kg in 2023/24 based on the volume supplied.

YEAR ENDING JUNE	2022	2023		2024	
	Value	Value	% YoY	Value	% YoY
Production (t)	121,955	92,450	-24%	84,761	-8%
Production (\$m)	\$131.6	\$126.1	-4%	\$125.6	>-1%
Fresh Export Volume (t)	8,743	6,912	-21%	5,138	-26%
Fresh Export Value (\$m)	\$14.1	\$12.1	-14%	\$10.5	-13%
Fresh Import Volume (t)	-	-	-	-	-
Fresh Import Value (\$m)	\$-	\$-	-	\$-	-
Fresh Supply (t)	61,065	53,208	-13%	47,377	-11%
Fresh Supply Wholesale Value (\$m)	\$130.9	\$129.3	-1%	\$129.5	<-1%
Supply per Capita (kg)	2.35	2.03	-14%	1.74	-14%
Retail Supply (t)	54,989	48,152	-12%	42,876	-11%
Retail Supply Wholesale Value (\$m)	\$117.9	\$117.0	>-1%	\$117.2	<-1%
Food Service Supply (t)	6,076	5,056	-17%	4,502	-11%
Food Service Wholesale Value (\$m)	\$13.0	\$12.3	-6%	\$12.3	<-1%

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

Fresh Pears Production

MAJOR PRODUCTION AREAS



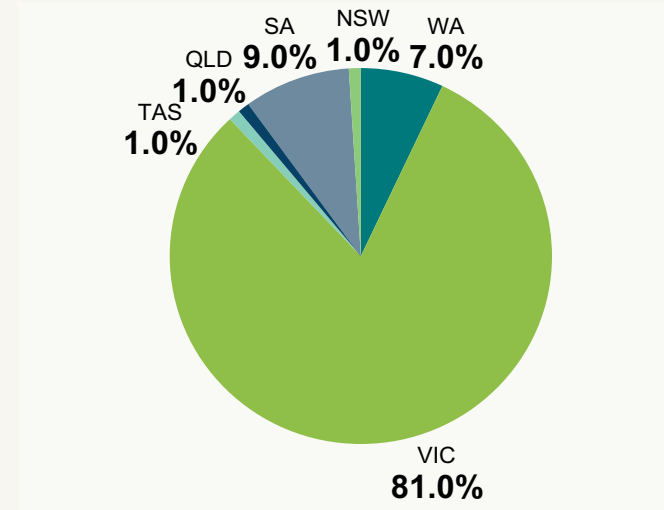
Source: APAL

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 WINDOW



2023/24 FRESH PEARS PRODUCTION BY STATE



Source: APAL

2023/24 FRESH PEARS SEASONALITY BY STATE

State	Volume (t)	Jul	Aug	Sep	Oct	Nov	Dec	Jan	Feb	Mar	Apr	May	Jun
Victoria	68,656	High	High	High	High	High	High	Low	High	High	High	High	High
South Australia	7,628	Low	Low	Low	Low	None	None	None	None	Low	Low	Low	Low
Western Australia	5,933	Low	Low	Low	Low	None	None	None	High	High	Low	Low	Low
Queensland	848	Low	Low	Low	Low	None	None	None	Low	Low	Low	Low	Low
New South Wales	848	Low	Low	Low	Low	None	None	None	Low	Low	Low	Low	Low
Tasmania	848	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

MAIN PEARS VARIETIES

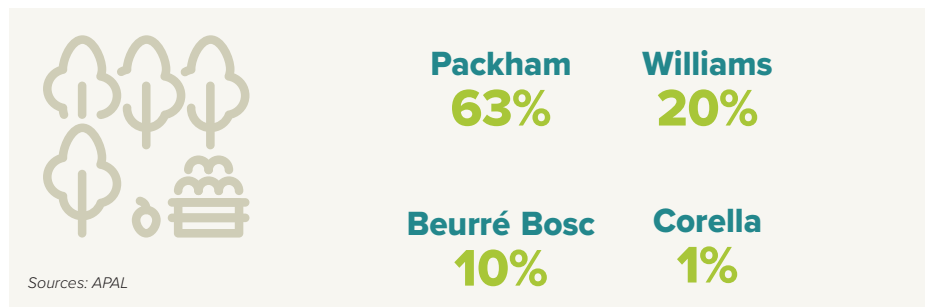
There are number of varieties grown in Australia, although production for the fresh market is dominated by three main varieties. These include:

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 **one percent** of fresh production.



2023/24 FRESH PEARS SEASONALITY BY VARIETY

Variety	Volume (t)	Jul	Aug	Sep	Oct	Nov	Dec	Jan	Feb	Mar	Apr	May	Jun
Packham	33,084	Medium	Medium	Medium	Medium	Medium	Medium	Low	Low	Low	Low	None	None
William	10,503	None	None	None	None	None	None	Low	High	High	High	Medium	None
Beurre Bosc	5,252	Medium	Medium	Medium	Medium	Medium	None	None	Low	High	High	Medium	Medium
Corella	525	Medium	Medium	None	None	None	None	None	None	Low	High	High	Medium
Others	3,151	Medium	Medium	Low	Low	Low	None	None	Low	High	High	Medium	Medium

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

Sources: APAL

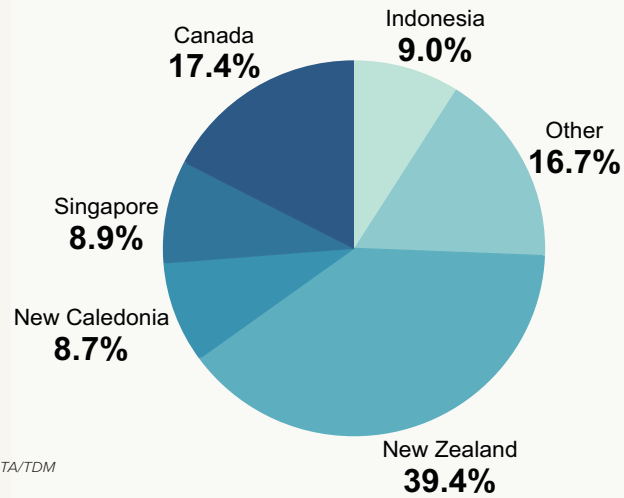
Fresh Pears International Trade

FRESH PEARS INTERNATIONAL TRADE

For the year ending June 2024, Australia exported **5,138 tonnes**. The exports and imports over the last five financial years are profiled in the graph below.



FRESH PEARS EXPORTS



Source: GTA/TDM

For the year ending June 2024, **39.4%** of exported fresh pears were sent to **New Zealand**, as profiled in the chart above.

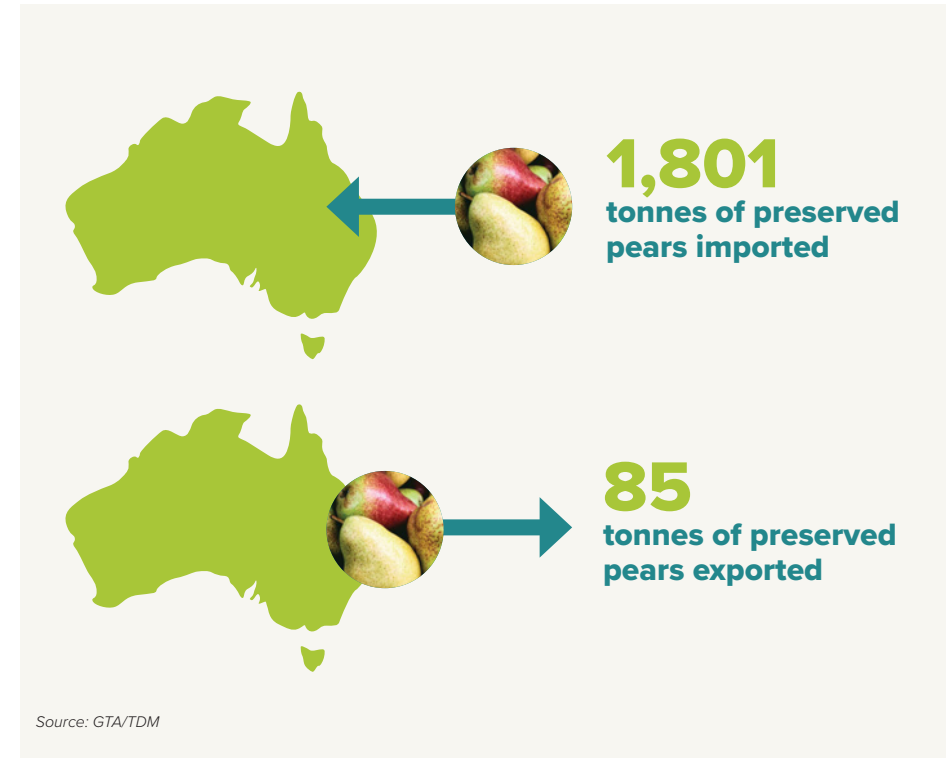
Exports by State of Production Origin (Tonnes)				Exports by Country (Tonnes)			
Year Ending June	2022	2023	2024	Year Ending June	2022	2023	2024
Victoria	8,427	6,677	4,891	New Zealand	3,129	2,857	2,024
New South Wales	163	109	90	Canada	567	379	893
Queensland	126	84	65	Indonesia	727	586	460
Western Australia	14	1	2	Singapore	1,580	919	456
South Australia	-	< 0.5	1	New Caledonia	561	519	448
Other	13	40	89	Other	2,178	1,652	857
TOTAL	8,743	6,912	5,138	TOTAL	8,743	6,912	5,138

Source: GTA/TDM

Processed Pears International Trade

2023/24 PROCESSED PEARS INTERNATIONAL TRADE

For the year ending June 2024, an additional **1,801 tonnes** of preserved pears were imported, while **85 tonnes** was exported.



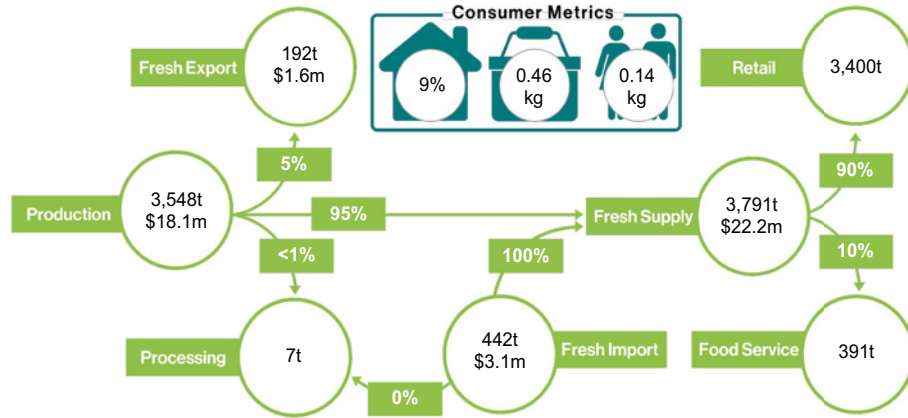
Source: GTA/TDM



Persimmons

Fresh Persimmons Overview

FRESH PERSIMMONS SUPPLY CHAIN – YEAR ENDING JUNE 2024



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

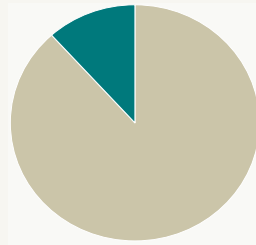
TOTAL PRODUCTION



\$18.1m

3,548t produced and valued at \$18.1m.

RETAIL VS FOOD SERVICE



■ Retail 90% ■ Food Service 10%

The fresh supply was **3,791t**, with **3,400t** distributed into retail and **391t** into food service.

CONSUMER METRICS



9% of Australian households purchased persimmons, buying an average of **458g** per shopping trip.

PER CAPITA CONSUMPTION



in 2023/24 based on the volume supplied.

YEAR ENDING JUNE	2022	2023		2024	
	Value	Value	% YoY	Value	% YoY
Production (t)	2,848	3,471	+22%	3,548	+2%
Production (\$m)	\$14.2	\$17.1	+20%	\$18.1	+5%
Fresh Export Volume (t)	145	158	+9%	192	+21%
Fresh Export Value (\$m)	\$1.1	\$1.4	+22%	\$1.6	+20%
Fresh Import Volume (t)	367	531	+45%	442	-17%
Fresh Import Value (\$m)	\$2.4	\$3.6	+48%	\$3.1	-14%
Fresh Supply (t)	3,064	3,837	+25%	3,791	-1%
Fresh Supply Wholesale Value (\$m)	\$17.8	\$21.8	+23%	\$22.2	+2%
Supply per Capita (kg)	0.12	0.15	+24%	0.14	-5%
Retail Supply (t)	2,707	3,441	+27%	3,400	-1%
Retail Supply Wholesale Value (\$m)	\$15.7	\$19.6	+25%	\$19.9	+2%
Food Service Supply (t)	357	396	+11%	391	-1%
Food Service Wholesale Value (\$m)	\$2.1	\$2.2	+9%	\$2.3	+2%

Note : This category has been updated to reflect revised data for previous years. Persimmons now align with season.

