



All Vegetables - Overview



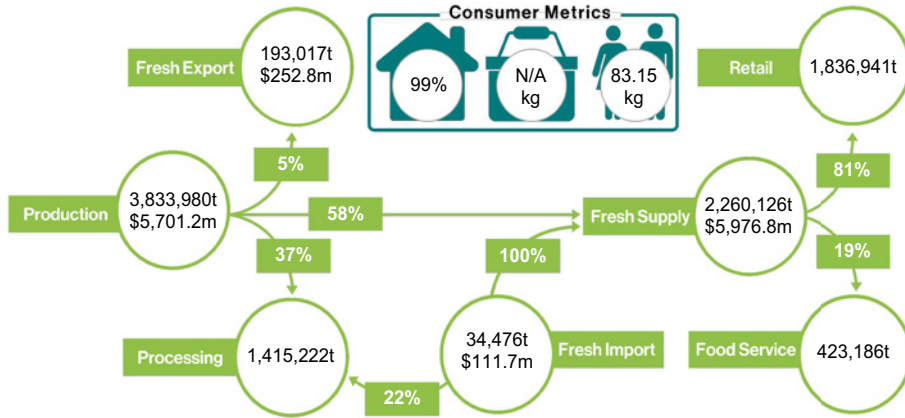
Table of Contents

All Vegetables Overview.....	182	Parsnips.....	301
Artichokes.....	185	Peas.....	304
Asparagus.....	189	Potatoes.....	309
Beans.....	194	Pumpkins.....	314
Beetroot.....	199	Sweet Corn.....	319
Broccoli/Baby Broccoli.....	203	Sweetpotato.....	323
Brussels Sprouts.....	207	Tomatoes.....	328
Cabbages.....	211	Zucchini.....	334
Capsicums.....	216		
Carrots.....	221		
Cauliflowers.....	225		
Celery.....	229		
Chillies.....	233		
Cucumbers.....	237		
Eggplants.....	243		
English Spinach/Silverbeet/Kale.....	248		
Fresh Herbs Overview.....	253		
Fennel.....	255		
Parsley and other Herbs.....	258		
Garlic.....	263		
Ginger.....	268		
Head Lettuce.....	273		
Leafy Asian Vegetables.....	278		
Leafy Salad Vegetables.....	282		
Leeks.....	287		
Mushrooms.....	291		
Onions.....	296		



All Fresh Vegetables Overview

ALL FRESH VEGETABLES SUPPLY CHAIN – YEAR ENDING JUNE 2024



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

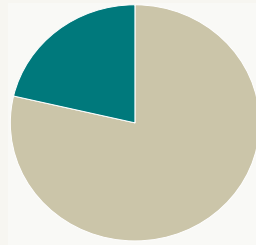
TOTAL PRODUCTION



\$5,701.2m

3,833,980t produced and valued at \$5,701.2m with 37% sent to be processed.

RETAIL VS FOOD SERVICE



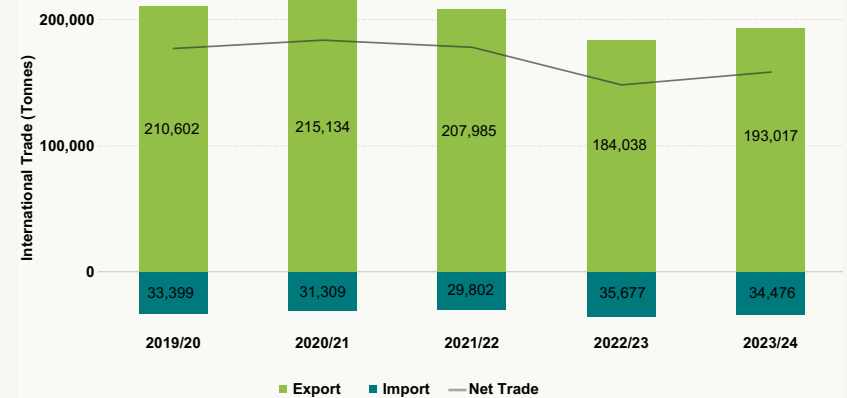
■ Retail 81% ■ Food Service 19%

The fresh supply was 2,260,126t, with 1,836,941t distributed into retail and 423,186t into food service.

YEAR ENDING JUNE	2022	2023		2024	
	Value	Value	% YoY	Value	% YoY
Production (t)	3,705,055	3,583,609	-3%	3,833,980	+7%
Production (\$m)	\$5,537.0	\$5,841.5	+5%	\$5,701.2	-2%
Fresh Export Volume (t)	207,985	184,038	-12%	193,017	+5%
Fresh Export Value (\$m)	\$254.1	\$251.7	>-1%	\$252.8	<-1%
Fresh Import Volume (t)	29,802	35,677	+20%	34,476	-3%
Fresh Import Value (\$m)	\$93.6	\$101.0	+8%	\$111.7	+11%
Fresh Supply (t)	2,142,346	2,160,793	<-1%	2,260,126	+5%
Fresh Supply Wholesale Value (\$m)	\$5,923.2	\$6,188.6	+4%	\$5,976.8	-3%
Supply per Capita (kg)	82.56	82.26	>-1%	83.15	+1%
Retail Supply (t)	1,730,477	1,753,870	+1%	1,836,941	+5%
Retail Supply Wholesale Value (\$m)	\$4,702.1	\$4,892.3	+4%	\$4,737.4	-3%
Food Service Supply (t)	411,869	406,923	-1%	423,186	+4%
Food Service Wholesale Value (\$m)	\$1,221.1	\$1,296.3	+6%	\$1,239.4	-4%

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

ALL FRESH VEGETABLES INTERNATIONAL TRADE

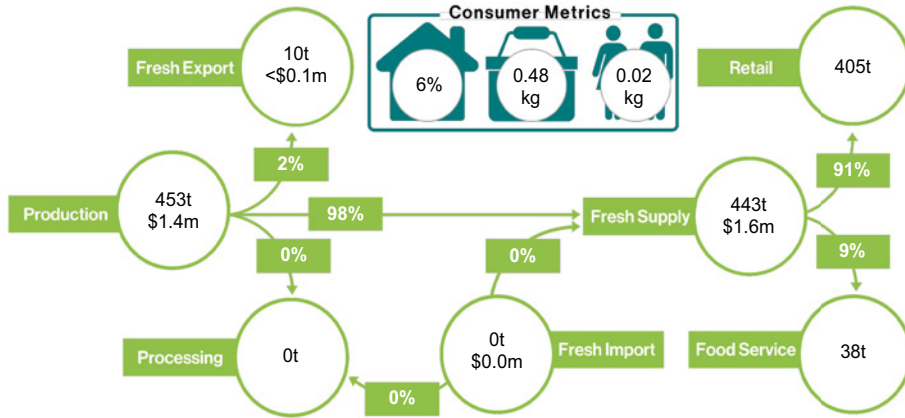




Artichokes

Fresh Artichokes Overview

FRESH ARTICHOKEs SUPPLY CHAIN – YEAR ENDING JUNE 2024



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

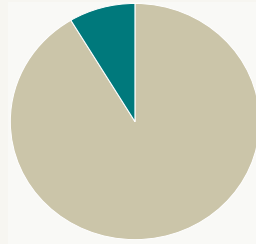
TOTAL PRODUCTION



\$1.4m

453t produced and valued at **\$1.4m**.

RETAIL VS FOOD SERVICE



■ Retail 91% ■ Food Service 9%

The fresh supply was **443t**, with **405t** distributed into retail and **38t** into food service.

CONSUMER METRICS



6% of Australian households purchased artichokes, buying an average of **480g** per shopping trip.

PER CAPITA CONSUMPTION



0.02kg in 2023/24 based on the volume supplied.

YEAR ENDING JUNE	2022	2023		2024	
	Value	Value	% YoY	Value	% YoY
Production (t)	447	450	<1%	453	<1%
Production (\$m)	\$1.2	\$1.6	+32%	\$1.4	-9%
Fresh Export Volume (t)	8	9	+14%	10	+9%
Fresh Export Value (\$m)	< \$0.1	< \$0.1	-	< \$0.1	+33%
Fresh Import Volume (t)	-	-	-	-	-
Fresh Import Value (\$m)	\$-	\$-	-	\$-	-
Fresh Supply (t)	439	441	<1%	443	<1%
Fresh Supply Wholesale Value (\$m)	\$1.4	\$1.8	+33%	\$1.6	-11%
Supply per Capita (kg)	0.02	0.02	>-1%	0.02	-3%
Retail Supply (t)	401	403	<1%	405	<1%
Retail Supply Wholesale Value (\$m)	\$1.2	\$1.7	+33%	\$1.5	-11%
Food Service Supply (t)	38	38	<1%	38	<1%
Food Service Wholesale Value (\$m)	\$0.1	\$0.2	+33%	\$0.1	-11%

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

Fresh Artichokes Production

MAJOR PRODUCTION AREAS



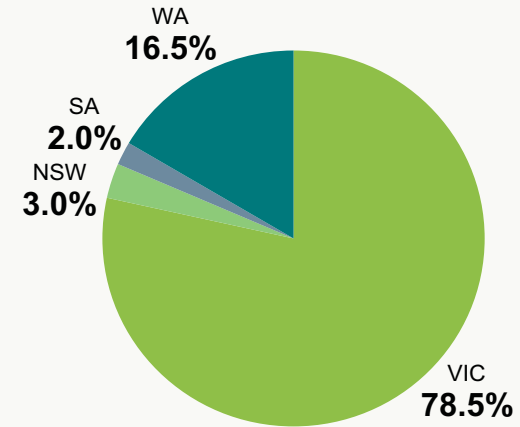
Source: AUSVEG

This report focuses exclusively on globe artichokes, excluding jerusalem artichokes. Artichoke production occurs predominately in Victoria, with smaller quantities produced in other states. The majority of Australian-grown artichokes are sold in the domestic fresh market, with a minor export market.

PRODUCTION WINDOW



2023/24 FRESH ARTICHOKE PRODUCTION BY STATE



Source: AUSVEG

2023/24 FRESH ARTICHOKE SEASONALITY BY STATE

State	Volume (t)	Jul	Aug	Sep	Oct	Nov	Dec	Jan	Feb	Mar	Apr	May	Jun
Victoria	355	High	Medium	Medium	Low	Low	None	None	Low	Medium	Medium	Medium	High
Western Australia	75	Low	Low	None	None	None	None	None	None	None	Low	Low	Low
New South Wales	14	Medium	Medium	Low	None	None	None	None	None	None	Low	Medium	Medium
South Australia	9	Low	Low	Low	None	None	None	None	None	None	None	Low	Low

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

Source: AUSVEG

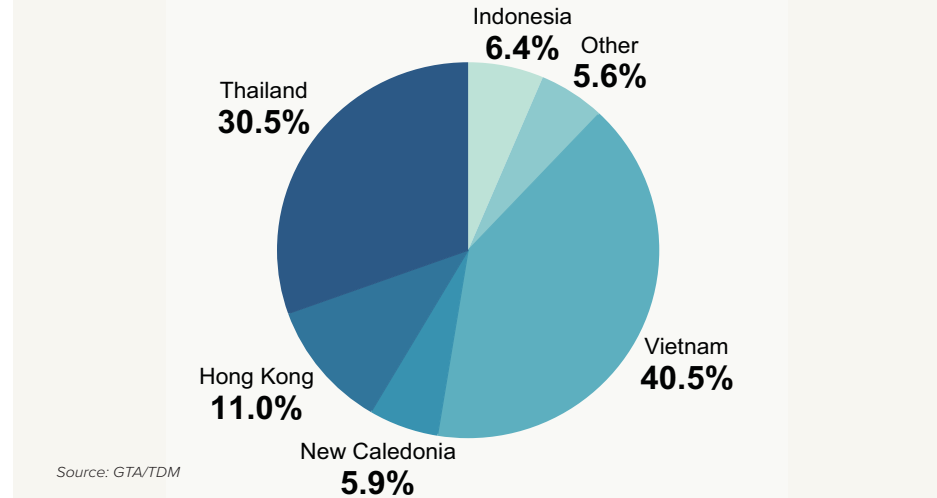
Fresh Artichokes International Trade

FRESH ARTICHOKEs INTERNATIONAL TRADE

There is minimal trade of artichokes, with Australia only occasionally importing small volumes, and typically exporting between **5-10 tonnes** every year. For the year ending June 2024, Australia exported **10 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 ARTICHOKEs EXPORTS



For the year ending June 2024, **40.5%** of exported fresh artichokes were sent to **Vietnam**, as profiled in the chart above.

Exports by State of Production Origin (Tonnes)			
Year Ending June	2022	2023	2024
Victoria	5	8	9
New South Wales	2	1	< 0.5
Queensland	< 0.5	1	< 0.5
South Australia	< 0.5	-	-
Other	< 0.5	-	< 0.5
TOTAL	8	9	10

Exports by Country (Tonnes)			
Year Ending June	2022	2023	2024
Vietnam	1	2	4
Thailand	1	2	3
Hong Kong	1	1	1
Indonesia	< 0.5	1	1
New Caledonia	2	2	1
Other	2	1	1
TOTAL	8	9	10

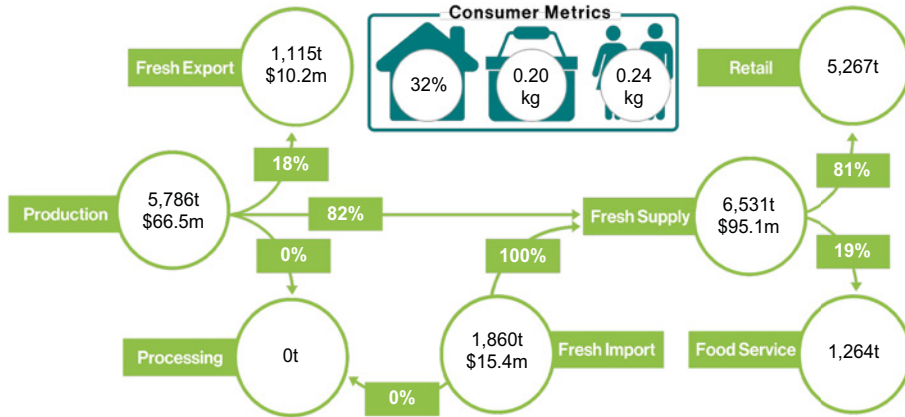
Source: GTA/TDM



Asparagus

Fresh Asparagus Overview

FRESH ASPARAGUS SUPPLY CHAIN – YEAR ENDING JUNE 2024



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

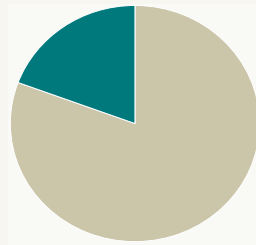
TOTAL PRODUCTION



\$66.5m

5,786t produced and valued at \$66.5m.

RETAIL VS FOOD SERVICE



■ Retail 81% ■ Food Service 19%

The fresh supply was **6,531t**, with **5,267t** distributed into retail and **1,264t** into food service.

CONSUMER METRICS



32% of Australian households purchased asparagus, buying an average of **202g** 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)	7,369	5,296	-28%	5,786	+9%
Production (\$m)	\$77.9	\$59.3	-24%	\$66.5	+12%
Fresh Export Volume (t)	1,181	1,022	-13%	1,115	+9%
Fresh Export Value (\$m)	\$10.0	\$10.7	+7%	\$10.2	-4%
Fresh Import Volume (t)	2,624	2,248	-14%	1,860	-17%
Fresh Import Value (\$m)	\$17.4	\$18.7	+8%	\$15.4	-17%
Fresh Supply (t)	8,812	6,522	-26%	6,531	<1%
Fresh Supply Wholesale Value (\$m)	\$116.3	\$90.1	-23%	\$95.1	+5%
Supply per Capita (kg)	0.34	0.25	-27%	0.24	-3%
Retail Supply (t)	7,107	5,260	-26%	5,267	<1%
Retail Supply Wholesale Value (\$m)	\$93.8	\$72.7	-23%	\$76.7	+5%
Food Service Supply (t)	1,706	1,262	-26%	1,264	<1%
Food Service Wholesale Value (\$m)	\$22.5	\$17.4	-23%	\$18.4	+5%

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

Fresh Asparagus Production

MAJOR PRODUCTION AREAS



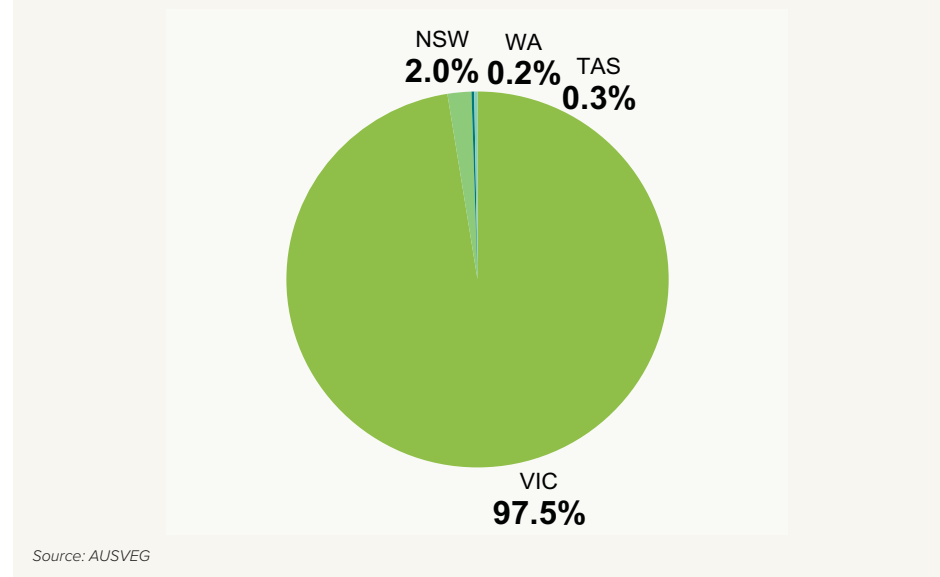
Source: AUSVEG

Asparagus production occurs predominantly in Victoria. There are typically two asparagus harvests: a spring cut, mainly destined for the export market, and a summer cut, primarily destined for the domestic market. There is minimal processing of local production, due to the low cost of imported product.

PRODUCTION WINDOW



2023/24 FRESH ASPARAGUS PRODUCTION BY STATE



2023/24 FRESH ASPARAGUS SEASONALITY BY STATE

State	Volume (t)	Jul	Aug	Sep	Oct	Nov	Dec	Jan	Feb	Mar	Apr	May	Jun
Victoria	5,640	None	Low	High	High	High	Medium	Medium	Medium	Medium	Low	None	None
New South Wales	116	Low	Low	Medium	High	Medium	Medium	Medium	Medium	None	None	None	None
Tasmania	15	None	None	Low	Low	None	None	None	None	None	None	None	None
Western Australia	14	None	None	Low	Medium	Medium	Medium	None	None	None	None	None	None

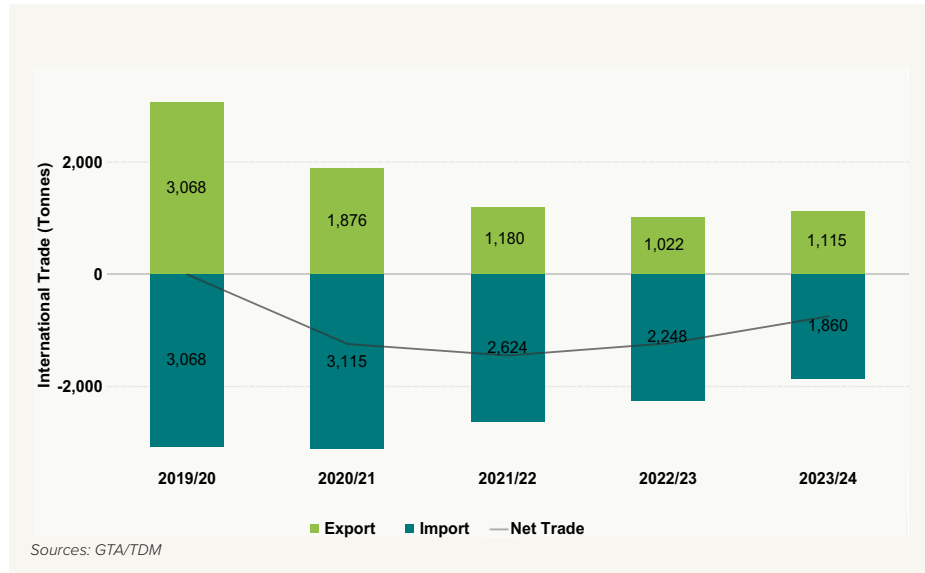
Availability legend: High (Dark Teal), Medium (Light Green), Low (Yellow-Green), None (Light Blue)

Source: AUSVEG

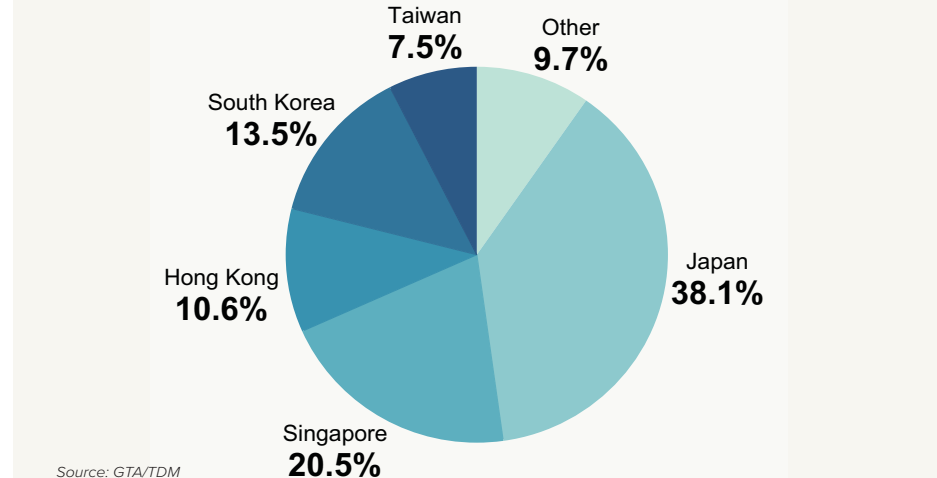
Fresh Asparagus International Trade

FRESH ASPARAGUS INTERNATIONAL TRADE

Australia has traditionally been a net exporter of fresh asparagus, typically exporting between **1,000-3,500 tonnes** per year. For the year ending June 2024, Australia imported **1,860 tonnes**, and exported **1,115 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 ASPARAGUS EXPORTS



For the year ending June 2024, **38.1%** of exported fresh asparagus 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	1,162	997	1,086	Japan	581	344	425
New South Wales	15	17	23	Singapore	148	199	229
Queensland	3	8	5	South Korea	182	132	151
South Australia	-	-	< 0.5	Hong Kong	115	116	118
Western Australia	-	< 0.5	-	Taiwan	109	174	84
Other	< 0.5	< 0.5	< 0.5	Other	46	56	108
TOTAL	1,180	1,022	1,115	TOTAL	1,180	1,022	1,115

FRESH ASPARAGUS IMPORTS

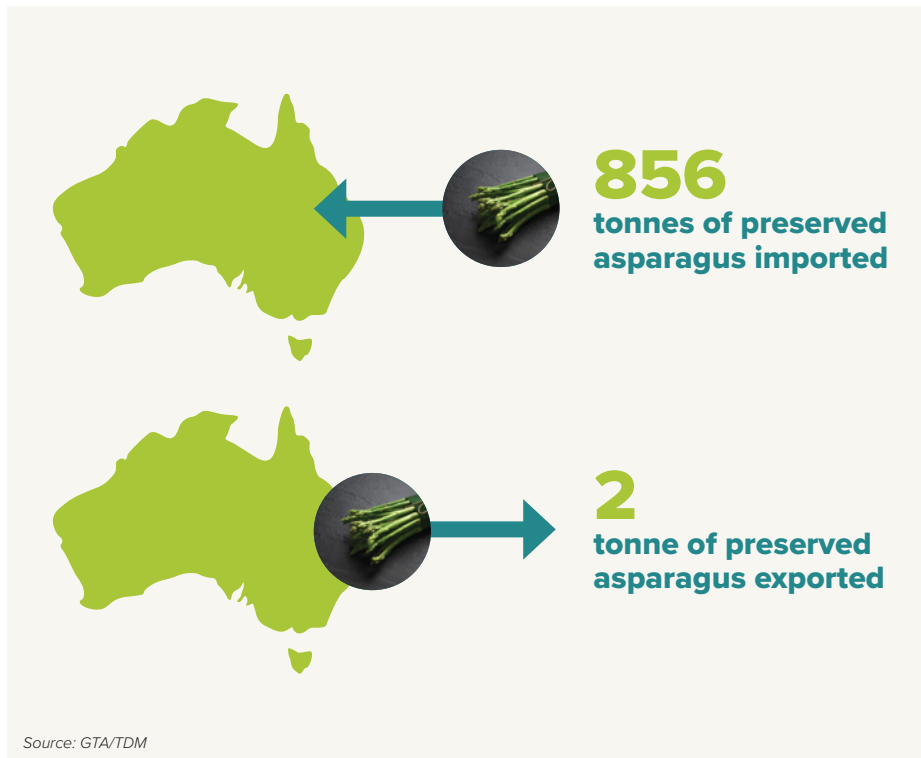
Imports by State Destination (Tonnes)				Imports by Country (Tonnes)			
Year Ending June	2022	2023	2024	Year Ending June	2022	2023	2024
Victoria	911	843	760	Mexico	2,564	2,237	1,825
New South Wales	965	721	505	US	58	11	20
Queensland	516	452	385	China	-	-	9
Western Australia	232	231	209	Thailand	2	-	6
Other	< 0.5	-	-	Italy	< 0.5	< 0.5	-
TOTAL	2,624	2,248	1,860	Other	< 0.5	< 0.5	-
				TOTAL	2,624	2,248	1,860

Source: GTA/TDM

Processed Asparagus International Trade

2023/24 PROCESSED ASPARAGUS INTERNATIONAL TRADE

For the year ending June 2024, an additional **856 tonnes** of preserved asparagus were imported, while **two tonnes** was exported. These volumes have not been included in the fresh imports and exports profiled on page **189**.

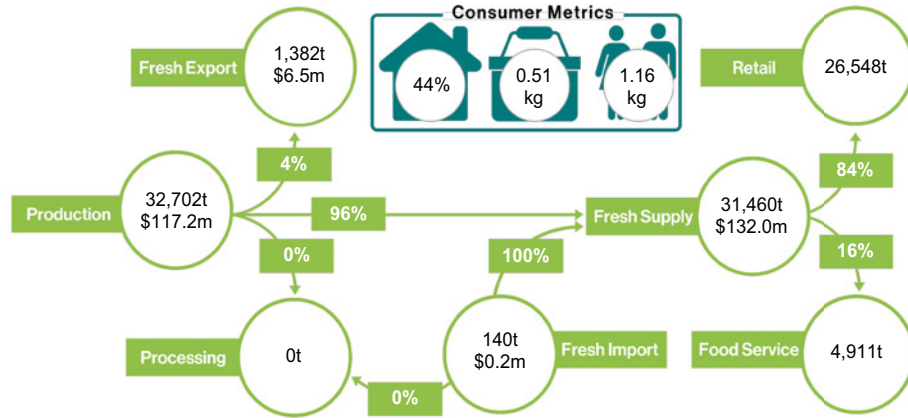


Beans



Fresh Beans Overview

FRESH BEANS SUPPLY CHAIN – YEAR ENDING JUNE 2024



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

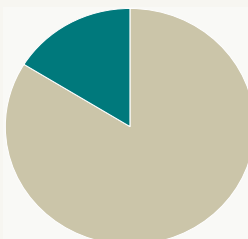
TOTAL PRODUCTION



\$117.2m

32,702t produced and valued at \$117.2m.


RETAIL VS FOOD SERVICE



■ Retail 84% ■ Food Service 16%

The fresh supply was **31,460t**, with **26,548t** distributed into retail and **4,911t** into food service.

CONSUMER METRICS



44%

44% of Australian households purchased beans, buying an average of **507g** per shopping trip.

PER CAPITA CONSUMPTION

1.16kg 

in 2023/24 based on the volume supplied.

YEAR ENDING JUNE	2022	2023		2024	
	Value	Value	% YoY	Value	% YoY
Production (t)	28,169	29,118	+3%	32,702	+12%
Production (\$m)	\$134.4	\$114.3	-15%	\$117.2	+2%
Fresh Export Volume (t)	1,188	1,254	+6%	1,382	+10%
Fresh Export Value (\$m)	\$6.2	\$7.2	+16%	\$6.5	-10%
Fresh Import Volume (t)	654	345	-47%	140	-59%
Fresh Import Value (\$m)	\$1.0	\$0.6	-42%	\$0.2	-63%
Fresh Supply (t)	27,635	28,209	+2%	31,460	+12%
Fresh Supply Wholesale Value (\$m)	\$155.6	\$128.9	-17%	\$132.0	+2%
Supply per Capita (kg)	1.06	1.07	<1%	1.16	+8%
Retail Supply (t)	23,164	23,645	+2%	26,548	+12%
Retail Supply Wholesale Value (\$m)	\$130.4	\$108.1	-17%	\$111.4	+3%
Food Service Supply (t)	4,471	4,564	+2%	4,911	+8%
Food Service Wholesale Value (\$m)	\$25.2	\$20.9	-17%	\$20.6	-1%

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

Fresh Beans Production

MAJOR PRODUCTION AREAS



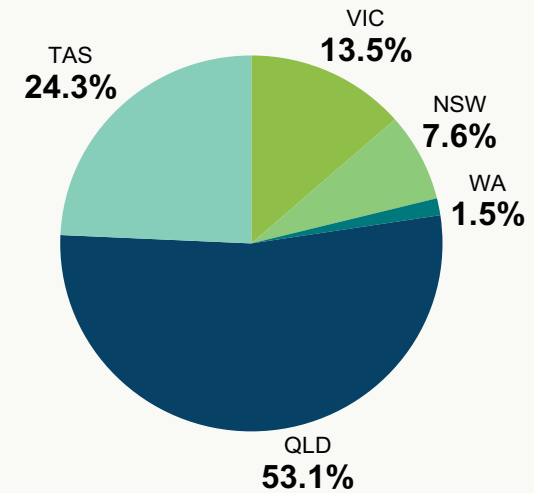
Source: AUSVEG

This report focuses on green beans, French beans and runner beans, excluding navy beans and other commonly sold tinned varieties. Bean production occurs predominately in Queensland. There is minimal processing of local production due to the low cost of imported product.

PRODUCTION WINDOW



2023/24 FRESH BEANS PRODUCTION BY STATE



Source: ABS

2023/24 FRESH BEANS SEASONALITY BY STATE

State	Volume (t)	Jul	Aug	Sep	Oct	Nov	Dec	Jan	Feb	Mar	Apr	May	Jun
Queensland	17,375	High	High	Medium	Medium	Low	Low	Low	Low	Low	High	High	High
Tasmania	7,940	Medium	Medium	Low	Low	Low	Low	Low	Low	Low	Low	Low	Low
Victoria	4,421	Medium	Medium	Medium	Medium	Low	Low	Low	Low	Low	Low	Low	High
New South Wales	2,489	Medium	Medium	Medium	Medium	Low	Low	Low	Low	Low	Low	Low	High
Western Australia	477	Medium	Medium	Medium	Medium	Low	Low	Low	Low	Low	Low	Low	Low

Availability legend: High Medium Low None

Source: AUSVEG

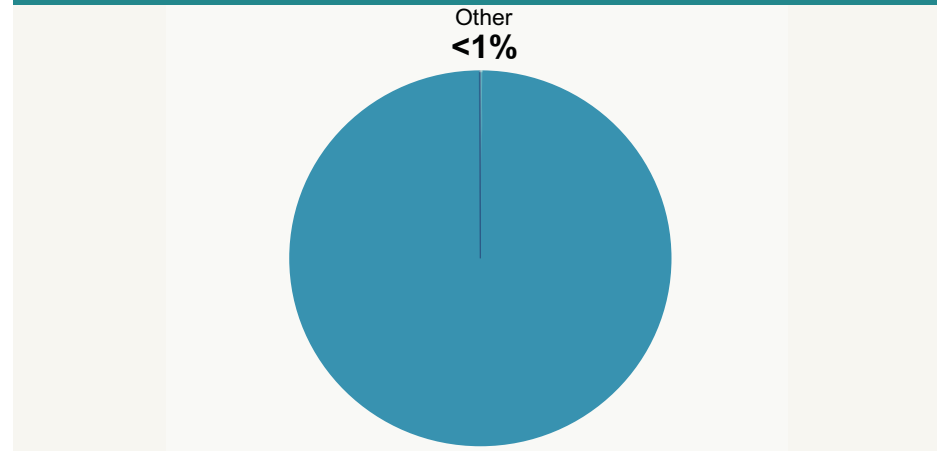
Fresh Beans International Trade

FRESH BEANS INTERNATIONAL TRADE

Australia is a net exporter of fresh beans, typically exporting between **1,200-1,700 tonnes** per year. For the year ending June 2024, Australia exported **1,382 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 BEANS EXPORTS



Source: GTA/TDM

For the year ending June 2024, **99.7%** of exported fresh beans 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	1,185	1,252	1,381	New Zealand	1,182	1,248	1,378
Victoria	2	2	1	New Caledonia	-	3	1
Tasmania	-	< 0.5	< 0.5	Hong Kong	1	1	1
New South Wales	1	< 0.5	-	UAE	< 0.5	< 0.5	< 0.5
Northern Territory	< 0.5	-	-	Malaysia	1	< 0.5	< 0.5
Other	< 0.5	1	< 0.5	Other	4	3	2
TOTAL	1,188	1,254	1,382	TOTAL	1,188	1,254	1,382

FRESH BEANS IMPORTS

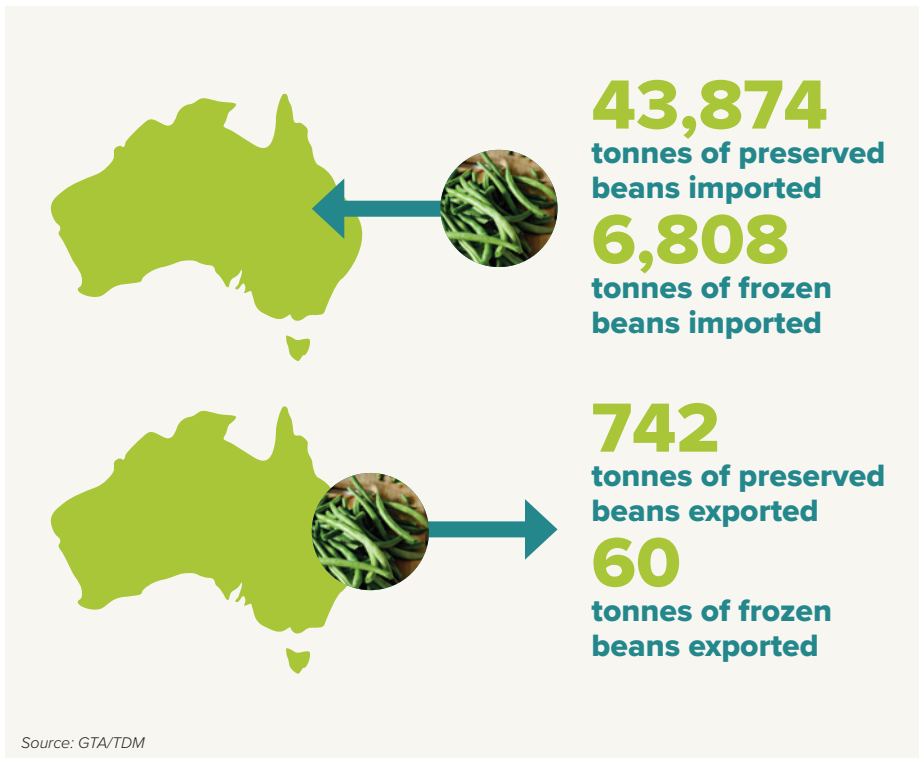
Imports by State Destination (Tonnes)				Imports by Country (Tonnes)			
Year Ending June	2022	2023	2024	Year Ending June	2022	2023	2024
Victoria	467	241	120	Canada	434	255	120
New South Wales	74	75	12	Nigeria	-	-	12
Western Australia	-	14	8	Belgium	-	14	8
Queensland	112	16	-	Iran	-	-	< 0.5
Other	< 0.5	-	-	Myanmar	50	75	-
TOTAL	654	345	140	Other	170	2	< 0.5
				TOTAL	654	345	140

Source: GTA/TDM

Processed Beans International Trade

2023/24 PROCESSED BEANS INTERNATIONAL TRADE

For the year ending June 2024, an additional **6,808 tonnes** of frozen beans and **43,874 tonnes** of preserved beans were imported, while **60 tonnes** of frozen beans and **742 tonnes** of preserved beans were exported.

