



All Other Horticulture



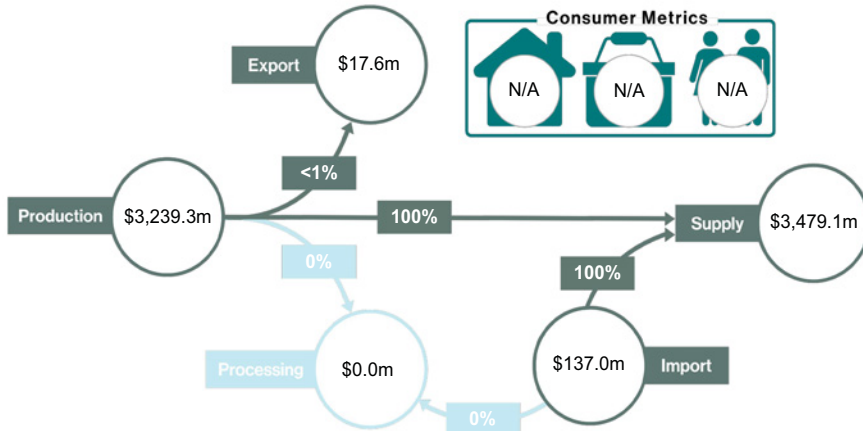
Table of Contents

All Other Horticulture Overview.....	367
Cut Flowers.....	370
Nursery.....	374
Turf.....	378



All Other Horticulture Overview

ALL FRESH OTHER HORTICULTURE SUPPLY CHAIN – YEAR ENDING JUNE 2024



Consumer Metrics

N/A	N/A	N/A
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Sources: ABS; AUSVEG; GTA/TDM; MP & DD (Freshlogic Analysis)

TOTAL PRODUCTION

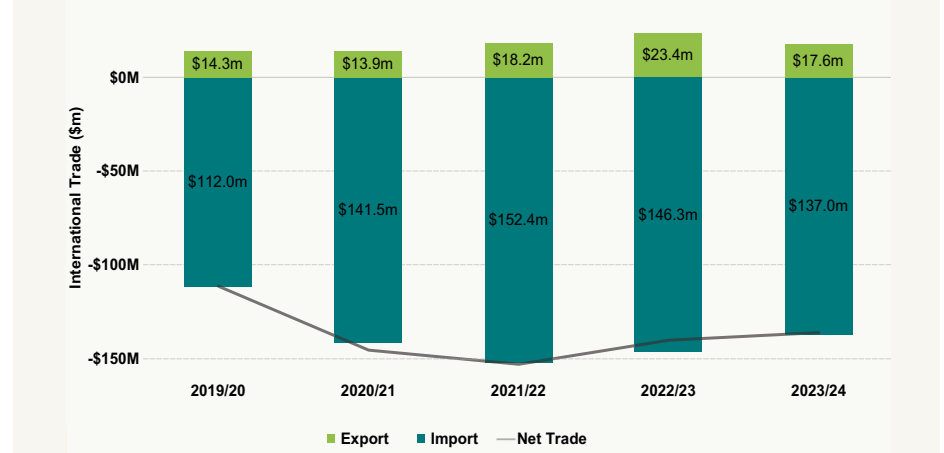


\$3,239.3m

The value of production was **\$3,239.3m** while the wholesale value was **\$3,479.1m**.

YEAR ENDING JUNE	2022	2023		2024	
	Value	Value	% YoY	Value	% YoY
Production (\$m)	\$3,429.6	\$3,379.8	-1%	\$3,239.3	-4%
Fresh Export Value (\$m)	\$18.2	\$23.4	+29%	\$17.6	-25%
Fresh Import Value (\$m)	\$152.4	\$146.4	-4%	\$137.0	-6%
Fresh Supply Wholesale Value (\$m)	\$3,693.3	\$3,628.7	-2%	\$3,479.1	-4%