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

Fresh Persimmons Production

MAJOR PRODUCTION AREAS



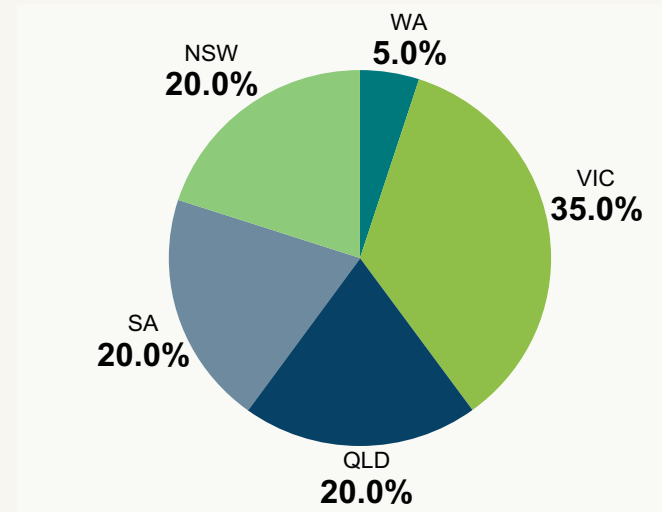
Source: PAus

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

PRODUCTION WINDOW



2023/24 FRESH PERSIMMONS PRODUCTION BY STATE



Source: PAus

2023/24 FRESH PERSIMMONS SEASONALITY BY STATE

State	Volume (t)	Jul	Aug	Sep	Oct	Nov	Dec	Jan	Feb	Mar	Apr	May	Jun
Victoria	1,242									Low	Medium	Medium	Low
South Australia	710									Low	Medium	Low	
Queensland	710								Low	High	Medium	Low	
New South Wales	710									Low	Medium	Medium	Low
Western Australia	177									Low	Medium	Low	Low

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

Source: PAus

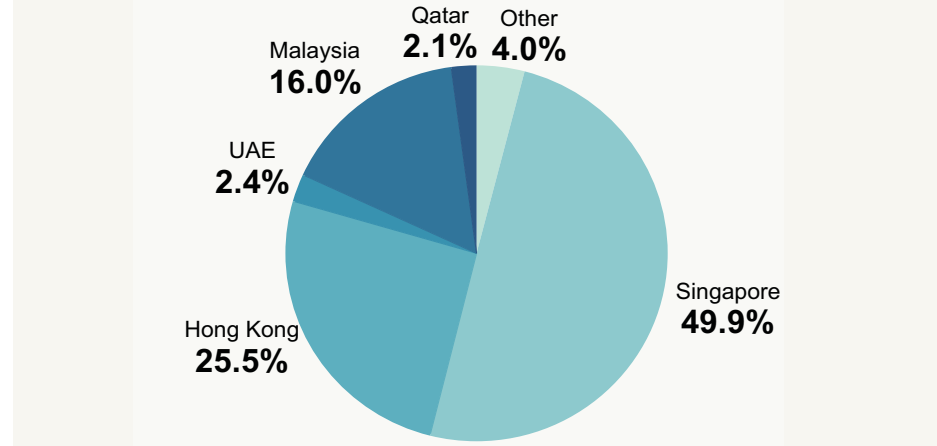
Fresh Persimmons International Trade

FRESH PERSIMMONS INTERNATIONAL TRADE

There is a small amount of international trade of persimmons, typically with more imports than exports. For the year ending 2024, Australia exported **192 tonnes**. The export and imports over the last five financial years are profiled in the graph below, where imports are counted as negative tonnes.



FRESH PERSIMMONS EXPORTS



Source: GTA/TDM

For the year ending June 2024, **49.9%** of exported fresh persimmons were sent to **Singapore**, as profiled in the chart above.

Exports by State of Production Origin (Tonnes)				Exports by Country (Tonnes)			
Year Ending June	2022	2023	2024	Year Ending June	2022	2023	2024
South Australia	74	82	118	Singapore	50	65	96
Queensland	8	27	28	Hong Kong	36	43	49
New South Wales	10	31	25	Malaysia	41	35	31
Victoria	51	15	21	UAE	-	3	5
Western Australia	2	3	< 0.5	Qatar	5	4	4
Other	< 0.5	< 0.5	< 0.5	Other	14	9	8
TOTAL	145	158	192	TOTAL	145	158	192

FRESH PERSIMMONS IMPORTS

Imports by State Destination (Tonnes)				Imports by Country (Tonnes)			
Year Ending June	2022	2023	2024	Year Ending June	2022	2023	2024
New South Wales	310	488	368	New Zealand	367	528	442
Victoria	16	43	51	China	-	3	-
Western Australia	4	-	23	TOTAL	367	531	442
TOTAL	367	531	442				

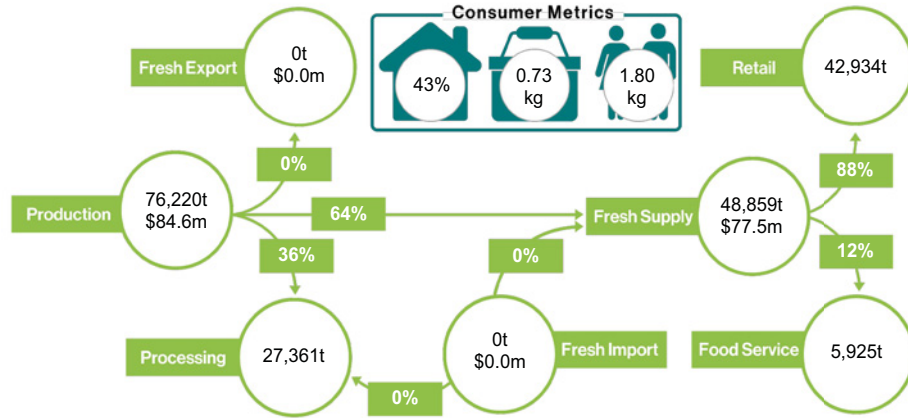
Source: GTA/TDM



Pineapples

Fresh Pineapples Overview

FRESH PINEAPPLES SUPPLY CHAIN – YEAR ENDING JUNE 2024



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

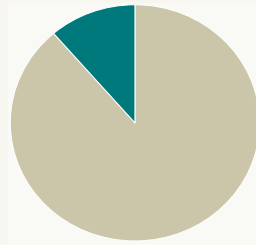
TOTAL PRODUCTION



\$84.6m

76,220t produced and valued at \$84.6m with 36% sent to be processed.

RETAIL VS FOOD SERVICE



■ Retail 88% ■ Food Service 12%

The fresh supply was 48,859t, with 42,934t distributed into retail and 5,925t into food service.

CONSUMER METRICS



43% of Australian households purchased pineapples, buying an average of 727g per shopping trip.

PER CAPITA CONSUMPTION



1.80kg in 2023/24 based on the volume supplied.

YEAR ENDING JUNE	2022	2023		2024	
	Value	Value	% YoY	Value	% YoY
Production (t)	74,653	72,178	-3%	76,220	+6%
Production (\$m)	\$66.7	\$76.0	+14%	\$84.6	+11%
Fresh Export Volume (t)	-	-	-	-	-
Fresh Export Value (\$m)	\$-	\$-	-	\$-	-
Fresh Import Volume (t)	-	-	-	-	-
Fresh Import Value (\$m)	\$-	\$-	-	\$-	-
Fresh Supply (t)	49,799	46,593	-6%	48,859	+5%
Fresh Supply Wholesale Value (\$m)	\$61.2	\$72.2	+18%	\$77.5	+7%
Supply per Capita (kg)	1.92	1.77	-8%	1.80	+1%
Retail Supply (t)	44,266	40,943	-8%	42,934	+5%
Retail Supply Wholesale Value (\$m)	\$54.4	\$63.5	+17%	\$68.1	+7%
Food Service Supply (t)	5,533	5,650	+2%	5,925	+5%
Food Service Wholesale Value (\$m)	\$6.8	\$8.8	+29%	\$9.4	+7%

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

Fresh Pineapples Production

MAJOR PRODUCTION AREAS



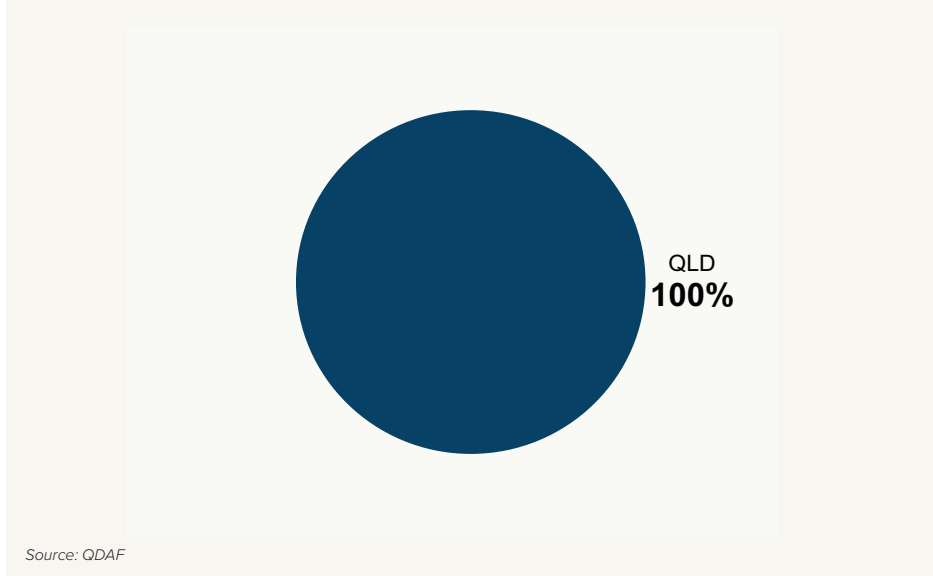
Source: QDAF

The majority of pineapple production occurs in Queensland. **36%** of pineapples grown in Australia in 2024 were sent to be processed, with the majority of this volume either tinned or juiced.

PRODUCTION WINDOW



2023/24 FRESH PINEAPPLES PRODUCTION BY STATE



Source: QDAF

2023/24 FRESH PINEAPPLES SEASONALITY BY STATE

State	Volume (t)	Jul	Aug	Sep	Oct	Nov	Dec	Jan	Feb	Mar	Apr	May	Jun
Queensland	76,220	High	High	Medium	Medium	Medium	Medium	Medium	Medium	Medium	Medium	Medium	Low

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

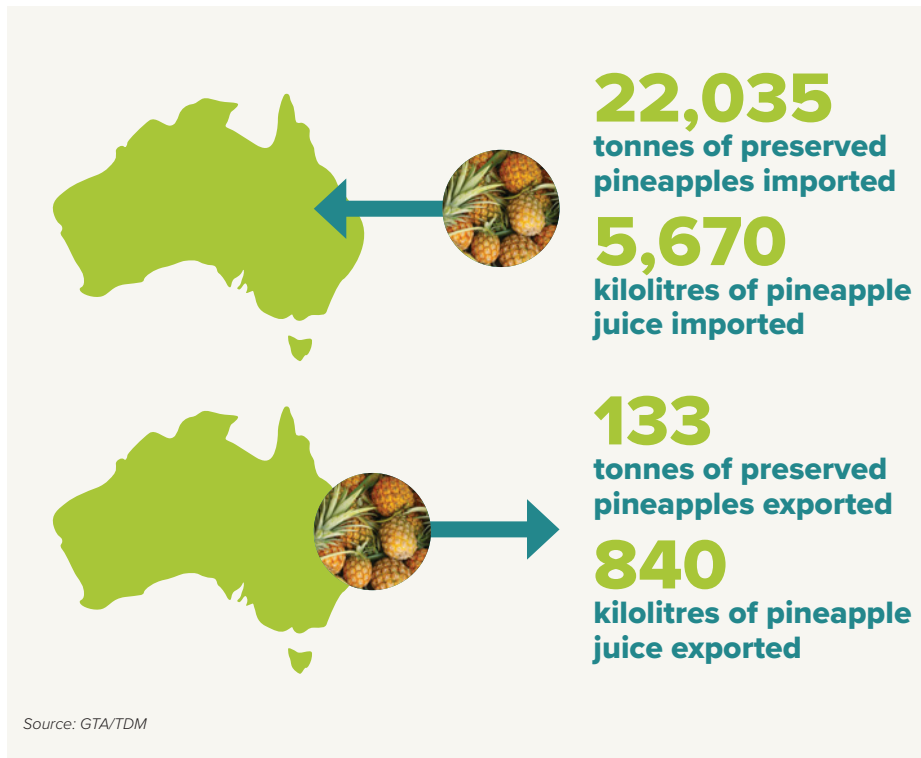
Source: Freshlogic Analysis; QDAF



Processed Pineapples International Trade

2023/24 PROCESSED PINEAPPLES INTERNATIONAL TRADE

For the year ending June 2024, an additional **22,035 tonnes** of preserved pineapples were imported, while **133 tonnes** were exported. Australia also imported **5,670 kilolitres** of pineapple juice, while exporting **840 kilolitres** of pineapple juice.