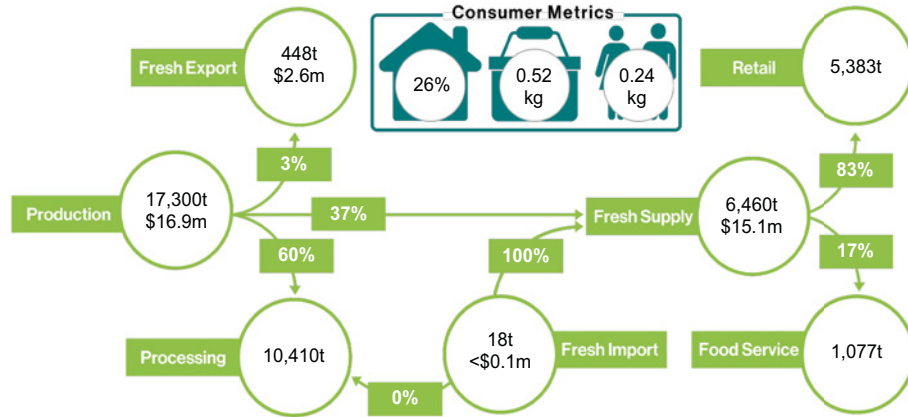


Beetroot



Fresh Beetroot Overview

FRESH BEETROOT SUPPLY CHAIN – YEAR ENDING JUNE 2024



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

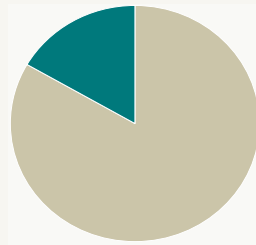
TOTAL PRODUCTION



\$16.9m

17,300t produced and valued at **\$16.9m** with 60% sent to be processed.

RETAIL VS FOOD SERVICE



■ Retail 83% ■ Food Service 17%

The fresh supply was **6,460t**, with **5,383t** distributed into retail and **1,077t** into food service.

CONSUMER METRICS



26% of Australian households purchased beetroot, buying an average of **515g** 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)	14,660	16,167	+10%	17,300	+7%
Production (\$m)	\$13.8	\$14.9	+8%	\$16.9	+13%
Fresh Export Volume (t)	346	306	-12%	448	+46%
Fresh Export Value (\$m)	\$1.3	\$1.7	+31%	\$2.6	+57%
Fresh Import Volume (t)	108	87	-19%	18	-80%
Fresh Import Value (\$m)	< \$0.1	\$0.2	>100%	< \$0.1	-80%
Fresh Supply (t)	5,600	6,220	+11%	6,460	+4%
Fresh Supply Wholesale Value (\$m)	\$13.4	\$14.2	+6%	\$15.1	+7%
Supply per Capita (kg)	0.22	0.24	+10%	0.24	<1%
Retail Supply (t)	4,667	5,183	+11%	5,383	+4%
Retail Supply Wholesale Value (\$m)	\$11.1	\$11.8	+6%	\$12.6	+7%
Food Service Supply (t)	933	1,037	+11%	1,077	+4%
Food Service Wholesale Value (\$m)	\$2.2	\$2.4	+6%	\$2.5	+7%

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

Fresh Beetroot Production

MAJOR PRODUCTION AREAS



Source: AUSVEG

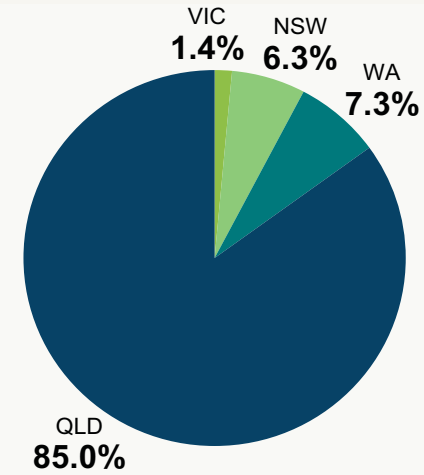
Beetroot production occurs predominantly in Queensland. Volumes grown for processing have decreased in recent years, however the majority of processed volume is tinned.

PRODUCTION WINDOW



Year-round

2023/24 FRESH BEETROOT PRODUCTION BY STATE



Source: AUSVEG

2023/24 FRESH BEETROOT SEASONALITY BY STATE

State	Volume (t)	Jul	Aug	Sep	Oct	Nov	Dec	Jan	Feb	Mar	Apr	May	Jun
Queensland	14,703	High	High	Medium	Medium	Medium	Medium	Medium	Medium	Medium	Medium	Medium	High
Western Australia	1,264	Medium	Medium	Medium	None	None	None	None	None	None	None	Medium	Medium
New South Wales	1,083	High	Medium	Medium	Medium	Medium	Medium	Medium	Medium	Medium	Medium	Medium	High
Victoria	250	Medium	Medium	Medium	Medium	Medium	Medium	Medium	Medium	Medium	Medium	Medium	High

Availability legend: High Medium Low None

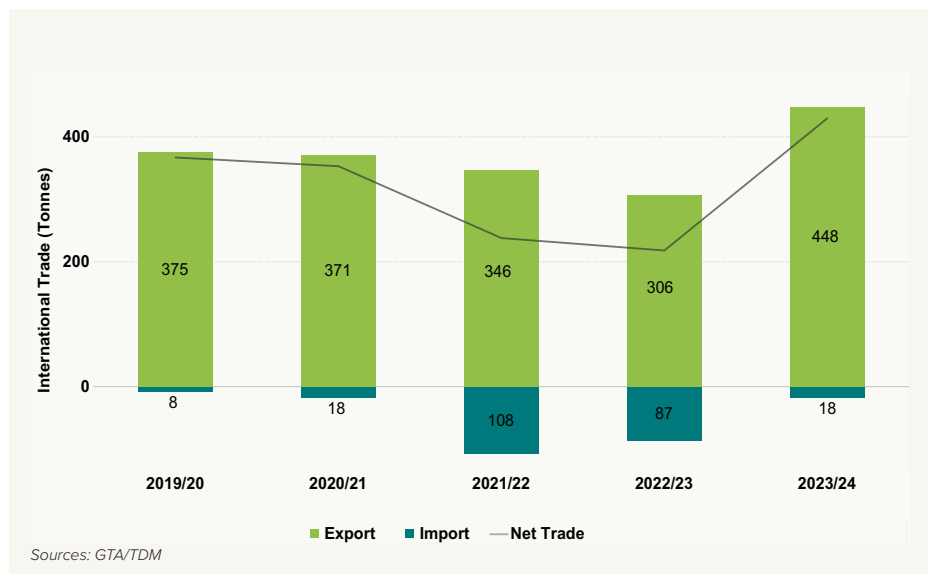
Source: AUSVEG

Fresh Beetroot, Celeriacs and Radishes International Trade

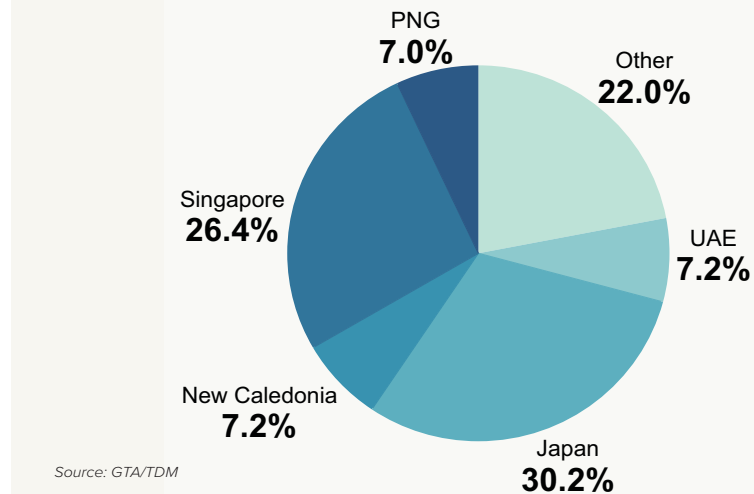
FRESH BEETROOT/CELERIACS/RADISHES INTERNATIONAL TRADE

Note: Trade data combines fresh beetroot, celeriacs and radishes.

For the year ending June 2024, Australia exported **448 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 BEETROOT/CELERIACS/RADISHES EXPORTS



Source: GTA/TDM

For the year ending June 2024, **30.2%** of exported fresh beetroot 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	121	161	201	Japan	87	104	135
Victoria	122	100	191	Singapore	41	47	118
South Australia	11	25	43	New Caledonia	12	15	32
New South Wales	50	19	11	UAE	66	25	32
Tasmania	13	< 0.5	2	PNG	24	20	31
Other	29	< 0.5	< 0.5	Other	116	95	98
TOTAL	346	306	448	TOTAL	346	306	448

FRESH BEETROOT/CELERIACS/RADISHES IMPORTS

Imports by State Destination (Tonnes)				Imports by Country (Tonnes)			
Year Ending June	2022	2023	2024	Year Ending June	2022	2023	2024
South Australia	81	50	17	Spain	81	50	17
New South Wales	14	26	< 0.5	Vietnam	-	< 0.5	< 0.5
Victoria	13	11	< 0.5	China	-	-	< 0.5
Other	-	-	< 0.5	Fiji	-	24	-
TOTAL	108	87	18	South Africa	-	11	-
				Other	27	2	< 0.5
				TOTAL	108	87	18

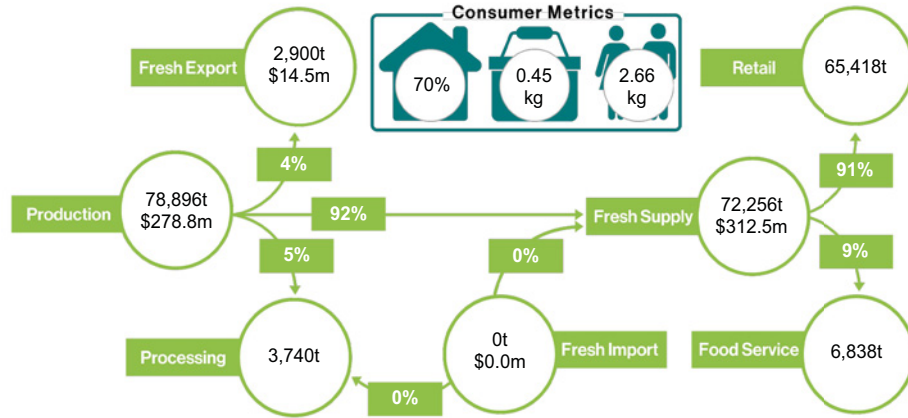
Source: GTA/TDM



Broccoli

Fresh Broccoli Overview

FRESH BROCCOLI SUPPLY CHAIN – YEAR ENDING JUNE 2024



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

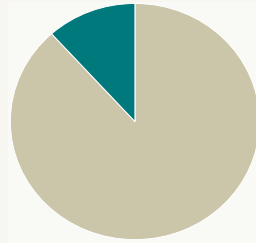
TOTAL PRODUCTION



\$278.8m

78,896t produced and valued at \$278.8m with 5% sent to be processed.

RETAIL VS FOOD SERVICE



■ Retail 91% ■ Food Service 9%

The fresh supply was 72,256t, with 65,418t distributed into retail and 6,838t into food service.

CONSUMER METRICS



70% of Australian households purchased broccoli, buying an average of 445g 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)	71,933	75,235	+5%	78,896	+5%
Production (\$m)	\$301.2	\$283.1	-6%	\$278.8	-1%
Fresh Export Volume (t)	2,546	2,223	-13%	2,900	+30%
Fresh Export Value (\$m)	\$13.2	\$11.7	-11%	\$14.5	+23%
Fresh Import Volume (t)	-	-	-	-	-
Fresh Import Value (\$m)	\$-	\$-	-	\$-	-
Fresh Supply (t)	66,100	69,499	+5%	72,256	+4%
Fresh Supply Wholesale Value (\$m)	\$340.2	\$320.2	-6%	\$312.5	-2%
Supply per Capita (kg)	2.55	2.65	+4%	2.66	<1%
Retail Supply (t)	59,277	62,754	+6%	65,418	+4%
Retail Supply Wholesale Value (\$m)	\$302.9	\$286.2	-6%	\$279.7	-2%
Food Service Supply (t)	6,823	6,744	-1%	6,838	+1%
Food Service Wholesale Value (\$m)	\$37.3	\$34.0	-9%	\$32.8	-4%

Note : This category has been updated to reflect revised data for previous years.

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

Fresh Broccoli Production

MAJOR PRODUCTION AREAS



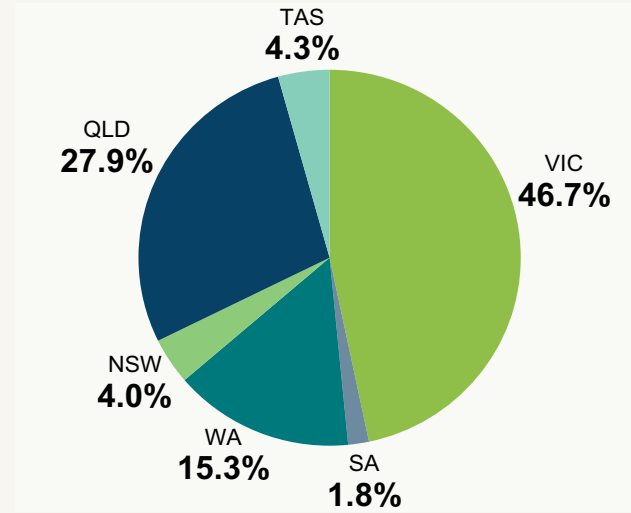
Source: AUSVEG

This section combines broccoli and baby broccoli. Baby broccoli refers to two distinct crops: baby broccoli is one variety of modified broccoli; and broccolini™ is a cross between broccoli and the leafy Asian vegetable ‘Gai Lan’ (Chinese broccoli). Broccoli is grown in most states of Australia.

PRODUCTION WINDOW



2023/24 FRESH BROCCOLI PRODUCTION BY STATE



Source: ABS

2023/24 FRESH BROCCOLI SEASONALITY BY STATE

State	Volume (t)	Jul	Aug	Sep	Oct	Nov	Dec	Jan	Feb	Mar	Apr	May	Jun
Victoria	36,851	Medium	High	High	Medium	Medium	Medium	Medium	Low	Low	Low	Low	Low
Queensland	22,029	Medium	Medium	Medium	Medium	Medium	Medium	Medium	Medium	Medium	Medium	Medium	High
Western Australia	12,041	Low	Medium	High	Medium	Medium	Medium	Medium	Medium	Medium	Medium	Medium	Medium
Tasmania	3,423	Medium	Medium	Medium	Medium	Medium	Medium	Medium	Medium	Medium	Medium	Medium	Medium
New South Wales	3,164	High	High	High	Medium	Medium	Medium	Medium	Medium	Medium	Medium	Medium	Medium
South Australia	1,389	Medium	Medium	Medium	Medium	Medium	Medium	Medium	Medium	Medium	Medium	Medium	Medium

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

Source: AUSVEG

Fresh Broccoli and Cauliflower International Trade

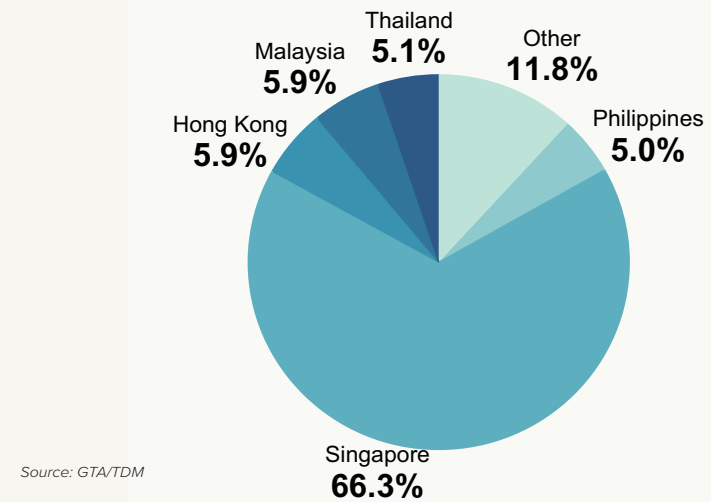
FRESH BROCCOLI AND CAULIFLOWER INTERNATIONAL TRADE

Note: Trade data combines fresh broccoli and cauliflower.

Australia is a net exporter of broccoli and cauliflower. For the year ending June 2024, Australia exported **3,193 tonnes**. The exports and imports over the last five financial years profiled in the graph below.



FRESH BROCCOLI AND CAULIFLOWER EXPORTS`



Source: GTA/TDM

For the year ending June 2024, **66.3%** of exported fresh broccoli and cauliflower 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	1,383	1,263	2,031	Singapore	1,734	1,309	2,116
Queensland	882	619	691	Hong Kong	328	227	190
New South Wales	392	328	278	Malaysia	177	123	187
South Australia	12	48	112	Thailand	130	215	164
Western Australia	81	59	54	Philippines	66	130	160
Other	60	118	28	Other	376	431	377
TOTAL	2,811	2,435	3,193	TOTAL	2,811	2,435	3,193

FRESH BROCCOLI AND CAULIFLOWER IMPORTS

Imports by State Destination (Tonnes)				Imports by Country (Tonnes)			
Year Ending June	2022	2023	2024	Year Ending June	2022	2023	2024
Victoria	64	-	-	China	44	-	-
Queensland	< 0.5	-	-	Egypt	20	-	-
Other	< 0.5	-	-	TOTAL	64	-	-
TOTAL	64	-	-				

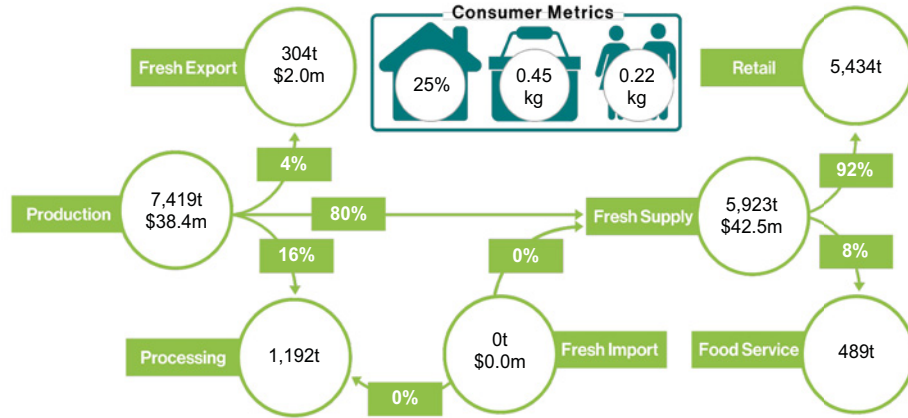
Source: GTA/TDM



Brussels Sprouts

Fresh Brussels Sprouts Overview

FRESH BRUSSELS SPROUTS SUPPLY CHAIN – YEAR ENDING JUNE 2024



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

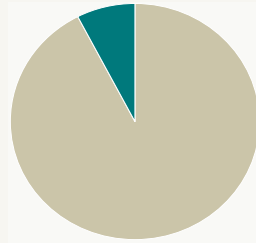
TOTAL PRODUCTION



\$38.4m

7,419t produced and valued at \$38.4m with 16% sent to be processed.

RETAIL VS FOOD SERVICE



■ Retail 92% ■ Food Service 8%

The fresh supply was 5,923t, with 5,434t distributed into retail and 489t into food service.

CONSUMER METRICS



25% of Australian households purchased brussels sprouts, buying an average of 448g per shopping trip.

PER CAPITA CONSUMPTION



0.22kg in 2023/24 based on the volume supplied.

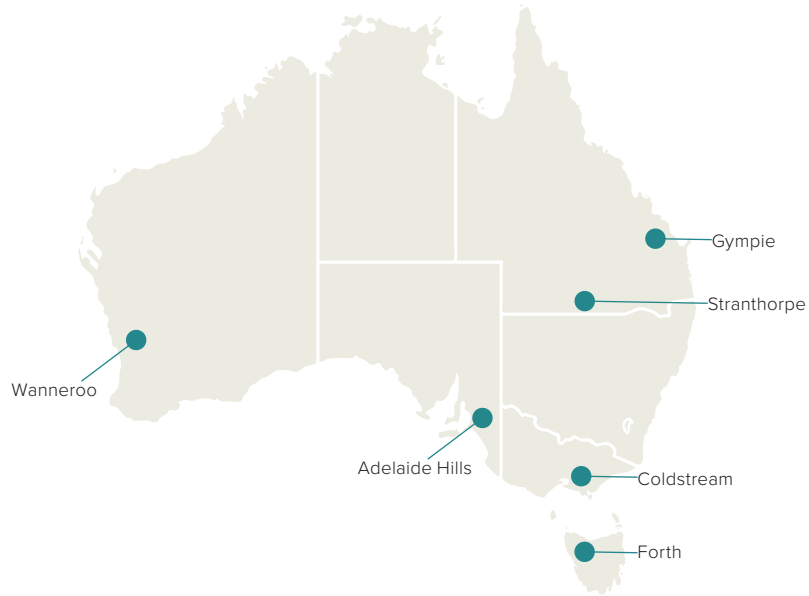
YEAR ENDING JUNE	2022	2023		2024	
	Value	Value	% YoY	Value	% YoY
Production (t)	5,353	6,845	+28%	7,419	+8%
Production (\$m)	\$27.5	\$37.4	+36%	\$38.4	+3%
Fresh Export Volume (t)	298	306	+3%	304	>-1%
Fresh Export Value (\$m)	\$1.8	\$2.2	+22%	\$2.0	-10%
Fresh Import Volume (t)	-	-	-	-	-
Fresh Import Value (\$m)	\$-	\$-	-	\$-	-
Fresh Supply (t)	4,108	5,439	+32%	5,923	+9%
Fresh Supply Wholesale Value (\$m)	\$29.9	\$41.1	+37%	\$42.5	+3%
Supply per Capita (kg)	0.16	0.21	+31%	0.22	+5%
Retail Supply (t)	3,797	4,974	+31%	5,434	+9%
Retail Supply Wholesale Value (\$m)	\$27.6	\$37.6	+36%	\$39.0	+4%
Food Service Supply (t)	311	465	+49%	489	+5%
Food Service Wholesale Value (\$m)	\$2.3	\$3.5	+55%	\$3.5	>-1%

Note : This category has been updated to reflect revised data for previous years.

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

Fresh Brussels Sprouts Production

MAJOR PRODUCTION AREAS



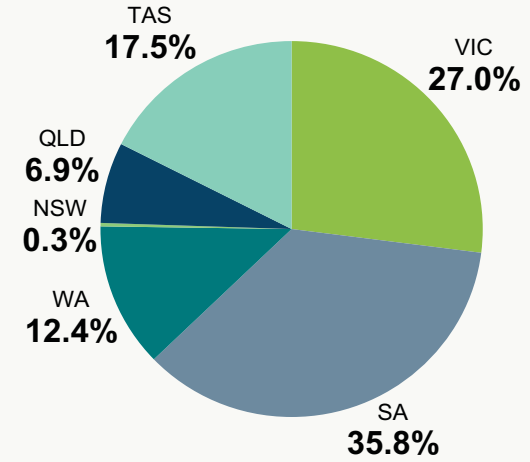
Source: AUSVEG

Brussels sprouts production occurs in the southern states of Australia, with the majority of production occurring in South Australia.

PRODUCTION WINDOW



2023/24 FRESH BRUSSELS SPROUTS PRODUCTION BY STATE



Source: ABS

2023/24 FRESH BRUSSELS SPROUTS SEASONALITY BY STATE

State	Volume (t)	Jul	Aug	Sep	Oct	Nov	Dec	Jan	Feb	Mar	Apr	May	Jun
South Australia	2,655	High	Medium	Low	None	None	Low	Medium	High	High	High	High	High
Victoria	2,005	High	Medium	None	None	None	None	None	Low	Medium	High	High	High
Tasmania	1,301	Medium	Low	None	None	None	None	Low	Medium	High	High	High	High
Western Australia	921	None	None	Low	Medium	High	High	High	None	None	None	None	None
Queensland	515	None	None	Low	Medium	High	High	High	High	None	None	None	None
New South Wales	22	Low	Medium	None	None	None	None	None	None	None	None	None	Low

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

Source: AUSVEG

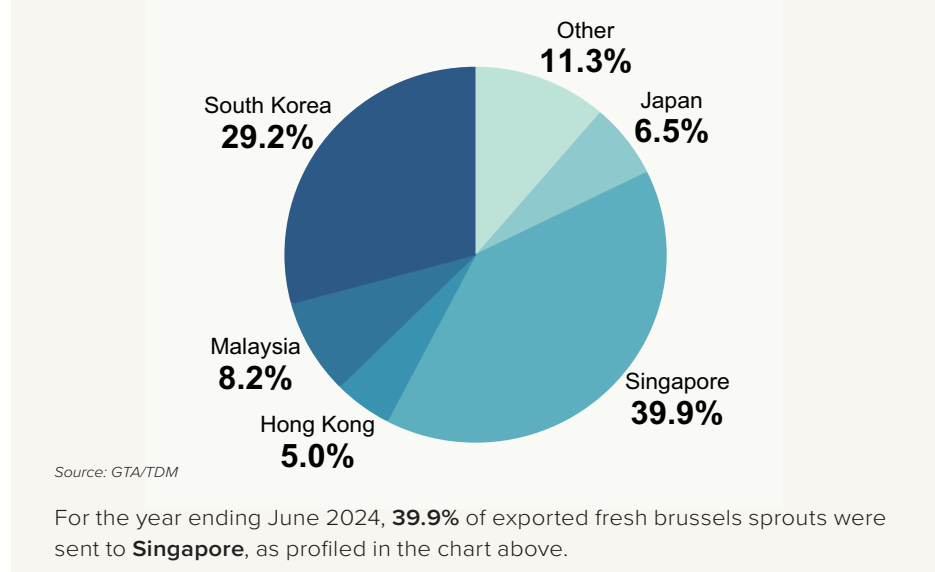
Fresh Brussels Sprouts International Trade

FRESH BRUSSELS SPROUTS INTERNATIONAL TRADE

Australia is a net exporter of brussels sprouts. For the year ending June 2024, Australia exported **304 tonnes**. The exports and imports over the last five years are profiled in the graph below.



FRESH BRUSSELS SPROUTS EXPORTS



Exports by State of Production Origin (Tonnes)			
Year Ending June	2022	2023	2024
South Australia	136	159	179
Victoria	123	132	98
Queensland	11	4	19
New South Wales	23	6	5
Tasmania	2	4	1
Other	3	2	2
TOTAL	298	306	304

Exports by Country (Tonnes)			
Year Ending June	2022	2023	2024
Singapore	43	76	121
South Korea	150	143	89
Malaysia	14	12	25
Japan	25	29	20
Hong Kong	30	17	15
Other	35	29	34
TOTAL	298	306	304

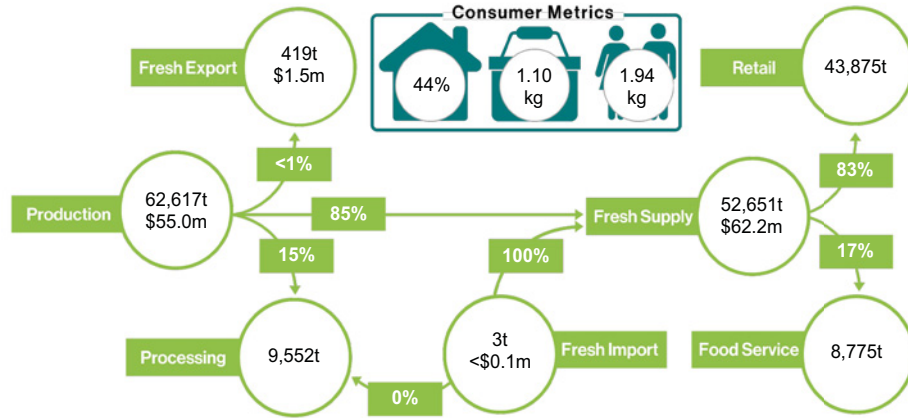
Source: GTA/TDM



Cabbages

Fresh Cabbages Overview

FRESH CABBAGES SUPPLY CHAIN – YEAR ENDING JUNE 2024



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

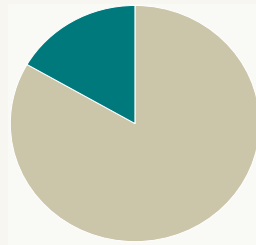
TOTAL PRODUCTION



\$55.0m

62,617t produced and valued at \$55.0m with 15% sent to be processed.

RETAIL VS FOOD SERVICE



■ Retail 83% ■ Food Service 17%

The fresh supply was 52,651t, with 43,875t distributed into retail and 8,775t into food service.

CONSUMER METRICS



44% of Australian households purchased cabbages, buying an average of 1.10kg per shopping trip.

PER CAPITA CONSUMPTION



1.94kg in 2023/24 based on the volume supplied.

YEAR ENDING JUNE	2022	2023		2024	
	Value	Value	% YoY	Value	% YoY
Production (t)	65,306	62,848	-4%	62,617	>-1%
Production (\$m)	\$49.8	\$59.7	+20%	\$55.0	-8%
Fresh Export Volume (t)	524	533	+2%	419	-22%
Fresh Export Value (\$m)	\$1.7	\$1.7	-3%	\$1.5	-11%
Fresh Import Volume (t)	<1	42	>100%	3	-92%
Fresh Import Value (\$m)	< \$0.1	\$0.1	>100%	< \$0.1	-80%
Fresh Supply (t)	54,820	52,770	-4%	52,651	>-1%
Fresh Supply Wholesale Value (\$m)	\$55.9	\$67.5	+21%	\$62.2	-8%
Supply per Capita (kg)	2.11	2.01	-5%	1.94	-4%
Retail Supply (t)	45,683	43,975	-4%	43,875	>-1%
Retail Supply Wholesale Value (\$m)	\$46.6	\$56.3	+21%	\$51.9	-8%
Food Service Supply (t)	9,137	8,795	-4%	8,775	>-1%
Food Service Wholesale Value (\$m)	\$9.3	\$11.3	+21%	\$10.4	-8%

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

Fresh Cabbages Production

MAJOR PRODUCTION AREAS



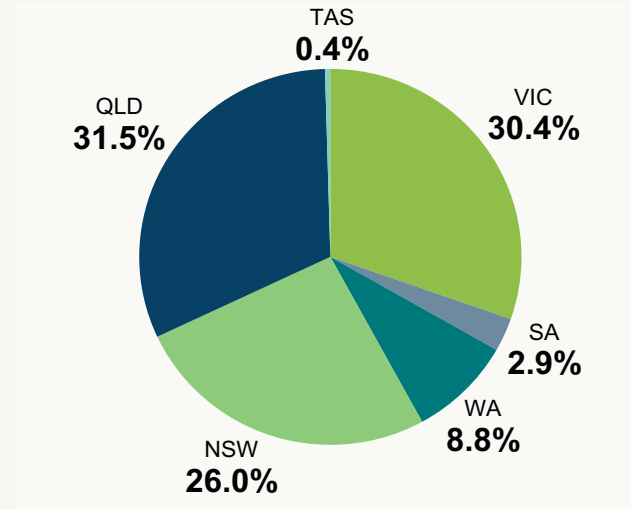
Source: AUSVEG

Cabbage production occurs in most states of Australia, with higher production predominantly occurring during the winter months.