ALL OTHER FRESH HORTICULTURE INTERNATIONAL TRADE



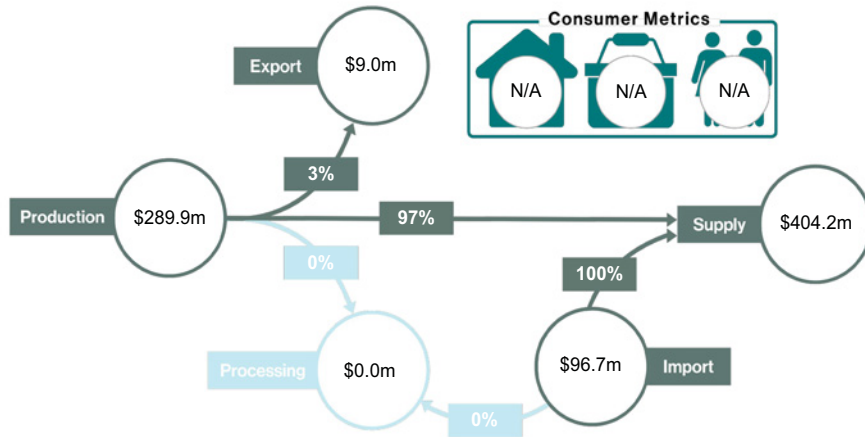
Cut Flowers



Cut Flowers Overview

CUT FLOWERS SUPPLY CHAIN – YEAR ENDING JUNE 2024

Note : Cut flowers have been represented in the following supply chain by their value rather than volume due to inconsistencies in units used to measure production volume across different cut flower varieties.



Sources: ABS; Flowers Association (FA); GTA/TDM; (Freshlogic Analysis)

YEAR ENDING JUNE	2023			2024	
	Value	Value	% YoY	Value	% YoY
Production (\$m)	\$314.7	\$308.4	-2%	\$289.9	-6%
Fresh Export Value (\$m)	\$9.5	\$9.3	-3%	\$9.0	-3%
Fresh Import Value (\$m)	\$104.6	\$103.0	-2%	\$96.7	-6%
Fresh Supply Wholesale Value (\$m)	\$438.7	\$430.0	-2%	\$404.2	-6%

Sources: ABS; Flowers Association (FA); GTA/TDM; (Freshlogic Analysis)

Cut Flowers Production

MAJOR PRODUCTION AREAS



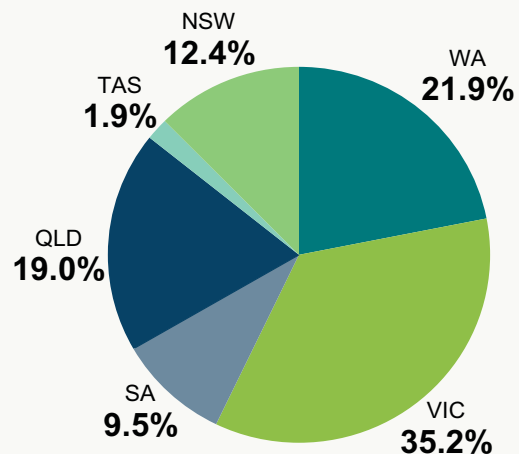
Source: FA

Cut flowers are grown year round in Australia, with peaks in February for Valentine’s day, May for Mother’s Day, and a smaller peak in December for Christmas. Production occurs in high tech glasshouses, low tech protected cropping and outdoor fields, as well as in outdoor fields. The majority of cut flowers grown in Australia are grown in Victoria.

PRODUCTION WINDOW



2023/24 CUT FLOWERS PRODUCTION BY STATE



Source: FA

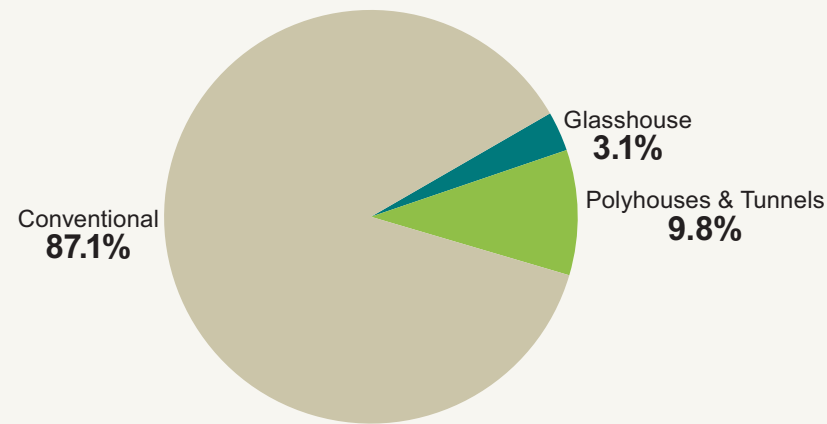
2023/24 CUT FLOWERS SEASONALITY BY STATE