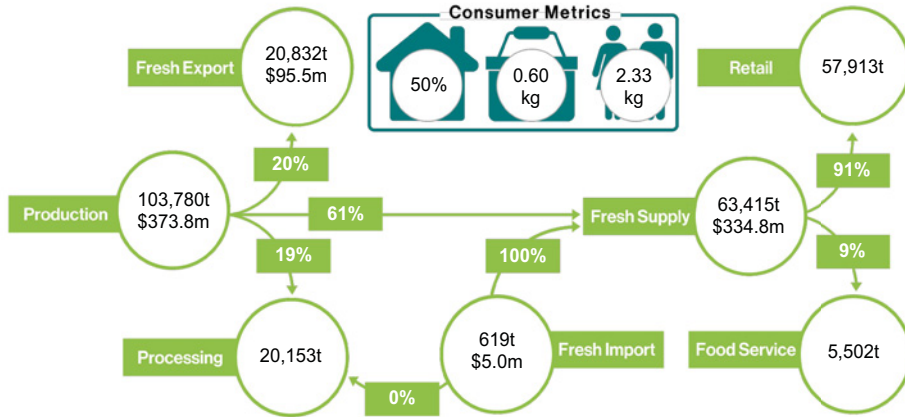




Summerfruit - Overview

Fresh Summerfruit Overview

FRESH SUMMERFRUIT SUPPLY CHAIN – YEAR ENDING JUNE 2024



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

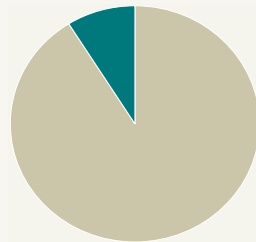
TOTAL PRODUCTION



\$373.8m

103,780t produced and valued at \$373.8m with 19% sent to be processed.

RETAIL VS FOOD SERVICE



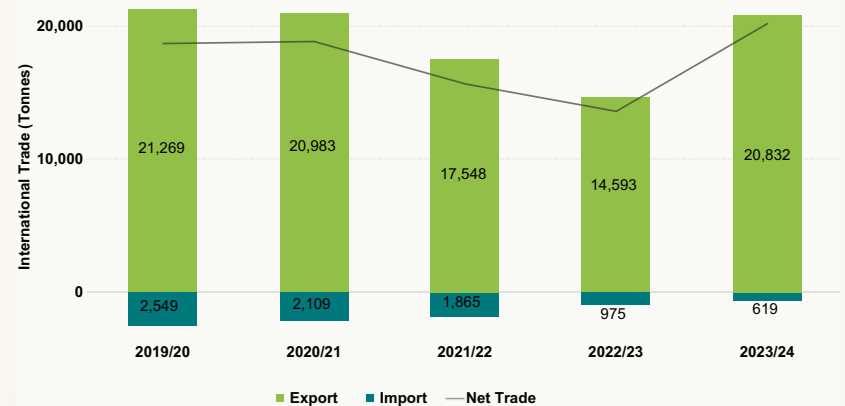
■ Retail 91% ■ Food Service 9%

The fresh supply was 63,415t, with 57,913t distributed into retail and 5,502t into food service.

YEAR ENDING JUNE	2022	2023		2024	
	Value	Value	% YoY	Value	% YoY
Production (t)	116,330	88,743	-24%	103,780	+17%
Production (\$m)	\$337.9	\$301.3	-11%	\$373.8	+24%
Fresh Export Volume (t)	17,548	14,593	-17%	20,832	+43%
Fresh Export Value (\$m)	\$79.6	\$67.1	-16%	\$95.5	+42%
Fresh Import Volume (t)	1,865	975	-48%	619	-37%
Fresh Import Value (\$m)	\$12.3	\$7.2	-42%	\$5.0	-30%
Fresh Supply (t)	78,252	58,628	-25%	63,415	+8%
Fresh Supply Wholesale Value (\$m)	\$313.0	\$281.6	-10%	\$334.8	+19%
Supply per Capita (kg)	3.02	2.23	-26%	2.33	+5%
Retail Supply (t)	71,407	53,513	-25%	57,913	+8%
Retail Supply Wholesale Value (\$m)	\$285.2	\$256.9	-10%	\$305.8	+19%
Food Service Supply (t)	6,844	5,115	-25%	5,502	+8%
Food Service Wholesale Value (\$m)	\$27.8	\$24.6	-11%	\$29.0	+18%

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

FRESH SUMMERFRUIT INTERNATIONAL TRADE

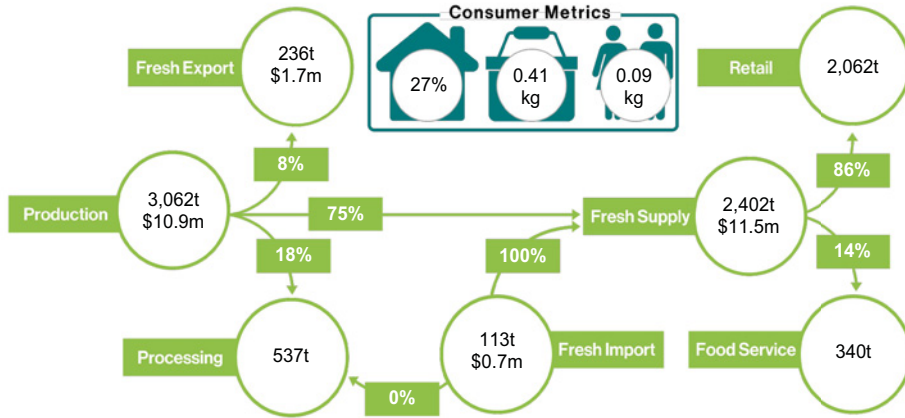




Summerfruit - Apricots

Fresh Apricots Overview

FRESH APRICOTS SUPPLY CHAIN – YEAR ENDING JUNE 2024



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

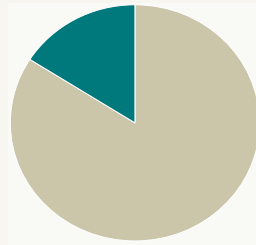
TOTAL PRODUCTION



\$10.9m

3,062t produced and valued at \$10.9m with 18% sent to be processed.

RETAIL VS FOOD SERVICE



■ Retail 86% ■ Food Service 14%

The fresh supply was 2,402t, with 2,062t distributed into retail and 340t into food service.

CONSUMER METRICS



27% of Australian households purchased apricots, buying an average of 414g per shopping trip.

PER CAPITA CONSUMPTION



in 2023/24 based on the volume supplied.

YEAR ENDING JUNE	2022	2023		2024	
	Value	Value	% YoY	Value	% YoY
Production (t)	3,448	2,495	-28%	3,062	+23%
Production (\$m)	\$15.2	\$9.5	-37%	\$10.9	+15%
Fresh Export Volume (t)	264	77	-71%	236	>100%
Fresh Export Value (\$m)	\$1.7	\$0.5	-70%	\$1.7	>100%
Fresh Import Volume (t)	153	98	-36%	113	+15%
Fresh Import Value (\$m)	\$1.0	\$0.4	-61%	\$0.7	+72%
Fresh Supply (t)	2,732	2,080	-24%	2,402	+16%
Fresh Supply Wholesale Value (\$m)	\$16.8	\$11.1	-34%	\$11.5	+4%
Supply per Capita (kg)	0.11	0.08	-25%	0.09	+12%
Retail Supply (t)	2,345	1,785	-24%	2,062	+16%
Retail Supply Wholesale Value (\$m)	\$14.4	\$9.5	-34%	\$9.9	+4%
Food Service Supply (t)	387	295	-24%	340	+16%
Food Service Wholesale Value (\$m)	\$2.4	\$1.6	-34%	\$1.6	+4%

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

Fresh Apricots Production

MAJOR PRODUCTION AREAS



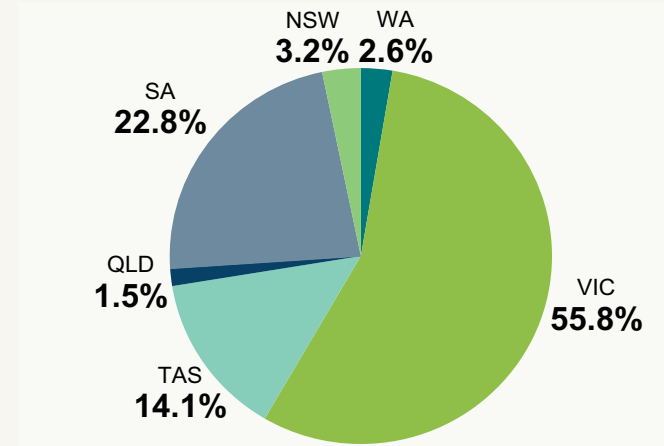
Source: SAL

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



2023/24 FRESH APRICOTS PRODUCTION BY STATE



Source: SAL

2023/24 FRESH APRICOTS SEASONALITY BY STATE

State	Volume (t)	Jul	Aug	Sep	Oct	Nov	Dec	Jan	Feb	Mar	Apr	May	Jun
Victoria	1,707					High	High	High	High	Medium			
South Australia	698					High	High	Medium	Medium				
Tasmania	430						High	High	High				
New South Wales	99					High	High	High	High				
Western Australia	81					High	High	High	High				
Queensland	46					High	High	High	High				

Availability legend: High Medium Low None

Source: SAL

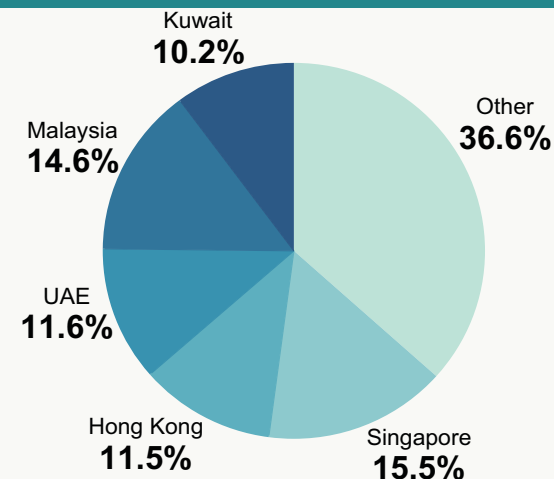
Fresh Apricots International Trade

FRESH APRICOTS INTERNATIONAL TRADE

Australia is a net exporter of fresh apricots. For the year ending June 2024, Australia exported **236 tonnes**. The exports and imports over the last five financial years are profiled in the graph below, where imports are counted as negative tonnes.



FRESH APRICOTS EXPORTS



Source: GTA/TDM

For the year ending June 2024, **15.5%** of exported fresh apricots were sent to **Singapore** as profiled in the chart above.

Exports by State of Production Origin (Tonnes)				Exports by Country (Tonnes)			
Year Ending June	2022	2023	2024	Year Ending June	2022	2023	2024
Victoria	210	60	186	Singapore	37	22	37
New South Wales	41	6	36	Malaysia	12	8	35
Queensland	12	9	6	UAE	84	2	27
South Australia	1	1	4	Hong Kong	29	11	27
Tasmania	-	-	< 0.5	Kuwait	18	13	24
Other	-	< 0.5	4	Other	85	21	86
TOTAL	264	77	236	TOTAL	264	77	236

FRESH APRICOTS IMPORTS

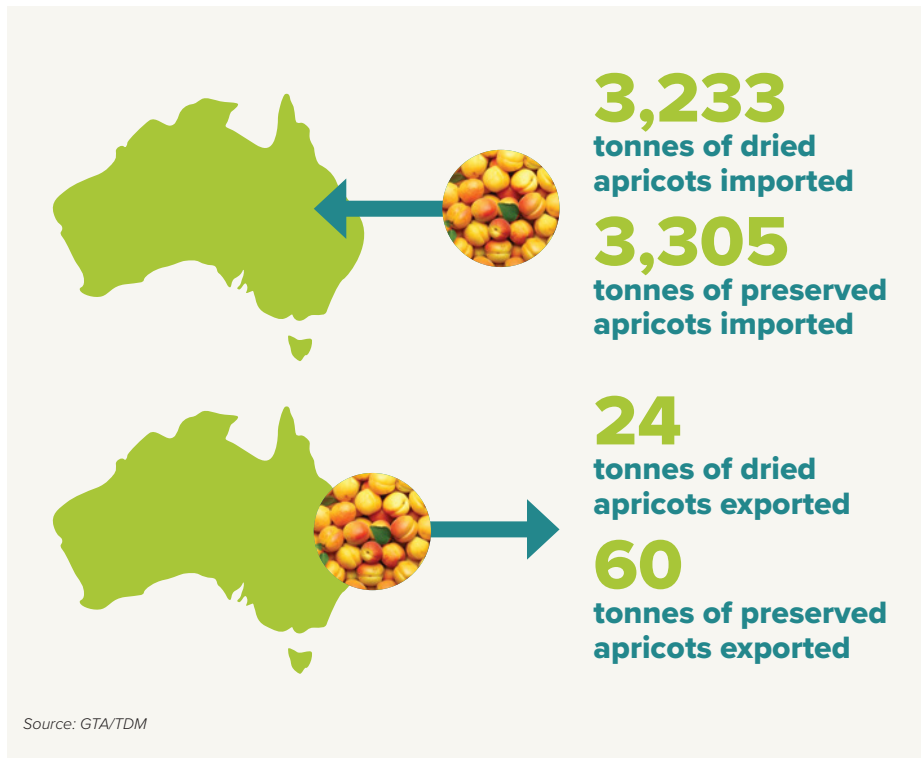
Imports by State Destination (Tonnes)				Imports by Country (Tonnes)			
Year Ending June	2022	2023	2024	Year Ending June	2022	2023	2024
Western Australia	50	25	58	New Zealand	149	16	113
New South Wales	67	36	37	South Africa	-	74	-
Victoria	32	18	14	US	1	9	-
Queensland	4	18	3	Syria	3	-	-
TOTAL	153	98	113	TOTAL	153	98	113