PRODUCTION WINDOW



2023/24 FRESH CABBAGES PRODUCTION BY STATE



Source: ABS

2023/24 FRESH CABBAGES SEASONALITY BY STATE

State	Volume (t)	Jul	Aug	Sep	Oct	Nov	Dec	Jan	Feb	Mar	Apr	May	Jun
Queensland	19,734	High	Medium	Low	Low	Low	Low	Low	Low	Low	High	High	High
Victoria	19,018	High	High	Medium	Medium	Low	Low	Low	Low	Low	High	High	High
New South Wales	16,279	High	Medium	Medium	Medium	Low	Low	Low	Low	Low	High	High	High
Western Australia	5,513	Medium	High	High	High	High	Low	Low	Low	Low	Low	Low	Low
South Australia	1,790	Medium	Medium	Medium	Low	Low	Low	Low	Low	Low	Low	Low	Low
Tasmania	281	Medium	Medium	Low	Low	Low	Low	Low	Low	Low	Low	Low	Low

Availability legend: High Medium Low None

Source: AUSVEG

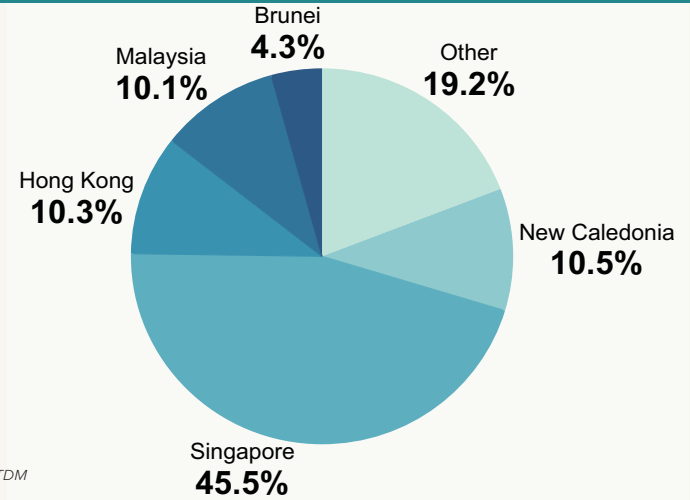
Fresh Cabbages International Trade

FRESH CABBAGES INTERNATIONAL TRADE

Australia is a net exporter of cabbages. For the year ending June 2024, Australia exported **419 tonnes**. The exports and imports over the last five years are profiled in the graph below, where imports are counted as negative tonnes.



FRESH CABBAGES EXPORTS



Source: GTA/TDM

For the year ending June 2024, **45.5%** of exported fresh cabbages 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
Queensland	201	258	155	Singapore	199	181	191
Victoria	98	117	153	New Caledonia	45	151	44
Western Australia	158	72	59	Hong Kong	44	22	43
New South Wales	65	83	45	Malaysia	101	54	42
Tasmania	1	3	5	Brunei	32	20	18
Other	2	1	1	Other	103	105	80
TOTAL	524	533	419	TOTAL	524	533	419

FRESH CABBAGES 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	-	40	3	China	-	40	3
Victoria	-	2	< 0.5	Netherlands	-	2	< 0.5
Other	-	-	< 0.5	Other	-	-	< 0.5
TOTAL	-	42	3	TOTAL	-	42	3

Source: GTA/TDM



Processed Cabbages International Trade

2023/24 PROCESSED CABBAGES INTERNATIONAL TRADE

For the year ending June 2024, **290 tonnes** of preserved cabbages were exported.



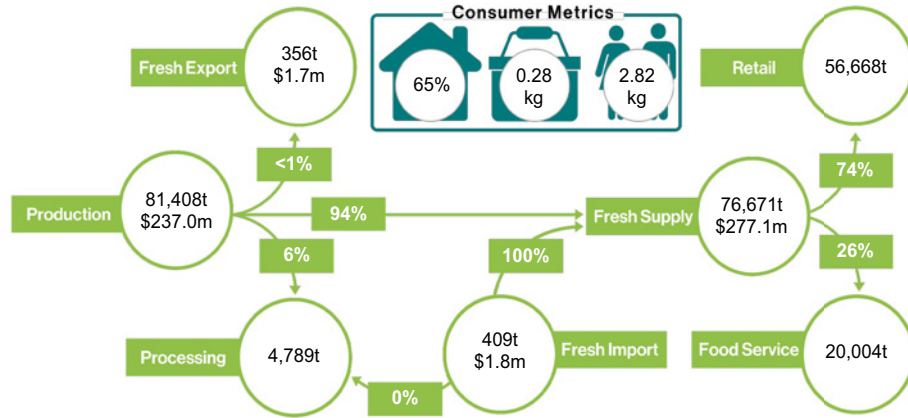
Source: GTA/TDM



Capsicum

Fresh Capsicums Overview

FRESH CAPSICUMS SUPPLY CHAIN – YEAR ENDING JUNE 2024



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

TOTAL PRODUCTION



\$237.0m

81,408t produced and valued at **\$237.0m** with 6% sent to be processed.


RETAIL VS FOOD SERVICE



■ Retail 74% ■ Food Service 26%

The fresh supply was **76,671t**, with **56,668t** distributed into retail and **20,004t** into food service.

CONSUMER METRICS



65%

65% of Australian households purchased capsicums, buying an average of **281g** per shopping trip.

PER CAPITA CONSUMPTION

2.82kg 

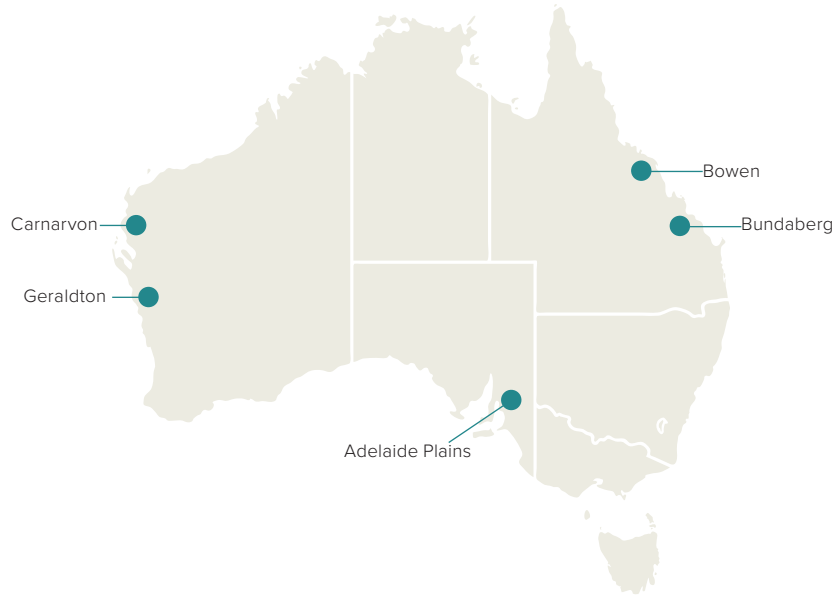
in 2023/24 based on the volume supplied.

YEAR ENDING JUNE	2022	2023		2024	
	Value	Value	% YoY	Value	% YoY
Production (t)	71,403	73,719	+3%	81,408	+10%
Production (\$m)	\$211.9	\$215.8	+2%	\$237.0	+10%
Fresh Export Volume (t)	345	333	-3%	356	+7%
Fresh Export Value (\$m)	\$1.5	\$1.9	+24%	\$1.7	-7%
Fresh Import Volume (t)	780	667	-15%	409	-39%
Fresh Import Value (\$m)	\$3.4	\$3.2	-8%	\$1.9	-40%
Fresh Supply (t)	67,638	69,716	+3%	76,671	+10%
Fresh Supply Wholesale Value (\$m)	\$249.3	\$253.1	+2%	\$277.1	+9%
Supply per Capita (kg)	2.61	2.65	+2%	2.82	+6%
Retail Supply (t)	49,991	51,527	+3%	56,668	+10%
Retail Supply Wholesale Value (\$m)	\$184.2	\$187.0	+2%	\$204.8	+9%
Food Service Supply (t)	17,647	18,189	+3%	20,004	+10%
Food Service Wholesale Value (\$m)	\$65.0	\$66.0	+2%	\$72.3	+9%

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

Fresh Capsicums Production

MAJOR PRODUCTION AREAS



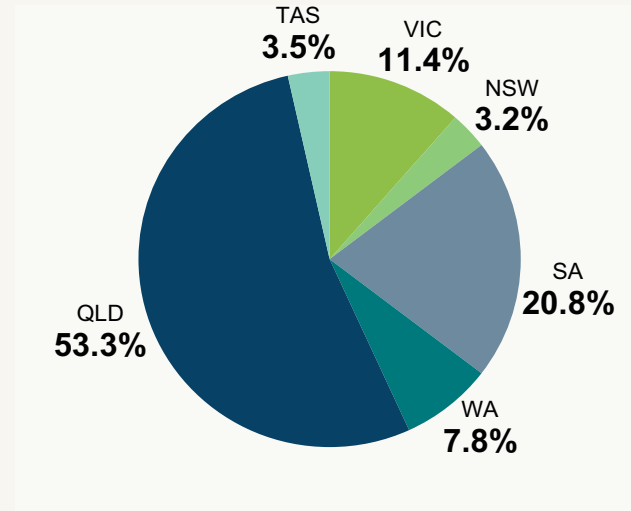
Source: AUSVEG

Capsicums, or bell peppers, are grown in most states of Australia. The majority of capsicums are currently grown outdoors in Queensland. However, increasingly capsicums are being grown year-round in high-tech greenhouses in the southern states.

PRODUCTION WINDOW



2023/24 FRESH CAPSICUMS PRODUCTION BY STATE



Source: ABS

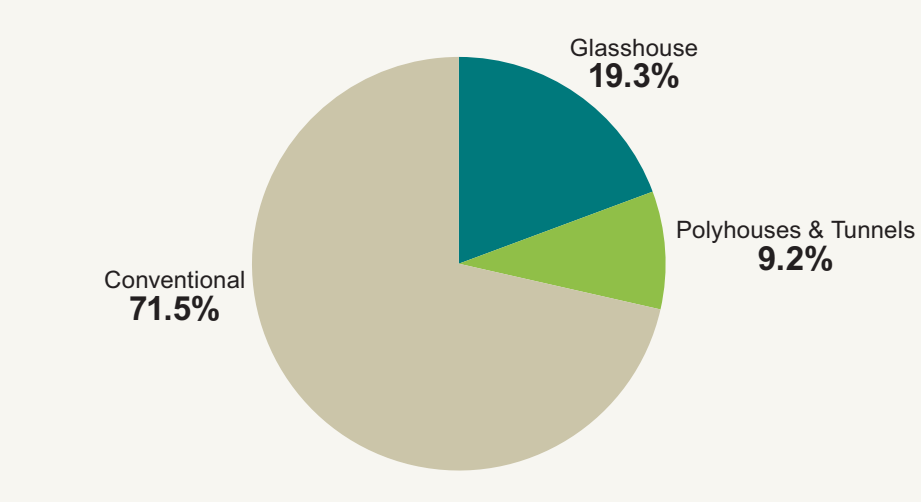
2023/24 FRESH CAPSICUMS SEASONALITY BY STATE

State	Volume (t)	Jul	Aug	Sep	Oct	Nov	Dec	Jan	Feb	Mar	Apr	May	Jun
Queensland	43,411	Low	Low	Low	Low	Low	Low	High	High	High	Medium	Medium	Medium
South Australia	16,921	Low	Low	Low	Low	Low	Low	High	High	Medium	Medium	Low	Low
Victoria	9,293	Low	Low	Low	Low	Low	Low	High	High	Medium	Medium	Medium	Medium
Western Australia	6,335	Low	Low	Low	Low	Low	Low	Medium	High	High	Medium	Medium	Low
Tasmania	2,846	Low	Low	Low	Low	Low	Low	High	High	Medium	Medium	Medium	Medium
New South Wales	2,602	None	None	None	Low	Low	Low	Low	Low	Low	Low	Low	None

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

Source: AUSVEG

2023/24 FRESH CAPSICUMS PRODUCTION BY SYSTEM



Production of capsicums in Australia occurs in three different types of farming systems. These systems and their contribution to production are **Glasshouse 19.3%**, **Polyhouses & Tunnels 9.2%** and **Conventional 71.5%**.

2023/24 FRESH CAPSICUMS PRODUCTION SYSTEM BY STATE

State	Glasshouse		Polyhouses & Tunnels		Conventional	
	Hectares (Ha)	Volume (t)	Hectares (Ha)	Volume (t)	Hectares (Ha)	Volume (t)
New South Wales	0	0	0	0	-	2,602
Victoria	8	3,000	16	3,100	-	3,193
Queensland	6	1,740	8	1,600	-	40,071
Western Australia	0	0	0	0	-	6,335
South Australia	24	9,600	14	2,800	-	4,521
Tasmania	4	1,400	0	0	-	1,446
Northern Territory	0	0	0	0	-	0
Total	41	15,740	38	7,500	-	58,168

Fresh Capsicums and Chillies International Trade

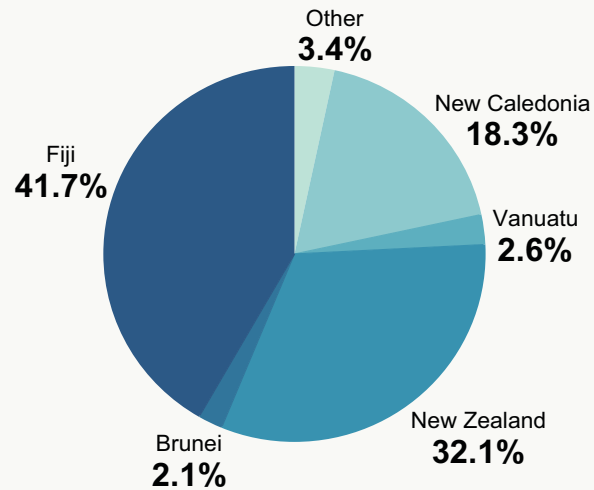
FRESH CAPSICUMS INTERNATIONAL TRADE

Note: Trade data combines fresh capsicums and chillies.

Australia is a net importer of capsicums and chillies, typically importing between **400-900 tonnes** every year, predominantly from Fiji. For the year ending June 2024, Australia exported **375 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 CAPSICUMS AND CHILLIES EXPORTS



Source: GTA/TDM

For the year ending June 2024, **41.7%** of exported fresh capsicums and chillies were sent to **Fiji**, 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	280	244	272	Fiji	64	117	156
Victoria	66	94	96	New Zealand	201	121	120
New South Wales	9	6	5	New Caledonia	51	85	69
South Australia	8	6	1	Vanuatu	5	5	10
Tasmania	-	-	1	Brunei	22	11	8
Other	-	-	< 0.5	Other	21	12	13
TOTAL	363	351	375	TOTAL	363	351	375

FRESH CAPSICUMS AND CHILLIES 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	505	388	258	New Zealand	726	655	378
Victoria	122	165	79	Vietnam	25	32	52
Western Australia	101	92	69	India	70	16	-
Queensland	88	57	24	Other	-	< 0.5	-
South Australia	4	-	-	TOTAL	822	702	430
Other	< 0.5	-	< 0.5				
TOTAL	822	702	430				

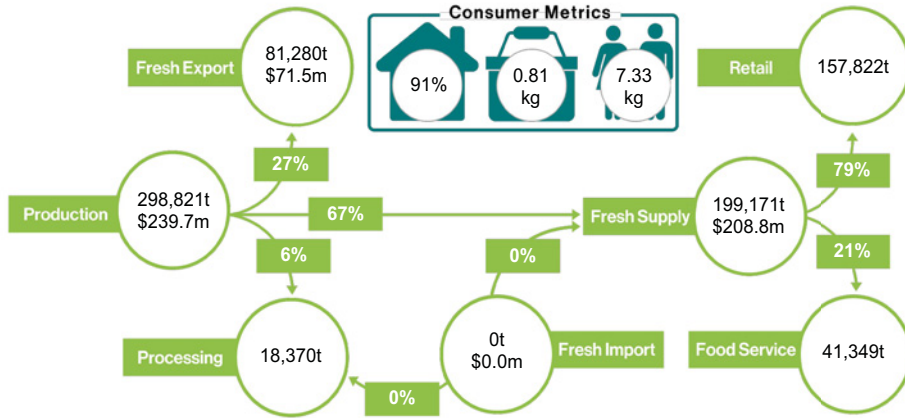
Source: GTA/TDM



Carrots

Fresh Carrots Overview

FRESH CARROTS SUPPLY CHAIN – YEAR ENDING JUNE 2024



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

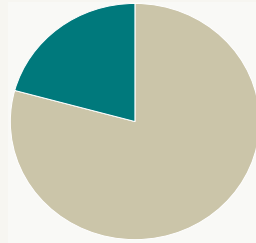
TOTAL PRODUCTION



\$239.7m

298,821t produced and valued at \$239.7m with 6% sent to be processed.

RETAIL VS FOOD SERVICE



■ Retail 79% ■ Food Service 21%

The fresh supply was 199,171t, with 157,822t distributed into retail and 41,349t into food service.

CONSUMER METRICS



91% of Australian households purchased carrots, buying an average of 808g per shopping trip.

PER CAPITA CONSUMPTION



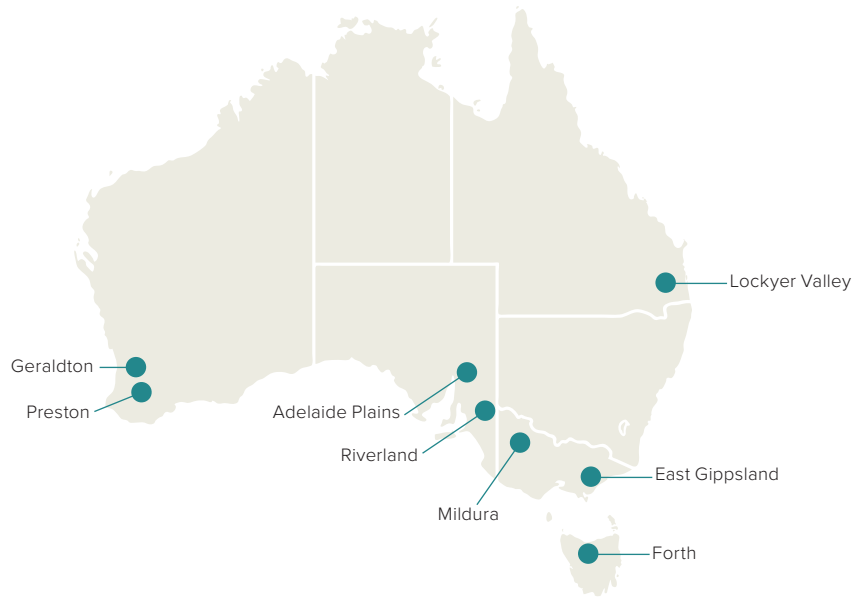
7.33kg in 2023/24 based on the volume supplied.

YEAR ENDING JUNE	2022	2023		2024	
	Value	Value	% YoY	Value	% YoY
Production (t)	306,394	300,715	-2%	298,821	>-1%
Production (\$m)	\$247.9	\$261.7	+6%	\$239.7	-8%
Fresh Export Volume (t)	99,247	87,847	-11%	81,280	-7%
Fresh Export Value (\$m)	\$92.2	\$82.5	-11%	\$71.5	-13%
Fresh Import Volume (t)	<1	-	-100%	-	-
Fresh Import Value (\$m)	\$-	\$-	-	\$-	-
Fresh Supply (t)	188,313	194,381	+3%	199,171	+2%
Fresh Supply Wholesale Value (\$m)	\$197.7	\$223.5	+13%	\$208.8	-7%
Supply per Capita (kg)	7.26	7.40	+2%	7.33	>-1%
Retail Supply (t)	149,218	154,027	+3%	157,822	+2%
Retail Supply Wholesale Value (\$m)	\$156.7	\$177.1	+13%	\$165.5	-7%
Food Service Supply (t)	39,095	40,355	+3%	41,349	+2%
Food Service Wholesale Value (\$m)	\$41.1	\$46.4	+13%	\$43.4	-7%

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

Fresh Carrots Production

MAJOR PRODUCTION AREAS



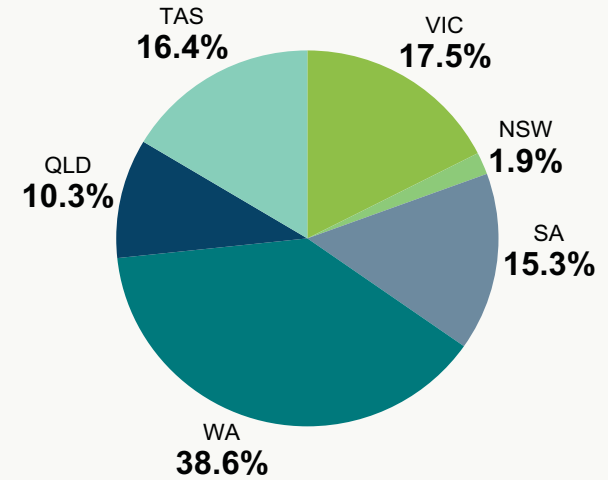
Source: AUSVEG

Carrot production occurs primarily in the southern states of Australia, with a large volume of carrots grown for the export market in Western Australia.

PRODUCTION WINDOW



2023/24 FRESH CARROTS PRODUCTION BY STATE



Source: AUSVEG

2023/24 FRESH CARROTS SEASONALITY BY STATE

State	Volume (t)	Jul	Aug	Sep	Oct	Nov	Dec	Jan	Feb	Mar	Apr	May	Jun
Western Australia	115,388	High	Medium	Low	Low	Medium	Medium	Medium	Medium	Medium	High	High	High
Victoria	52,317	High	Medium	Medium	Medium	Medium	Medium	Medium	Medium	Medium	High	High	High
Tasmania	48,975	High	High	High	Medium	Medium	Medium	Medium	Medium	Medium	High	High	High
South Australia	45,748	Medium	Medium	Medium	Medium	Medium	Medium	Medium	Medium	Medium	High	High	High
Queensland	30,670	Medium	Medium	Medium	Medium	Medium	Medium	Medium	Medium	High	High	High	High
New South Wales	5,724	Medium	Medium	Medium	Medium	Medium	Medium	Medium	Medium	High	High	High	High

Availability legend: High Medium Low None

Source: AUSVEG

Fresh Carrots and Turnips International Trade

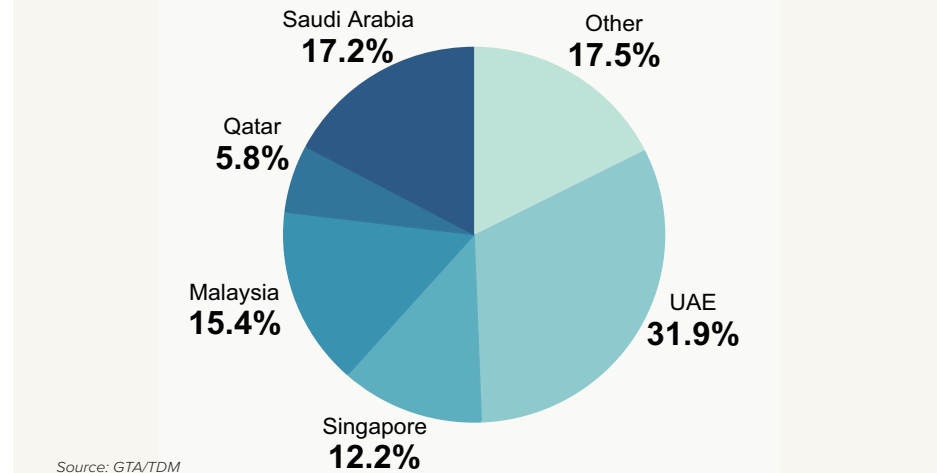
FRESH CARROTS AND TURNIPS INTERNATIONAL TRADE

Note: Trade data combines fresh carrots and turnips.

Australia is a net exporter of carrots and turnips, typically exporting between **80,000-110,000** tonnes every year, predominantly from Western Australia. For the year ending June 2024, Australia exported **81,280 tonnes**. The exports and imports over the last five financial years are profiled in the graph below.



FRESH CARROTS EXPORTS



For the year ending June 2024, **31.9%** of exported fresh carrots and turnips 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
Western Australia	92,641	81,654	72,795	UAE	29,450	29,950	25,888
Queensland	1,567	2,082	4,447	Saudi Arabia	18,355	13,371	13,995
Victoria	1,607	1,554	2,152	Malaysia	16,541	13,447	12,494
Tasmania	2,687	2,320	1,610	Singapore	12,633	10,934	9,900
New South Wales	261	149	217	Qatar	7,544	6,925	4,745
Other	482	87	59	Other	14,723	13,221	14,259
TOTAL	99,247	87,847	81,280	TOTAL	99,247	87,847	81,280

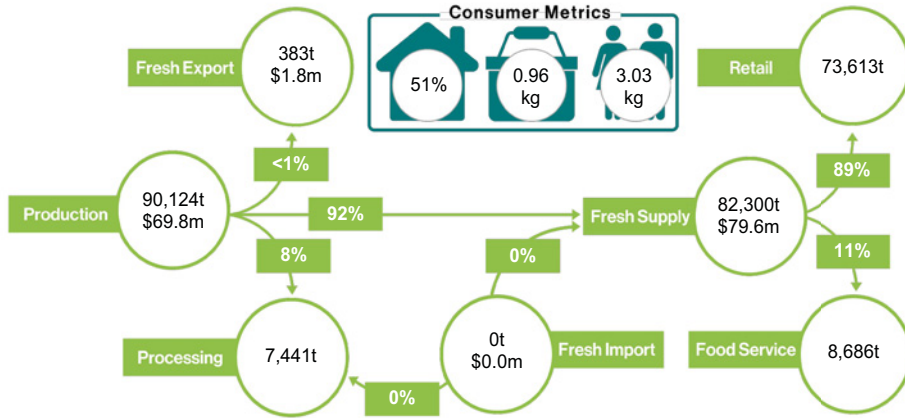
Source: GTA/TDM



Cauliflowers

Fresh Cauliflowers Overview

FRESH CAULIFLOWERS SUPPLY CHAIN – YEAR ENDING JUNE 2024



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

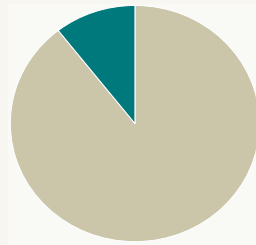
TOTAL PRODUCTION



\$69.8m

90,124t produced and valued at **\$69.8m** with 8% sent to be processed.

RETAIL VS FOOD SERVICE



■ Retail 89% ■ Food Service 11%

The fresh supply was **82,300t**, with **73,613t** distributed into retail and **8,686t** into food service.

CONSUMER METRICS



51% of Australian households purchased cauliflowers, buying an average of **964g** 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)	77,061	84,893	+10%	90,124	+6%
Production (\$m)	\$61.4	\$73.7	+20%	\$69.8	-5%
Fresh Export Volume (t)	337	292	-13%	383	+31%
Fresh Export Value (\$m)	\$1.7	\$1.5	-13%	\$1.9	+24%
Fresh Import Volume (t)	8	-	-100%	-	-
Fresh Import Value (\$m)	< \$0.1	\$-	-100%	\$-	-
Fresh Supply (t)	70,369	77,591	+10%	82,300	+6%
Fresh Supply Wholesale Value (\$m)	\$70.0	\$84.6	+21%	\$79.6	-6%
Supply per Capita (kg)	2.71	2.95	+9%	3.03	+3%
Retail Supply (t)	62,942	69,402	+10%	73,613	+6%
Retail Supply Wholesale Value (\$m)	\$62.6	\$75.6	+21%	\$71.2	-6%
Food Service Supply (t)	7,427	8,189	+10%	8,686	+6%
Food Service Wholesale Value (\$m)	\$7.4	\$8.9	+21%	\$8.4	-6%

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

Fresh Cauliflowers Production

MAJOR PRODUCTION AREAS



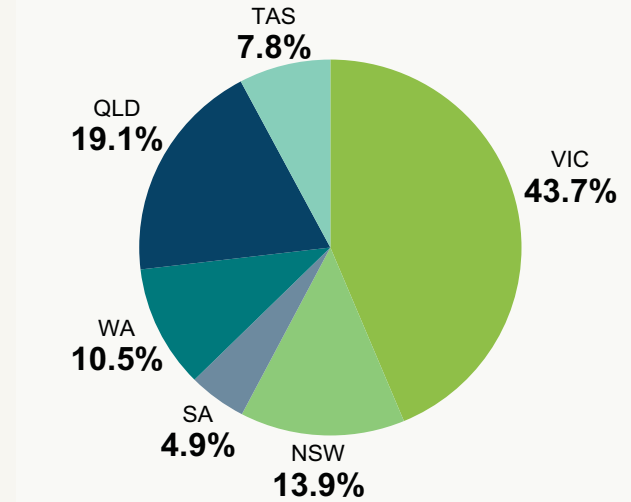
Source: AUSVEG

Cauliflower production occurs across most states in Australia, with production occurring predominantly the winter months.

PRODUCTION WINDOW



2023/24 FRESH CAULIFLOWERS PRODUCTION BY STATE



Source: ABS

2023/24 FRESH CAULIFLOWERS SEASONALITY BY STATE

State	Volume (t)	Jul	Aug	Sep	Oct	Nov	Dec	Jan	Feb	Mar	Apr	May	Jun
Victoria	39,411	High	Medium	Low	Low	Low	Low	Low	Low	Low	Low	Low	High
Queensland	17,213	Low	High	Medium	Low	Low	Low	Low	Low	Low	Low	Low	Low
New South Wales	12,557	High	High	Low	Low	Low	Low	Low	Low	Low	Low	Low	High
Western Australia	9,507	Low	High	High	High	Low	Low	Low	Low	Low	Low	Low	Low
Tasmania	6,992	Low	Low	High	Low	Low	Low	Low	Low	Low	Low	Low	Low
South Australia	4,444	Low	Low	High	Low	Low	Low	Low	Low	Low	Low	Low	Low

Availability legend: High Medium Low None

Source: ABS

Fresh Broccoli and Cauliflower International Trade

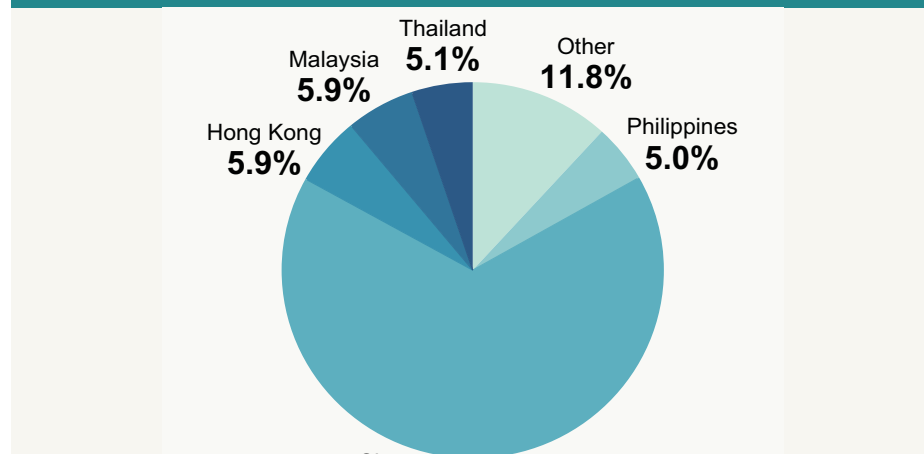
FRESH BROCCOLI AND CAULIFLOWER INTERNATIONAL TRADE

Note: Trade data combines fresh broccoli and cauliflower.

Australia is a net exporter of broccoli and cauliflower. For the year ending June 2024, Australia exported **3,193 tonnes**. The exports and imports over the last five financial years profiled in the graph below.



FRESH BROCCOLI AND CAULIFLOWER EXPORTS



Source: GTA/TDM

For the year ending June 2024, **66.3%** of exported fresh broccoli and cauliflower 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	1,383	1,263	2,031	Singapore	1,734	1,309	2,116
Queensland	882	619	691	Hong Kong	328	227	190
New South Wales	392	328	278	Malaysia	177	123	187
South Australia	12	48	112	Thailand	130	215	164
Western Australia	81	59	54	Philippines	66	130	160
Other	60	118	28	Other	376	431	377
TOTAL	2,811	2,435	3,193	TOTAL	2,811	2,435	3,193

FRESH BROCCOLI AND CAULIFLOWER IMPORTS

Imports by State Destination (Tonnes)				Imports by Country (Tonnes)			
Year Ending June	2022	2023	2024	Year Ending June	2022	2023	2024
Victoria	64	-	-	China	44	-	-
Queensland	< 0.5	-	-	Egypt	20	-	-
Other	< 0.5	-	-	TOTAL	64	-	-
TOTAL	64	-	-				

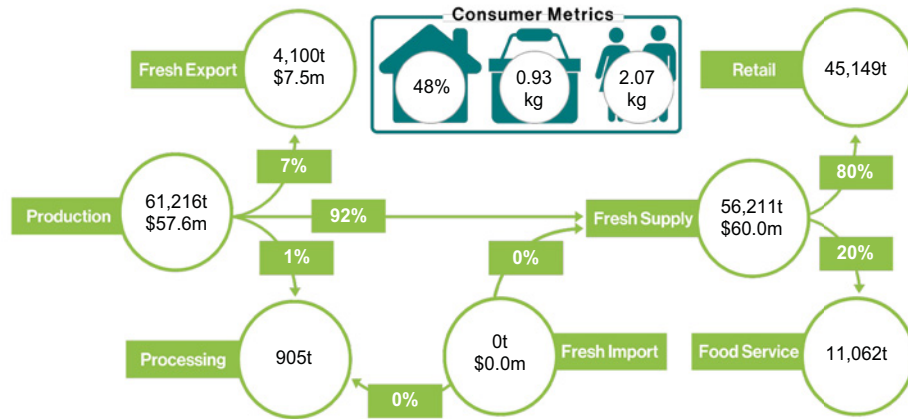
Source: GTA/TDM

Celery



Fresh Celery Overview

FRESH CELERY SUPPLY CHAIN – YEAR ENDING JUNE 2024



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

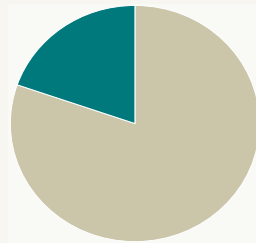
TOTAL PRODUCTION



\$57.6m

61,216t produced and valued at \$57.6m with 1% sent to be processed.

RETAIL VS FOOD SERVICE



■ Retail 80% ■ Food Service 20%

The fresh supply was 56,211t, with 45,149t distributed into retail and 11,062t into food service.