State	Value (\$m)	Jul	Aug	Sep	Oct	Nov	Dec	Jan	Feb	Mar	Apr	May	Jun
Victoria	\$102.2	High	High	High	High	High	High	High	High	High	High	High	High
Western Australia	\$63.5	High	High	High	High	High	High	High	High	High	High	High	High
Queensland	\$55.2	High	High	High	High	High	High	High	High	High	High	High	High
New South Wales	\$35.9	High	High	High	High	High	High	High	High	High	High	High	High
South Australia	\$27.6	High	High	High	High	High	High	High	High	High	High	High	High
Tasmania	\$5.5	High	High	High	High	High	High	High	High	High	High	High	High

Availability legend: High Medium Low None

Source: FA

2023/24 FRESH CUT FLOWERS PRODUCTION BY SYSTEM



Production of cut flowers in Australia occurs in three different types of farming systems. These systems and their contribution to production are **Glasshouses 3.1%**, **Polyhouses & Tunnels 9.8%** and **Conventional 87.1%**.

2023/24 FRESH CUT FLOWERS PRODUCTION SYSTEM BY STATE

State	Glasshouse		Polyhouses & Tunnels		Conventional	
	Hectares (Ha)	Value (\$m)	Hectares (Ha)	Value (\$m)	Hectares (Ha)	Value (\$m)
New South Wales	3	\$1.1	10	\$3.5	105	\$31.3
Victoria	7	\$3.2	30	\$10.0	299	\$89.0
Queensland	4	\$1.7	16	\$5.4	162	\$48.1
Western Australia	5	\$2.0	18	\$6.2	186	\$55.3
South Australia	2	\$0.9	8	\$2.7	81	\$24.0
Tasmania	0	\$0.2	2	\$0.5	16	\$4.8
Total	21	\$9.0	84	\$28.4	850	\$252.5

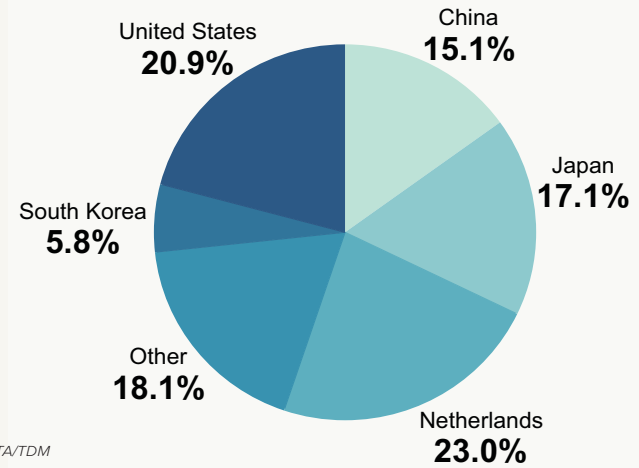
Cut Flowers International Trade

CUT FLOWERS INTERNATIONAL TRADE

Australia is a net importer of fresh cut flowers. International trade has been presented in terms of value rather than volume, due to inconsistencies in the way trade volume data is recorded. For the year ending June 2024, Australia exported **\$9.0 million**, and imported **\$96.7 million** worth of cut flowers. The exports and imports over the last five financial years are profiled in the graph below, where imports are counted as negative million dollars.



CUT FLOWERS EXPORTS



Source: GTA/TDM

For the year ending June 2024, **23.0%** of cut flower exports (by value) were sent to **Netherlands**, as profiled in the chart above.

Exports by State of Production Origin (\$m)			
Year Ending June	2022	2023	2024
Queensland	\$4.0	\$4.5	\$4.3
Western Australia	\$3.7	\$2.9	\$2.4
Victoria	\$1.7	\$1.8	\$1.4
New South Wales	\$0.1	\$0.1	\$0.9
TOTAL	\$9.5	\$9.3	\$9.0

Exports by Country (\$m)			
Year Ending June	2022	2023	2024
Netherlands	\$2.2	\$2.3	\$2.0
US	\$2.2	\$2.6	\$1.8
Japan	\$2.9	\$1.9	\$1.5
China	\$1.0	\$0.8	\$1.3
Sth. Korea	\$0.3	\$0.5	\$0.5
Other	\$1.0	\$1.3	\$1.8
TOTAL	\$9.5	\$9.3	\$9.0