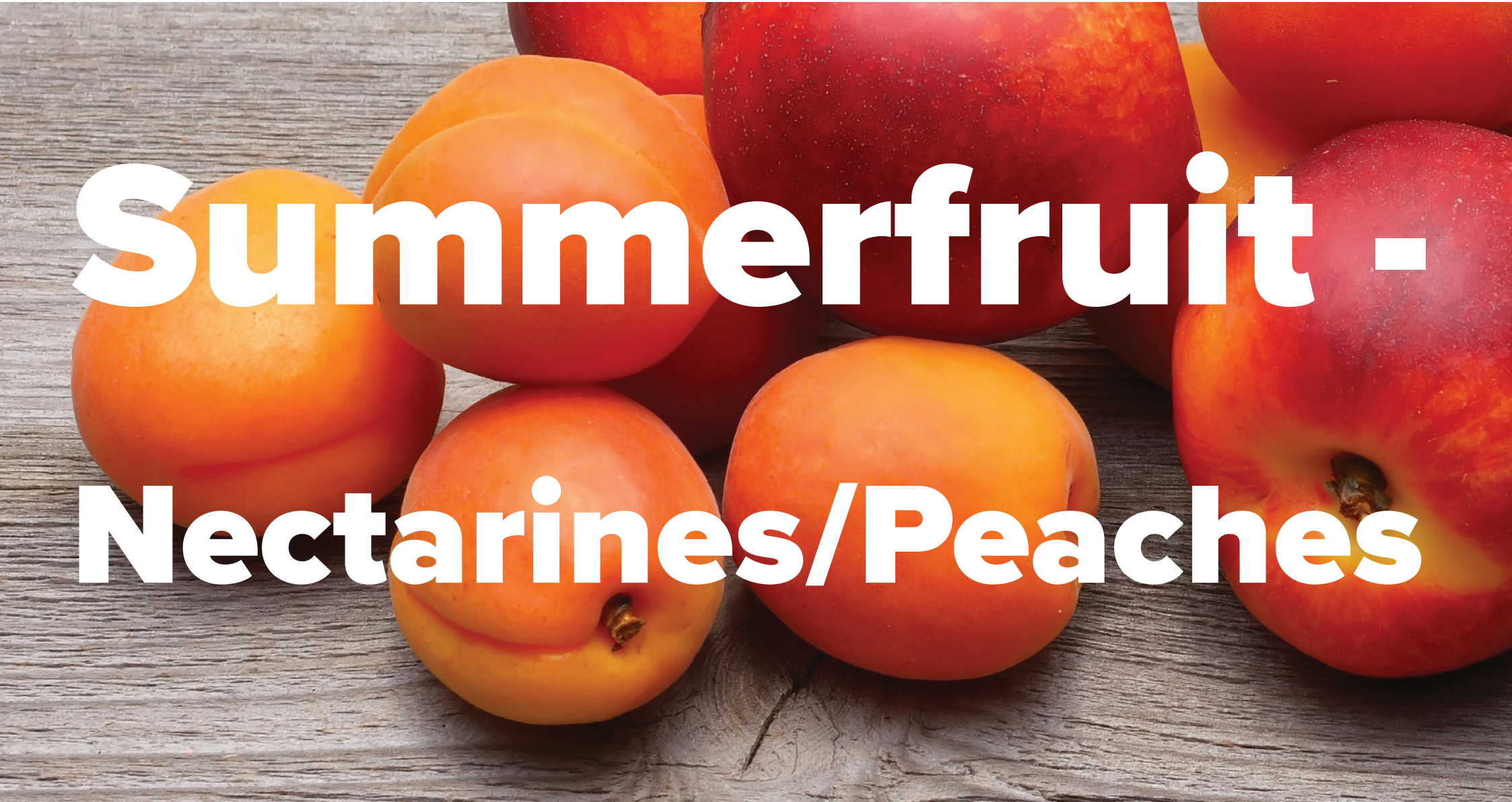
Source: GTA/TDM

Processed Apricots International Trade

2023/24 PROCESSED APRICOTS INTERNATIONAL TRADE

For the year ending June 2024, an additional **3,233 tonnes** of dried apricots and **3,305 tonnes** of preserved apricots were imported, while **24 tonnes** of dried apricots and **60 tonnes** of preserved apricots were exported.

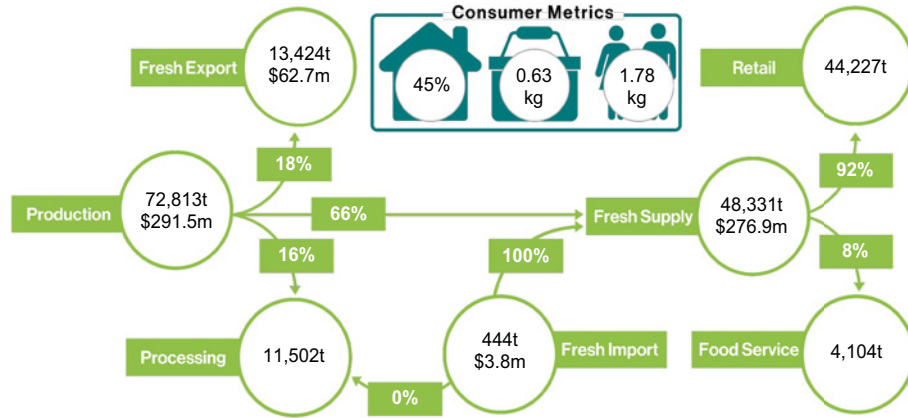




Summerfruit - Nectarines/Peaches

Fresh Nectarines/Peaches Overview

FRESH NECTARINES/PEACHES SUPPLY CHAIN – YEAR ENDING JUNE 2024



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

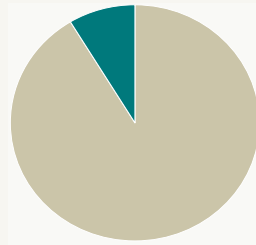
TOTAL PRODUCTION



\$291.5m

72,813t produced and valued at \$291.5m with 16% sent to be processed.

RETAIL VS FOOD SERVICE



■ Retail 92% ■ Food Service 8%

The fresh supply was 48,331t, with 44,227t distributed into retail and 4,104t into food service.

CONSUMER METRICS



45% of Australian households purchased nectarines/peaches, buying an average of 630g per shopping trip.

PER CAPITA CONSUMPTION



1.78kg in 2023/24 based on the volume supplied.

YEAR ENDING JUNE	2022	2023		2024	
	Value	Value	% YoY	Value	% YoY
Production (t)	81,084	62,202	-23%	72,813	+17%
Production (\$m)	\$244.1	\$224.8	-8%	\$291.5	+30%
Fresh Export Volume (t)	11,179	9,909	-11%	13,424	+35%
Fresh Export Value (\$m)	\$52.0	\$46.3	-11%	\$62.7	+35%
Fresh Import Volume (t)	1,487	785	-47%	444	-43%
Fresh Import Value (\$m)	\$9.8	\$6.0	-39%	\$3.8	-37%
Fresh Supply (t)	58,848	44,011	-25%	48,331	+10%
Fresh Supply Wholesale Value (\$m)	\$236.3	\$218.2	-8%	\$276.9	+27%
Supply per Capita (kg)	2.27	1.68	-26%	1.78	+6%
Retail Supply (t)	53,781	40,236	-25%	44,227	+10%
Retail Supply Wholesale Value (\$m)	\$215.8	\$199.5	-8%	\$253.3	+27%
Food Service Supply (t)	5,067	3,775	-26%	4,104	+9%
Food Service Wholesale Value (\$m)	\$20.4	\$18.7	-9%	\$23.5	+26%

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

Fresh Nectarines/Peaches Production

MAJOR PRODUCTION AREAS



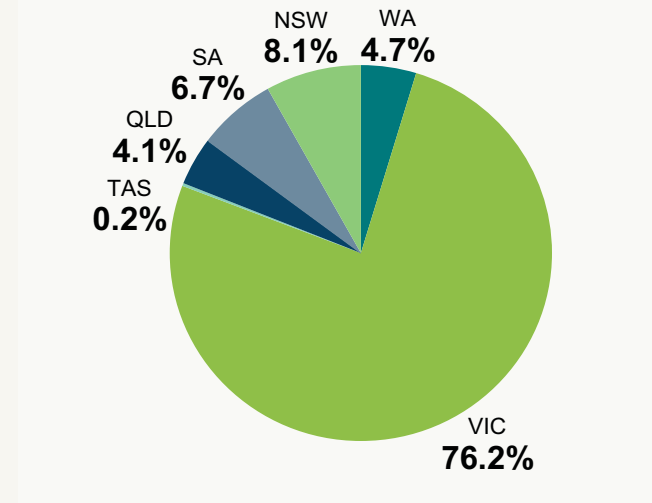
Source: SAL

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

PRODUCTION WINDOW



2023/24 FRESH NECTARINES/PEACHES PRODUCTION BY STATE



Source: SAL

2023/24 FRESH NECTARINES/PEACHES SEASONALITY BY STATE

State	Volume (t)	Jul	Aug	Sep	Oct	Nov	Dec	Jan	Feb	Mar	Apr	May	Jun
Victoria	55,455				Low	Low	Low	High	High	Low	Low	Low	
New South Wales	5,883					Low	Low	High	Low	Low	Low	Low	
South Australia	4,881				Low	Low	Low	Low	Low	Low	Low		
Western Australia	3,391				Low	Low	Low	Low	Low	Low	Low		
Queensland	3,022				Low	Low	High	High	Low	Low			
Tasmania	182					Low	Low	Low	Low				

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

Source: SAL

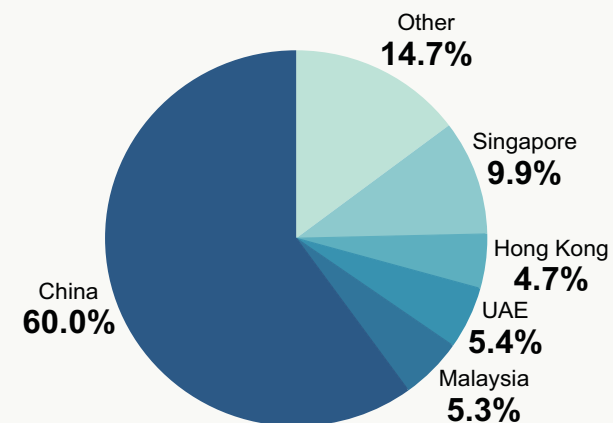
Fresh Nectarines/Peaches International Trade

FRESH NECTARINES/PEACHES INTERNATIONAL TRADE

Australia is a net exporter of fresh nectarines and peaches. For the year ending June 2024, Australia exported **13,424 tonnes**. The exports and imports over the last five financial years are profiled in the graph below, where imports are counted as negative tonnes.



FRESH NECTARINES/PEACHES EXPORTS



Source: GTA/TDM

For the year ending June 2024, **60.0%** of exported fresh nectarines and peaches were sent to **China**, as profiled in the chart above.