CONSUMER METRICS



48% of Australian households purchased celery, buying an average of 933g 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)	58,291	56,472	-3%	61,216	+8%
Production (\$m)	\$65.2	\$72.1	+11%	\$57.6	-20%
Fresh Export Volume (t)	4,221	4,118	-2%	4,100	>-1%
Fresh Export Value (\$m)	\$7.7	\$7.5	-3%	\$7.6	+2%
Fresh Import Volume (t)	-	-	-	-	-
Fresh Import Value (\$m)	\$-	\$-	-	\$-	-
Fresh Supply (t)	53,209	51,520	-3%	56,211	+9%
Fresh Supply Wholesale Value (\$m)	\$68.9	\$77.3	+12%	\$60.0	-22%
Supply per Capita (kg)	2.05	1.96	-4%	2.07	+5%
Retail Supply (t)	42,738	41,381	-3%	45,149	+9%
Retail Supply Wholesale Value (\$m)	\$55.3	\$62.1	+12%	\$48.2	-22%
Food Service Supply (t)	10,471	10,138	-3%	11,062	+9%
Food Service Wholesale Value (\$m)	\$13.6	\$15.2	+12%	\$11.8	-22%

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

Fresh Celery Production

MAJOR PRODUCTION AREAS



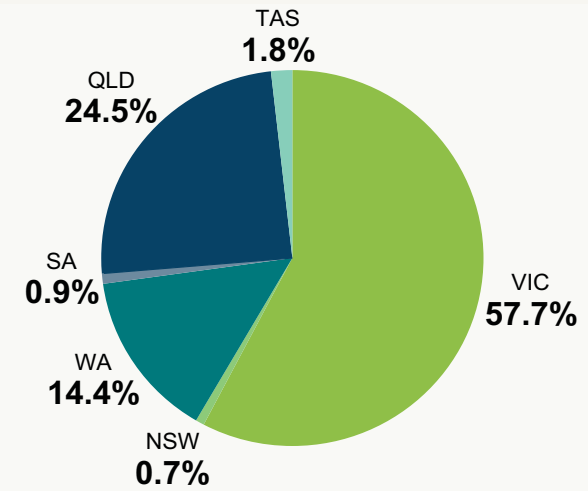
Source: AUSVEG

Celery is grown in most states of Australia, with the majority of production occurring in Victoria. Most of the celery grown in Australia is destined for the fresh local market, with a small but growing fresh export market.

PRODUCTION WINDOW



2023/24 FRESH CELERY PRODUCTION BY STATE



Source: AUSVEG

2023/24 FRESH CELERY SEASONALITY BY STATE

State	Volume (t)	Jul	Aug	Sep	Oct	Nov	Dec	Jan	Feb	Mar	Apr	May	Jun
Victoria	35,315	High	High	High	High	High	High	High	High	High	High	High	High
Queensland	15,018	High	High	High	High	High	High	High	High	High	High	High	High
Western Australia	8,828	High	High	High	High	High	High	High	High	High	High	High	High
Tasmania	1,092	High	High	High	High	High	High	High	High	High	High	High	High
New South Wales	438	None	High	High	High	High	High	High	High	High	High	High	High
South Australia	525	None	None	None	High	High	High	High	High	High	High	High	High

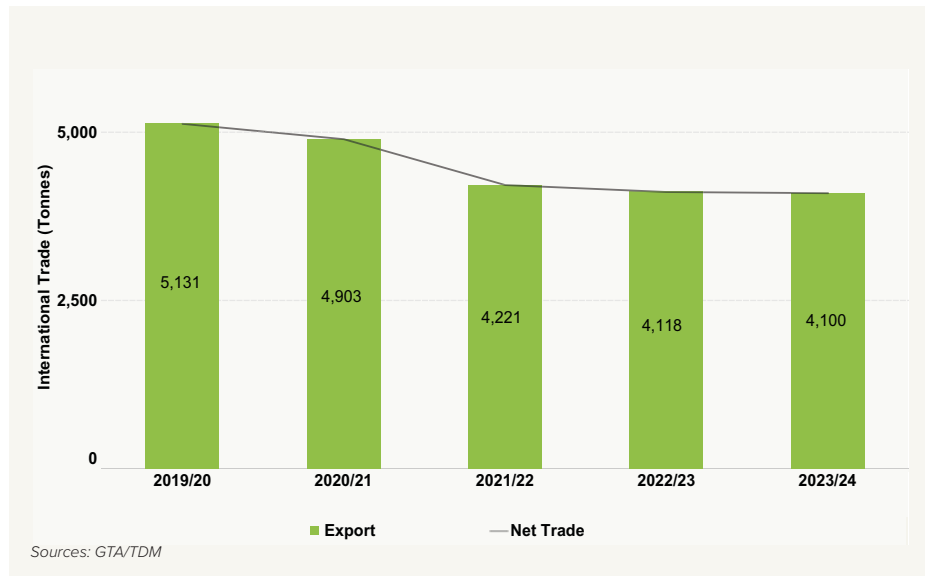
Availability legend: High Medium Low None

Source: AUSVEG

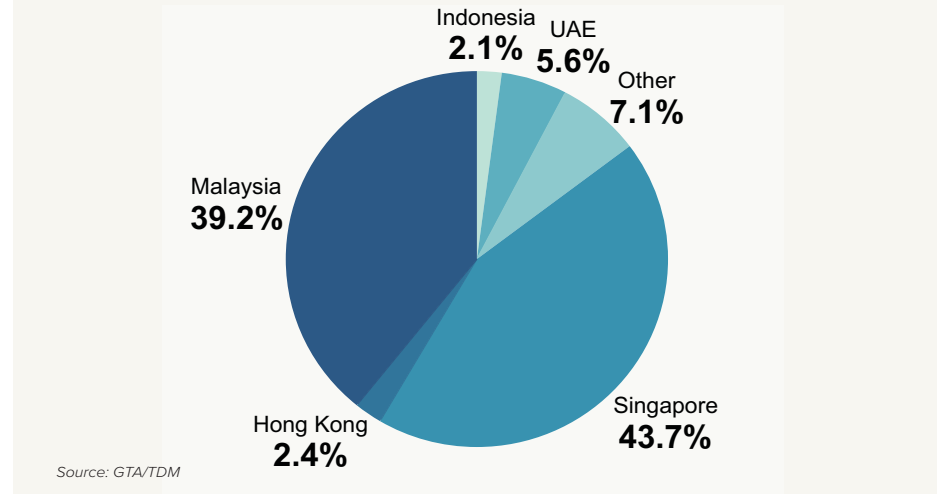
Fresh Celery International Trade

FRESH CELERY INTERNATIONAL TRADE

Australia is a net exporter of celery, with exports growing in recent years. For the year ending in June 2024, Australia exported **4,100 tonnes**. The exports and imports over the last five financial years are profiled in the graph below.



FRESH CELERY EXPORTS



For the year ending June 2024, **43.7%** of exported fresh celery 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
Western Australia	2,613	2,704	2,758	Singapore	1,918	1,920	1,793
Victoria	1,469	1,267	1,209	Malaysia	1,741	1,615	1,606
Queensland	64	118	106	UAE	229	170	228
Tasmania	-	13	16	Hong Kong	21	88	96
New South Wales	71	9	8	Indonesia	115	114	85
Other	3	6	3	Other	197	211	291
TOTAL	4,221	4,118	4,100	TOTAL	4,221	4,118	4,100

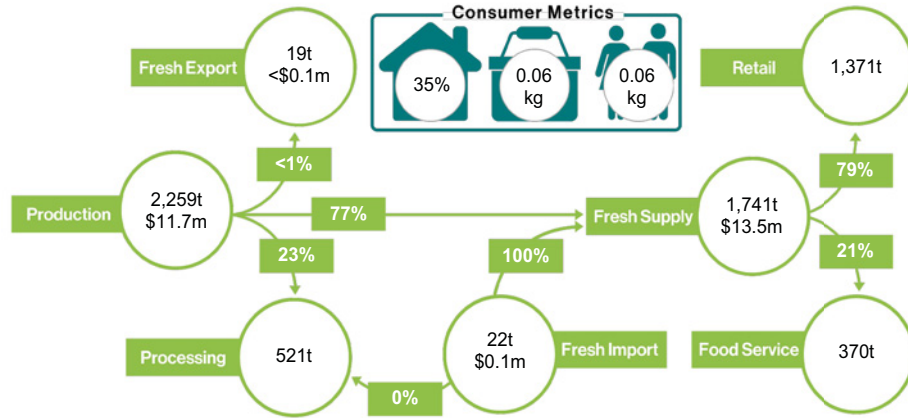
Source: GTA/TDM

Chillies



Fresh Chillies Overview

FRESH CHILLIES SUPPLY CHAIN – YEAR ENDING JUNE 2024



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

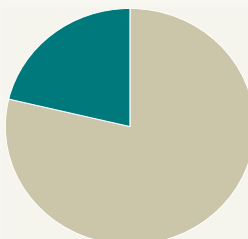
TOTAL PRODUCTION



\$11.7m

2,259t produced and valued at **\$11.7m** with 23% sent to processed.

RETAIL VS FOOD SERVICE



■ Retail 79% ■ Food Service 21%

The fresh supply was **1,741t**, with **1,371t** distributed into retail and **370t** into food service.

CONSUMER METRICS



35%

35% of Australian households purchased chillies, buying an average of **64g** 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)	2,218	2,232	<1%	2,259	+1%
Production (\$m)	\$12.0	\$13.5	+12%	\$11.7	-13%
Fresh Export Volume (t)	18	18	-3%	19	+7%
Fresh Export Value (\$m)	< \$0.1	< \$0.1	+24%	< \$0.1	-7%
Fresh Import Volume (t)	41	35	-15%	22	-39%
Fresh Import Value (\$m)	\$0.2	\$0.2	-8%	\$0.1	-40%
Fresh Supply (t)	1,729	1,734	<1%	1,741	<1%
Fresh Supply Wholesale Value (\$m)	\$14.0	\$15.7	+12%	\$13.5	-14%
Supply per Capita (kg)	0.07	0.07	>-1%	0.06	-3%
Retail Supply (t)	1,362	1,366	<1%	1,371	<1%
Retail Supply Wholesale Value (\$m)	\$11.1	\$12.3	+12%	\$10.6	-14%
Food Service Supply (t)	368	369	<1%	370	<1%
Food Service Wholesale Value (\$m)	\$3.0	\$3.3	+12%	\$2.9	-14%

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

Fresh Chillies Production

MAJOR PRODUCTION AREAS



Source: AUSVEG

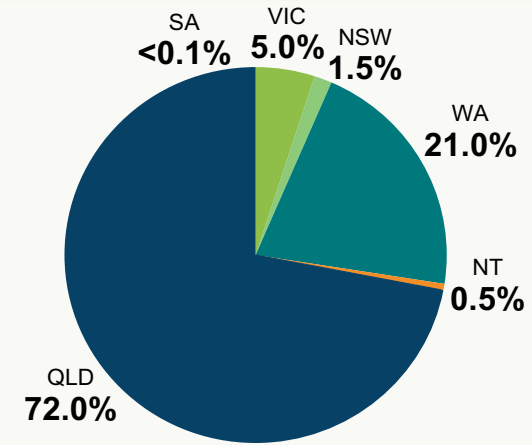
Chillies are grown in most states of Australia, with the majority of chillies being grown in Queensland.

PRODUCTION WINDOW



Year-round

2023/24 FRESH CHILLIES PRODUCTION BY STATE



Source: AUSVEG

2023/24 FRESH CHILLIES SEASONALITY BY STATE

State	Volume (t)	Jul	Aug	Sep	Oct	Nov	Dec	Jan	Feb	Mar	Apr	May	Jun
Queensland	1,627	Low	Low	Low	Low	Low	Low	High	High	High	Medium	Medium	Medium
Western Australia	474	Low	Low	Low	Low	Low	Low	Medium	Medium	Medium	Medium	Medium	Medium
Victoria	113	Low	Low	Low	Low	Low	Low	Medium	Medium	Medium	Medium	Medium	Medium
New South Wales	34	None	None	None	Low	Low	Low	Medium	Medium	Medium	Medium	Medium	Medium
Northern Territory	12	None	None	None	None	None	Low	Low	Low	Low	Low	Low	Low

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

Source: AUSVEG



Fresh Capsicums and Chillies International Trade

FRESH CAPSICUMS AND CHILLIES INTERNATIONAL TRADE

Note: Trade data combines fresh capsicums and chillies.

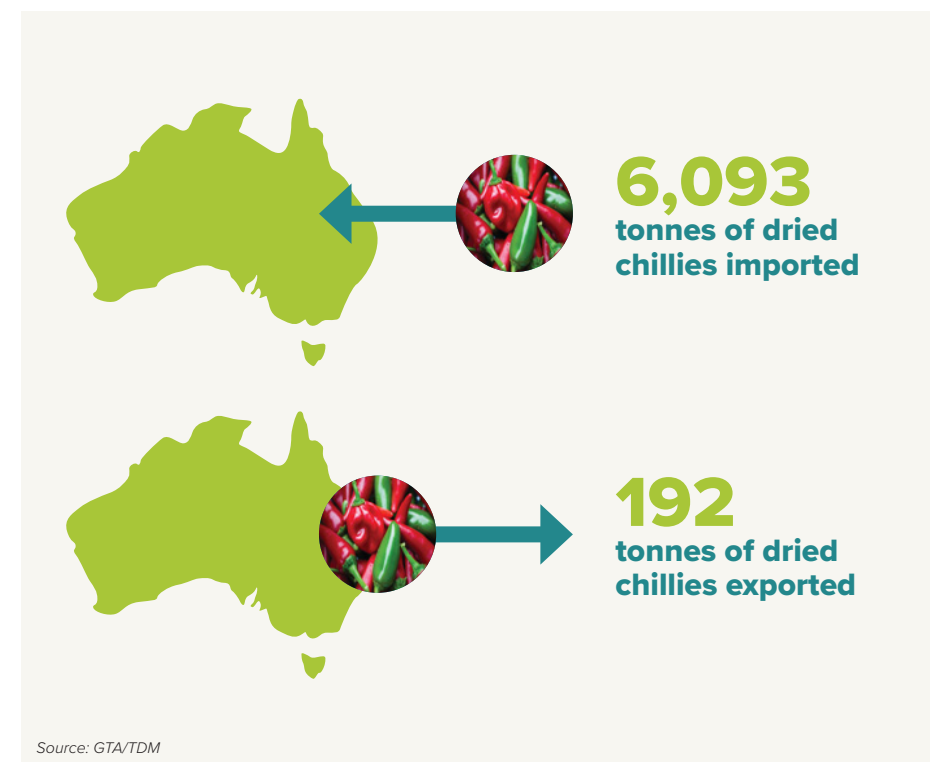
Australia is a net importer of capsicums and chillies, typically importing between **400-900 tonnes** every year, predominantly from Fiji. For the year ending June 2024, Australia exported **375 tonnes**. The exports and imports over the last five financial years are profiled in the graph below, where imports are counted as negative tonnes.



Processed Chillies International Trade

2023/24 PROCESSED CHILLIES INTERNATIONAL TRADE

For the year ending June 2024, an additional **6,093 tonnes** of dried chillies were imported, while **192 tonnes** were exported.

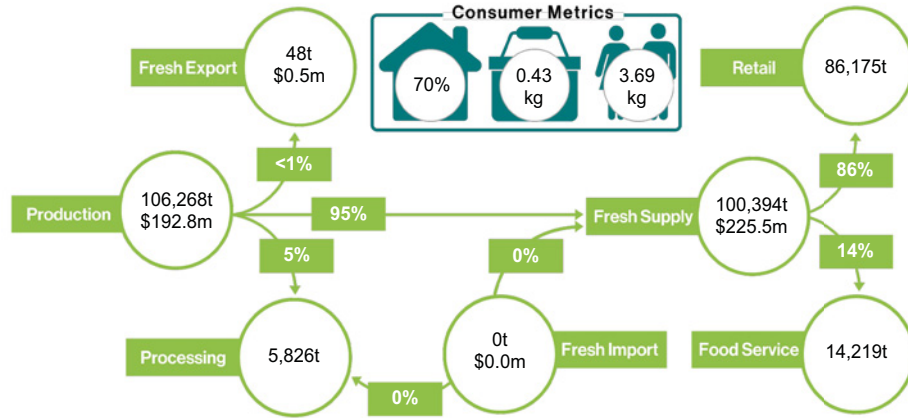




Cucumbers

Fresh Cucumbers Overview

FRESH CUCUMBERS SUPPLY CHAIN – YEAR ENDING JUNE 2024



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

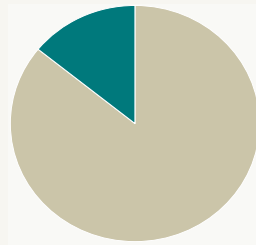
TOTAL PRODUCTION



\$192.8m

106,268t produced and valued at \$192.8m with 5% sent to be processed.

RETAIL VS FOOD SERVICE



■ Retail 86% ■ Food Service 14%

The fresh supply was 100,394t, with 86,175t distributed into retail and 14,219t into food service.

CONSUMER METRICS



70% of Australian households purchased cucumbers, buying an average of 428g per shopping trip.

PER CAPITA CONSUMPTION



3.69kg in 2023/24 based on the volume supplied.

YEAR ENDING JUNE	2022	2023		2024	
	Value	Value	% YoY	Value	% YoY
Production (t)	88,429	93,469	+6%	106,268	+14%
Production (\$m)	\$229.9	\$213.6	-7%	\$192.8	-10%
Fresh Export Volume (t)	79	51	-36%	48	-5%
Fresh Export Value (\$m)	\$0.6	\$0.5	-7%	\$0.5	-13%
Fresh Import Volume (t)	-	-	-	-	-
Fresh Import Value (\$m)	\$-	\$-	-	\$-	-
Fresh Supply (t)	83,503	88,294	+6%	100,394	+14%
Fresh Supply Wholesale Value (\$m)	\$268.9	\$249.9	-7%	\$225.5	-10%
Supply per Capita (kg)	3.22	3.36	+4%	3.69	+10%
Retail Supply (t)	71,676	75,789	+6%	86,175	+14%
Retail Supply Wholesale Value (\$m)	\$230.9	\$214.5	-7%	\$193.6	-10%
Food Service Supply (t)	11,827	12,505	+6%	14,219	+14%
Food Service Wholesale Value (\$m)	\$38.1	\$35.4	-7%	\$31.9	-10%

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

Fresh Cucumbers Production

MAJOR PRODUCTION AREAS



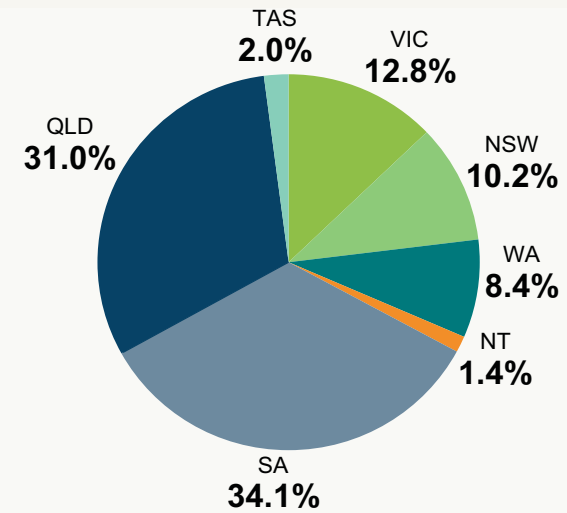
Source: AUSVEG

In Australia, cucumber production primarily takes place in protected cropping systems, such as covered structures and increasingly in high-tech glasshouses. The majority of cucumbers are produced in South Australia and Queensland.

PRODUCTION WINDOW



2023/24 FRESH CUCUMBERS PRODUCTION BY STATE



Source: AUSVEG

2023/24 FRESH CUCUMBERS SEASONALITY BY STATE

State	Volume (t)	Jul	Aug	Sep	Oct	Nov	Dec	Jan	Feb	Mar	Apr	May	Jun
South Australia	36,188	Low	Low	Low	High	High	High	High	High	Medium	Medium	Medium	Medium
Queensland	32,943	Low	Low	Low	High	High	High	High	High	Medium	Medium	Medium	Medium
Victoria	13,636	Low	Low	Low	Low	Low	High	High	High	Medium	Medium	Medium	Medium
New South Wales	10,871	Low	Low	Low	High	High	High	High	High	Medium	Medium	Medium	Medium
Western Australia	8,965	Low	Low	Low	Low	Low	High	High	High	Medium	Medium	Medium	Medium
Tasmania	2,178	Low	Low	Low	Low	Low	Low	Low	Low	Low	Low	Low	Low
Northern Territory	1,488	Low	Low	Low	Low	Low	Low	Low	Low	Low	Low	Low	Low

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

Source: AUSVEG

MAIN CUCUMBERS VARIETIES

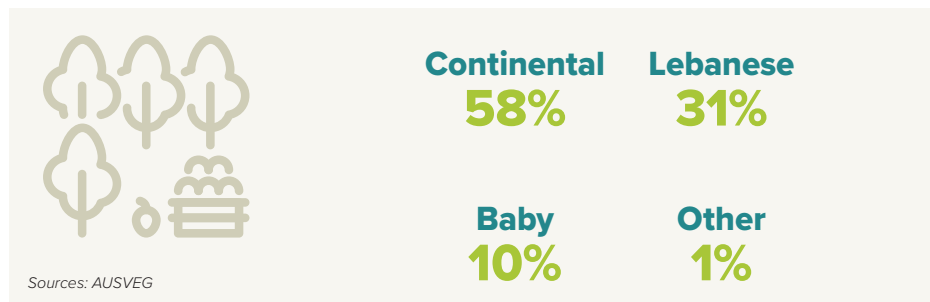
There are currently three main varieties grown in Australia. These include:

Continental cucumbers, also known as telegraph cucumbers, the most common variety in Australia. Continental cucumbers accounted for **58%** of fresh production for the year ending June 2024.

Lebanese cucumbers, a small cucumber with bumpy ridged skin. Lebanese cucumbers accounted for **31%** of fresh production.

Baby cucumbers, including the trademarked Qukes™, accounted for **10%** of fresh production.

Other varieties, including white and apple cucumbers, accounted for **1%** of fresh production.



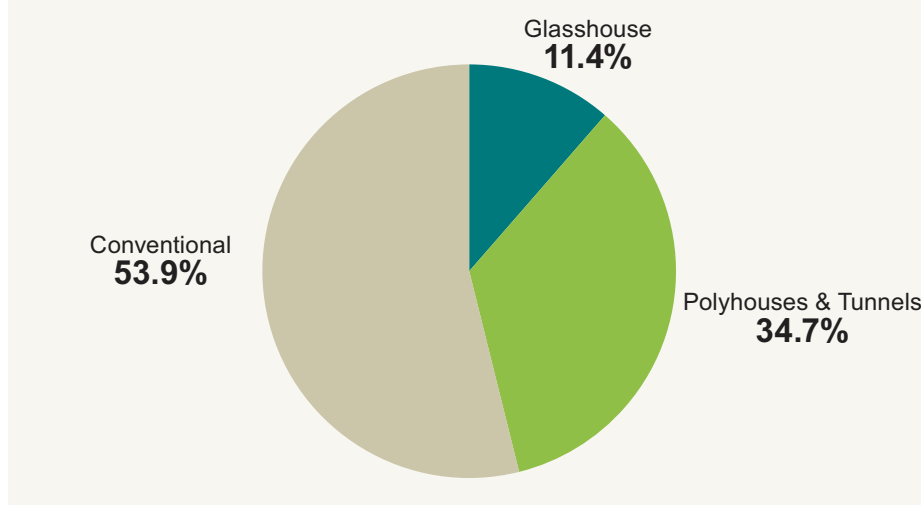
2023/24 FRESH CUCUMBERS SEASONALITY BY VARIETY

Variety	Volume (t)	Jul	Aug	Sep	Oct	Nov	Dec	Jan	Feb	Mar	Apr	May	Jun
Continental	61,833	Low	Low	Low	Medium	High	High	High	High	Medium	Medium	Medium	Medium
Lebanese	32,943	Low	Low	Low	Low	High	High	Medium	Medium	Medium	Medium	Medium	Medium
Baby	10,429	Low	Low	Low	Low	Low	Low	Low	Low	Low	Low	Low	Low
Other	1,063	Low	Low	Low	Low	Low	Low	Low	Low	Low	Low	Low	Low

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

Sources: AUSVEG

2023/24 FRESH CUCUMBERS PRODUCTION BY SYSTEM



Production of cucumbers in Australia occurs in three different types of farming systems. These systems and their contribution to production are **Glasshouse 11.4%**, **Polyhouses & Tunnels 34.7%** and **Conventional 53.9%**.

2023/24 FRESH CUCUMBERS PRODUCTION SYSTEM BY STATE

State	Glasshouse		Polyhouses & Tunnels		Conventional	
	Hectares (Ha)	Volume (t)	Hectares (Ha)	Volume (t)	Hectares (Ha)	Volume (t)
New South Wales	0	0	13	6,500	-	4,371
Victoria	2	800	22	9,515	-	3,321
Queensland	12	9,600	8	4,000	-	19,343
Western Australia	0	0	5	2,500	-	5,933
South Australia	3	1,320	31	13,375	-	21,493
Tasmania	1	400	2	1,000	-	778
Northern Territory	0	0	0	0	-	2,019
Total	18	12,120	81	36,890	-	57,258

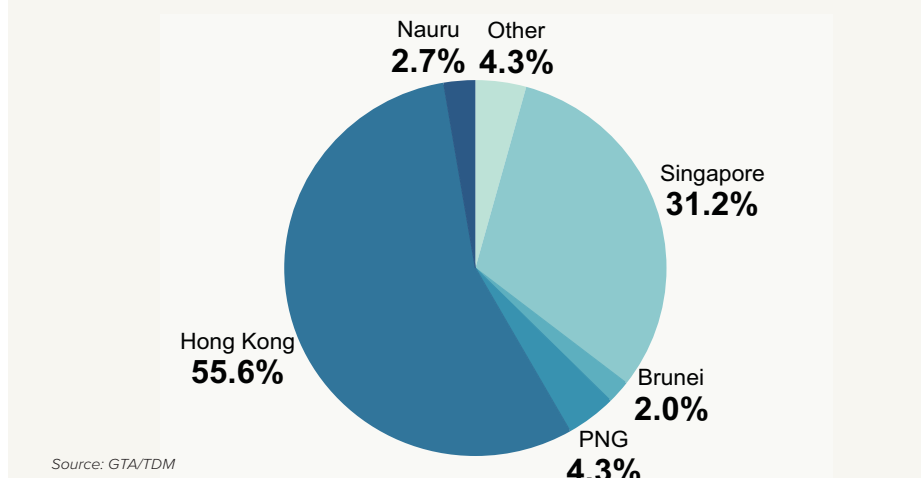
Fresh Cucumbers International Trade

FRESH CUCUMBERS INTERNATIONAL TRADE

Australia is a net exporter of fresh cucumbers, typically exporting **50-90 tonnes** every year. For the year ending June 2024, Australia exported **48 tonnes**. The exports and imports over the last five financial years profiled in the graph.



FRESH CUCUMBERS EXPORTS



For the year ending June 2024, **55.6%** of exported fresh cucumbers 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
Victoria	28	36	31	Hong Kong	29	37	27
New South Wales	13	3	7	Singapore	7	6	15
Queensland	32	8	6	PNG	1	1	2
South Australia	6	4	4	Nauru	4	1	1
Tasmania	-	-	< 0.5	Brunei	1	1	1
Other	< 0.5	< 0.5	< 0.5	Other	37	6	2
TOTAL	79	51	48	TOTAL	79	51	48

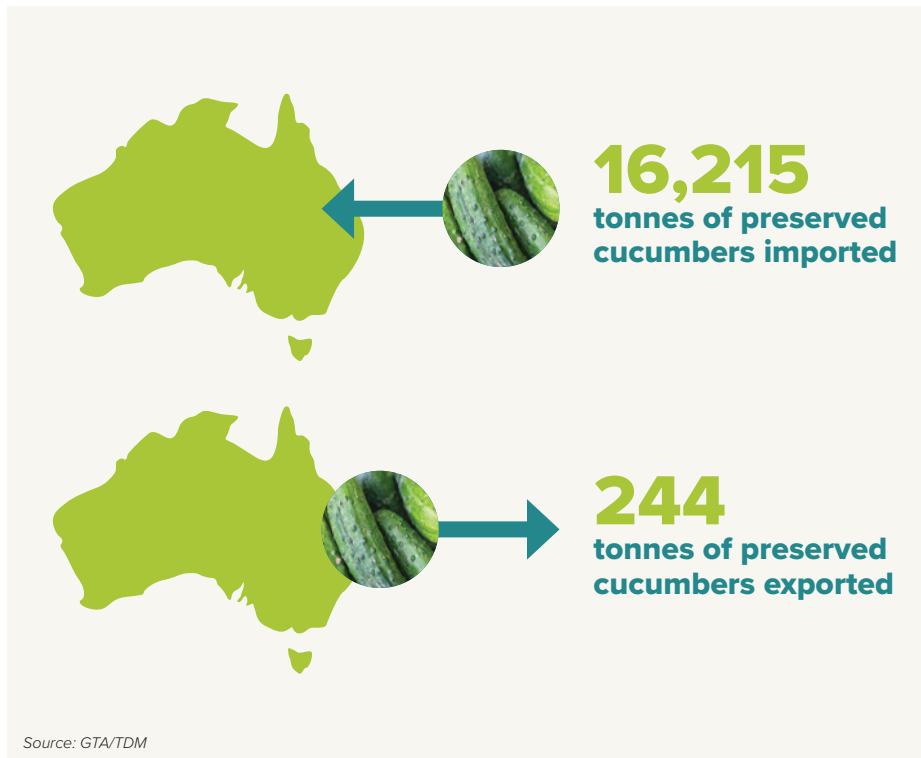
Source: GTA/TDM



Processed Cucumbers International Trade

2023/24 PROCESSED CUCUMBERS INTERNATIONAL TRADE

For the year ending June 2024, an additional **16,215 tonnes** of preserved cucumbers were imported, while **244 tonnes** of preserved cucumbers were exported.

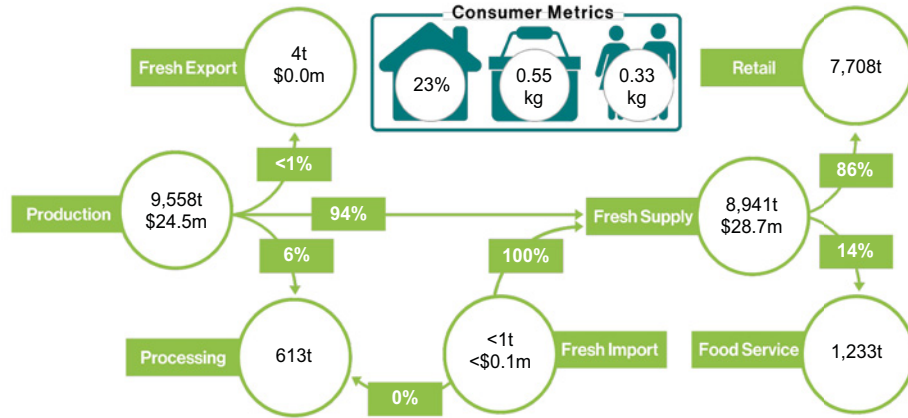


Eggplants



Fresh Eggplants Overview

FRESH EGGPLANTS SUPPLY CHAIN – YEAR ENDING JUNE 2024



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

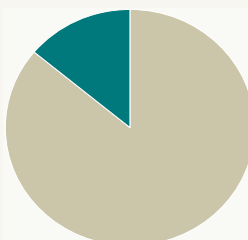
TOTAL PRODUCTION



\$24.5m

9,558t produced and valued at **\$24.5m** with 6% sent to be processed.


RETAIL VS FOOD SERVICE



■ Retail 86% ■ Food Service 14%

The fresh supply was **8,941t**, with **7,708t** distributed into retail and **1,233t** into food service.

CONSUMER METRICS



23%

23% of Australian households purchased eggplants, buying an average of **548g** per shopping trip.

PER CAPITA CONSUMPTION

0.33kg 

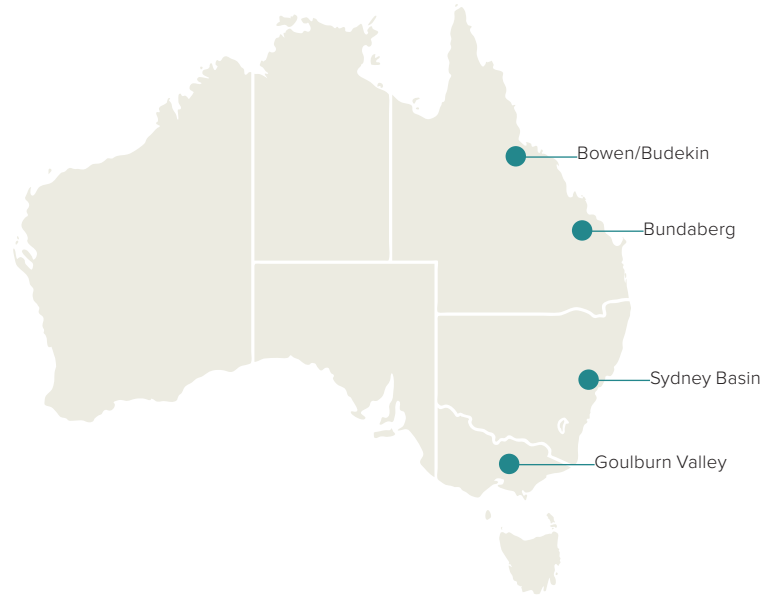
in 2023/24 based on the volume supplied.

YEAR ENDING JUNE	2022	2023		2024	
	Value	Value	% YoY	Value	% YoY
Production (t)	8,271	8,698	+5%	9,558	+10%
Production (\$m)	\$21.7	\$23.6	+9%	\$24.5	+4%
Fresh Export Volume (t)	9	6	-36%	4	-23%
Fresh Export Value (\$m)	< \$0.1	< \$0.1	+100%	\$-	-100%
Fresh Import Volume (t)	25	3	-89%	<1	-99%
Fresh Import Value (\$m)	< \$0.1	< \$0.1	>100%	< \$0.1	-67%
Fresh Supply (t)	7,757	8,138	+5%	8,941	+10%
Fresh Supply Wholesale Value (\$m)	\$25.4	\$27.6	+8%	\$28.7	+4%
Supply per Capita (kg)	0.30	0.31	+4%	0.33	+6%
Retail Supply (t)	6,675	7,003	+5%	7,708	+10%
Retail Supply Wholesale Value (\$m)	\$21.9	\$23.7	+8%	\$24.7	+4%
Food Service Supply (t)	1,081	1,135	+5%	1,233	+9%
Food Service Wholesale Value (\$m)	\$3.5	\$3.8	+8%	\$4.0	+3%

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

Fresh Eggplants Production

MAJOR PRODUCTION AREAS



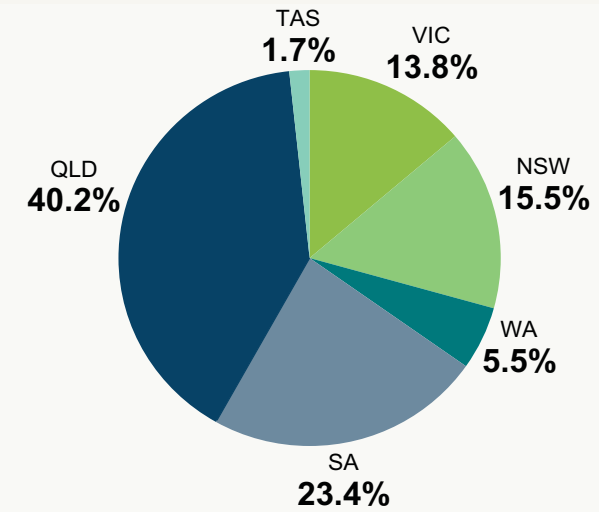
Source: AUSVEG

Eggplants are grown in most states of Australia, with the majority of production occurring along the east coast. Currently, most eggplants are grown outdoors. However, increasing volumes are being grown year-round in high-tech greenhouses in the southern states.