CUT FLOWERS IMPORTS

Imports by State Destination (\$m)			
Year Ending June	2022	2023	2024
Victoria	\$32.1	\$31.8	\$37.5
New South Wales	\$37.8	\$37.5	\$28.8
Western Australia	\$24.1	\$22.4	\$16.5
Queensland	\$5.8	\$6.7	\$9.0
South Australia	\$4.9	\$4.6	\$4.9
Other	\$-	<\$0.1	<\$0.1
TOTAL	\$104.6	\$103.0	\$96.7

Imports by Country (\$m)			
Year Ending June	2022	2023	2024
Malaysia	\$28.6	\$22.9	\$22.6
Kenya	\$17.4	\$18.1	\$17.8
Ecuador	\$13.8	\$15.2	\$15.5
China	\$21.8	\$17.9	\$10.7
Colombia	\$9.0	\$11.1	\$9.9
Other	\$14.0	\$17.9	\$20.1
TOTAL	\$104.6	\$103.0	\$96.7

Source: GTA/TDM

Nursery

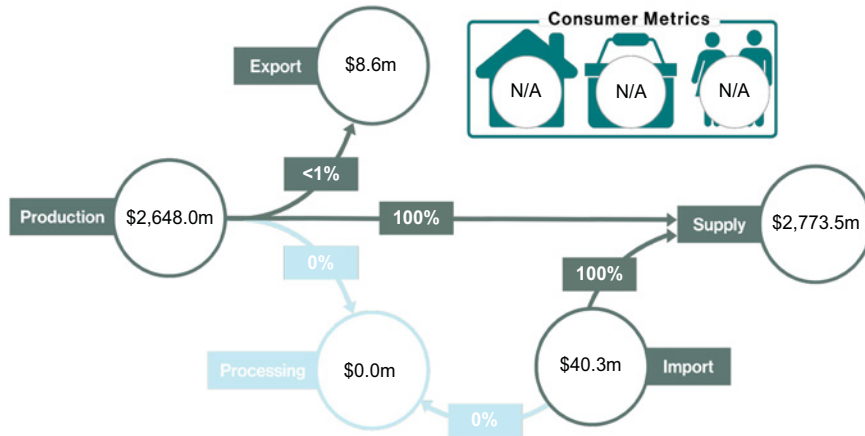
A wide-angle photograph of a nursery field. In the foreground and middle ground, numerous young trees are planted in white plastic pots, arranged in neat, parallel rows on a green lawn. The trees vary in size and species, including some with yellowish-green foliage. In the background, a dense, lush forest of taller trees stretches across the horizon under a bright, overcast sky. The overall scene is vibrant and well-maintained.



Nursery Overview

NURSERY SUPPLY CHAIN – YEAR ENDING JUNE 2024

Note : The production value for the nursery sector has been determined independently of the THRUChain methodology. This value is based on data obtained from the NY21000 project (Nursery Industry Statistics 2020/21 to 2024/25).



Sources: ABS; GTA/TDM; Hort Innovation; Greenlife Industry Australia

YEAR ENDING JUNE	2023			2024	
	Value	Value	% YoY	Value	% YoY
Production (m units)	2,334	2,264	-3%	2,064	-9%
Production (\$m)	\$2,833.0	\$2,775.3	-2%	\$2,648.0	-5%
Export Value (\$m)	\$8.7	\$14.1	+63%	\$8.6	-39%
Import Value (\$m)	\$47.8	\$43.4	-9%	\$40.3	-7%
Supply Wholesale Value (\$m)	\$2,972.7	\$2,902.7	-2%	\$2,773.5	-4%

Sources: ABS 8501.0 Retail Trade; GTA/TDM; Hort Innovation; Greenlife Industry Australia