Exports by State of Production Origin (Tonnes)				Exports by Country (Tonnes)			
Year Ending June	2022	2023	2024	Year Ending June	2022	2023	2024
Victoria	9,945	8,261	11,415	China	7,264	6,380	8,052
New South Wales	443	965	1,630	Singapore	990	835	1,328
Queensland	153	74	202	UAE	490	383	722
South Australia	629	562	120	Malaysia	522	414	715
Tasmania	1	1	39	Hong Kong	443	528	630
Other	7	46	19	Other	1,470	1,370	1,978
TOTAL	11,179	9,909	13,424	TOTAL	11,179	9,909	13,424

FRESH NECTARINES/PEACHES IMPORTS

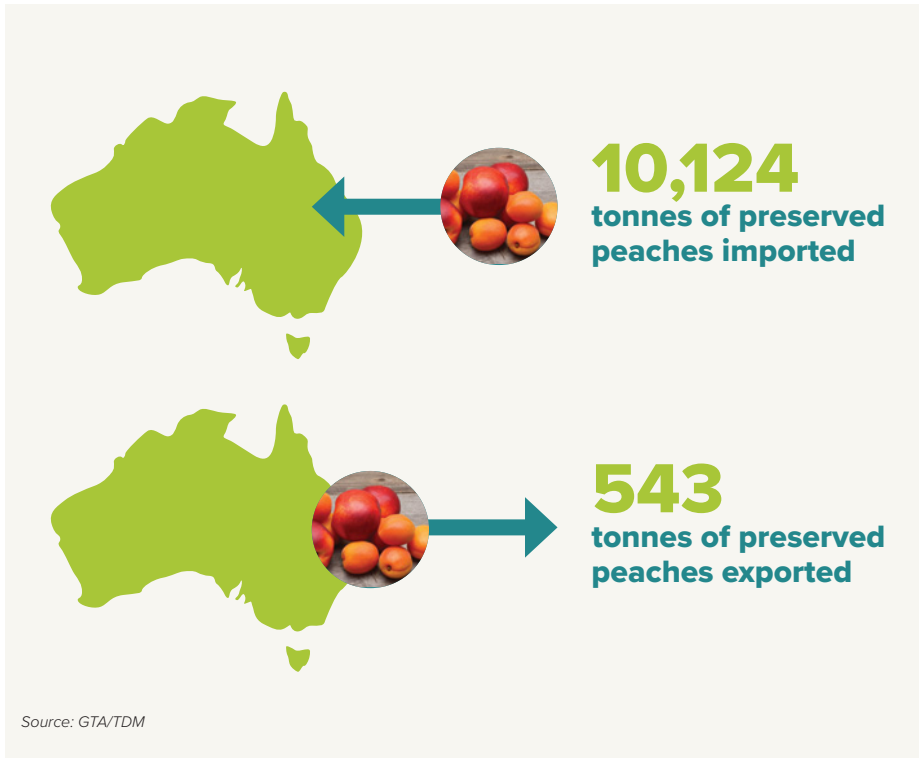
Imports by State Destination (Tonnes)				Imports by Country (Tonnes)			
Year Ending June	2022	2023	2024	Year Ending June	2022	2023	2024
New South Wales	826	506	234	US	1,453	785	444
Victoria	304	155	108	China	35	-	-
Western Australia	258	117	103	TOTAL	1,487	785	444
Queensland	99	8	-				
TOTAL	1,487	785	444				

Source: GTA/TDM

Processed Nectarines/Peaches International Trade

2023/24 PROCESSED NECTARINES/PEACHES INTERNATIONAL TRADE

For the year ending June 2024, an additional **10,124 tonnes** of preserved peaches were imported, while **543 tonnes** of preserved peaches were exported.

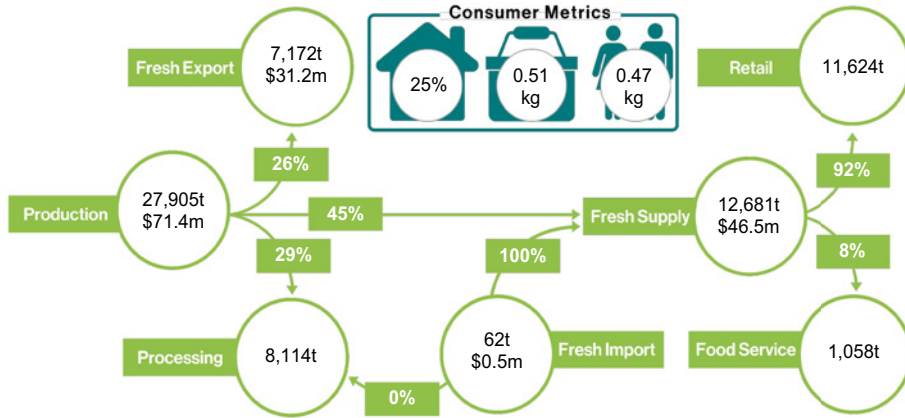




Summerfruit - Plums

Fresh Plums Overview

FRESH PLUMS SUPPLY CHAIN – YEAR ENDING JUNE 2024



Note: The processing volume does not include dried plums.

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

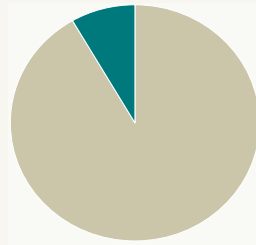
TOTAL PRODUCTION



\$71.4m

27,905t produced and valued at **\$71.4m** with 29% sent to be processed.

RETAIL VS FOOD SERVICE



■ Retail 92% ■ Food Service 8%

The fresh supply was **12,681t**, with **11,624t** distributed into retail and **1,058t** into food service.

CONSUMER METRICS



25% of Australian households purchased plums, buying an average of **505g** per shopping trip.

PER CAPITA CONSUMPTION



in 2023/24 based on the volume supplied.

YEAR ENDING JUNE	2022	2023		2024	
	Value	Value	% YoY	Value	% YoY
Production (t)	31,798	24,045	-24%	27,905	+16%
Production (\$m)	\$78.6	\$66.9	-15%	\$71.4	+7%
Fresh Export Volume (t)	6,105	4,608	-25%	7,172	+56%
Fresh Export Value (\$m)	\$25.9	\$20.3	-22%	\$31.2	+53%
Fresh Import Volume (t)	225	92	-59%	62	-32%
Fresh Import Value (\$m)	\$1.5	\$0.7	-51%	\$0.5	-27%
Fresh Supply (t)	16,672	12,537	-25%	12,681	+1%
Fresh Supply Wholesale Value (\$m)	\$60.0	\$52.3	-13%	\$46.5	-11%
Supply per Capita (kg)	0.64	0.48	-26%	0.47	-2%
Retail Supply (t)	15,281	11,491	-25%	11,624	+1%
Retail Supply Wholesale Value (\$m)	\$55.0	\$47.9	-13%	\$42.6	-11%
Food Service Supply (t)	1,391	1,046	-25%	1,058	+1%
Food Service Wholesale Value (\$m)	\$5.0	\$4.4	-13%	\$3.9	-11%

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

Fresh Plums Production

MAJOR PRODUCTION AREAS



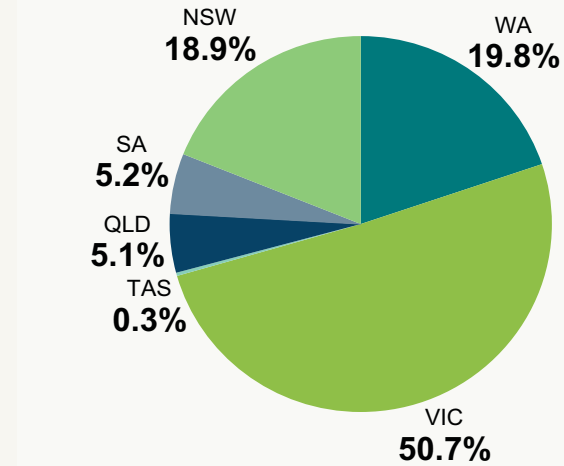
Source: SAL

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

PRODUCTION WINDOW



2023/24 FRESH PLUMS PRODUCTION BY STATE



Source: SAL

2023/24 FRESH PLUMS SEASONALITY BY STATE

State	Volume (t)	Jul	Aug	Sep	Oct	Nov	Dec	Jan	Feb	Mar	Apr	May	Jun
Victoria	14,156					High	High	Medium	Medium	Low	Low	Low	
Western Australia	5,537					Medium	Medium	Medium	Medium	Medium	Medium		
New South Wales	5,282						Medium	Medium	Medium	Medium	Medium		
South Australia	1,441					Medium	Medium	Medium	Medium	Medium	Medium		
Queensland	1,413					Medium	Medium	Medium	Medium	Medium	Medium		
Tasmania	78							Medium	Medium	Medium			

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

Source: SAL

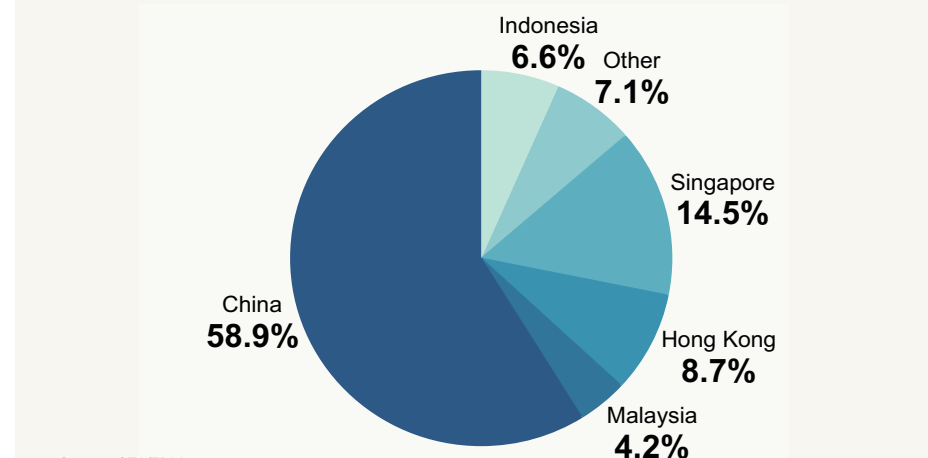
Fresh Plums International Trade

FRESH PLUMS INTERNATIONAL TRADE

Australia is a net exporter of fresh plums. For the year ending June 2024, Australia exported **7,172 tonnes**. The exports and imports over the last five financial years are profiled in the graph below, where imports are counted as negative tonnes.



FRESH PLUMS EXPORTS



Source: GTA/TDM

For the year ending June 2024, **58.9%** of exported fresh plums were sent to **China**, as profiled in the chart above.

Exports by State of Production Origin (Tonnes)				Exports by Country (Tonnes)			
Year Ending June	2022	2023	2024	Year Ending June	2022	2023	2024
Victoria	5,136	3,167	5,540	China	4,378	2,424	4,222
New South Wales	795	1,072	1,383	Singapore	713	950	1,041
Western Australia	83	255	148	Hong Kong	409	610	624
Queensland	28	108	100	Indonesia	212	263	474
Tasmania	-	5	1	Malaysia	141	124	305
Other	64	1	< 0.5	Other	252	237	506
TOTAL	6,105	4,608	7,172	TOTAL	6,105	4,608	7,172

FRESH PLUMS IMPORTS

Imports by State Destination (Tonnes)				Imports by Country (Tonnes)			
Year Ending June	2022	2023	2024	Year Ending June	2022	2023	2024
New South Wales	153	73	47	US	222	92	62
Western Australia	37	18	14	Afghanistan	3	-	-
Victoria	13	-	1	TOTAL	225	92	62
Queensland	22	-	-				
Other	< 0.5	< 0.5	-				
TOTAL	225	92	62				

Source: GTA/TDM


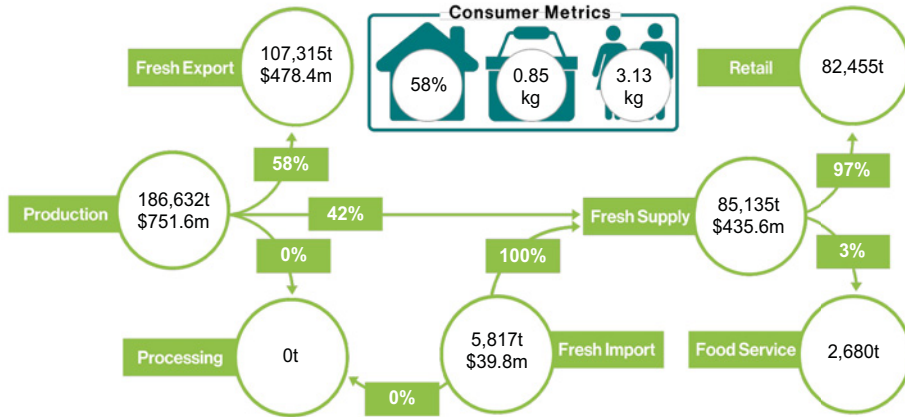


Table Grapes

Fresh Table Grapes Overview

FRESH TABLE GRAPES SUPPLY CHAIN – YEAR ENDING JUNE 2024



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

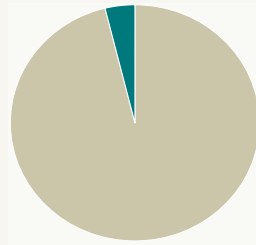
TOTAL PRODUCTION



\$751.6m

186,632t produced and valued at \$751.6m.

RETAIL VS FOOD SERVICE



■ Retail 97% ■ Food Service 3%

The fresh supply was 85,135t, with 82,455t distributed into retail and 2,680t into food service.