PRODUCTION WINDOW



2023/24 FRESH EGGPLANTS PRODUCTION BY STATE



Source: AUSVEG

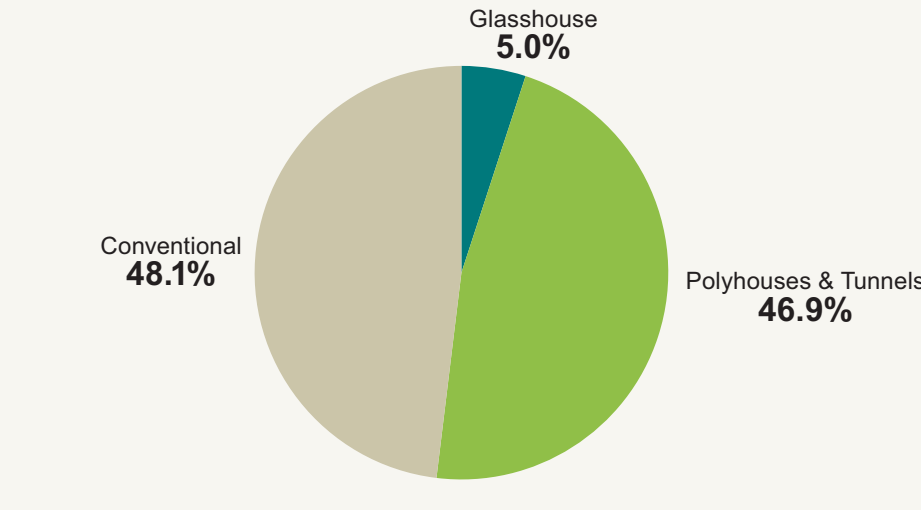
2023/24 FRESH EGGPLANTS SEASONALITY BY STATE

State	Volume (t)	Jul	Aug	Sep	Oct	Nov	Dec	Jan	Feb	Mar	Apr	May	Jun
Queensland	3,838	Low	Low	Low	Low	Low	Low	Low	High	High	High	Low	Low
South Australia	2,235	Low	Low	Low	Low	None	None	Low	Low	High	High	High	Low
New South Wales	1,485	Low	Low	Low	Low	Low	Low	High	High	Low	Low	Low	Low
Victoria	1,316	Low	Low	Low	Low	Low	High	High	Low	Low	Low	Low	Low
Western Australia	523	Low	Low	Low	Low	Low	Low	Low	Low	High	High	Low	Low
Tasmania	162	None	None	None	None	None	None	Low	Low	Low	None	None	None

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

Source: AUSVEG

2023/24 FRESH EGGPLANTS PRODUCTION BY SYSTEM



Production of eggplants in Australia occurs in three different types of farming systems. These systems and their contribution to production are **Glasshouse 5.0%**, **Polyhouses & Tunnels 46.9%** and **Conventional 48.1%**.

2023/24 FRESH EGGPLANTS PRODUCTION SYSTEM BY STATE

State	Glasshouse		Polyhouses & Tunnels		Conventional	
	Hectares (Ha)	Volume (t)	Hectares (Ha)	Volume (t)	Hectares (Ha)	Volume (t)
New South Wales	0	0	2	583	-	902
Victoria	0	0	3	900	-	416
Queensland	1	480	3	900	-	2,458
Western Australia	0	0	1	300	-	223
South Australia	0	0	6	1,800	-	435
Tasmania	0	0	0	0	-	162
Northern Territory	0	0	0	0	-	0
Total	1	480	15	4,483	-	4,595

Fresh Eggplants International Trade

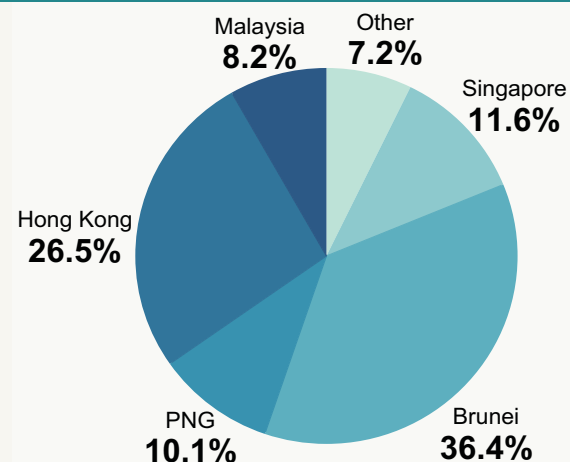
FRESH EGGPLANTS INTERNATIONAL TRADE

There is minimal trade of eggplants, with Australia typically exporting **4-9 tonnes** every year. For the year ending June 2024, Australia exported **four 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 EGGPLANTS EXPORTS



Source: GTA/TDM

For the year ending June 2024, **36.4%** of exported fresh eggplants were sent to **Brunei**, 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	3	3	Brunei	2	2	2
New South Wales	2	1	1	Hong Kong	1	1	1
Tasmania	-	< 0.5	< 0.5	Singapore	1	< 0.5	1
Victoria	1	< 0.5	< 0.5	PNG	< 0.5	< 0.5	< 0.5
Northern Territory	-	-	< 0.5	Malaysia	< 0.5	< 0.5	< 0.5
Other	1	2	< 0.5	Other	5	3	1
TOTAL	9	6	4	TOTAL	9	6	4

FRESH EGGPLANTS IMPORTS

Imports by State Destination (Tonnes)				Imports by Country (Tonnes)			
Year Ending June	2022	2023	2024	Year Ending June	2022	2023	2024
Western Australia	-	-	< 0.5	Ghana	-	-	< 0.5
Victoria	-	3	-	UAE	-	3	-
New South Wales	25	-	-	Egypt	25	-	-
Other	-	-	< 0.5	Other	-	-	< 0.5
TOTAL	25	3	< 0.5	TOTAL	25	3	< 0.5

Source: GTA/TDM

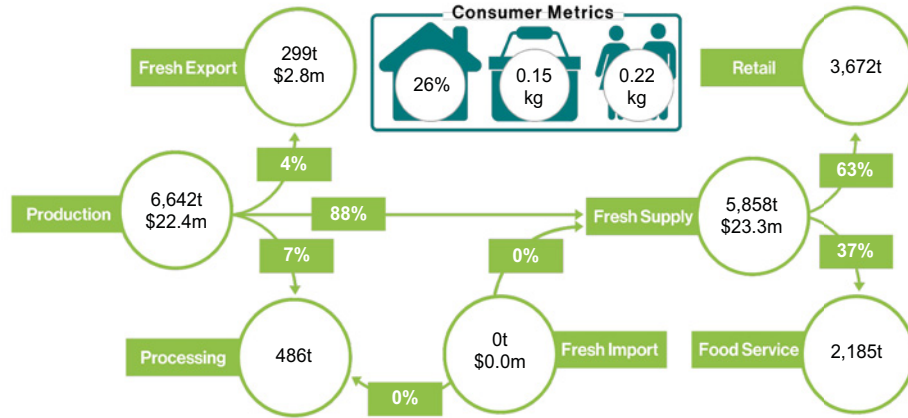


**English Spinach/
Silverbeet/Kale**



Fresh English Spinach/Silverbeet/Kale Overview

FRESH ENGLISH SPINACH/SILVERBEET/KALE SUPPLY CHAIN – YEAR ENDING JUNE 2024



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

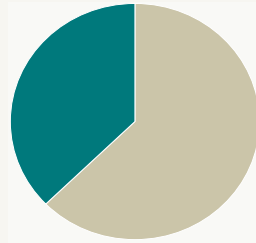
TOTAL PRODUCTION



\$22.4m

6,642t produced and valued at **\$22.4m** with 7% sent to be processed.

RETAIL VS FOOD SERVICE



■ Retail 63% ■ Food Service 37%

The fresh supply was **5,858t**, with **3,672t** distributed into retail and **2,185t** into food service.

CONSUMER METRICS



26% of Australian households purchased english spinach/silverbeet/kale, buying an average of **151g** per shopping trip.

PER CAPITA CONSUMPTION



in 2023/24 based on the volume supplied.

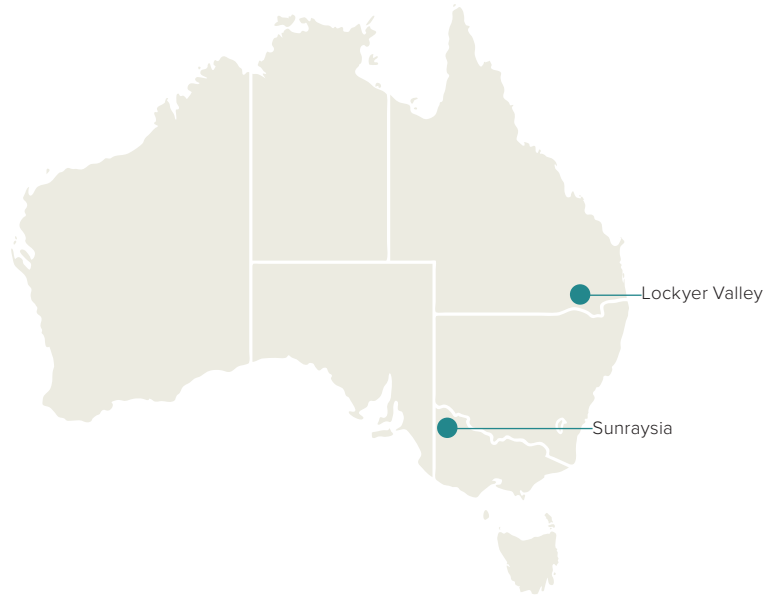
YEAR ENDING JUNE	2022	2023		2024	
	Value	Value	% YoY	Value	% YoY
Production (t)	6,716	6,674	>-1%	6,642	>-1%
Production (\$m)	\$23.5	\$25.5	+8%	\$22.4	-12%
Fresh Export Volume (t)	322	240	-25%	299	+24%
Fresh Export Value (\$m)	\$2.7	\$2.6	-5%	\$2.9	+12%
Fresh Import Volume (t)	21	-	-100%	-	-
Fresh Import Value (\$m)	< \$0.1	\$-	-100%	\$-	-
Fresh Supply (t)	5,923	5,945	<-1%	5,858	-1%
Fresh Supply Wholesale Value (\$m)	\$24.9	\$27.2	+9%	\$23.3	-14%
Supply per Capita (kg)	0.23	0.23	>-1%	0.22	-5%
Retail Supply (t)	3,713	3,727	<-1%	3,672	-1%
Retail Supply Wholesale Value (\$m)	\$15.6	\$17.0	+9%	\$14.6	-14%
Food Service Supply (t)	2,209	2,218	<-1%	2,185	-1%
Food Service Wholesale Value (\$m)	\$9.3	\$10.1	+9%	\$8.7	-14%

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



Fresh English Spinach/Silverbeet/Kale Production

MAJOR PRODUCTION AREAS



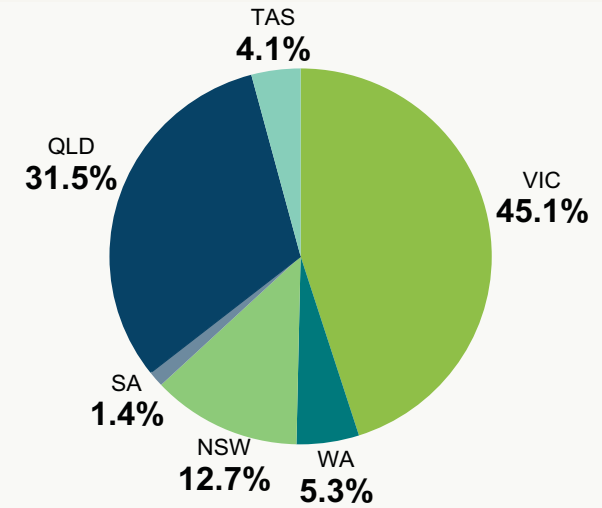
Source: AUSVEG

This section combines information on English spinach, silverbeet and kale. These categories are produced in most states of Australia.

PRODUCTION WINDOW



2023/24 FRESH ENGLISH SPINACH/SILVERBEET/KALE PRODUCTION BY STATE



Source: AUSVEG

2023/24 FRESH ENGLISH SPINACH/SILVERBEET/KALE SEASONALITY BY STATE

State	Volume (t)	Jul	Aug	Sep	Oct	Nov	Dec	Jan	Feb	Mar	Apr	May	Jun
Victoria	2,994	High	High	Medium	Medium	Medium	High	High	High	Medium	Medium	Medium	High
Queensland	2,090	Medium	Medium	Medium	Medium	High	High	High	Medium	Medium	Medium	Medium	Medium
New South Wales	842	Medium	Medium	Medium	Medium	Medium	High	Medium	Medium	Medium	Medium	Medium	Medium
Western Australia	351	Medium	Medium	Medium	Medium	Medium	Medium	Medium	Medium	Medium	Medium	Medium	Medium
Tasmania	276	None	None	Medium	Medium	Medium	Medium	Medium	Medium	Medium	Medium	Medium	None
South Australia	90	Medium	Medium	Medium	Medium	Medium	Medium	Medium	Medium	Medium	Medium	Medium	Medium

Availability legend: High Medium Low None

Source: AUSVEG



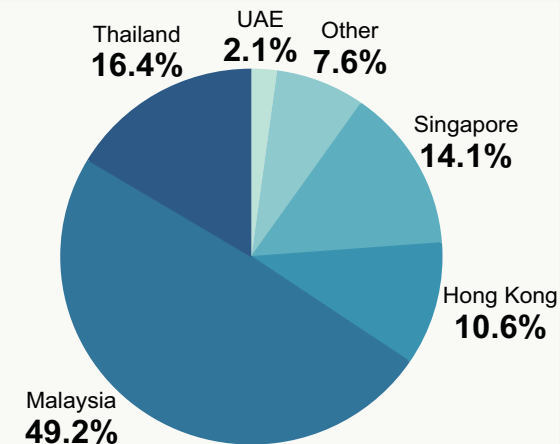
Fresh English Spinach/Kale International Trade

FRESH ENGLISH SPINACH/KALE INTERNATIONAL TRADE

There is minimal trade of fresh English spinach, although Australia's exports increased in recent years. For the year ending in June 2024, Australia exported **299 tonnes**. The exports and imports over the last five financial years are profiled in the graph below.



FRESH ENGLISH SPINACH EXPORTS



Source: GTA/TDM

For the year ending June 2024, **49.2%** of exported fresh English spinach were sent to **Malaysia**, 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	205	157	202	Malaysia	139	108	147
Western Australia	77	70	77	Thailand	32	47	49
Queensland	20	7	6	Singapore	59	42	42
Tasmania	-	1	5	Hong Kong	63	18	32
South Australia	5	< 0.5	4	UAE	4	5	6
Other	14	5	4	Other	26	20	23
TOTAL	322	240	299	TOTAL	322	240	299

FRESH ENGLISH SPINACH IMPORTS

Imports by State Destination (Tonnes)				Imports by Country (Tonnes)			
Year Ending June	2022	2023	2024	Year Ending June	2022	2023	2024
Victoria	21	-	-	US	21	-	-
TOTAL	21	-	-	TOTAL	21	-	-

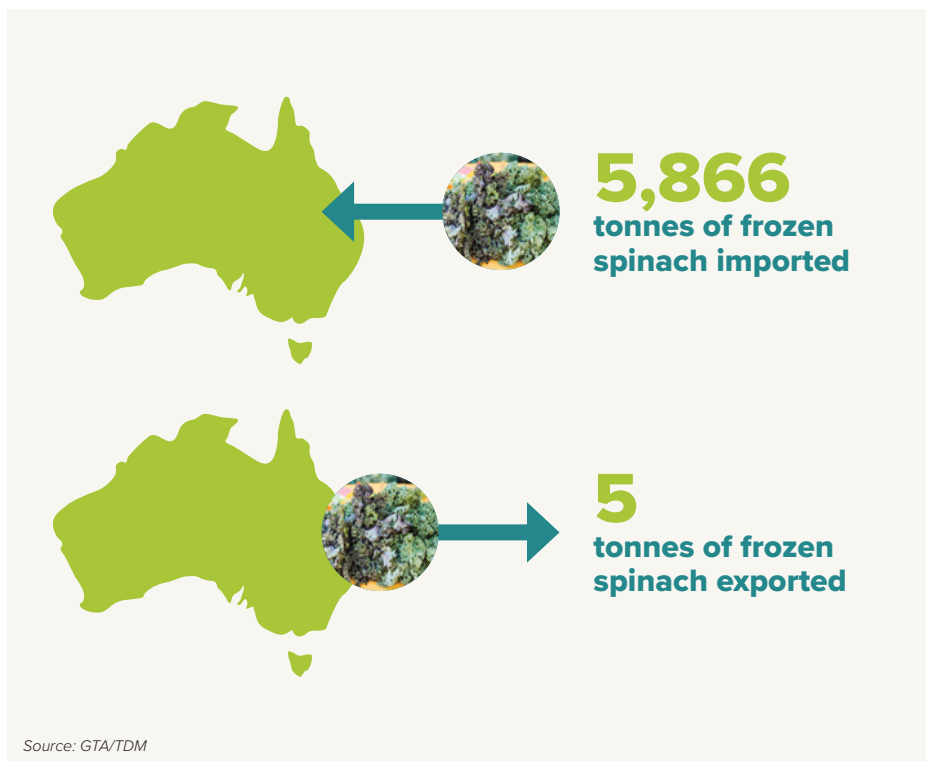
Source: GTA/TDM



Processed Spinach International Trade

2023/24 PROCESSED SPINACH INTERNATIONAL TRADE

For the year ending June 2024, an additional **5,866 tonnes** of frozen spinach was imported, while **5 tonnes** were exported.

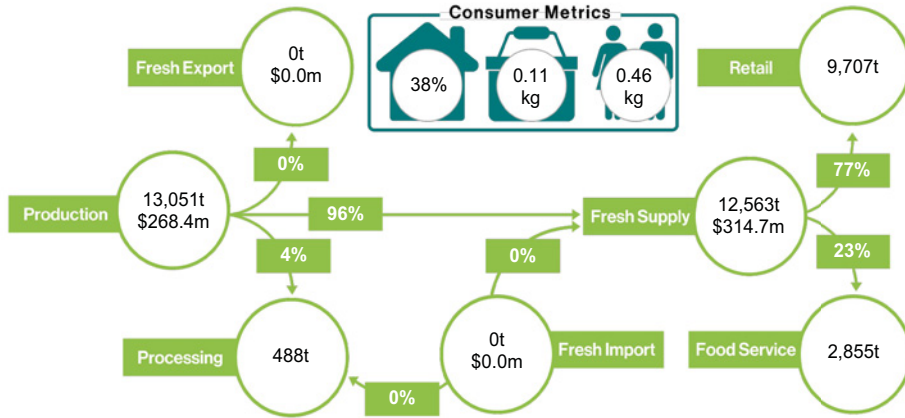




Fresh Herbs - Overview

Fresh Herbs Overview

FRESH HERBS SUPPLY CHAIN – YEAR ENDING JUNE 2024



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

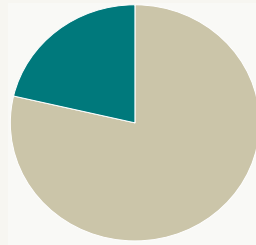
TOTAL PRODUCTION



\$268.4m

13,051t produced and valued at \$268.4m with 4% sent to be processed.

RETAIL VS FOOD SERVICE



■ Retail 77% ■ Food Service 23%

The fresh supply was 12,563t, with 9,707t distributed into retail and 2,855t into food service.

YEAR ENDING JUNE	2022	2023		2024	
	Value	Value	% YoY	Value	% YoY
Production (t)	13,264	13,064	-2%	13,051	>-1%
Production (\$m)	\$270.5	\$317.3	+17%	\$268.4	-15%
Fresh Export Volume (t)	-	-	-	-	-
Fresh Export Value (\$m)	\$-	\$-	-	\$-	-
Fresh Import Volume (t)	-	-	-	-	-
Fresh Import Value (\$m)	\$-	\$-	-	\$-	-
Fresh Supply (t)	12,767	12,575	-2%	12,563	>-1%
Fresh Supply Wholesale Value (\$m)	\$317.1	\$372.0	+17%	\$314.7	-15%
Supply per Capita (kg)	0.49	0.48	-3%	0.46	-3%
Retail Supply (t)	9,876	9,723	-2%	9,707	>-1%
Retail Supply Wholesale Value (\$m)	\$249.4	\$292.7	+17%	\$247.5	0 -15%
Food Service Supply (t)	2,892	2,852	-1%	2,855	<-1%
Food Service Wholesale Value (\$m)	\$67.7	\$79.3	+17%	\$67.2	-15%

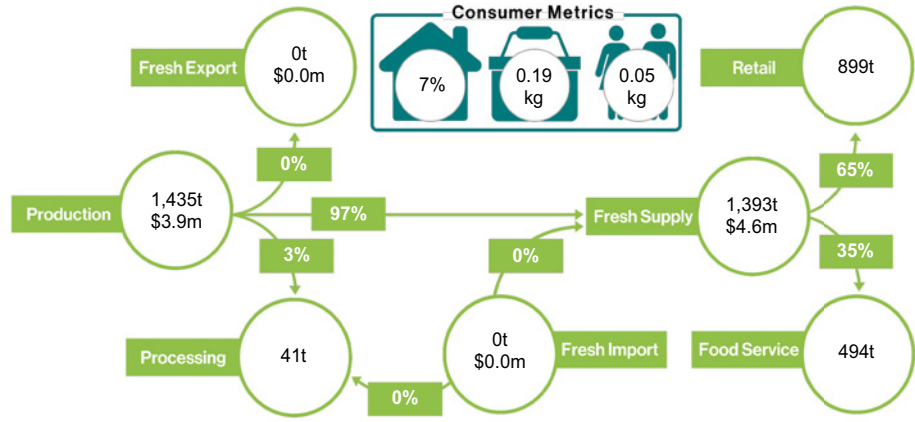
Sources: AC, AUSVEG; CFVIWA; GTA/TDM; MP & DD (Freshlogic Analysis)



Fresh Herbs - Fennel

Fresh Fennel Overview

FRESH FENNEL SUPPLY CHAIN – YEAR ENDING JUNE 2024



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

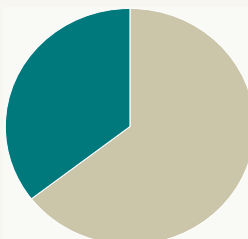
TOTAL PRODUCTION



\$3.9m

1,435t produced and valued at **\$3.9m** with 3% sent to be processed.


RETAIL VS FOOD SERVICE



■ Retail 65% ■ Food Service 35%

The fresh supply was **1,393t**, with **899t** distributed into retail and **494t** into food service.

CONSUMER METRICS



7%

7% of Australian households purchased fennel, buying an average of **185g** per shopping trip.

PER CAPITA CONSUMPTION

0.05kg 

in 2023/24 based on the volume supplied.

YEAR ENDING JUNE	2022	2023		2024	
	Value	Value	% YoY	Value	% YoY
Production (t)	1,386	1,391	<1%	1,435	+3%
Production (\$m)	\$4.0	\$4.0	<1%	\$3.9	-3%
Fresh Export Volume (t)	-	-	-	-	-
Fresh Export Value (\$m)	\$-	\$-	-	\$-	-
Fresh Import Volume (t)	-	-	-	-	-
Fresh Import Value (\$m)	\$-	\$-	-	\$-	-
Fresh Supply (t)	1,346	1,351	<1%	1,393	+3%
Fresh Supply Wholesale Value (\$m)	\$4.7	\$4.7	<1%	\$4.6	-3%
Supply per Capita (kg)	0.05	0.05	>-1%	0.05	>-1%
Retail Supply (t)	868	871	<1%	899	+3%
Retail Supply Wholesale Value (\$m)	\$3.0	\$3.0	<1%	\$3.0	-3%
Food Service Supply (t)	477	479	<1%	494	+3%
Food Service Wholesale Value (\$m)	\$1.7	\$1.7	<1%	\$1.6	-3%

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

Fresh Fennel Production

MAJOR PRODUCTION AREAS



Source: AUSVEG

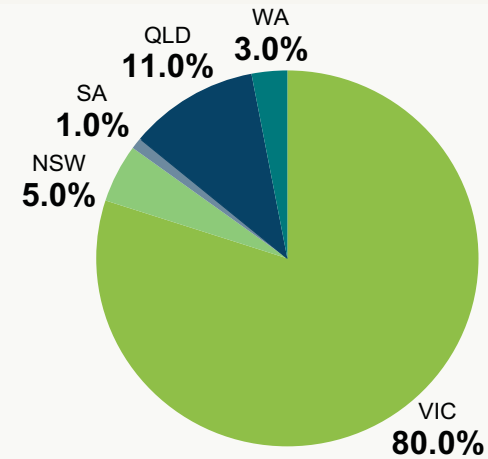
Production of fennel occurs mostly in Victoria, with the majority of production being used in the fresh market.

PRODUCTION WINDOW



Mar-Nov

2023/24 FRESH FENNEL PRODUCTION BY STATE



Source: AUSVEG

2023/24 FRESH FENNEL SEASONALITY BY STATE

State	Volume (t)	Jul	Aug	Sep	Oct	Nov	Dec	Jan	Feb	Mar	Apr	May	Jun
Victoria	1,148	High	High	High	High	High	None	None	None	Low	Low	Low	Low
Queensland	158	High	High	High	High	High	None	None	None	Low	Low	Low	Low
New South Wales	72	High	High	High	High	High	None	None	None	Low	Low	Low	Low
Western Australia	43	High	High	High	None	None	None	None	None	None	None	None	Low
South Australia	14	High	High	None	None	None	None	None	None	None	None	None	Low

Availability legend: High Medium Low None

Source: AUSVEG

Fresh Herbs -

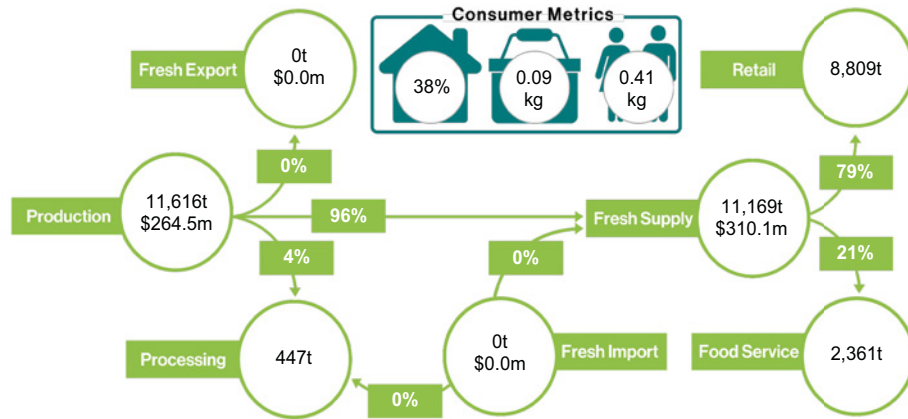
Parsley and other Fresh Herbs





Fresh Parsley and other Fresh Herbs Overview

FRESH PARSLEY AND OTHER FRESH HERBS SUPPLY CHAIN – YEAR ENDING JUNE 2024



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

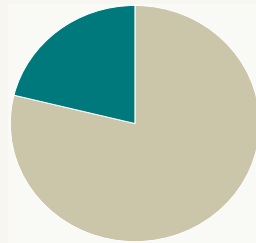
TOTAL PRODUCTION



\$264.5m

11,616t produced and valued at \$264.5m with 4% sent to be processed.

RETAIL VS FOOD SERVICE



■ Retail 79% ■ Food Service 21%

The fresh supply was 11,169t, with 8,809t distributed into retail and 2,361t into food service.

CONSUMER METRICS



38% of Australian households purchased parsley and other fresh herbs, buying an average of 93g per shopping trip.

PER CAPITA CONSUMPTION



0.41kg in 2023/24 based on the volume supplied.

YEAR ENDING JUNE	2022	2023		2024	
	Value	Value	% YoY	Value	% YoY
Production (t)	11,879	11,673	-2%	11,616	>-1%
Production (\$m)	\$266.5	\$313.3	+18%	\$264.5	-16%
Fresh Export Volume (t)	-	-	-	-	-
Fresh Export Value (\$m)	\$-	\$-	-	\$-	-
Fresh Import Volume (t)	-	-	-	-	-
Fresh Import Value (\$m)	\$-	\$-	-	\$-	-
Fresh Supply (t)	11,422	11,224	-2%	11,169	>-1%
Fresh Supply Wholesale Value (\$m)	\$312.4	\$367.3	+18%	\$310.1	-16%
Supply per Capita (kg)	0.44	0.43	-3%	0.41	-4%
Retail Supply (t)	9,008	8,852	-2%	8,809	>-1%
Retail Supply Wholesale Value (\$m)	\$246.3	\$289.6	+18%	\$244.6	-16%
Food Service Supply (t)	2,414	2,372	-2%	2,361	>-1%
Food Service Wholesale Value (\$m)	\$66.0	\$77.6	+18%	\$65.5	-16%

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



Fresh Parsley and other Fresh Herbs Production

MAJOR PRODUCTION AREAS



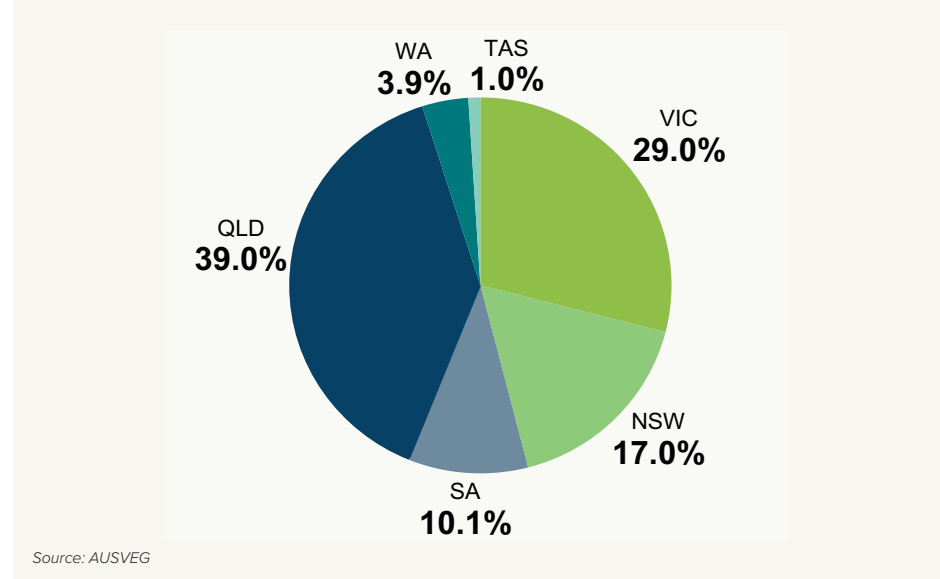
Source: AUSVEG

Fresh herbs, including parsley, are grown in most states of Australia, typically in markets near the major capitals. Increasingly volumes are being grown year-round in high tech greenhouses in New South Wales.

PRODUCTION WINDOW



2023/24 FRESH PARSLEY AND OTHER FRESH HERBS PRODUCTION BY STATE



Source: AUSVEG

2023/24 FRESH PARSLEY AND OTHER FRESH HERBS SEASONALITY BY STATE

State	Volume (t)	Jul	Aug	Sep	Oct	Nov	Dec	Jan	Feb	Mar	Apr	May	Jun
Queensland	4,530	Low	Low	Low	Low	High	High	Low	Low	Low	Low	Low	Low
Victoria	3,369	Low	Low	Low	Low	Low	High	Low	Low	Low	Low	Low	Low
New South Wales	1,975	Low	Low	Low	Low	Low	High	High	Low	Low	Low	Low	Low
South Australia	1,173	None	Low	Low	Low	Low	Low	Low	Low	Low	Low	None	None
Western Australia	453	Low	Low	Low	Low	High	Low	Low	Low	Low	Low	Low	Low
Tasmania	116	None	None	None	Low	Low	Low	Low	Low	Low	None	None	None

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

Source: AUSVEG



MAIN PARSLEY AND OTHER FRESH HERBS VARIETIES

There are a large number of fresh herbs varieties grown in Australia. Some of the major varieties include:

Coriander, a small leafed fresh herb. Coriander accounted for **28%** of fresh production.

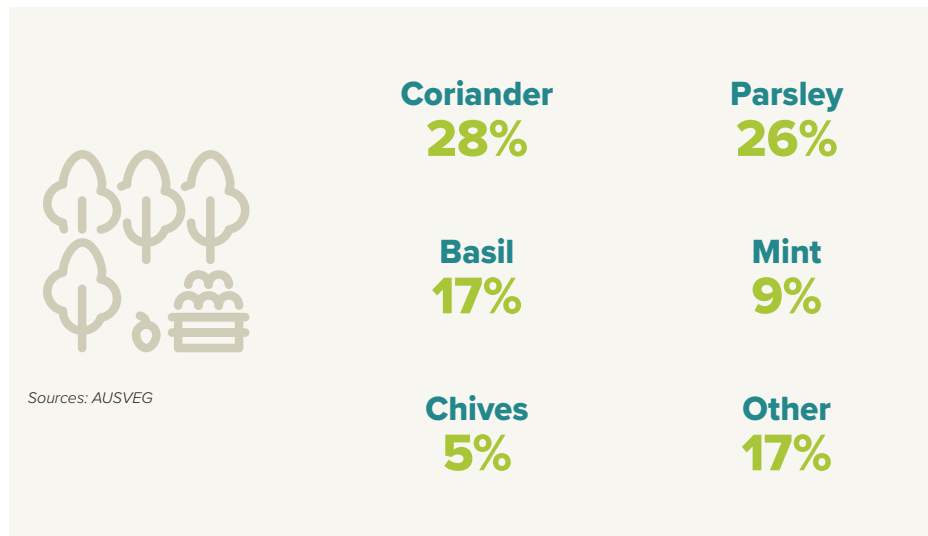
Parsley, including continental and curly-leaf parsley. Parsley accounted for **26%** of fresh production.

Basil, a large flat leafed fresh herb, accounted for **17%** of fresh production.

Mint, a smaller leafed fresh herb, accounted for **9%** of fresh production.

Chives, including garlic chives, a long thin fresh herb, accounted for **5%** of fresh production.

Other varieties accounted for **17%** of fresh production.