Nursery Production

MAJOR PRODUCTION AREAS



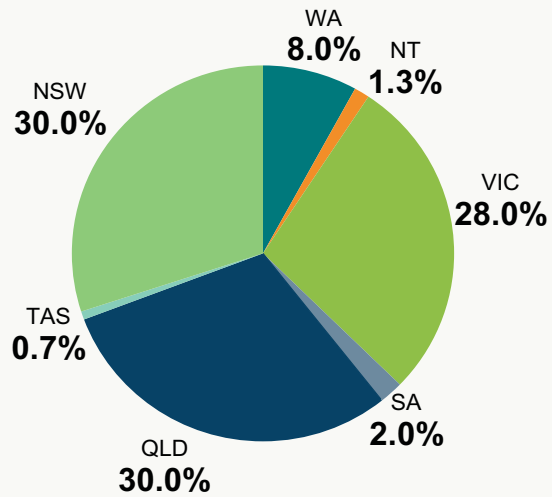
Source: Greenlife Industry Australia

Nursery encompasses the production of live plants for a range of purposes, including landscaping, revegetation, and supplying ornamental plants to retail outlets. Nurseries also provide starter plants for the commercial production of fruit, vegetables, and forestry. Nursery production occurs in all states and territories of Australia, with the majority of production occurring in Victoria, Queensland and New South Wales. Production occurs year-round, with peaks selling during spring for ornamental retail product lines.

PRODUCTION WINDOW

Year-round

2023/24 NURSERY PRODUCTION BY STATE



Source: ABS

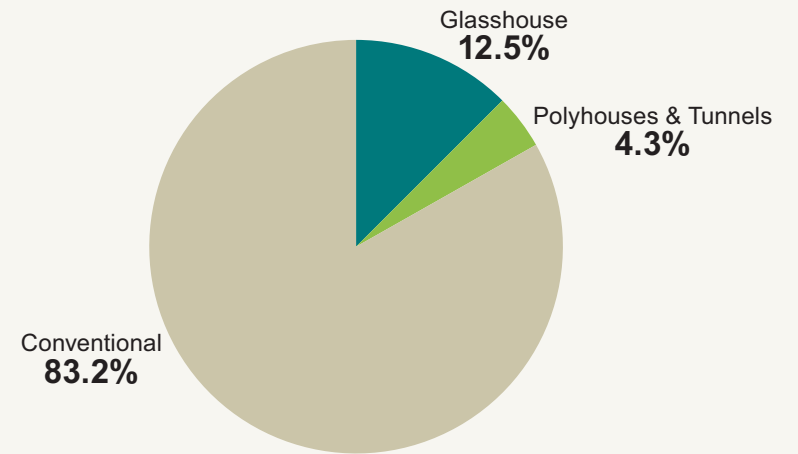
2023/24 NURSERY SEASONALITY BY STATE

State	Value (\$m)	Jul	Aug	Sep	Oct	Nov	Dec	Jan	Feb	Mar	Apr	May	Jun
New South Wales	\$794.3	Low	Low	High	High	High	High	High	High	High	High	High	High
Queensland	\$794.3	Low	Low	High	High	High	High	High	High	High	High	High	High
Victoria	\$741.5	Low	Low	High	High	High	High	High	High	High	High	High	High
Western Australia	\$211.9	Low	Low	High	High	High	High	High	High	High	High	High	High
South Australia	\$53.0	Low	Low	High	High	High	High	High	High	High	High	High	High
Northern Territory	\$34.4	Low	Low	High	High	High	High	High	High	High	High	High	High
Tasmania	\$18.5	Low	Low	High	High	High	High	High	High	High	High	High	High

Availability legend: High Medium Low None

Source: ABS

2023/24 NURSERY PRODUCTION BY SYSTEM



Production of nursery in Australia occurs in three different types of farming systems. These systems and their contribution to the value of production are **Glasshouses 12.5%**, **Polyhouses & Tunnels 4.3%** and **Conventional 83.2%**.