CONSUMER METRICS



58% of Australian households purchased table grapes, buying an average of 848g per shopping trip.

PER CAPITA CONSUMPTION



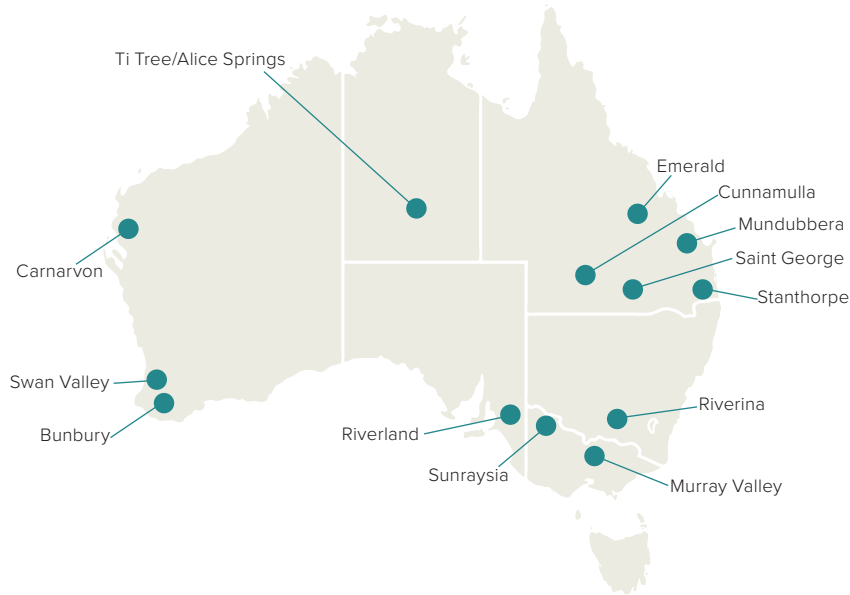
3.13kg in 2023/24 based on the volume supplied.

YEAR ENDING JUNE	2022	2023		2024	
	Value	Value	% YoY	Value	% YoY
Production (t)	195,925	232,962	+19%	186,632	-20%
Production (\$m)	\$722.2	\$918.6	+27%	\$751.6	-18%
Production area (Ha)	10,350	12,175	+18%	14,250	+17%
Fresh Export Volume (t)	108,204	132,316	+22%	107,315	-19%
Fresh Export Value (\$m)	\$440.0	\$557.3	+27%	\$478.4	-14%
Fresh Import Volume (t)	9,105	8,369	-8%	5,817	-30%
Fresh Import Value (\$m)	\$49.6	\$49.6	>-1%	\$39.8	-20%
Fresh Supply (t)	96,826	109,015	+13%	85,135	-22%
Fresh Supply Wholesale Value (\$m)	\$452.1	\$566.9	+25%	\$435.6	-23%
Supply per Capita (kg)	3.73	4.15	+11%	3.13	-25%
Retail Supply (t)	93,102	105,584	+13%	82,455	-22%
Retail Supply Wholesale Value (\$m)	\$434.7	\$549.0	+26%	\$421.9	-23%
Food Service Supply (t)	3,724	3,431	-8%	2,680	-22%
Food Service Wholesale Value (\$m)	\$17.4	\$17.8	+3%	\$13.7	-23%

Sources: Australian Table Grape Association (ATGA); AC; CFVIWA; GTA/TDM; 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



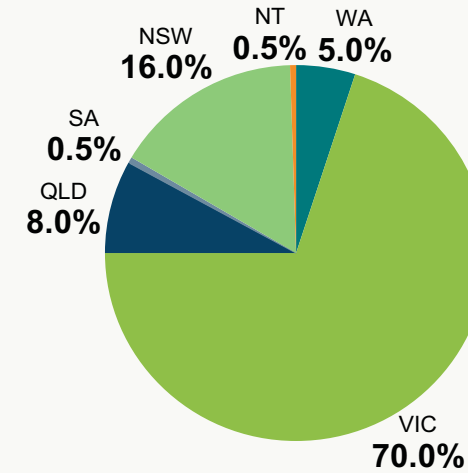
14,250
Ha

PRODUCTION WINDOW



Nov-May

2023/24 FRESH TABLE GRAPES PRODUCTION BY STATE



Source: ATGA

2023/24 FRESH TABLE GRAPES SEASONALITY BY STATE

State	Volume (t)	Jul	Aug	Sep	Oct	Nov	Dec	Jan	Feb	Mar	Apr	May	Jun
Victoria	130,642					Low	High	High	Medium	Medium	Medium	Low	
New South Wales	29,861						High	Medium	Medium	Medium	Medium	Low	
Queensland	14,931						High	Medium	Medium	Medium	Medium	Low	
Western Australia	9,332							Medium	Medium	Medium	Medium	Low	
South Australia	933							High	Medium	Medium	Medium	Low	
Northern Territory	933						Low	Medium	Medium	Medium	Medium	Low	

Availability legend: High Medium Low None

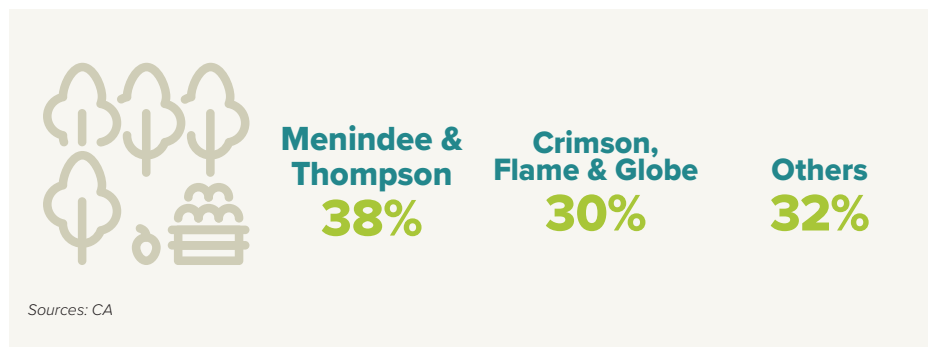
Source: ATGA

MAIN TABLE GRAPES VARIETIES

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

Menindee and **Thompson**, the two most common white varieties in Australia. These grapes accounted for **38%** of fresh production for the year ending June 2024.

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



2023/24 FRESH TABLE GRAPES SEASONALITY BY VARIETY

Variety	Volume (t)	Jul	Aug	Sep	Oct	Nov	Dec	Jan	Feb	Mar	Apr	May	Jun
White - Thompson	46,658							High	High	High	High	Low	
White - Menindee	24,262					Low	Low	High	Low				
Red - Crimson	35,460							High	High	High	Low	Low	
Red - Flame	11,198					Low	Low	High	Low				
Red - Globe	9,332							High	High	High	High	Low	
Black	7,435						Low	Low	Low				
Other	52,287						Low	Low	High	High	Low	Low	

Availability legend: High Medium Low None

Sources: CA

Fresh Table Grapes International Trade

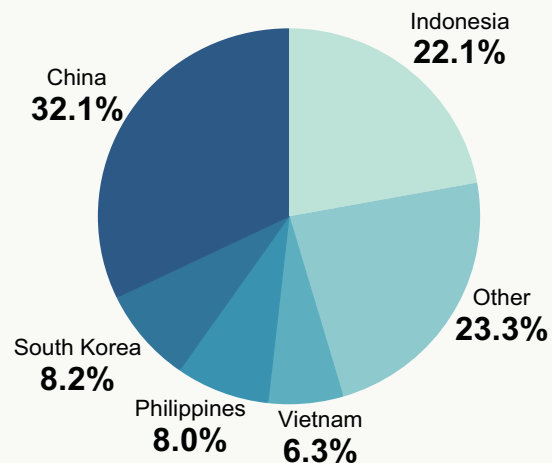
FRESH TABLE GRAPES INTERNATIONAL TRADE

Australia is a net exporter of fresh table grapes. For the year ending June 2024, Australia exported **107,315 tonnes**. The exports and imports over the last five financial years are profiled in the graph below, where imports are counted as negative tonnes.





FRESH TABLE GRAPES EXPORTS



Source: GTA/TDM

For the year ending June 2024, **32.1%** of exported fresh table grapes were sent to **China**, as profiled in the chart above.

Exports by State of Production Origin (Tonnes)				Exports by Country (Tonnes)			
Year Ending June	2022	2023	2024	Year Ending June	2022	2023	2024
Victoria	96,768	119,166	92,647	China	26,392	47,234	34,438
New South Wales	9,013	11,112	11,899	Indonesia	20,048	22,544	23,753
Western Australia	961	1,386	1,614	Sth. Korea	4,123	3,262	8,771
Queensland	1,172	416	716	Philippines	8,473	8,539	8,545
South Australia	289	165	426	Vietnam	13,129	13,202	6,799
Other	< 0.5	70	13	Other	36,039	37,534	25,008
TOTAL	108,204	132,316	107,315	TOTAL	108,204	132,316	107,315

FRESH TABLE GRAPES IMPORTS

Imports by State Destination (Tonnes)				Imports by Country (Tonnes)			
Year Ending June	2022	2023	2024	Year Ending June	2022	2023	2024
New South Wales	5,007	5,001	3,071	US	8,612	7,967	5,127
Victoria	2,944	2,360	2,030	Mexico	435	293	658
Western Australia	981	953	694	Sth. Korea	16	15	8
Queensland	109	54	22	China	42	76	7
South Australia	65	-	-	UAE	-	< 0.5	-
Other	-	-	< 0.5	Other	< 0.5	18	17
TOTAL	9,105	8,369	5,817	TOTAL	9,105	8,369	5,817

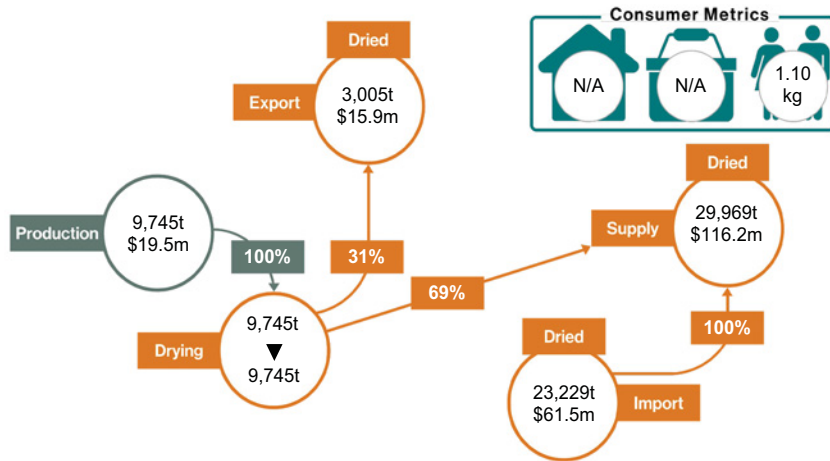
Source: GTA/TDM



Dried Grapes

Dried Grapes Overview

DRIED GRAPES SUPPLY CHAIN – YEAR ENDING JUNE 2024



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

YEAR ENDING JUNE	2022	2023		2024	
	Value	Value	% YoY	Value	% YoY
Dried Production (t)	9,917	14,184	+43%	9,745	-31%
Production (\$m)	\$19.8	\$29.6	+49%	\$19.5	-34%
Dried Export Volume (t)	3,367	2,523	-25%	3,005	+19%
Dried Export Value (\$m)	\$17.8	\$13.9	-22%	\$15.9	+14%
Dried Import Volume (t)	19,720	17,720	-10%	23,229	+31%
Dried Import Value (\$m)	\$48.2	\$44.1	-8%	\$61.5	+40%
Dried Supply (t)	26,269	29,380	+12%	29,969	+2%
Dried Supply Wholesale Value (\$m)	\$85.6	\$106.9	+25%	\$116.2	+9%
Supply per Capita (kg)	1.01	1.12	+10%	1.10	-1%

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

TOTAL PRODUCTION



\$19.5m

9,745t produced and valued at \$19.5m with 100% of production going through the drying process.

PER CAPITA CONSUMPTION



1.10kg

in 2023/24 based on the volume supplied.