2023/24 FRESH PARSLEY AND OTHER FRESH HERBS SEASONALITY BY VARIETY

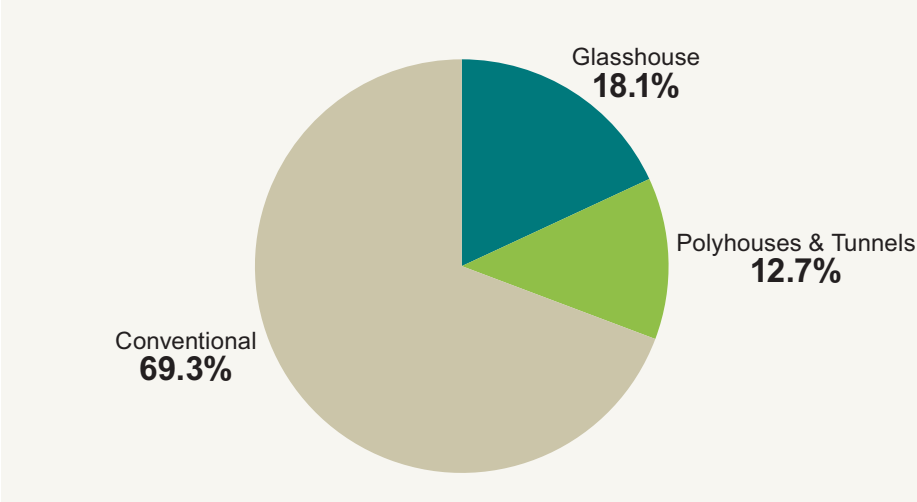
Variety	Volume (t)	Jul	Aug	Sep	Oct	Nov	Dec	Jan	Feb	Mar	Apr	May	Jun
Coriander	3,194	Low	Low	Medium	High	High	High	High	Medium	Low	Low	Low	Low
Parsley	2,962	Low	Low	Medium	High	High	High	Medium	Low	Low	Low	Low	Low
Other	1,975	Low	Low	Medium	Medium	High	High	Medium	Low	Low	Low	Low	Low
Basil	1,917	Low	Low	Medium	Medium	High	High	Medium	Low	Low	Low	Low	Low
Mint	1,045	Low	Low	Medium	High	High	High	Medium	Low	Low	Low	Low	Low
Chives	523	Low	Low	Medium	Medium	High	High	Medium	Low	Low	Low	Low	Low

Availability legend: High Medium Low None

Sources: AUSVEG



2023/24 FRESH PARSLEY AND OTHER FRESH HERBS PRODUCTION BY SYSTEM



Production of parsley and other fresh herbs in Australia occurs in three different types of farming systems. These systems and their contribution to production are **Glasshouse 18.1%**, **Polyhouses & Tunnels 12.7%** and **Conventional 69.3%**.

2023/24 FRESH PARSLEY AND OTHER FRESH HERBS PRODUCTION SYSTEM BY STATE

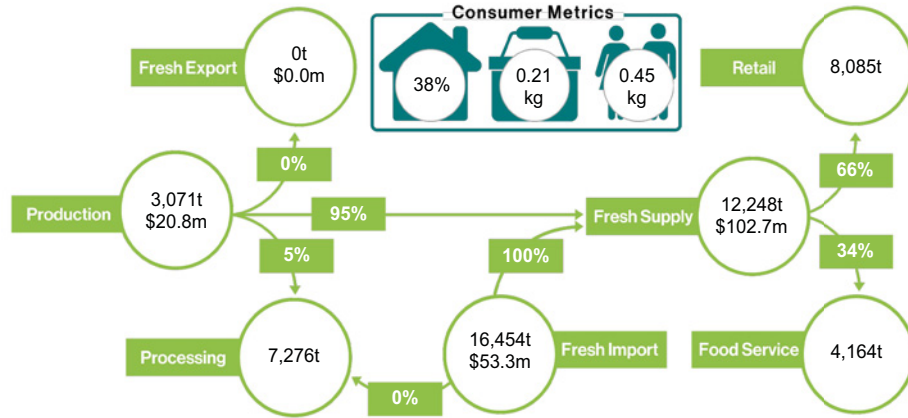
State	Glasshouse		Polyhouses & Tunnels		Conventional	
	Hectares (Ha)	Volume (t)	Hectares (Ha)	Volume (t)	Hectares (Ha)	Volume (t)
New South Wales	2	300	3	300	-	1,375
Victoria	5	675	6	600	-	2,094
Queensland	0	0	3	300	-	4,230
Western Australia	0	0	3	270	-	183
South Australia	8	1,125	0	0	-	48
Tasmania	0	0	0	0	-	116
Northern Territory	0	0	0	0	-	0
Total	14	2,100	15	1,470	-	8,046

Garlic



Fresh Garlic Overview

FRESH GARLIC SUPPLY CHAIN – YEAR ENDING JUNE 2024



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

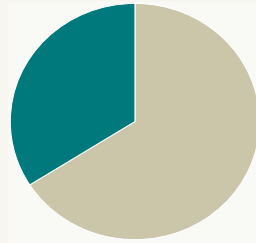
TOTAL PRODUCTION



\$20.8m

3,071t produced and valued at **\$20.8m** with 5% sent to be processed.

RETAIL VS FOOD SERVICE



■ Retail 66% ■ Food Service 34%

The fresh supply was **12,248t**, with **8,085t** distributed into retail and **4,164t** into food service.

CONSUMER METRICS



38% of Australian households purchased garlic, buying an average of **206g** 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)	3,174	2,730	-14%	3,071	+12%
Production (\$m)	\$20.9	\$21.3	+2%	\$20.8	-2%
Fresh Export Volume (t)	-	-	-	-	-
Fresh Export Value (\$m)	\$-	\$-	-	\$-	-
Fresh Import Volume (t)	14,729	15,428	+5%	16,454	+7%
Fresh Import Value (\$m)	\$38.8	\$36.0	-7%	\$53.3	+48%
Fresh Supply (t)	11,367	11,343	>-1%	12,248	+8%
Fresh Supply Wholesale Value (\$m)	\$92.6	\$109.4	+18%	\$102.7	-6%
Supply per Capita (kg)	0.44	0.43	-1%	0.45	+4%
Retail Supply (t)	7,503	7,487	>-1%	8,085	+8%
Retail Supply Wholesale Value (\$m)	\$61.1	\$72.2	+18%	\$67.8	-6%
Food Service Supply (t)	3,864	3,856	>-1%	4,164	+8%
Food Service Wholesale Value (\$m)	\$31.5	\$37.2	+18%	\$34.9	-6%

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

Fresh Garlic Production

MAJOR PRODUCTION AREAS



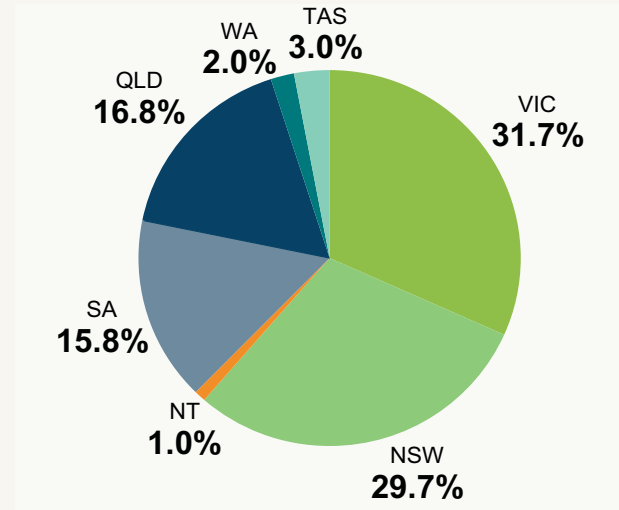
Source: AGIA

Australia has a small but growing garlic industry, with the majority of current fresh supply being sourced from imports. Garlic is grown around Australia, with significant volumes produced in Victoria, New South Wales and Queensland.

PRODUCTION WINDOW



2023/24 FRESH GARLIC PRODUCTION BY STATE



Source: AGIA

2023/24 FRESH GARLIC SEASONALITY BY STATE

State	Volume (t)	Jul	Aug	Sep	Oct	Nov	Dec	Jan	Feb	Mar	Apr	May	Jun
Victoria	973	Low	Low	None	None	Low	High	High	High	High	Low	Low	Low
New South Wales	912	Low	Low	None	Low	High	High	High	High	Low	Low	Low	Low
Queensland	517	None	Low	High	High	High	Low	Low	Low	None	None	None	None
South Australia	486	None	None	None	Low	Low	High	High	High	Low	Low	None	None
Tasmania	91	Low	Low	None	None	None	Low	High	High	High	High	Low	Low
Western Australia	61	None	None	Low	High	High	High	High	Low	Low	None	None	None
Northern Territory	30	None	Low	Low	High	High	Low	Low	None	None	None	None	None

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

Source: AGIA, GTA/TDM

MAIN GARLIC VARIETIES

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

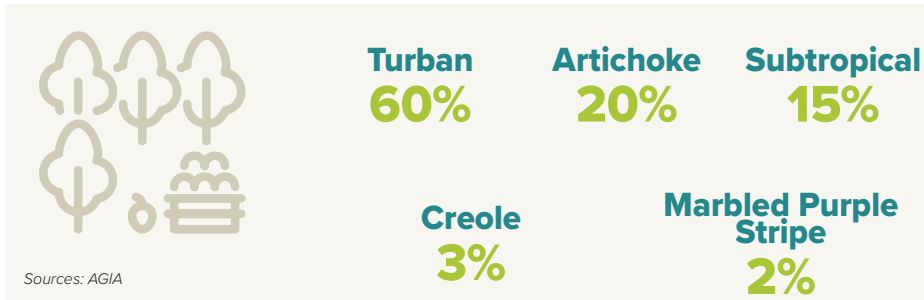
Turban, accounted for **60%** of fresh production.

Artichoke, accounted for **20%** of fresh production.

Subtropical, accounted for **15%** of fresh production.

Creole, accounted for **3%** of fresh production.

Marbled Purple Stripe, accounted for **2%** of fresh production.



2023/24 FRESH GARLIC SEASONALITY BY VARIETY

Variety	Volume (t)	Jul	Aug	Sep	Oct	Nov	Dec	Jan	Feb	Mar	Apr	May	Jun
Turban	1,842	None	None	Low	Medium	High	High	High	High	High	Medium	None	None
Artichoke	614	Low	Medium	None	None	Low	High	High	High	High	High	Medium	Low
Subtropical	461	None	Low	High	High	Medium	Low	None	None	None	None	None	None
Creole	92	High	High	Medium	Low	None	High	High	High	High	High	High	High
Marbled Purple Stripe	61	Low	None	None	None	Low	High	High	High	High	High	High	High

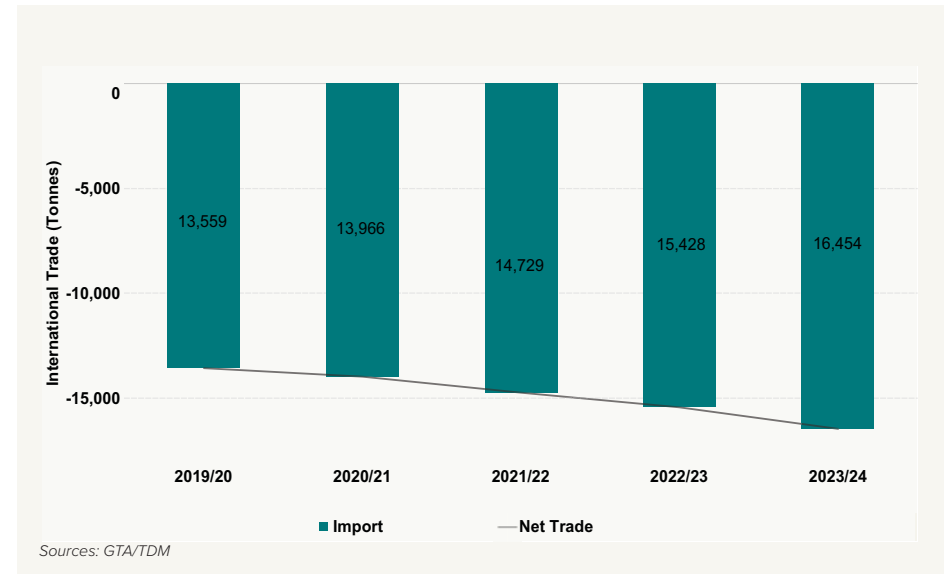
Availability legend: High (Dark Teal), Medium (Light Teal), Low (Light Green), None (Light Grey)

Sources: AGIA

Fresh Garlic International Trade

FRESH GARLIC INTERNATIONAL TRADE

Australia is a net importer of fresh garlic, importing **13,000-17,000 tonnes** annually. For the year ending in June 2024, Australia imported **16,454 tonnes** of fresh garlic. The exports and imports over the last five financial years are profiled in the graph below, where imports are counted as negative tonnes.





FRESH GARLIC IMPORTS

Imports by State Destination (Tonnes)				Imports by Country (Tonnes)			
Year Ending June	2022	2023	2024	Year Ending June	2022	2023	2024
Victoria	5,610	6,810	6,780	China	11,420	12,282	13,526
New South Wales	6,185	5,366	5,697	Argentina	658	1,402	988
Queensland	1,620	1,923	2,612	Mexico	1,119	715	660
Western Australia	1,280	1,296	1,364	Spain	851	554	594
South Australia	34	33	-	Peru	171	262	256
TOTAL	14,729	15,428	16,454	Other	511	213	431
				TOTAL	14,729	15,428	16,454

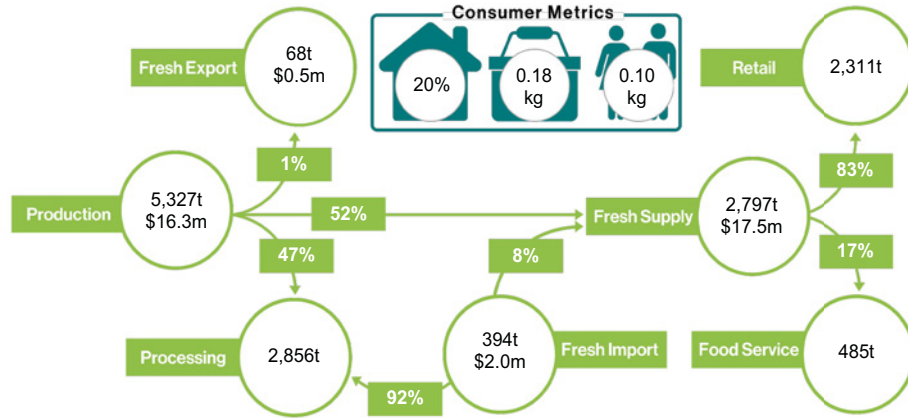
Source: GTA/TDM



Ginger

Fresh Ginger Overview

FRESH GINGER SUPPLY CHAIN – YEAR ENDING JUNE 2024



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

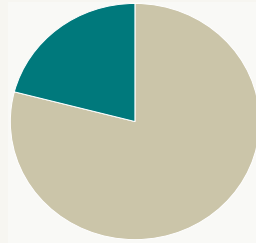
TOTAL PRODUCTION



\$16.3m

5,327t produced and valued at \$16.3m with 47% sent to be processed.

RETAIL VS FOOD SERVICE



■ Retail 83% ■ Food Service 17%

The fresh supply was 2,797t, with 2,311t distributed into retail and 485t into food service.

CONSUMER METRICS



20% of Australian households purchased ginger, buying an average of 183g per shopping trip.

PER CAPITA CONSUMPTION



0.10kg in 2023/24 based on the volume supplied.

YEAR ENDING JUNE	2022	2023		2024	
	Value	Value	% YoY	Value	% YoY
Production (t)	4,495	4,922	+9%	5,327	+8%
Production (\$m)	\$25.8	\$13.6	-47%	\$16.3	+19%
Fresh Export Volume (t)	55	26	-53%	68	>100%
Fresh Export Value (\$m)	\$0.5	\$0.3	-48%	\$0.5	+74%
Fresh Import Volume (t)	1,227	560	-54%	394	-30%
Fresh Import Value (\$m)	\$3.9	\$2.4	-38%	\$2.0	-19%
Fresh Supply (t)	2,434	2,637	+8%	2,797	+6%
Fresh Supply Wholesale Value (\$m)	\$28.8	\$14.9	-48%	\$17.5	+18%
Supply per Capita (kg)	0.09	0.10	+7%	0.10	+2%
Retail Supply (t)	1,924	2,085	+8%	2,311	+11%
Retail Supply Wholesale Value (\$m)	\$22.8	\$11.8	-48%	\$14.5	+23%
Food Service Supply (t)	510	552	+8%	485	-12%
Food Service Wholesale Value (\$m)	\$6.0	\$3.1	-48%	\$3.0	-2%

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

Fresh Ginger Production

MAJOR PRODUCTION AREAS



Source: AUSVEG

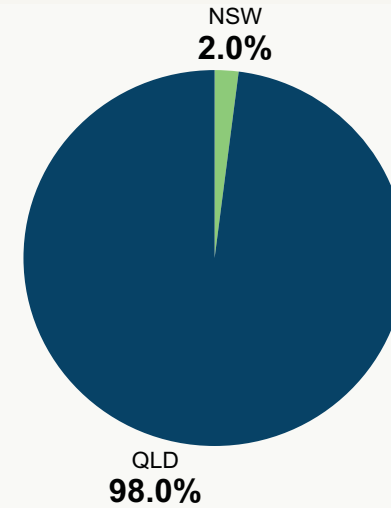
Australian ginger is grown mostly in Queensland. Processed ginger is often minced, candied and used in beverages. Australia imports fresh ginger, but the majority of these fresh imports are processed without entering the fresh supply chain.

PRODUCTION WINDOW



Year-round

2023/24 FRESH GINGER PRODUCTION BY STATE



Source: AUSVEG

2023/24 FRESH GINGER SEASONALITY BY STATE

State	Volume (t)	Jul	Aug	Sep	Oct	Nov	Dec	Jan	Feb	Mar	Apr	May	Jun
Queensland	5,220	High	High	High	High	High	High	High	High	High	High	High	High
New South Wales	107	None	None	None	Low	Medium	Medium	Medium	None	None	None	None	None

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

Source: AUSVEG

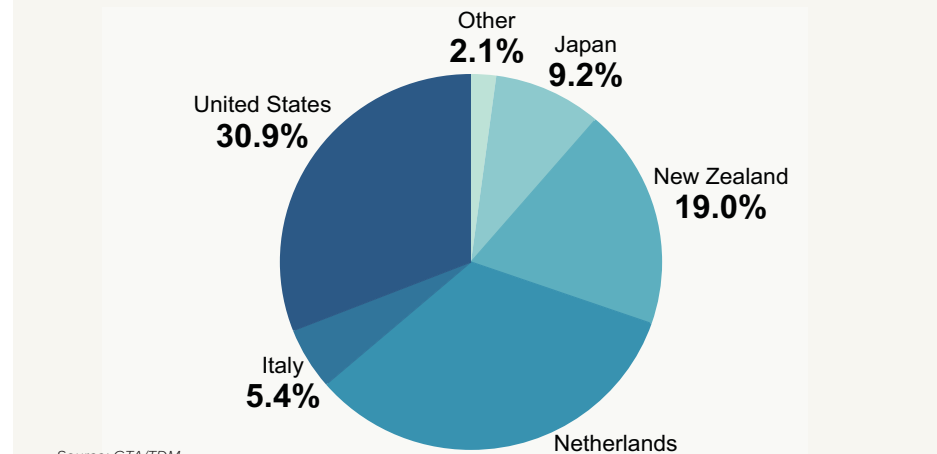
Fresh Ginger International Trade

FRESH GINGER INTERNATIONAL TRADE

Australia is a net importer of fresh ginger, although traditionally this has all been used in the processing industry without entering the fresh supply chain. The exports and imports over the last five financial years are profiled in the graph below, where imports are counted as negative tonnes.



FRESH GINGER EXPORTS



Source: GTA/TDM

For the year ending June 2024, **33.4%** of exported fresh ginger were sent to **Netherlands** as profiled in the chart above.

Exports by State of Production Origin (Tonnes)			
Year Ending June	2022	2023	2024
Queensland	35	4	55
New South Wales	12	13	13
Victoria	8	8	< 0.5
Northern Territory	< 0.5	-	-
Other	< 0.5	< 0.5	< 0.5
TOTAL	55	26	68

Exports by Country (Tonnes)			
Year Ending June	2022	2023	2024
Netherlands	-	-	23
US	< 0.5	-	21
New Zealand	22	23	13
Japan	-	2	6
Italy	-	-	4
Other	33	1	1
TOTAL	55	26	68

FRESH GINGER IMPORTS

Imports by State Destination (Tonnes)			
Year Ending June	2022	2023	2024
Queensland	719	318	274
Victoria	196	116	75
New South Wales	264	118	40
Western Australia	42	3	3
South Australia	7	5	2
Other	< 0.5	< 0.5	-0
TOTAL	1,227	560	394

Imports by Country (Tonnes)			
Year Ending June	2022	2023	2024
Fiji	646	300	250
China	188	82	71
Vietnam	271	114	32
India	34	30	30
Thailand	43	7	5
Other	46	27	8
TOTAL	1,227	560	394

Source: GTA/TDM

Processed Ginger International Trade

2023/24 PROCESSED GINGER INTERNATIONAL TRADE

For the year ending June 2024, **nine tonnes** of preserved ginger was imported, while **409 tonnes** were exported.

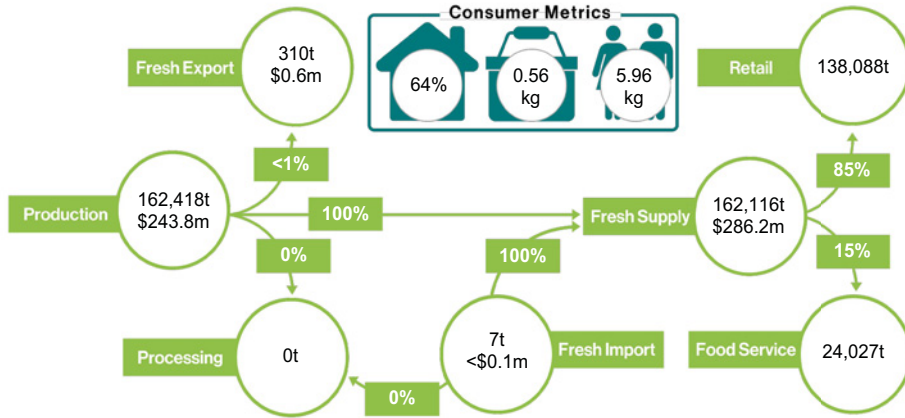




Head Lettuce

Fresh Head Lettuce Overview

FRESH HEAD LETTUCE SUPPLY CHAIN – YEAR ENDING JUNE 2024



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

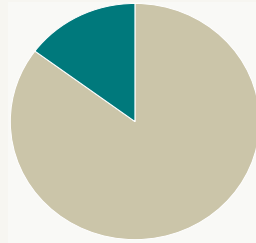
TOTAL PRODUCTION



\$243.8m

162,418t produced and valued at \$243.8m.

RETAIL VS FOOD SERVICE



■ Retail 85% ■ Food Service 15%

The fresh supply was 162,116t, with 138,088t distributed into retail and 24,027t into food service.

CONSUMER METRICS



64% of Australian households purchased head lettuce, buying an average of 562g per shopping trip.

PER CAPITA CONSUMPTION



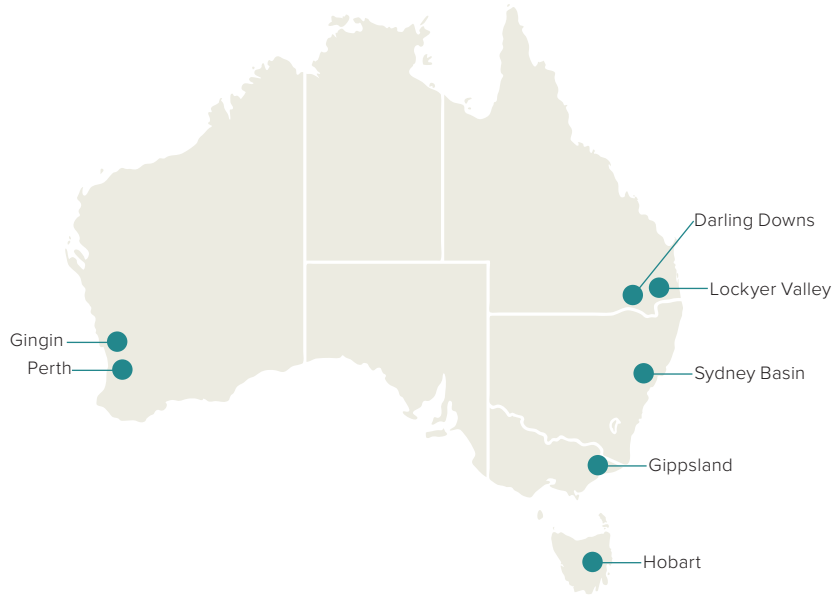
5.96kg in 2023/24 based on the volume supplied.

YEAR ENDING JUNE	2022	2023		2024	
	Value	Value	% YoY	Value	% YoY
Production (t)	134,726	145,394	+8%	162,418	+12%
Production (\$m)	\$266.7	\$243.8	-9%	\$243.8	<1%
Fresh Export Volume (t)	413	376	-9%	310	-18%
Fresh Export Value (\$m)	\$1.2	\$1.1	-11%	\$0.6	-43%
Fresh Import Volume (t)	-	1	-	7	>100%
Fresh Import Value (\$m)	\$-	\$-	-	< \$0.1	-
Fresh Supply (t)	134,313	145,019	+8%	162,116	+12%
Fresh Supply Wholesale Value (\$m)	\$312.6	\$285.7	-9%	\$286.2	<1%
Supply per Capita (kg)	5.18	5.52	+7%	5.96	+8%
Retail Supply (t)	114,406	123,526	+8%	138,088	+12%
Retail Supply Wholesale Value (\$m)	\$266.3	\$243.3	-9%	\$243.8	<1%
Food Service Supply (t)	19,907	21,493	+8%	24,027	+12%
Food Service Wholesale Value (\$m)	\$46.3	\$42.3	-9%	\$42.4	<1%

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

Fresh Head Lettuce Production

MAJOR PRODUCTION AREAS



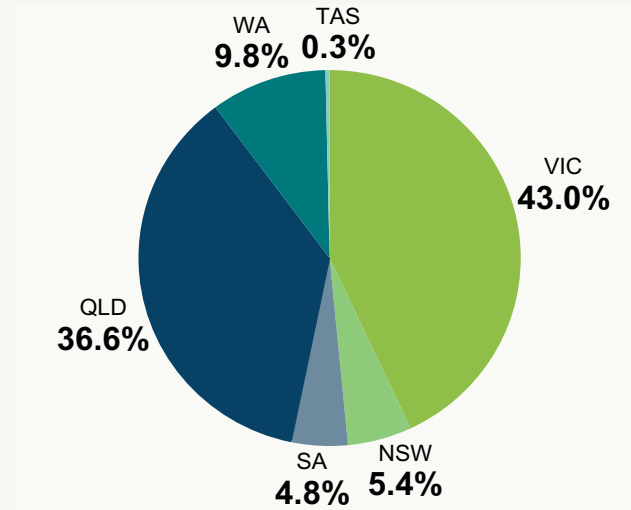
Source: AUSVEG

Head lettuce refers to lettuce products that are typically sold in a headed form, such as iceberg, cos and oak lettuces. Fresh lettuce leaves predominantly sold loose are covered in *Leafy Salad Vegetables* on page 281. Head lettuces are typically grown close to the major population centres across most states.

PRODUCTION WINDOW



2023/24 FRESH HEAD LETTUCE PRODUCTION BY STATE



Source: ABS

2023/24 FRESH HEAD LETTUCE SEASONALITY BY STATE

State	Volume (t)	Jul	Aug	Sep	Oct	Nov	Dec	Jan	Feb	Mar	Apr	May	Jun
Victoria	69,919	Low	Low	Low	Low	Low	High	High	High	Low	Low	Low	Low
Queensland	59,404	Low	Low	Low	Low	High	High	High	Low	Low	Low	Low	Low
Western Australia	15,981	Low	Low	Low	High	High	High	Low	Low	Low	Low	Low	Low
New South Wales	8,813	Low	Low	Low	Low	Low	High	High	High	Low	Low	Low	Low
South Australia	7,748	Low	Low	Low	Low	Low	High	Low	Low	Low	Low	Low	Low
Tasmania	554	Low	Low	Low	Low	Low	High	Low	Low	Low	Low	Low	Low

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

Source: AUSVEG

MAIN HEAD LETTUCE VARIETIES

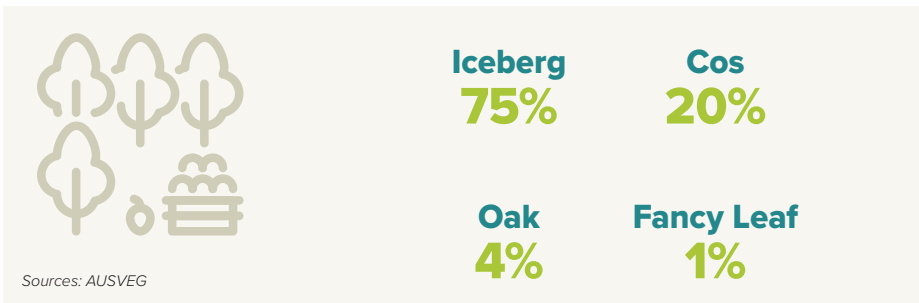
Although there are currently a number of varieties grown in Australia, production for the fresh market is dominated by three main varieties. These include:

Iceberg, a tight headed spherical head lettuce. Iceberg lettuce accounted for **75%** of fresh production for the year ending June 2024.

Cos, a tight bunched head lettuce. Cos lettuces accounted for **20%** of fresh production.

Oak, the most common loose head lettuce, accounted for **four percent** of fresh production.

Other common **Fancy Leaf** lettuces such as butter leaf accounted for **one percent** of fresh production.



2023/24 FRESH HEAD LETTUCE SEASONALITY BY VARIETY

Variety	Volume (t)	Jul	Aug	Sep	Oct	Nov	Dec	Jan	Feb	Mar	Apr	May	Jun
Iceberg	123,006	Low	Low	Low	Medium	High	High	High	High	Medium	Medium	Low	Low
Cos	32,387	Low	Low	Low	Low	Low	High	High	Medium	Medium	Low	Low	Low
Oak	6,379	Low	Low	Low	Low	Low	High	High	Medium	Medium	Low	Low	Low
Other Fancy	1,799	Low	Low	Low	Low	High	High	High	Medium	Medium	Low	Low	Low

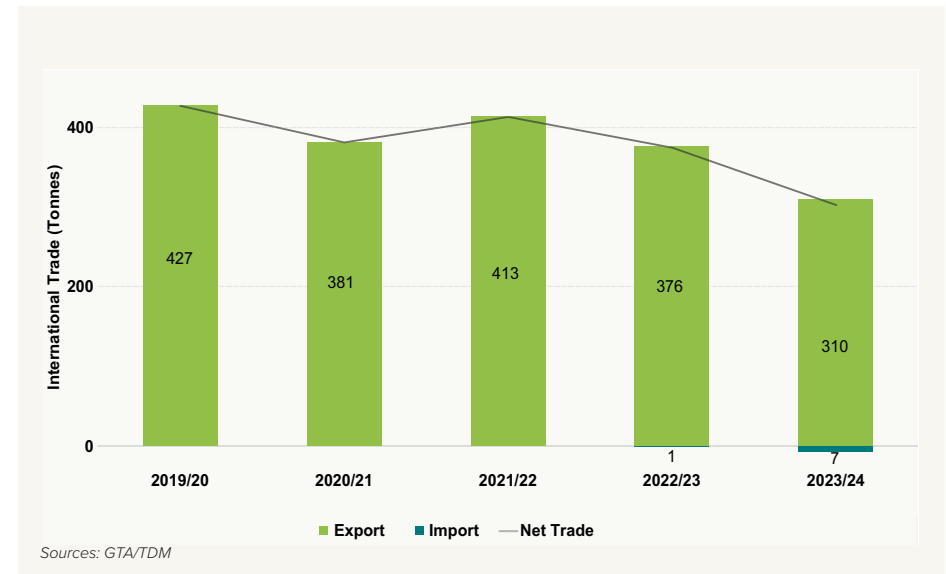
Availability legend: ■ High ■ Medium ■ Low ■ None

Sources: AUSVEG

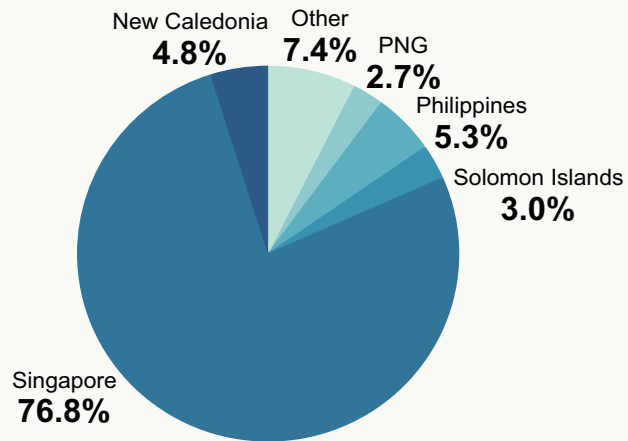
Fresh Head Lettuce International Trade

FRESH HEAD LETTUCE INTERNATIONAL TRADE

Australia has a small trade in head lettuce. For the year ending in June 2024, Australia exported **310 tonnes** of fresh head lettuce. The exports and imports over the last five financial years are profiled in the graph below, where imports are counted as negative tonnes.