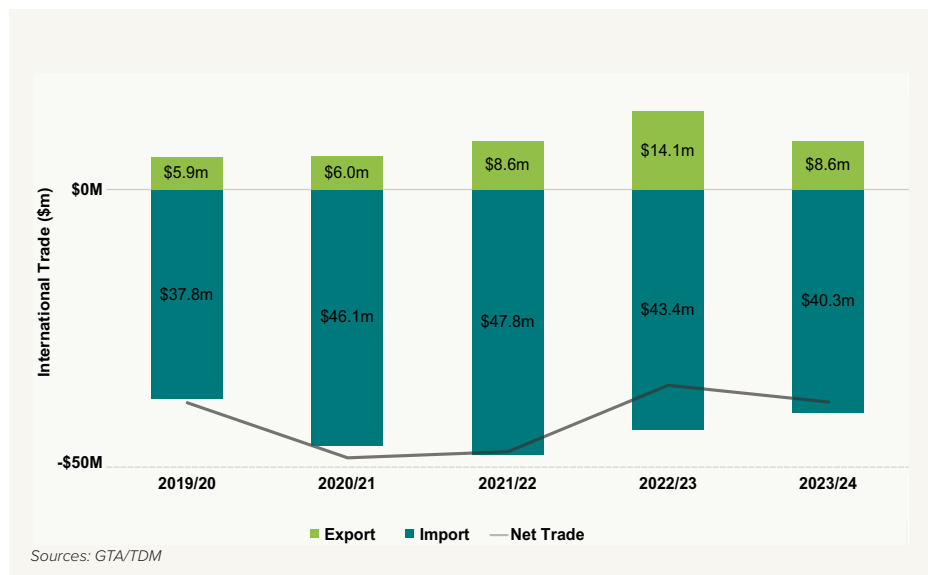
2023/24 NURSERY PRODUCTION SYSTEM BY STATE

State	Glasshouse		Polyhouses & Tunnels		Conventional	
	Hectares (Ha)	Value (\$m)	Hectares (Ha)	Value (\$m)	Hectares (Ha)	Value (\$m)
New South Wales	241	\$99.4	139	\$34.2	1,911	\$661.1
Victoria	225	\$92.7	130	\$31.9	1,784	\$617.1
Queensland	241	\$99.4	139	\$34.2	1,911	\$661.1
Western Australia	64	\$26.4	37	\$9.1	508	\$175.6
South Australia	16	\$6.6	9	\$2.3	127	\$44.1
Tasmania	6	\$2.3	3	\$0.8	45	\$15.4
Northern Territory	10	\$4.3	6	\$1.5	83	\$28.7
Total	802	\$331.1	463	\$113.8	6,369	\$2,203.0

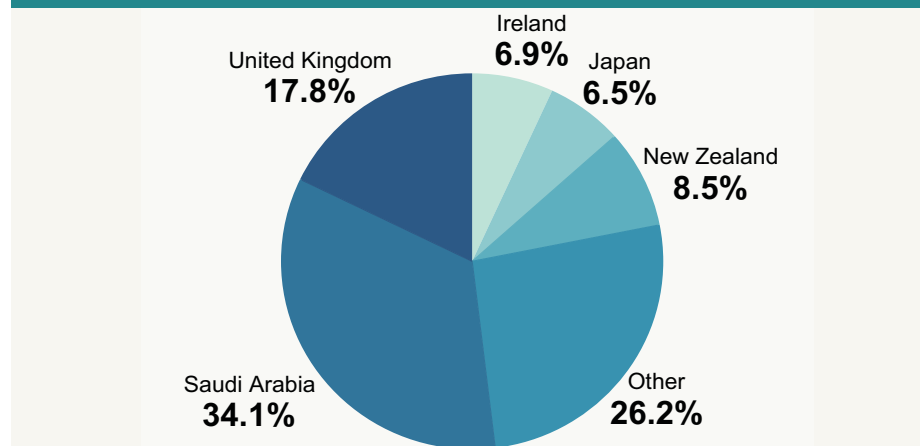
Nursery International Trade

NURSERY INTERNATIONAL TRADE

Australia is a net importer of nursery products. International trade has been presented in terms of value rather than volume, due to the way trade data is recorded. For the year ending June 2024, Australia exported **\$8.6 million** worth, and imported **\$40.3 million** worth. The exports and imports over the last five financial years are profiled in the graph below, where imports are counted as negative dollars.



NURSERY EXPORTS



Source: GTA/TDM

For the year ending June 2024, **34.1%** of nursery plant exports (by value) were sent to **Saudi Arabia**, as profiled in the chart above.