Dried Grapes Production

MAJOR PRODUCTION AREAS



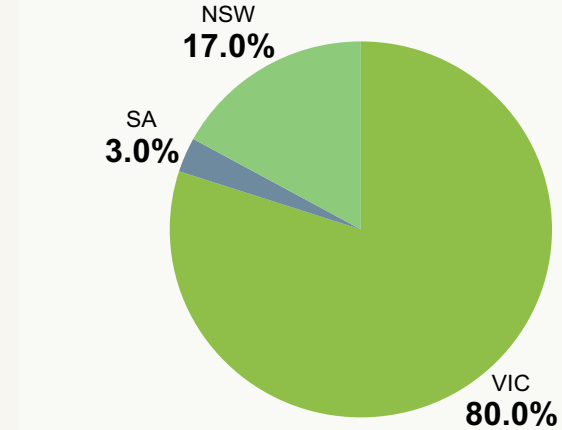
Source: DFA

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 WINDOW



2023/24 DRIED GRAPES PRODUCTION BY STATE



Source: DFA

2023/24 DRIED GRAPES SEASONALITY BY STATE

State	Volume (t)	Jul	Aug	Sep	Oct	Nov	Dec	Jan	Feb	Mar	Apr	May	Jun
Victoria	7,796								High	Medium	Low		
New South Wales	1,657								Medium	Medium	Low		
South Australia	292								Medium	Medium	Low		

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

Source: DFA

MAIN DRIED GRAPES VARIETIES

Australia's dried grape production is heavily concentrated in a few main varieties. These include:

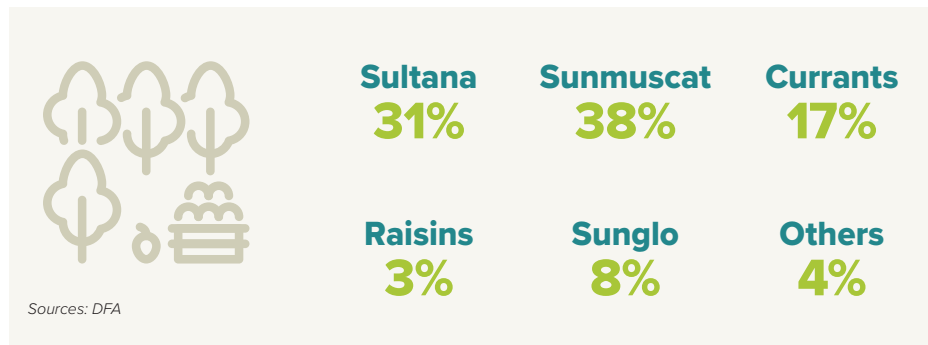
Sultana, which remains a staple and one of the most widely produced types, representing **31%** of the market.

Sunmuscat, the leading variety, making up **38%** of total production.

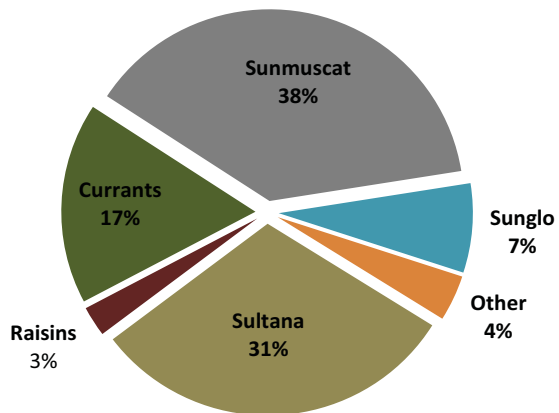
Currants, which account for **17%** of production.

Raisins, contributing a smaller share at **3%**.

Sunglo, another significant type, which represents **8%**.



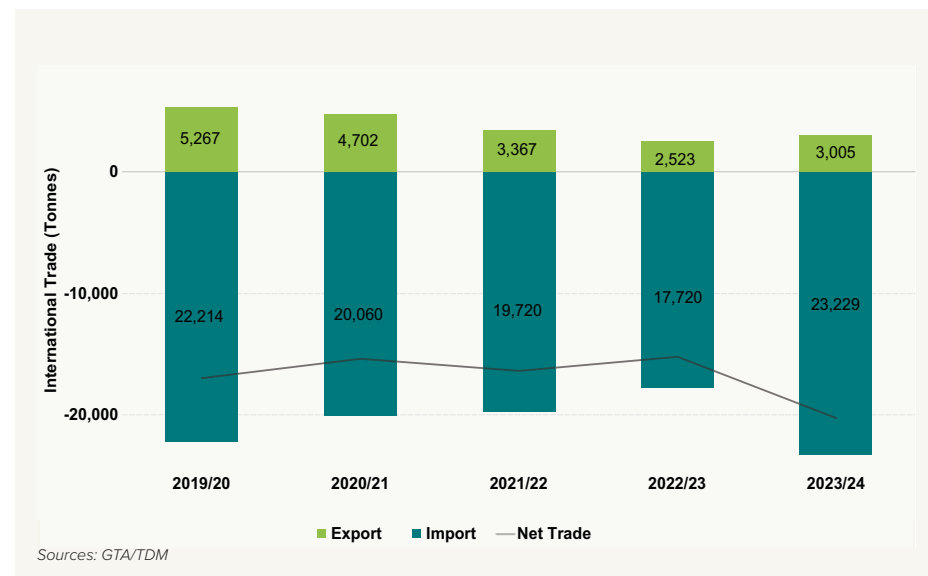
2023/24 MAIN DRIED GRAPES BY VARIETY



Processed Dried Grapes International Trade

PROCESSED DRIED GRAPES INTERNATIONAL TRADE

For the year ending June 2024, Australia imported **23,229 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.

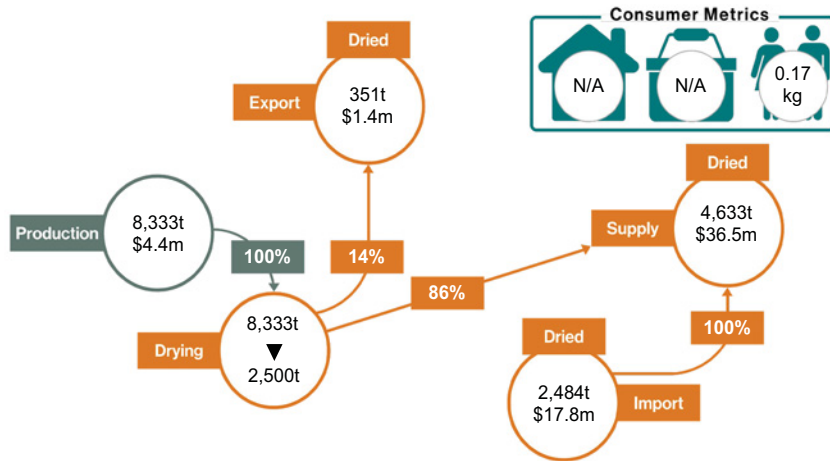




Prunes

Prunes Overview

PRUNES SUPPLY CHAIN – YEAR ENDING JUNE 2024



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

YEAR ENDING JUNE	2022	2023		2024	
	Value	Value	% YoY	Value	% YoY
Dried Production (t)	1,829	2,700	+48%	2,500	-7%
Production (\$m)	\$2.8	\$3.7	+30%	\$4.4	+20%
Dried Export Volume (t)	807	631	-22%	351	-44%
Dried Export Value (\$m)	\$2.9	\$2.0	-31%	\$1.4	-28%
Dried Import Volume (t)	2,072	2,090	<1%	2,484	+19%
Dried Import Value (\$m)	\$13.7	\$16.3	+19%	\$17.8	+9%
Dried Supply (t)	3,094	4,159	+34%	4,633	+11%
Dried Supply Wholesale Value (\$m)	\$22.5	\$35.7	+59%	\$36.5	+2%
Supply per Capita (kg)	0.12	0.16	+33%	0.17	+8%

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

TOTAL PRODUCTION



\$4.4m

8,333t produced and valued at \$4.4m with 100% of production going through the drying process.

PER CAPITA CONSUMPTION



0.17kg

in 2023/24 based on the volume supplied.

Prunes Production

MAJOR PRODUCTION AREAS



Source: DFA

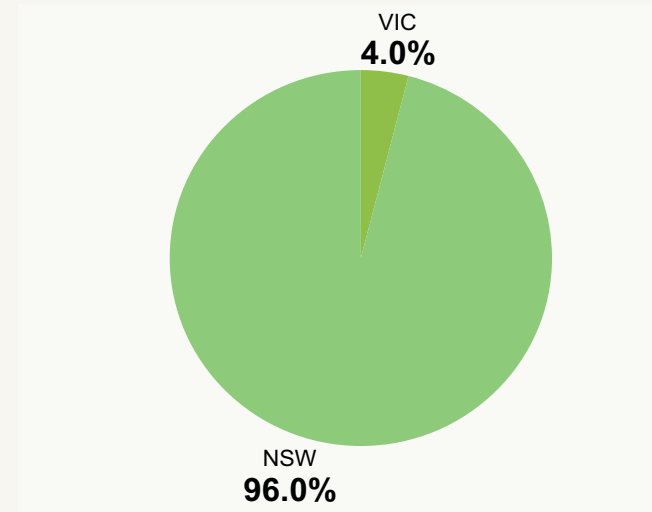
Plums grown for drying are predominantly grown in New South Wales and Victoria, with Griffith being the major producing area.

PRODUCTION WINDOW



Nov-May

2023/24 PRUNES PRODUCTION BY STATE



Source: DFA

2023/24 PRUNES SEASONALITY BY STATE

State	Volume (t)	Jul	Aug	Sep	Oct	Nov	Dec	Jan	Feb	Mar	Apr	May	Jun
New South Wales	8,000					Low	Medium	High	High	Medium	Low	Low	
Victoria	333						Low	Low	Low	Low	Low		

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

Source: DFA

Prunes International Trade

PRUNES INTERNATIONAL TRADE

For the year ending June 2024, Australia imported **2,484 tonnes** and exported **351 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.

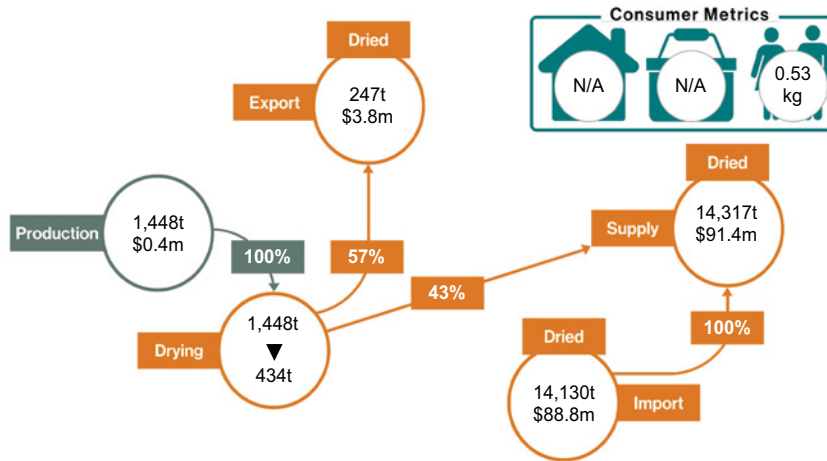




Other Dried Tree Fruit

Other Dried Tree Fruit Overview

OTHER DRIED TREE FRUIT SUPPLY CHAIN – YEAR ENDING JUNE 2024



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

YEAR ENDING JUNE	2022	2023		2024	
	Value	Value	% YoY	Value	% YoY
Dried Production (t)	529	381	-28%	434	+14%
Production (\$m)	\$0.5	\$0.3	-27%	\$0.4	+14%
Dried Export Volume (t)	220	156	-29%	247	+58%
Dried Export Value (\$m)	\$3.2	\$3.3	+4%	\$3.8	+16%
Dried Import Volume (t)	14,313	13,311	-7%	14,130	+6%
Dried Import Value (\$m)	\$70.9	\$82.6	+17%	\$88.8	+7%
Dried Supply (t)	14,622	13,535	-7%	14,317	+6%
Dried Supply Wholesale Value (\$m)	\$74.9	\$86.9	+16%	\$91.4	+5%
Supply per Capita (kg)	0.56	0.52	-9%	0.53	+2%

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

TOTAL PRODUCTION



\$0.4m

1,448t produced and valued at \$0.4m with 100% of production going through the drying process.

PER CAPITA CONSUMPTION



0.53kg

in 2023/24 based on the volume supplied.



Dried Tree Fruit Production

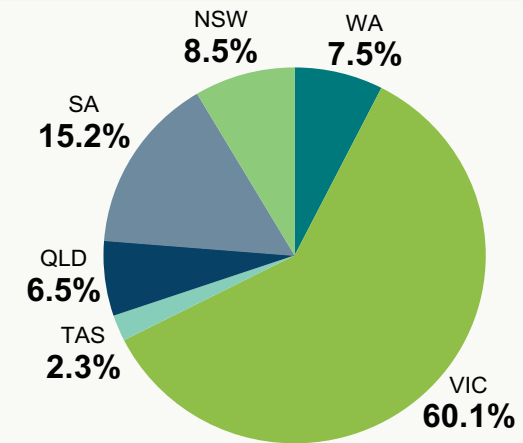
MAJOR PRODUCTION AREAS



Source: DFA

Dried tree fruits other than plums are a combination from different categories, predominantly summerfruits. They include apples, apricots, mandarins, nectarines, pineapples, peaches, and pears. The majority of the fruit grown for this category are from the Riverland, Sunraysia and Goulburn Valley regions.

2023/24 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 **20%** of production.