FRESH HEAD LETTUCE EXPORTS



Source: GTA/TDM

For the year ending June 2024, **76.8%** of exported fresh head lettuce 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
Western Australia	156	177	216	Singapore	175	235	238
Queensland	8	61	40	Philippines	9	11	16
Victoria	177	115	36	New Caledonia	155	67	15
New South Wales	71	21	17	Solomon Islands	< 0.5	3	9
Tasmania	-	< 0.5	< 0.5	PNG	4	8	8
Other	1	2	1	Other	71	48	22
TOTAL	413	376	310	TOTAL	413	376	310

FRESH HEAD LETTUCE IMPORTS

Imports by State Destination (Tonnes)				Imports by Country (Tonnes)			
Year Ending June	2022	2023	2024	Year Ending June	2022	2023	2024
Queensland	-	-	7	New Zealand	-	1	7
New South Wales	-	1	< 0.5	TOTAL	-	1	7
Other	-	-	< 0.5				
TOTAL	-	1	7				

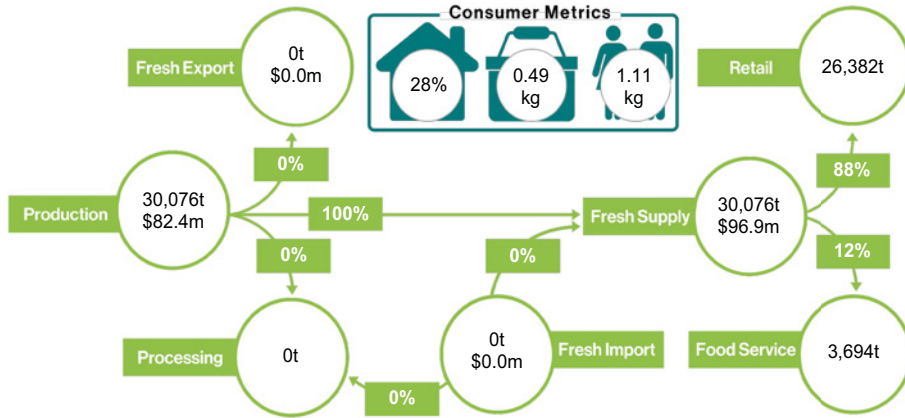
Source: GTA/TDM



Leafy Asian Vegetables

Fresh Leafy Asian Vegetable Overview

FRESH LEAFY ASIAN VEGETABLE SUPPLY CHAIN – YEAR ENDING JUNE 2024



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

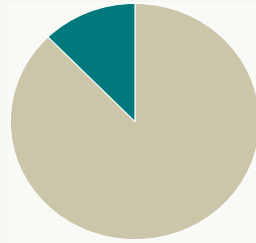
TOTAL PRODUCTION



\$82.4m

30,076t produced and valued at \$82.4m.

RETAIL VS FOOD SERVICE



■ Retail 88% ■ Food Service 12%

The fresh supply was 30,076t, with 26,382t distributed into retail and 3,694t into food service.

CONSUMER METRICS



28% of Australian households purchased leafy Asian vegetables, buying an average of 488g per shopping trip.

PER CAPITA CONSUMPTION



1.11kg in 2023/24 based on the volume supplied.

YEAR ENDING JUNE	2022	2023		2024	
	Value	Value	% YoY	Value	% YoY
Production (t)	29,547	29,092	-2%	30,076	+3%
Production (\$m)	\$86.2	\$91.2	+6%	\$82.4	-10%
Fresh Export Volume (t)	-	-	-	-	-
Fresh Export Value (\$m)	\$-	\$-	-	\$-	-
Fresh Import Volume (t)	-	-	-	-	-
Fresh Import Value (\$m)	\$-	\$-	-	\$-	-
Fresh Supply (t)	29,547	29,092	-2%	30,076	+3%
Fresh Supply Wholesale Value (\$m)	\$101.4	\$107.3	+6%	\$96.9	-10%
Supply per Capita (kg)	1.14	1.11	-3%	1.11	>-1%
Retail Supply (t)	25,919	25,519	-2%	26,382	+3%
Retail Supply Wholesale Value (\$m)	\$88.9	\$94.2	+6%	\$85.0	-10%
Food Service Supply (t)	3,629	3,573	-2%	3,694	+3%
Food Service Wholesale Value (\$m)	\$12.4	\$13.2	+6%	\$11.9	-10%

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

Fresh Leafy Asian Vegetables Production

MAJOR PRODUCTION AREAS



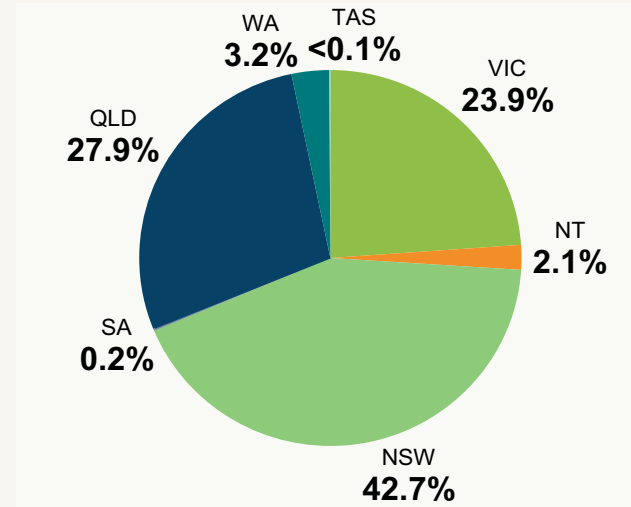
Source: AUSVEG

Leafy Asian vegetables cover a range of similar vegetables such as bok choy, pak choy, gai lan and wombok (Chinese cabbage). The most common names have been used in this report, but these varieties are sometimes referred to with different names.

PRODUCTION WINDOW



2023/24 FRESH LEAFY ASIAN VEGETABLE PRODUCTION BY STATE



Source: AUSVEG

2023/24 FRESH LEAFY ASIAN VEGETABLE SEASONALITY BY STATE

State	Volume (t)	Jul	Aug	Sep	Oct	Nov	Dec	Jan	Feb	Mar	Apr	May	Jun
New South Wales	12,829	Low	Low	Low	High	High	Medium	Medium	Medium	Medium	Medium	Medium	Medium
Queensland	8,389	Low	Low	Low	High	High	Medium	Medium	Medium	Medium	Medium	Medium	Medium
Victoria	7,185	Low	Low	Low	High	High	Medium	Medium	Medium	Medium	Medium	Medium	Medium
Western Australia	953	Low	Low	Low	High	High	Medium	Medium	Medium	Medium	Medium	Medium	Medium
Northern Territory	639	None	Low	Low	High	High	Medium	Medium	Medium	Medium	Medium	Medium	Medium
South Australia	56	Low	Low	Low	Low	Low	Low	Low	Low	Low	Low	Low	Low
Tasmania	26	Low	Low	Low	Low	Low	None	None	None	None	None	None	None

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

Source: AUSVEG

MAIN LEAFY ASIAN VEGETABLES VARIETIES

There are a large number of leafy Asian vegetables grown in Australia. Some of the major varieties include:

Wombok, also known as Chinese cabbage, accounted for **38%** of fresh production.

Pak Choy accounted for **28%** of fresh production.

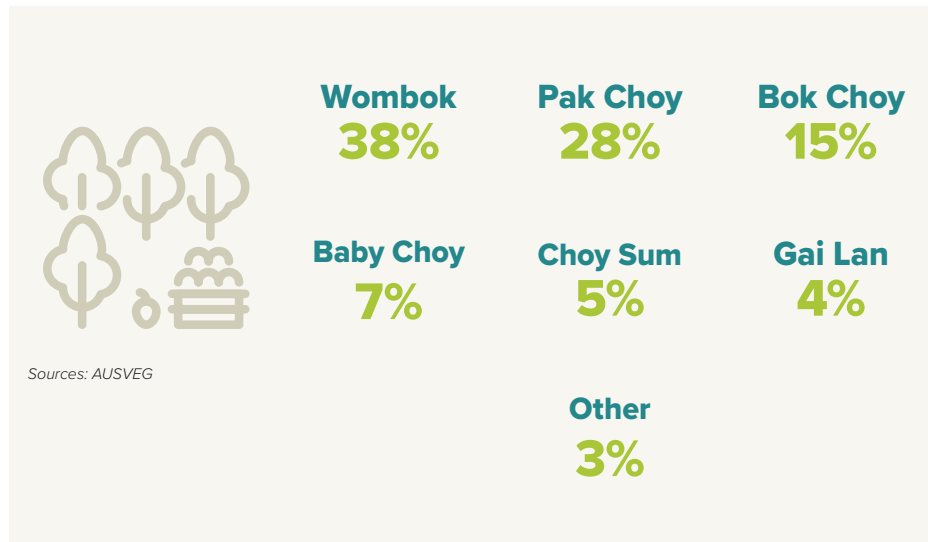
Bok Choy accounted for **15%** of fresh production.

Baby Choy accounted for **seven percent** of fresh production.

Choy Sum accounted for **five percent** of fresh production.

Gai Lan, also known as Chinese broccoli, accounted for **four percent** of fresh production.

Other varieties accounted for **three percent** of fresh production.



2023/24 FRESH LEAFY ASIAN VEGETABLES SEASONALITY BY VARIETY

Variety	Volume (t)	Jul	Aug	Sep	Oct	Nov	Dec	Jan	Feb	Mar	Apr	May	Jun
Wombok	11,429	Low	None	None	Low	Medium	Medium	Medium	Medium	Medium	Medium	Medium	Medium
Pak Choy	8,421	Low	Low	Medium	Medium	Medium	Medium	Medium	Medium	Medium	Medium	Medium	Medium
Bok Choy	4,511	Medium	Medium	Medium	Medium	Medium	Low	Medium	Medium	Medium	Medium	Medium	Medium
Baby Choy	2,105	Medium	Medium	Medium	Medium	Medium	Medium	Medium	Medium	Medium	Medium	Medium	Medium
Choy Sum	1,504	Low	Medium	Medium	Medium	Medium	Medium	Medium	Medium	Medium	Medium	Medium	Medium
Gai Lan	1,233	Medium	Medium	Medium	Medium	Low	Medium	Medium	Medium	Medium	Medium	Medium	Medium
Other	872	Medium	Medium	Medium	Medium	Medium	Medium	Medium	Medium	Medium	Medium	Medium	Medium

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

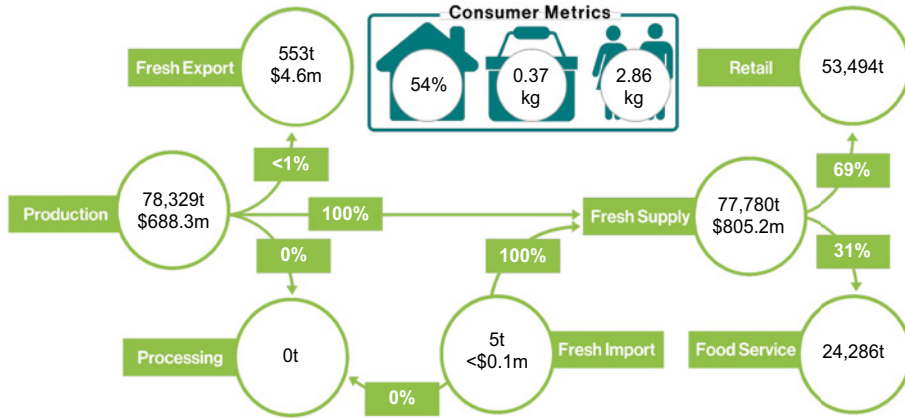
Sources: AUSVEG



Leafy Salad Vegetables

Fresh Leafy Salad Vegetable Overview

FRESH LEAFY SALAD VEGETABLE SUPPLY CHAIN – YEAR ENDING JUNE 2024



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

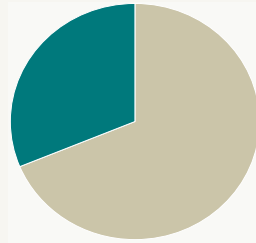
TOTAL PRODUCTION



\$688.3m

78,329t produced and valued at \$688.3m.

RETAIL VS FOOD SERVICE



■ Retail 69% ■ Food Service 31%

The fresh supply was 77,780t, with 53,494t distributed into retail and 24,286t into food service.

CONSUMER METRICS



54% of Australian households purchased leafy salad vegetables, buying an average of 369g per shopping trip.

PER CAPITA CONSUMPTION



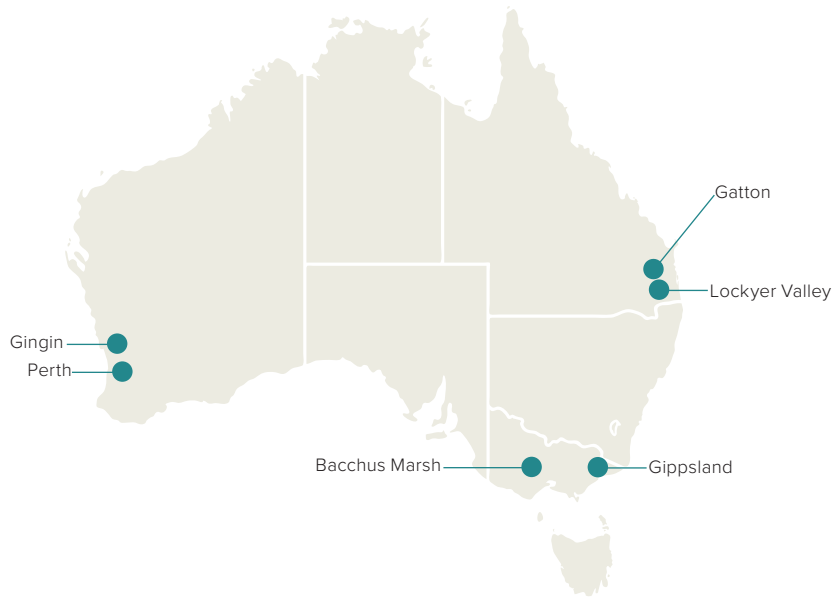
2.86kg in 2023/24 based on the volume supplied.

YEAR ENDING JUNE	2022	2023		2024	
	Value	Value	% YoY	Value	% YoY
Production (t)	78,495	75,720	-4%	78,329	+3%
Production (\$m)	\$589.2	\$736.5	+25%	\$688.3	-7%
Fresh Export Volume (t)	816	646	-21%	553	-14%
Fresh Export Value (\$m)	\$7.0	\$6.1	-12%	\$4.6	-25%
Fresh Import Volume (t)	66	56	-16%	5	-91%
Fresh Import Value (\$m)	\$0.3	\$0.1	-62%	< \$0.1	-69%
Fresh Supply (t)	77,745	75,129	-3%	77,780	+4%
Fresh Supply Wholesale Value (\$m)	\$686.8	\$861.0	+25%	\$805.2	-6%
Supply per Capita (kg)	3.00	2.86	-5%	2.86	<1%
Retail Supply (t)	53,469	51,671	-3%	53,494	+4%
Retail Supply Wholesale Value (\$m)	\$472.3	\$592.1	+25%	\$553.8	-6%
Food Service Supply (t)	24,275	23,459	-3%	24,286	+4%
Food Service Wholesale Value (\$m)	\$214.4	\$268.8	+25%	\$251.4	-6%

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

Fresh Leafy Salad Vegetables Production

MAJOR PRODUCTION AREAS



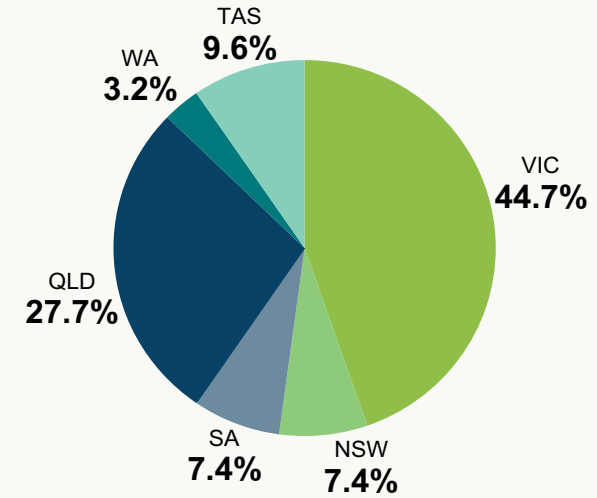
Source: AUSVEG

Leafy salad vegetables refers to a number of varieties of leafy vegetables that are typically in a loose form, such as rocket and baby spinach.

PRODUCTION WINDOW



2023/24 FRESH LEAFY SALAD VEGETABLE PRODUCTION BY STATE



Source: AUSVEG

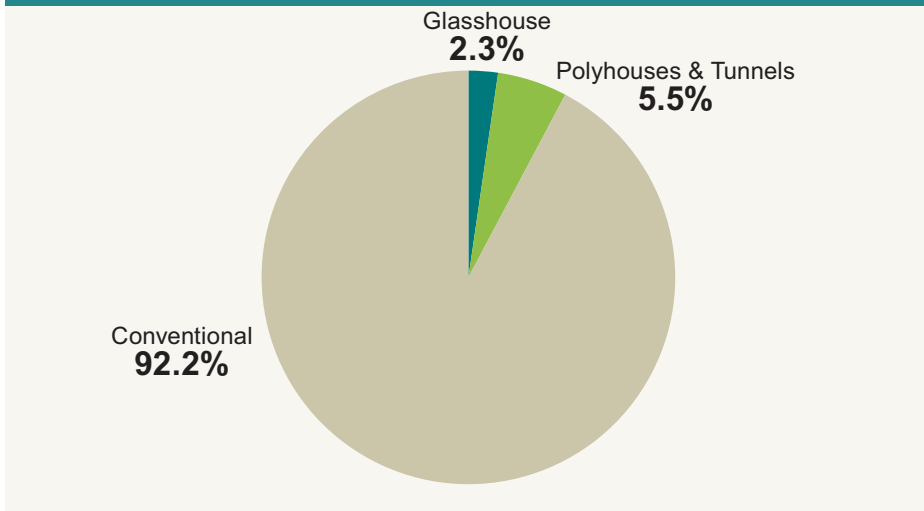
2023/24 FRESH LEAFY SALAD VEGETABLE SEASONALITY BY STATE

State	Volume (t)	Jul	Aug	Sep	Oct	Nov	Dec	Jan	Feb	Mar	Apr	May	Jun
Victoria	35,005	Low	Low	Low	Low	Low	Low	High	High	High	Medium	Medium	Medium
Queensland	21,670	Low	Low	Low	Low	Low	Low	Low	High	High	Medium	Medium	Medium
Tasmania	7,501	Low	Low	Low	Low	Low	Low	Low	High	Medium	Medium	Medium	Medium
New South Wales	5,834	Low	Low	Low	Low	Low	Low	Low	High	High	Medium	Medium	Medium
South Australia	5,834	Low	Low	Low	Low	Low	Low	Low	Low	Low	Low	Low	Low
Western Australia	2,484	Low	Low	Low	Low	Low	Low	Low	Low	Low	Low	Low	Low

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

Source: AUSVEG

2023/24 FRESH LEAFY SALAD VEGETABLES PRODUCTION BY SYSTEM



Production of leafy salad vegetables in Australia occurs in three different types of farming systems. These systems and their contribution to production are **Glasshouse 2.3%**, **Polyhouses & Tunnels 5.5%** and **Conventional 92.2%**.

2023/24 FRESH LEAFY SALAD VEGETABLES PRODUCTION SYSTEM BY STATE

State	Glasshouse		Polyhouses & Tunnels		Conventional	
	Hectares (Ha)	Volume (t)	Hectares (Ha)	Volume (t)	Hectares (Ha)	Volume (t)
New South Wales	0	0	6	900	-	4,934
Victoria	3	540	7	1,050	-	33,415
Queensland	4	720	5	750	-	20,200
Western Australia	1	180	3	375	-	1,929
South Australia	0	0	6	900	-	4,934
Tasmania	2	360	2	300	-	6,841
Northern Territory	0	0	0	0	-	0
Total	10	1,800	29	4,275	-	72,254

Fresh Leafy Salad Vegetable International Trade

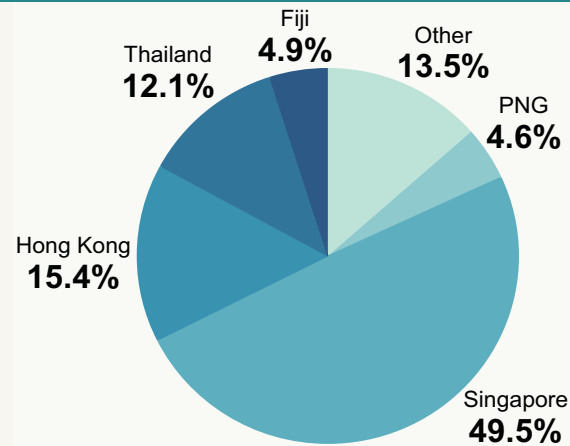
FRESH LEAFY SALAD VEGETABLE INTERNATIONAL TRADE

Australia is a net exporter of leafy salad vegetables. For the year ending in June 2024, Australia exported **553 tonnes** of fresh leafy salad vegetables. The exports and imports over the last five financial years are profiled in the graph below, where imports are counted as negative tonnes.





FRESH LEAFY SALAD VEGETABLE EXPORTS



Source: GTA/TDM

For the year ending June 2024, **49.5%** of exported fresh leafy salad vegetables 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	580	495	404	Singapore	422	299	274
Queensland	75	78	76	Hong Kong	187	122	85
New South Wales	118	72	70	Thailand	63	97	67
South Australia	3	< 0.5	3	Fiji	14	30	27
Tasmania	< 0.5	< 0.5	< 0.5	PNG	11	19	26
Other	40	1	1	Other	120	79	75
TOTAL	816	646	553	TOTAL	816	646	553

FRESH LEAFY SALAD VEGETABLE 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	66	56	5	New Zealand	41	5	5
TOTAL	66	56	5	US	25	51	-
				Italy	< 0.5	-	-
				Other	< 0.5	-	-
				TOTAL	66	56	5

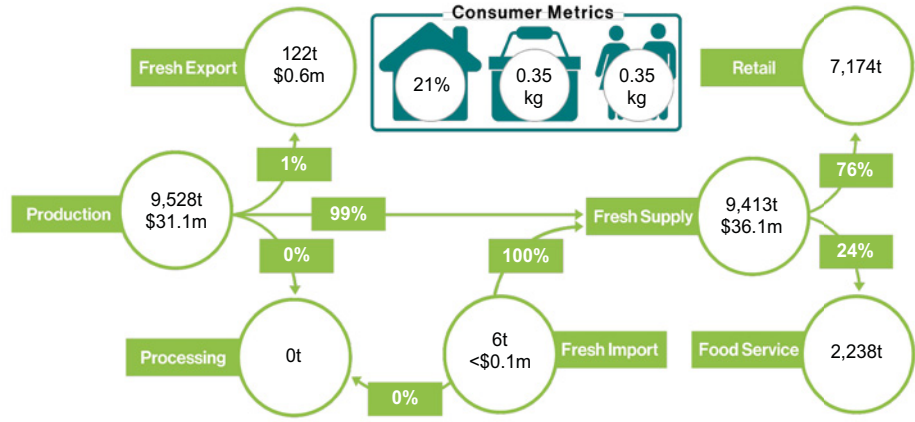
Source: GTA/TDM



Leeks

Fresh Leeks Overview

FRESH LEEKS SUPPLY CHAIN – YEAR ENDING JUNE 2024



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

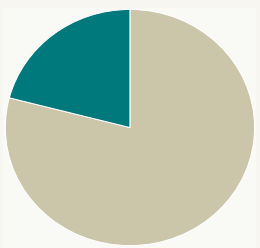
TOTAL PRODUCTION



\$31.1m

9,528t produced and valued at \$31.1m.

RETAIL VS FOOD SERVICE:



■ Retail 76% ■ Food Service 24%

The fresh supply was 9,413t, with 7,174t distributed into retail and 2,238t into food service.

CONSUMER METRICS



21%

21% of Australian households purchased leeks, buying an average of 349g per shopping trip.

PER CAPITA CONSUMPTION

0.35kg 

in 2023/24 based on the volume supplied.

YEAR ENDING JUNE	2022	2023		2024	
	Value	Value	% YoY	Value	% YoY
Production (t)	10,722	10,127	-6%	9,528	-6%
Production (\$m)	\$34.2	\$34.8	+2%	\$31.1	-11%
Fresh Export Volume (t)	126	117	-7%	122	+4%
Fresh Export Value (\$m)	\$0.8	\$0.7	-14%	\$0.6	-17%
Fresh Import Volume (t)	-	96	-	6	-94%
Fresh Import Value (\$m)	\$-	< \$0.1	-	< \$0.1	>100%
Fresh Supply (t)	10,596	10,106	-5%	9,413	-7%
Fresh Supply Wholesale Value (\$m)	\$39.4	\$40.7	+3%	\$36.1	-11%
Supply per Capita (kg)	0.41	0.38	-6%	0.35	-10%
Retail Supply (t)	8,076	7,703	-5%	7,174	-7%
Retail Supply Wholesale Value (\$m)	\$30.0	\$31.0	+3%	\$27.5	-11%
Food Service Supply (t)	2,520	2,403	-5%	2,238	-7%
Food Service Wholesale Value (\$m)	\$9.4	\$9.7	+3%	\$8.6	-11%

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

Fresh Leeks Production

MAJOR PRODUCTION AREAS



Source: AUSVEG

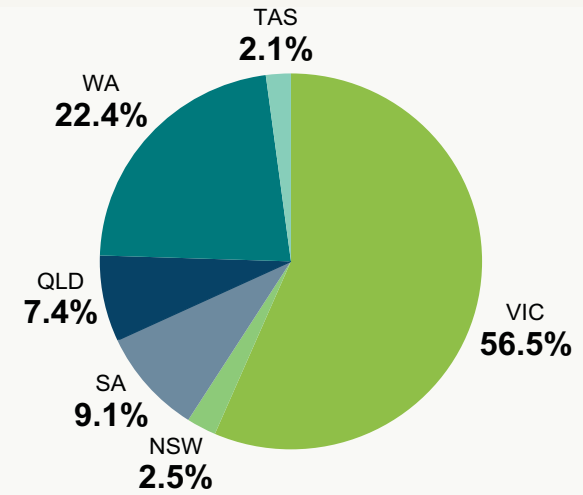
Leeks are grown predominantly in Victoria. Almost all of the leeks grown in Australia are destined for the fresh market.

PRODUCTION WINDOW



Year-round

2023/24 FRESH LEEKS PRODUCTION BY STATE



Source: AUSVEG

2023/24 FRESH LEEKS SEASONALITY BY STATE

State	Volume (t)	Jul	Aug	Sep	Oct	Nov	Dec	Jan	Feb	Mar	Apr	May	Jun
Victoria	5,386	Medium	High	High	High	Medium	Medium	Low	Low	Low	Low	Low	Low
Western Australia	2,134	High	High	Medium	Medium	Low	Low	Low	Low	Low	Low	Low	Low
South Australia	864	High	Medium	Medium	Low	Low	Low	Low	Low	Low	Low	Low	High
Queensland	705	High	Medium	Medium	Medium	Low	Low	Low	Low	Low	Low	Low	Low
New South Wales	240	High	Medium	Medium	Low	Low	Low	Low	Low	Low	Low	Low	High
Tasmania	199	Medium	Medium	Medium	Medium	Low	Low	Low	Low	Low	Low	Low	Low

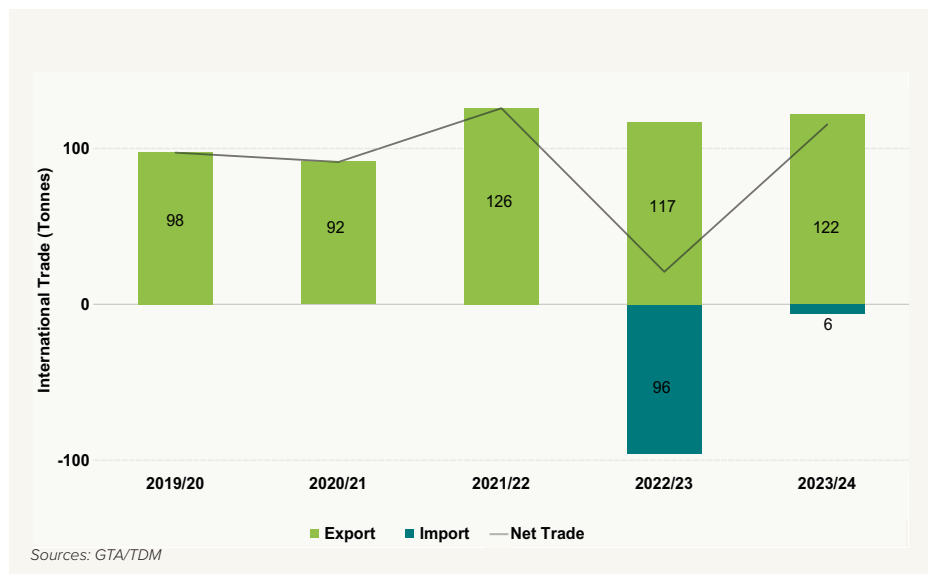
Availability legend: High (Dark Green), Medium (Light Green), Low (Yellow-Green), None (Grey)

Source: AUSVEG

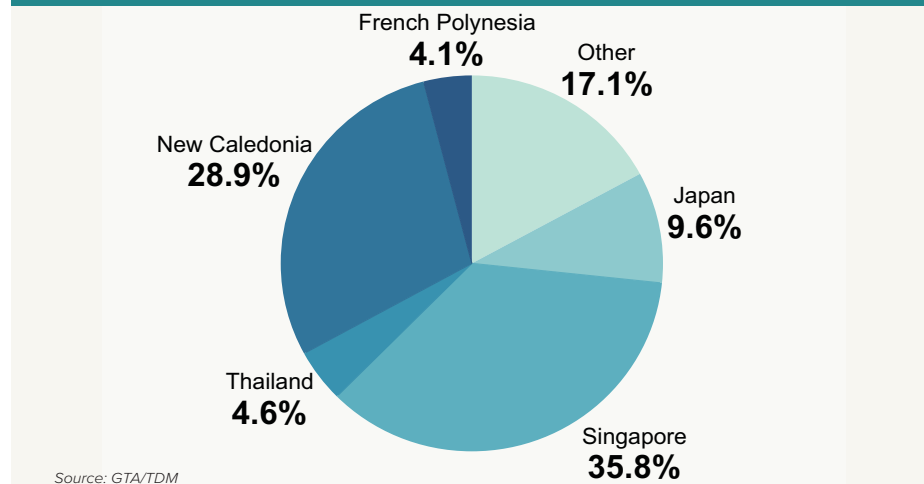
Fresh Leeks International Trade

FRESH LEEKS INTERNATIONAL TRADE

Australia has a small trade in leeks. For the year ending June 2024, Australia exported **122 tonnes** of fresh leeks. The exports and imports over the last five years are profiled in the graph below, where imports are counted as negative tonnes.



FRESH LEEKS EXPORTS



For the year ending June 2024, **35.8%** of exported fresh leeks 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	94	92	115	Singapore	44	26	44
Queensland	7	13	4	New Caledonia	27	48	35
New South Wales	23	9	1	Japan	13	15	12
Tasmania	2	1	1	Thailand	4	8	6
South Australia	< 0.5	1	< 0.5	French Polynesia	1	-	5
Other	< 0.5	1	1	Other	36	20	21
TOTAL	126	117	122	TOTAL	126	117	122

FRESH LEEKS 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	-	96	5	India	-	-	4
Western Australia	-	-	1	China	-	-	3
Queensland	-	-	< 0.5	South Korea	-	96	-
Other	-	-	< 0.5	TOTAL	-	96	6
TOTAL	-	96	6				

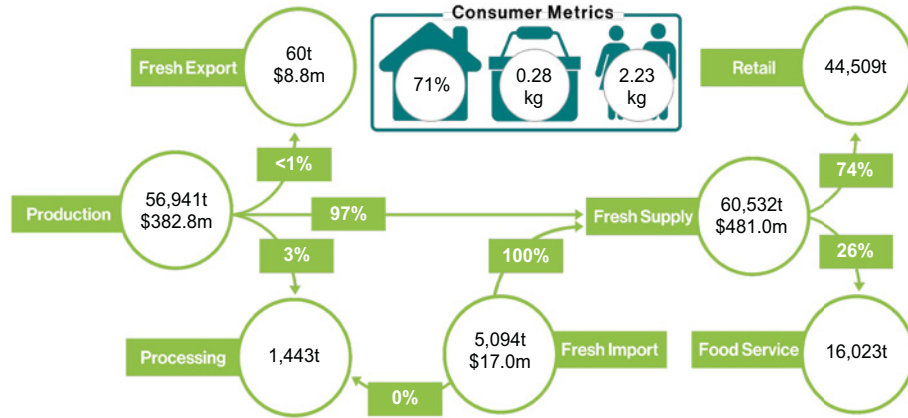
Source: GTA/TDM

Mushrooms



Fresh Mushrooms Overview

FRESH MUSHROOMS SUPPLY CHAIN – YEAR ENDING JUNE 2024



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

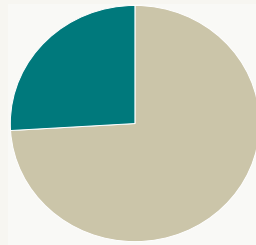
TOTAL PRODUCTION



\$382.8m

56,941t produced and valued at \$382.8m with 3% sent to be processed.

RETAIL VS FOOD SERVICE



■ Retail 74% ■ Food Service 26%

The fresh supply was 60,532t, with 44,509t distributed into retail and 16,023t into food service.

CONSUMER METRICS



71% of Australian households purchased mushrooms, buying an average of 276g per shopping trip.

PER CAPITA CONSUMPTION



2.23kg in 2023/24 based on the volume supplied.

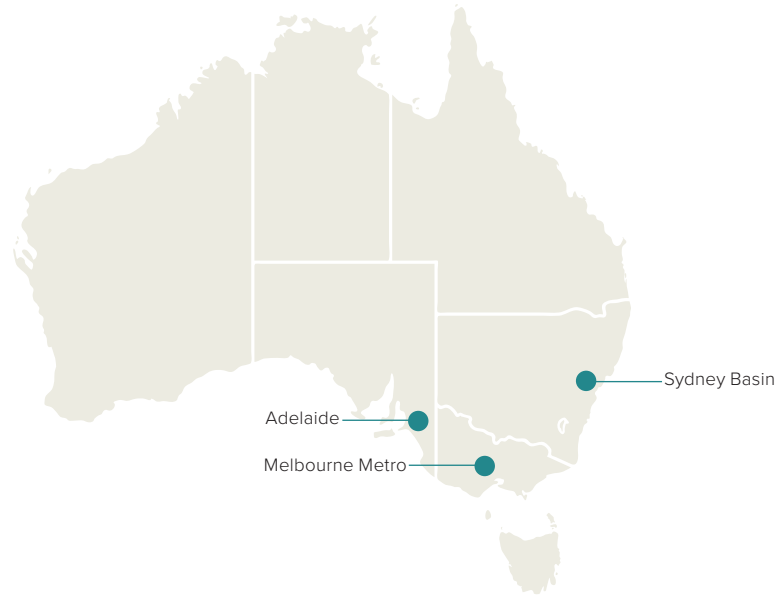
YEAR ENDING JUNE	2022	2023		2024	
	Value	Value	% YoY	Value	% YoY
Production (t)	63,901	61,633	-4%	56,941	-8%
Production (\$m)	\$420.9	\$409.4	-3%	\$382.8	-6%
Fresh Export Volume (t)	76	59	-23%	60	+1%
Fresh Export Value (\$m)	\$7.4	\$8.9	+21%	\$8.8	>-1%
Fresh Import Volume (t)	4,508	4,823	+7%	5,094	+6%
Fresh Import Value (\$m)	\$14.8	\$17.1	+16%	\$17.0	-1%
Fresh Supply (t)	66,713	64,835	-3%	60,532	-7%
Fresh Supply Wholesale Value (\$m)	\$522.0	\$509.6	-2%	\$481.0	-6%
Supply per Capita (kg)	2.57	2.47	-4%	2.23	-10%
Retail Supply (t)	49,417	48,026	-3%	44,509	-7%
Retail Supply Wholesale Value (\$m)	\$386.6	\$377.5	-2%	\$353.7	-6%
Food Service Supply (t)	17,296	16,809	-3%	16,023	-5%
Food Service Wholesale Value (\$m)	\$135.3	\$132.1	-2%	\$127.3	-4%

Note : This category has been updated to reflect revised data for previous years.