Exports by State of Production Origin (\$m)				Exports by Country (\$m)			
Year Ending June	2022	2023	2024	Year Ending June	2022	2023	2024
Queensland	\$1.9	\$6.2	\$3.4	Saudi Arabia	\$1.3	\$7.5	\$2.9
Tasmania	\$1.5	\$2.2	\$2.8	UK	\$1.1	\$0.9	\$1.5
New South Wales	\$2.7	\$2.5	\$1.5	New Zealand	\$1.0	\$0.8	\$0.7
Northern Territory	\$-	\$1.0	\$0.3	Ireland	\$0.1	\$0.5	\$0.6
Victoria	\$1.5	\$0.9	\$0.3	Japan	\$0.9	\$0.7	\$0.6
Other	\$1.1	\$1.4	\$0.2	Other	\$4.3	\$3.8	\$2.3
TOTAL	\$8.6	\$14.1	\$8.6	TOTAL	\$8.6	\$14.1	\$8.6

NURSERY IMPORTS

Imports by State Destination (\$m)				Imports by Country (\$m)			
Year Ending June	2022	2023	2024	Year Ending June	2022	2023	2024
Netherlands	\$17.9	\$16.8	\$16.1	Netherlands	\$17.9	\$16.8	\$16.1
Taiwan	\$10.7	\$9.5	\$9.2	Taiwan	\$10.7	\$9.5	\$9.2
China	\$9.4	\$8.9	\$8.1	China	\$9.4	\$8.9	\$8.1
New Zealand	\$2.7	\$2.2	\$1.3	New Zealand	\$2.7	\$2.2	\$1.3
South Africa	\$0.8	\$1.0	\$0.9	South Africa	\$0.8	\$1.0	\$0.9
Other	\$6.2	\$5.0	\$4.8	Other	\$6.2	\$5.0	\$4.8
TOTAL	\$47.8	\$43.4	\$40.3	TOTAL	\$47.8	\$43.4	\$40.3

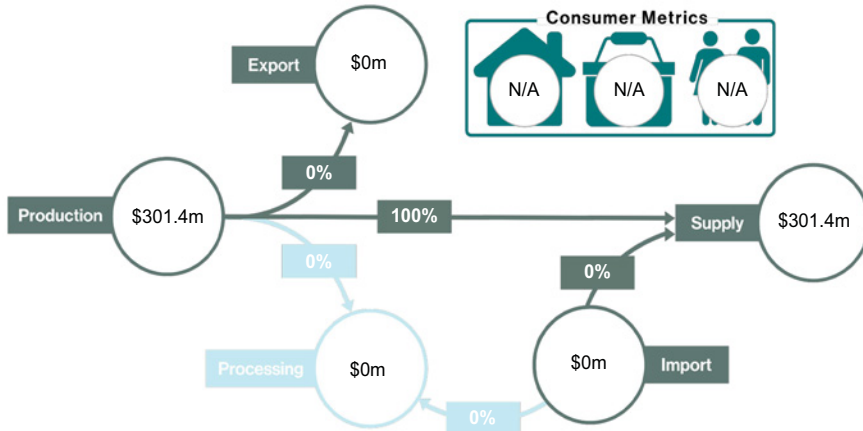
Source: GTA/TDM



Turf

Turf Overview

TURF SUPPLY CHAIN – YEAR ENDING JUNE 2024



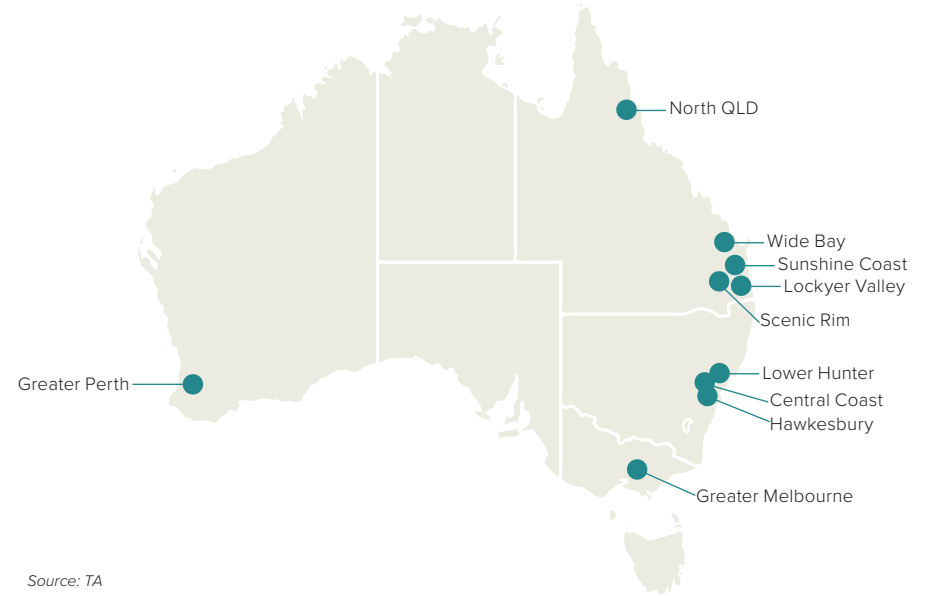
Sources: GTA/TDM; Turf Australia (TA); Freshlogic Analysis