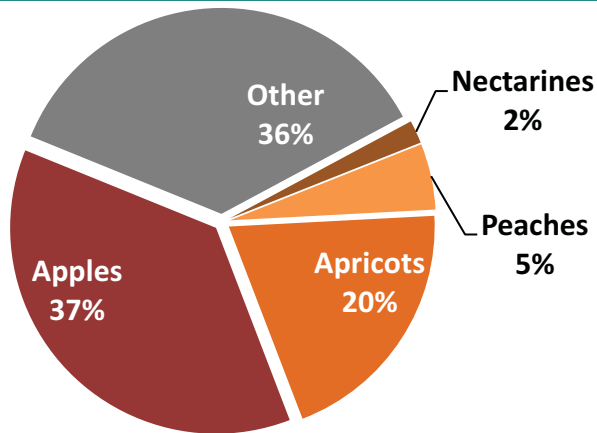
Apples, grown for drying accounted for **37%** production.

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

Other fruits grown for drying, including pineapples, mandarins and pears, accounted for **36%** of production.



2023/24 MAIN DRIED TREE FRUIT BY VARIETY



Processed Dried Tree Fruit International Trade

PROCESSED DRIED TREE FRUIT INTERNATIONAL TRADE

For the year ending June 2024, Australia imported **14,130 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.

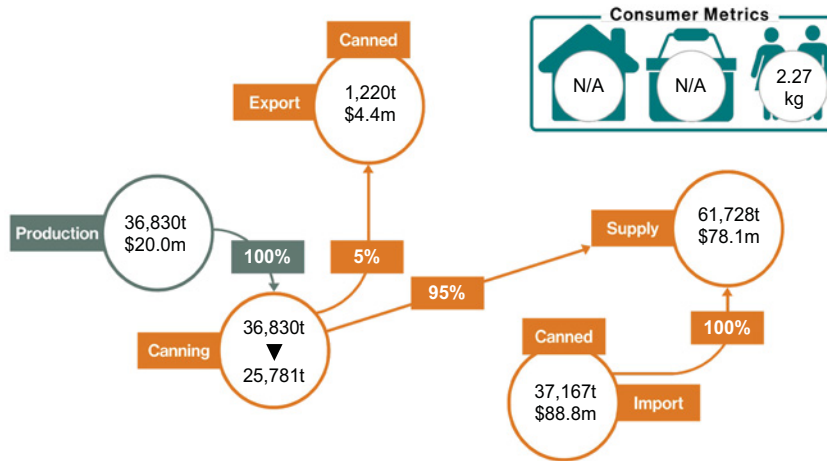




Canned Fruits

Canned Fruits Overview

CANNED FRUITS SUPPLY CHAIN – YEAR ENDING JUNE 2024



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

TOTAL PRODUCTION



\$20.0m

36,830t produced and valued at \$20.0m with 100% sent to canning process resulting in 25,781t of canned product.

PER CAPITA CONSUMPTION



2.27kg

in 2023/24 based on the volume supplied.

YEAR ENDING JUNE	2022	2023		2024	
	Value	Value	% YoY	Value	% YoY
Canned Production (t)	35,705	29,697	-17%	25,781	-13%
Production (\$m)	\$20.9	\$19.1	-8%	\$20.0	+4%
Canned Export Volume (t)	1,590	1,355	-15%	1,220	-10%
Canned Export Value (\$m)	\$6.4	\$5.7	-11%	\$4.4	-23%
Canned Import Volume (t)	36,382	34,583	-5%	37,167	+7%
Canned Import Value (\$m)	\$76.8	\$83.6	+9%	\$88.8	+6%
Canned Supply (t)	70,498	62,925	-11%	61,728	-2%
Supply Wholesale Value (\$m)	\$99.0	\$92.8	-6%	\$78.1	-16%
Supply per Capita (kg)	2.72	2.40	-12%	2.27	-5%

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

Canned Fruits Production

MAJOR PRODUCTION AREAS



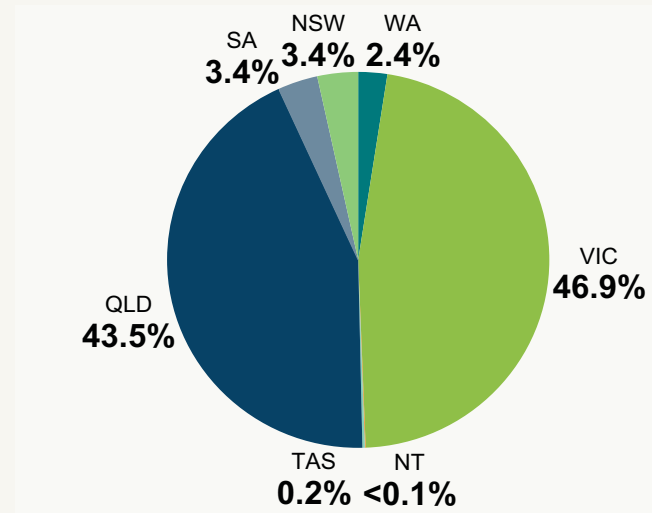
Source: (Freshlogic Analysis)

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



2023/24 CANNED FRUITS PRODUCTION BY STATE



Source: (Freshlogic Analysis)

2023/24 CANNED FRUITS SEASONALITY BY STATE

State	Volume (t)	Jul	Aug	Sep	Oct	Nov	Dec	Jan	Feb	Mar	Apr	May	Jun
Victoria	17,291	None	None	None	Low	Medium	High	High	High	Medium	Low	None	None
Queensland	16,034	None	None	None	Low	Medium	High	High	High	Medium	Low	None	None
New South Wales	1,263	None	None	None	Low	Medium	Medium	Medium	Medium	Medium	Low	None	None
South Australia	1,244	None	None	None	Low	Medium	Medium	Medium	Medium	Medium	Low	None	None
Western Australia	900	None	None	None	Low	Medium	Medium	Medium	Medium	Medium	Low	None	None
Tasmania	77	None	None	None	Low	Medium	Medium	Medium	Medium	Medium	Low	None	None
Northern Territory	22	None	None	None	None	None	None	Low	Medium	Medium	None	None	None

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

Source: (Freshlogic Analysis)

MAIN CANNED FRUITS PRODUCTS

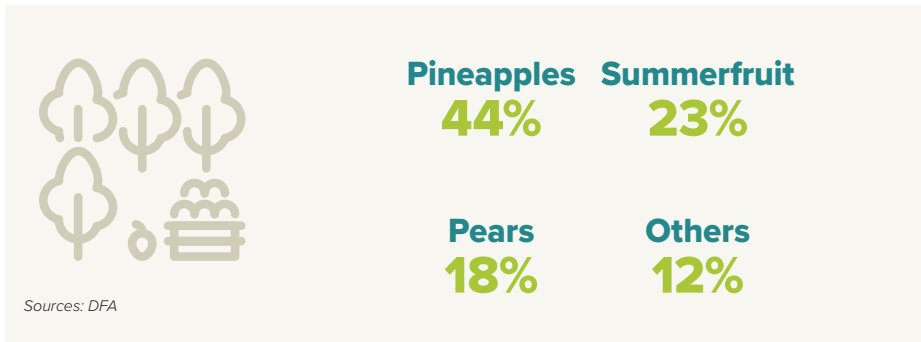
There are a number of categories of tree fruits grown for canning in Australia, consisting mainly of three types for the year ending June 2024. These include:

Pineapples, accounting for **44%** of canned fruit processing during the 2023/24 period.

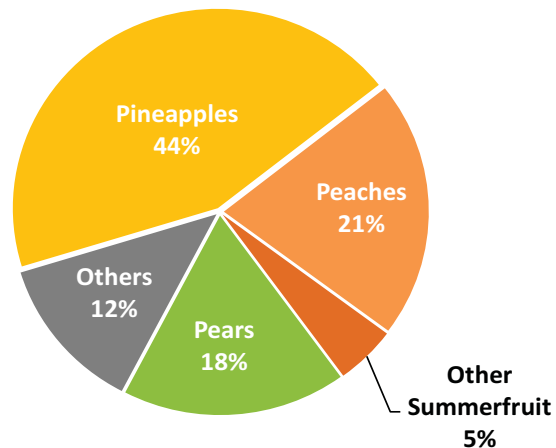
Summerfruit including **peaches, apricots** and **plums** from the Goulburn region accounting for **23%** of canned fruit production.

Pears, accounted for **18%** of the fruit grown for canning in Australia.

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



2023/24 MAIN CANNED FRUITS BY VARIETY



Processed Canned Fruits International Trade

PROCESSED CANNED FRUITS INTERNATIONAL TRADE

For the year ending June 2024, Australia imported **37,167 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.

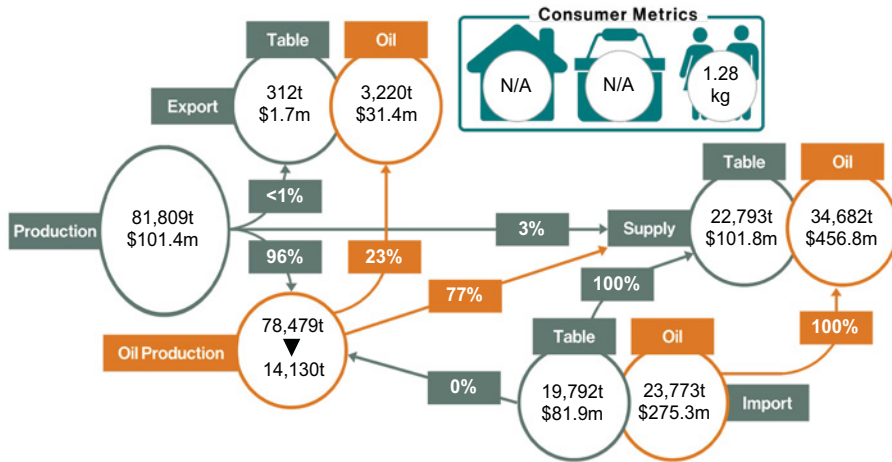




Olives

Olives Overview

OLIVE OIL/TABLE OLIVE SUPPLY CHAIN – YEAR ENDING JUNE 2024



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

YEAR ENDING JUNE	2022	2023		2024	
	Value	Value	% YoY	Value	% YoY
Production (t)	77,000	100,536	+31%	81,809	-19%
Production (\$m)	\$95.5	\$124.7	+31%	\$101.4	-19%
Production area (Ha)	-	33,595	-	33,619	-
Olive Oil Export Volume (t)	2,421	3,703	+53%	3,220	-13%
Olive Oil Export Value (\$m)	\$17.8	\$27.9	+57%	\$31.4	+13%
Olive Oil Import Volume (t)	31,377	33,599	+7%	23,773	-29%
Olive Oil Import Value (\$m)	\$167.3	\$229.3	+37%	\$275.3	+20%
Olive Oil Supply (t)	41,005	47,404	+16%	34,682	-27%
Olive Oil Wholesale Value (\$m)	\$251.8	\$364.8	+45%	\$456.8	+25%
Oil Consumption per Capita (kg)	1.58	1.80	+14%	1.28	-29%

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

TOTAL PRODUCTION



\$101.4m

81,809t produced and valued at \$101.4m with 96% sent to oil production resulting in 14,130t of olive oil.

PER CAPITA CONSUMPTION



1.28kg

in 2023/24 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 AREA



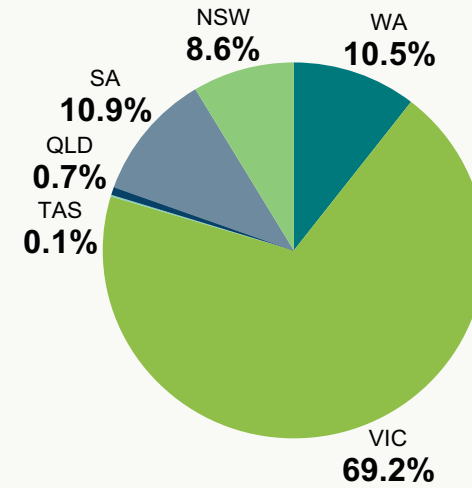
33,619
Ha

PRODUCTION WINDOW



Mar-Aug

2023/24 OLIVES PRODUCTION BY STATE



Source: AOA

2023/24 OLIVES SEASONALITY BY STATE

State	Volume (t)	Jul	Aug	Sep	Oct	Nov	Dec	Jan	Feb	Mar	Apr	May	Jun
Victoria	56,571	High	Medium	None	None	None	None	None	None	None	Low	High	High
South Australia	8,917	None	None	None	None	None	None	None	None	None	Low	High	Medium
Western Australia	8,590	None	None	None	None	None	None	None	None	None	Low	High	Medium
New South Wales	7,036	None	None	None	None	None	None	None	None	None	Low	Medium	Medium
Queensland	589	None	None	None	None	None	None	None	None	Low	Low	Low	None
Tasmania	106	Low	Low	None	None	None	None	None	None	None	None	Low	Low

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

Source: AOA

Olive Oil International Trade

OLIVE OIL INTERNATIONAL TRADE

For the year ending June 2024, Australia imported **23,773 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.