YEAR ENDING JUNE	2022		2023		2024	
	Value	Value	% YoY	Value	% YoY	
Production (m m ²)	33	35	+5%	35	+2%	
Production (\$m)	\$281.9	\$296.1	+5%	\$301.4	+2%	
Production area (Ha)	3,312	3,479	+5%	3,542	+2%	
Fresh Supply (m m ²)	33	35	+5%	35	+2%	
Fresh Supply Wholesale Value (\$m)	\$281.9	\$296.1	+5%	\$301.4	+2%	

Sources: GTA/TDM; TA; Freshlogic Analysis

Turf Production

MAJOR PRODUCTION AREAS



Source: TA

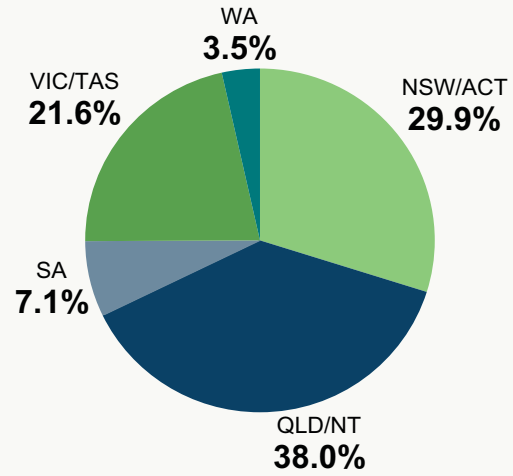
Turf production encompasses the cultivation of live grass products for a variety of applications, including: parks, gardens, residential and commercial properties, sporting venues, and land rehabilitation and landscape improvement. Turf production occurs in all states, with the majority concentrated in New South Wales and Queensland. Production is year-round, with a number of different varieties being grown, although there is a peak of production during the spring and summer months.

PRODUCTION WINDOW



Year-round

2023/24 TURF PRODUCTION BY STATE



Source: TA

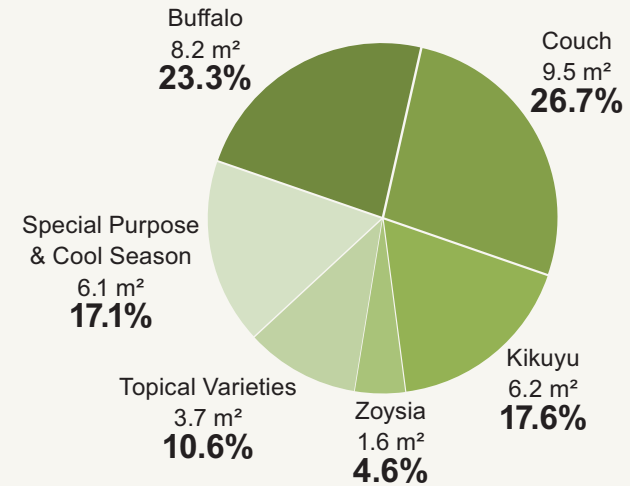
2023/24 TURF SEASONALITY BY STATE

State	Value (\$m)	Jul	Aug	Sep	Oct	Nov	Dec	Jan	Feb	Mar	Apr	May	Jun
QLD/NT	\$114.4	High	High	High	High	High	High	High	High	High	High	High	High
NSW/ACT	\$90.0	High	High	High	High	High	High	High	High	High	High	High	High
VIC/TAS	\$65.0	High	High	High	High	High	High	High	High	High	High	High	High
SA	\$21.5	High	High	High	High	High	High	High	High	High	High	High	High
WA	\$10.6	High	High	High	High	High	High	High	High	High	High	High	High

Availability legend: High Medium Low None

Source: TA

2023/24 TURF PRODUCTION BY VARIETY



Source: TA