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

Fresh Mushrooms Production

MAJOR PRODUCTION AREAS



Source: AMGA

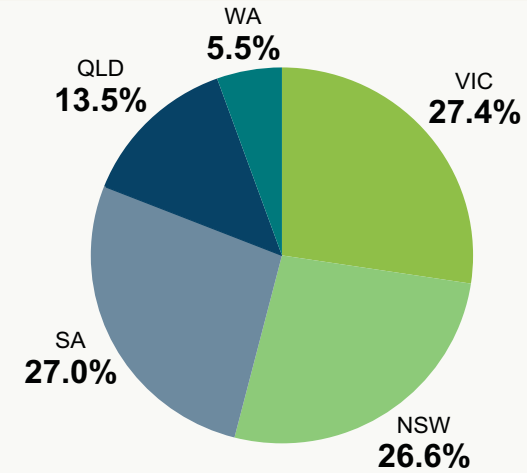
Mushrooms refer to a number of edible mushrooms grown for human consumption, including *agaricus bisporus* (button, cup, flat and brown mushrooms), as well as a number of exotic varieties including shiimeji and oyster mushroom. Mushrooms are grown in most states of Australia, close to population centres.

PRODUCTION WINDOW



Year-round

2023/24 FRESH MUSHROOMS PRODUCTION BY STATE



Source: AMGA

2023/24 FRESH MUSHROOMS SEASONALITY BY STATE

State	Volume (t)	Jul	Aug	Sep	Oct	Nov	Dec	Jan	Feb	Mar	Apr	May	Jun
Victoria	15,602	Medium	Medium	Medium	Medium	Medium	Medium	Medium	Medium	Medium	Medium	Medium	Medium
South Australia	15,374	Medium	Medium	Medium	Medium	Medium	Medium	Medium	Medium	Medium	Medium	Medium	Medium
New South Wales	15,146	Medium	Medium	Medium	Medium	Medium	Medium	Medium	Medium	Medium	Medium	Medium	Medium
Queensland	7,687	Medium	Medium	Medium	Medium	Medium	Low	Low	Low	Medium	Medium	Medium	Medium
Western Australia	3,132	Medium	Medium	Medium	Medium	Low	Low	Low	Low	Low	Low	Low	Low

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

Source: AMGA

Fresh Mushrooms International Trade

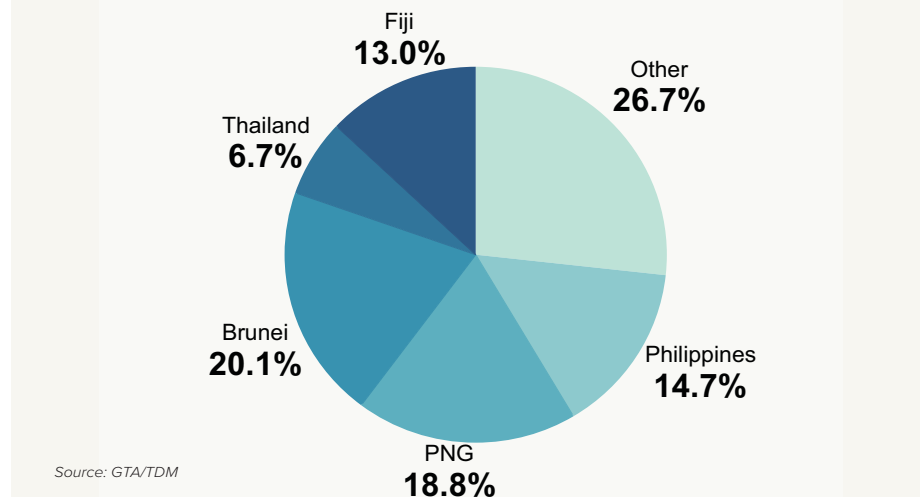
FRESH MUSHROOMS INTERNATIONAL TRADE

Note: Fresh mushroom international trade includes truffles.

Australia is a net importer of fresh mushrooms. For the year ending June 2024, Australia imported **5,094 tonnes** of fresh mushrooms. The exports and imports over the last five financial years are profiled in the graph below, where imports are counted as negative tonnes.



FRESH MUSHROOMS EXPORTS



For the year ending June 2024, **20.1%** of exported fresh mushrooms were sent to **Brunei**, 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	28	20	19	Brunei	21	15	12
New South Wales	14	9	16	PNG	10	11	11
Victoria	26	20	15	Philippines	4	5	9
Western Australia	9	9	10	Fiji	9	11	8
South Australia	1	1	< 0.5	Thailand	1	1	4
Other	< 0.5	< 0.5	1	Other	32	15	16
TOTAL	76	59	60	TOTAL	76	59	60

FRESH MUSHROOMS IMPORTS

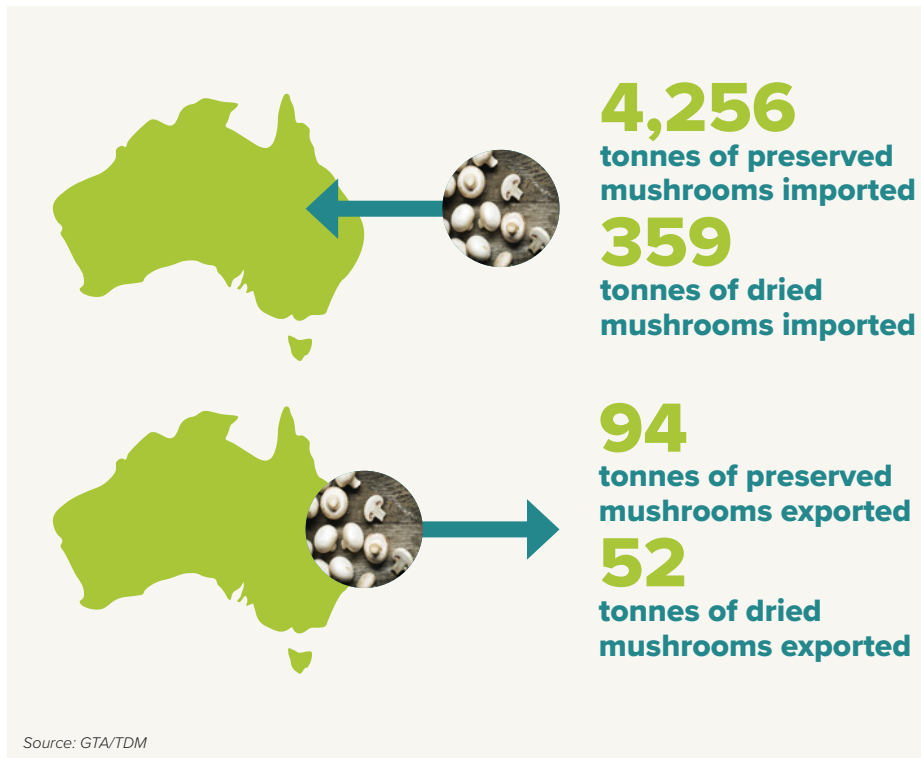
Imports by State Destination (Tonnes)				Imports by Country (Tonnes)			
Year Ending June	2022	2023	2024	Year Ending June	2022	2023	2024
New South Wales	1,789	2,056	2,057	South Korea	3,539	3,623	3,668
Victoria	1,832	1,834	1,918	China	829	1,028	1,315
Western Australia	390	415	539	Spain	31	86	42
Queensland	497	507	534	Croatia	47	12	39
South Australia	-	10	45	Italy	62	72	30
TOTAL	4,508	4,823	5,094	Other	< 0.5	1	< 0.5
				TOTAL	4,508	4,823	5,094

Source: GTA/TDM

Processed Mushrooms International Trade

2023/24 PROCESSED MUSHROOMS INTERNATIONAL TRADE

For the year ending June 2024, an additional **4,256 tonnes** of preserved mushrooms were imported and **94 tonnes** were exported, while **359 tonnes** of dried mushrooms were imported and **52 tonnes** were exported.

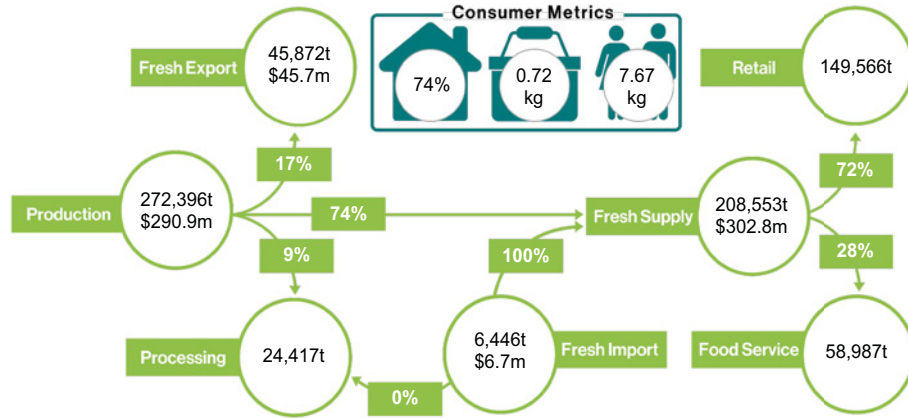


Onions

A photograph of two onions on a wooden surface. In the foreground, a single yellow onion is in sharp focus, showing its characteristic layered texture and golden-brown skin. Behind it, a red onion is visible but out of focus, its deep purple-red color contrasting with the yellow onion. The wooden surface they rest on has a natural grain pattern. The background is a soft, out-of-focus grey.

Fresh Onions Overview

FRESH ONIONS SUPPLY CHAIN – YEAR ENDING JUNE 2024



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

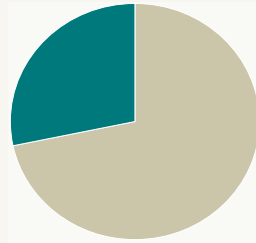
TOTAL PRODUCTION



\$290.9m

272,396t produced and valued at \$290.9m with 9% sent to be processed.

RETAIL VS FOOD SERVICE



■ Retail 72% ■ Food Service 28%

The fresh supply was 208,553t, with 149,566t distributed into retail and 58,987t into food service.

CONSUMER METRICS



74% of Australian households purchased onions, buying an average of 720g per shopping trip.

PER CAPITA CONSUMPTION



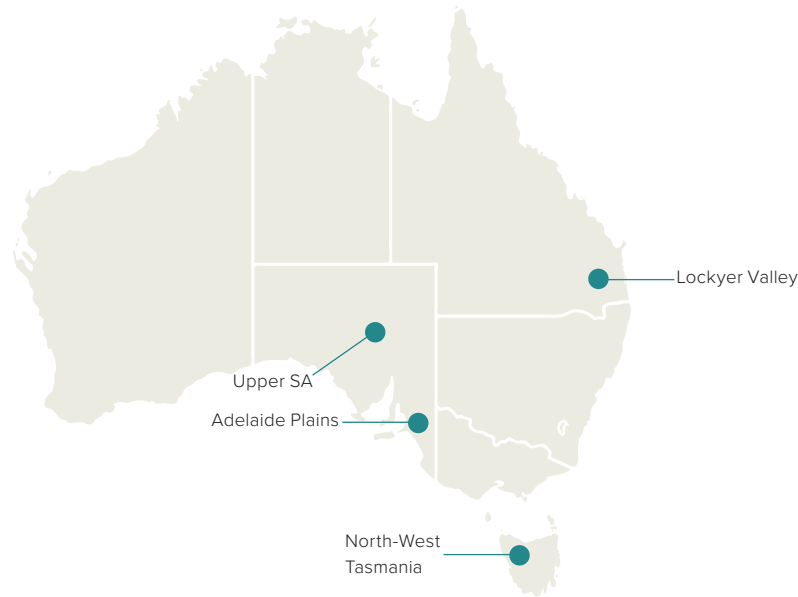
7.67kg in 2023/24 based on the volume supplied.

YEAR ENDING JUNE	2022	2023		2024	
	Value	Value	% YoY	Value	% YoY
Production (t)	272,604	255,159	-6%	272,396	+7%
Production (\$m)	\$253.4	\$332.7	+31%	\$290.9	-13%
Fresh Export Volume (t)	42,305	36,299	-14%	45,872	+26%
Fresh Export Value (\$m)	\$33.9	\$39.2	+16%	\$45.7	+16%
Fresh Import Volume (t)	1,430	7,855	>100%	6,446	-18%
Fresh Import Value (\$m)	\$2.3	\$9.4	>100%	\$6.7	-28%
Fresh Supply (t)	206,548	203,844	-1%	208,553	+2%
Fresh Supply Wholesale Value (\$m)	\$263.2	\$362.5	+38%	\$302.8	-16%
Supply per Capita (kg)	7.96	7.76	-3%	7.67	-1%
Retail Supply (t)	148,169	146,188	-1%	149,566	+2%
Retail Supply Wholesale Value (\$m)	\$188.8	\$260.0	+38%	\$217.1	-16%
Food Service Supply (t)	58,379	57,655	-1%	58,987	+2%
Food Service Wholesale Value (\$m)	\$74.4	\$102.5	+38%	\$85.6	-16%

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

Fresh Onions Production

MAJOR PRODUCTION AREAS



Source: OA

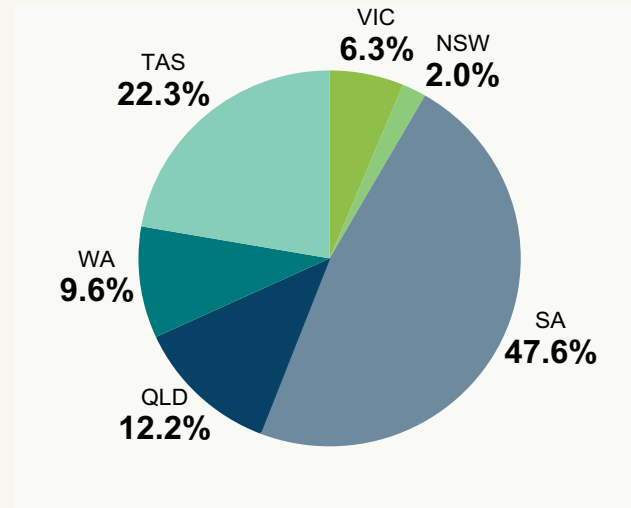
Onions are grown across most states of Australia, with the majority of production occurring in South Australia and Tasmania. Processed onions are typically dried and preserved.

PRODUCTION WINDOW



Year-round

2023/24 FRESH ONIONS PRODUCTION BY STATE



Source: ABS

2023/24 FRESH ONIONS SEASONALITY BY STATE

State	Volume (t)	Jul	Aug	Sep	Oct	Nov	Dec	Jan	Feb	Mar	Apr	May	Jun
South Australia	129,682	High	High	High	High	High	High	High	High	High	High	High	High
Tasmania	60,670	High	High	High	High	High	High	High	High	High	High	High	High
Queensland	33,347	High	High	High	High	High	High	High	High	High	High	High	High
Western Australia	26,071	High	High	High	High	High	High	High	High	High	High	High	High
Victoria	17,048	High	High	High	High	High	High	High	High	High	High	High	High
New South Wales	5,578	High	High	High	High	High	High	High	High	High	High	High	High

Availability legend: High Medium Low None

Source: ABS

MAIN ONION VARIETIES

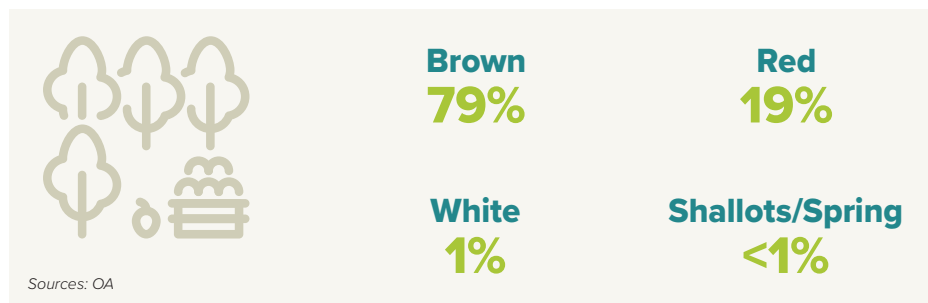
There are a number of onion varieties grown in Australia for the year ending June 2024. Some of the major varieties include:

Brown onions, accounted for **79%** of fresh production.

Red onions, accounted for **19%** of fresh production

White onions, accounted for **one percent** of fresh production.

Shallots/Spring onions, accounted for **less than one percent** of fresh production.



2023/24 FRESH ONION SEASONALITY BY VARIETY

Variety	Volume (t)	Jul	Aug	Sep	Oct	Nov	Dec	Jan	Feb	Mar	Apr	May	Jun
Brown	196,822	High	Medium	Medium	Medium	Low	None	None	None	None	None	None	None
Red	47,586	High	Medium	Medium	Medium	Low	None	None	None	None	None	None	None
Processing	24,417	High	Medium	Medium	Medium	Low	None	None	None	None	None	None	None
White	2,373	High	Medium	Medium	Medium	Low	None	None	None	None	None	None	None
Shallots/Spring	1,195	High	Medium	Medium	Medium	Low	None	None	None	None	None	None	None

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

Sources: OA

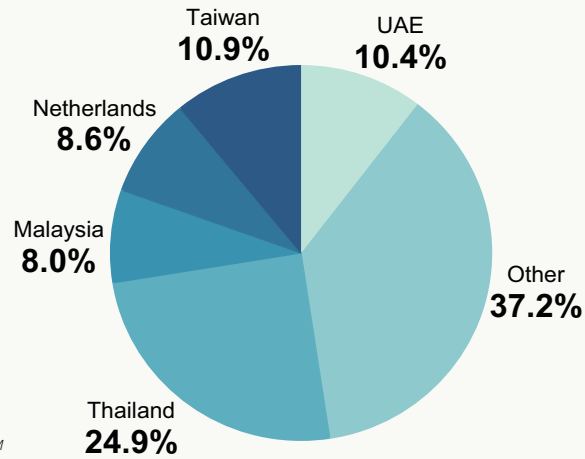
Fresh Onion International Trade

FRESH ONION INTERNATIONAL TRADE

Australia is a net exporter of fresh onions. For the year ending in June 2024, Australia exported **45,872 tonnes** of fresh onions. The exports and imports over the last five financial years are profiled in the graph below, where imports are counted as negative tonnes.



FRESH ONIONS EXPORTS



Source: GTA/TDM

For the year ending June 2024, **24.9%** of exported fresh onions 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
Tasmania	21,990	21,981	25,300	Thailand	14,394	9,997	11,410
Western Australia	9,209	6,612	10,250	Taiwan	8,423	2,441	5,015
South Australia	9,897	6,688	7,952	UAE	1,466	3,242	4,783
Queensland	477	505	1,580	Netherlands	1,239	2,533	3,946
Victoria	504	268	708	Malaysia	2,089	3,847	3,672
Other	229	247	82	Other	14,694	14,238	17,046
TOTAL	42,305	36,299	45,872	TOTAL	42,305	36,299	45,872

FRESH ONIONS IMPORTS

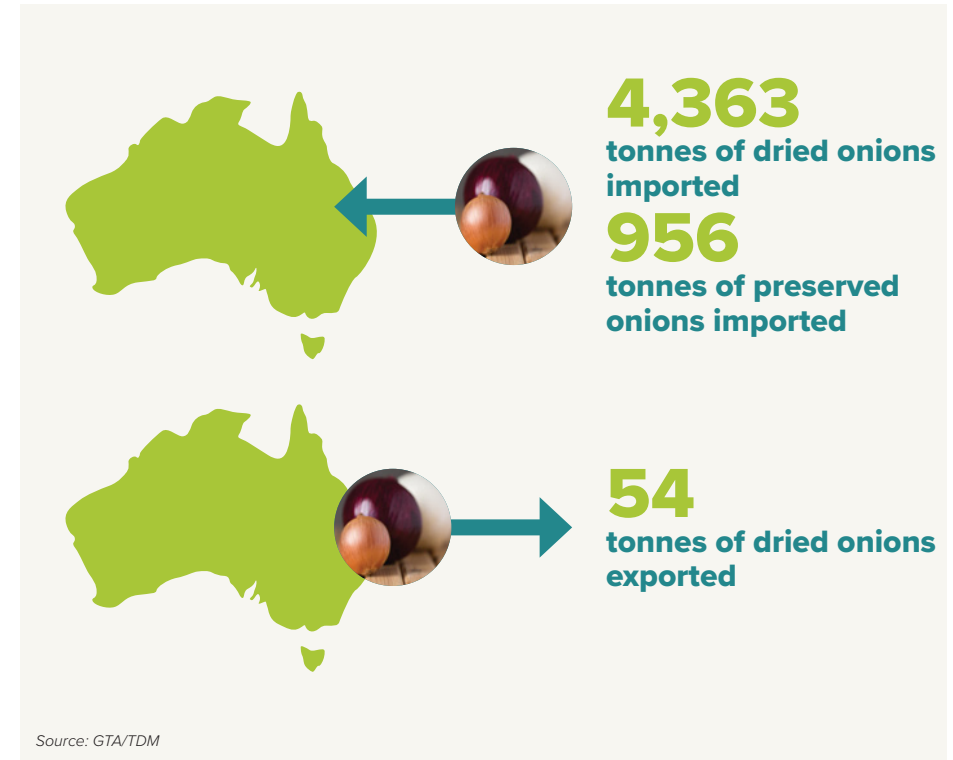
Imports by State Destination (Tonnes)				Imports by Country (Tonnes)			
Year Ending June	2022	2023	2024	Year Ending June	2022	2023	2024
New South Wales	492	2,752	2,378	China	1,049	5,957	5,878
Victoria	216	2,994	1,824	Netherlands	295	767	468
Western Australia	700	1,885	1,324	US	71	1,048	98
Queensland	-	202	612	India	1	1	3
South Australia	22	22	308	New Zealand	-	82	-
TOTAL	1,430	7,855	6,446	Other	13	1	-0
				TOTAL	1,430	7,855	6,446

Source: GTA/TDM

Processed Onions International Trade

2023/24 PROCESSED ONIONS INTERNATIONAL TRADE

For the year ending June 2024, an additional **4,363 tonnes** of dried onions and **956 tonnes** of preserved onions were imported, while **54 tonnes** of dried onions were exported.



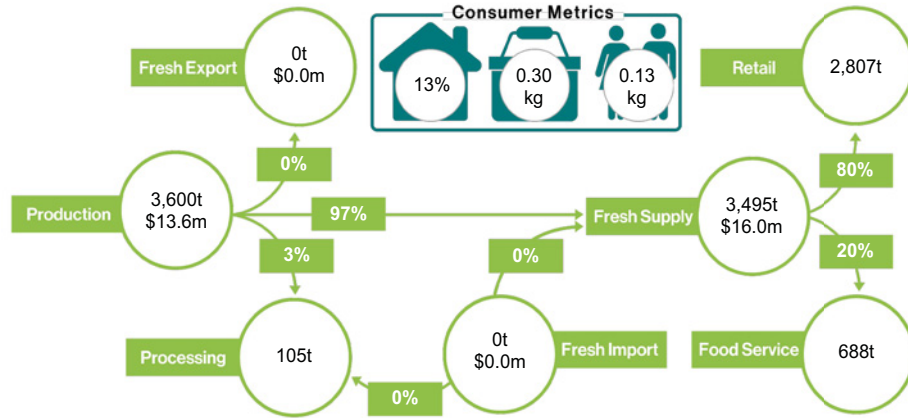
Source: GTA/TDM



Parsnips

Fresh Parsnips Overview

FRESH PARSNIPS SUPPLY CHAIN – YEAR ENDING JUNE 2024



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

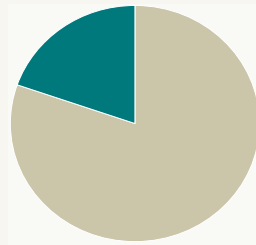
TOTAL PRODUCTION



\$13.6m

3,600t produced and valued at \$13.6m with 3% sent to be processed.

RETAIL VS FOOD SERVICE



■ Retail 80% ■ Food Service 20%

The fresh supply was 3,495t, with 2,807t distributed into retail and 688t into food service.

CONSUMER METRICS



13% of Australian households purchased parsnips, buying an average of 303g per shopping trip.

PER CAPITA CONSUMPTION



0.13kg in 2023/24 based on the volume supplied.

YEAR ENDING JUNE	2022	2023		2024	
	Value	Value	% YoY	Value	% YoY
Production (t)	3,580	3,593	<1%	3,600	<1%
Production (\$m)	\$14.2	\$14.4	+1%	\$13.6	-5%
Fresh Export Volume (t)	-	-	-	-	-
Fresh Export Value (\$m)	\$-	\$-	-	\$-	-
Fresh Import Volume (t)	-	-	-	-	-
Fresh Import Value (\$m)	\$-	\$-	-	\$-	-
Fresh Supply (t)	3,476	3,488	<1%	3,495	<1%
Fresh Supply Wholesale Value (\$m)	\$16.6	\$16.8	+1%	\$16.0	-5%
Supply per Capita (kg)	0.13	0.13	>-1%	0.13	-3%
Retail Supply (t)	2,792	2,802	<1%	2,807	<1%
Retail Supply Wholesale Value (\$m)	\$13.4	\$13.5	+1%	\$12.8	-5%
Food Service Supply (t)	684	686	<1%	688	<1%
Food Service Wholesale Value (\$m)	\$3.3	\$3.3	+1%	\$3.1	-5%

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

Fresh Parsnips Production

MAJOR PRODUCTION AREAS



Source: AUSVEG

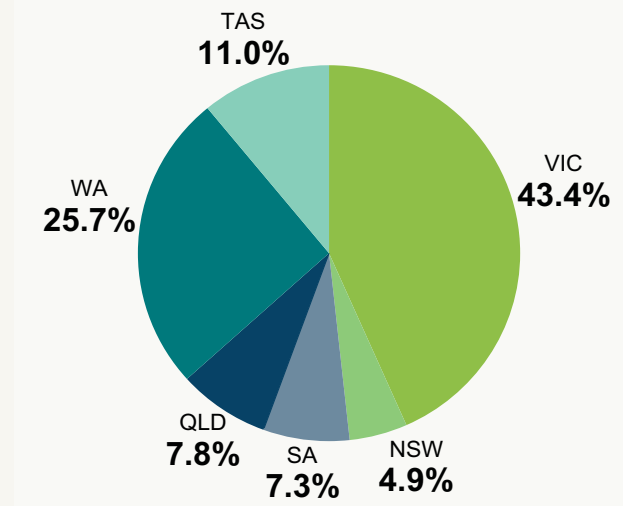
Parsnips are grown across most states of Australia, with the majority of production occurring in Victoria. Almost all parsnips grown in Australia are destined for the fresh market.

PRODUCTION WINDOW



Year-round

2023/24 FRESH PARSNIPS PRODUCTION BY STATE



Source: AUSVEG

2023/24 FRESH PARSNIPS SEASONALITY BY STATE

State	Volume (t)	Jul	Aug	Sep	Oct	Nov	Dec	Jan	Feb	Mar	Apr	May	Jun
Victoria	1,562	High	Medium	Low	Low	Low	Low	Low	Low	Low	Low	Medium	High
Western Australia	925	Low	Low	Low	Low	Low	Low	Low	Low	Low	Low	Low	High
Tasmania	394	Low	Low	Low	Low	Low	Low	Low	Low	Low	Low	Low	Low
Queensland	279	High	Medium	Low	Low	Low	Low	Low	Low	Low	Low	Low	High
South Australia	263	Low	Low	Low	Low	Low	Low	Low	Low	Low	Low	Low	Low
New South Wales	177	High	Medium	Low	Low	Low	Low	Low	Low	Low	Low	Low	High

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

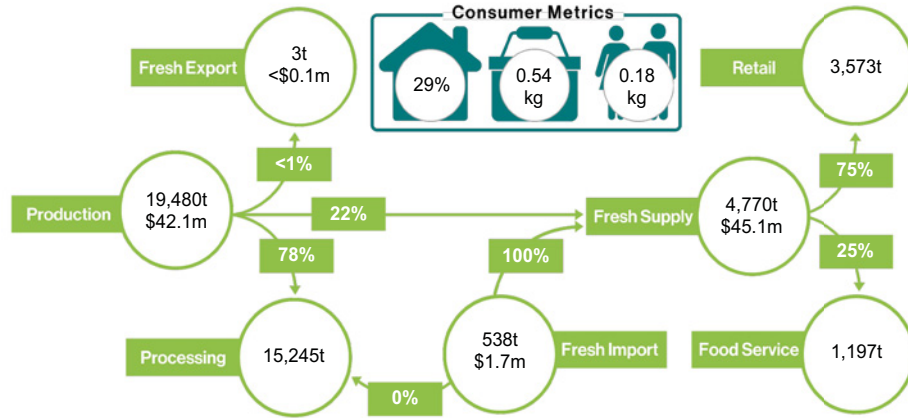
Source: AUSVEG



Peas

Fresh Peas Overview

FRESH PEAS SUPPLY CHAIN – YEAR ENDING JUNE 2024



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

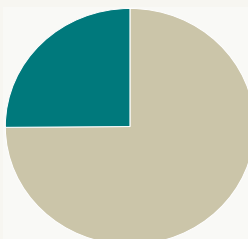
TOTAL PRODUCTION



\$42.1m

19,480t produced and valued at \$42.1m with 78% sent to be processed.

RETAIL VS FOOD SERVICE



■ Retail 75% ■ Food Service 25%

The fresh supply was 4,770t, with 3,573t distributed into retail and 1,197t into food service.

CONSUMER METRICS



29%

29% of Australian households purchased peas, buying an average of 536g per shopping trip.

PER CAPITA CONSUMPTION

0.18kg 

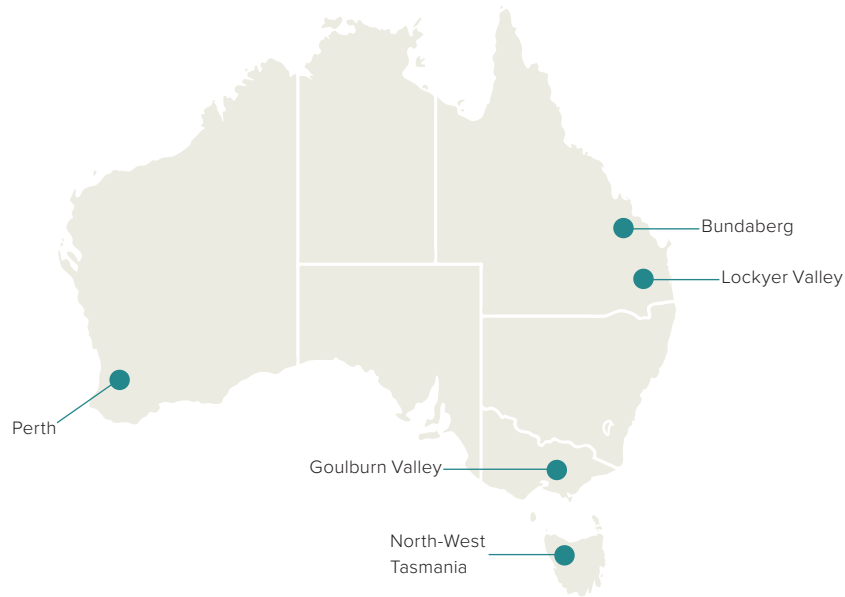
in 2023/24 based on the volume supplied.

YEAR ENDING JUNE	2022	2023		2024	
	Value	Value	% YoY	Value	% YoY
Production (t)	31,123	25,448	-18%	19,480	-23%
Production (\$m)	\$70.1	\$64.9	-7%	\$42.1	-35%
Fresh Export Volume (t)	6	6	-3%	3	-51%
Fresh Export Value (\$m)	< \$0.1	< \$0.1	>100%	< \$0.1	-57%
Fresh Import Volume (t)	248	281	+14%	538	+91%
Fresh Import Value (\$m)	\$1.1	\$1.4	+30%	\$1.7	+18%
Fresh Supply (t)	7,008	5,808	-17%	4,770	-18%
Fresh Supply Wholesale Value (\$m)	\$69.1	\$64.8	-6%	\$45.1	-30%
Supply per Capita (kg)	0.27	0.22	-18%	0.18	-21%
Retail Supply (t)	5,249	4,351	-17%	3,573	-18%
Retail Supply Wholesale Value (\$m)	\$51.8	\$48.6	-6%	\$33.8	-30%
Food Service Supply (t)	1,759	1,457	-17%	1,197	-18%
Food Service Wholesale Value (\$m)	\$17.3	\$16.3	-6%	\$11.3	-30%

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

Fresh Peas Production

MAJOR PRODUCTION AREAS



Source: AUSVEG

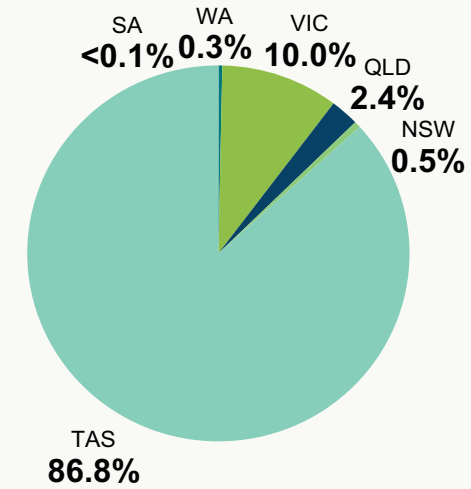
Peas are grown across most states of Australia, with the majority of production occurring in Tasmania.

PRODUCTION WINDOW



Year-round

2023/24 FRESH PEAS PRODUCTION BY STATE



Source: AUSVEG

2023/24 FRESH PEAS SEASONALITY BY STATE

State	Volume (t)	Jul	Aug	Sep	Oct	Nov	Dec	Jan	Feb	Mar	Apr	May	Jun
Tasmania	16,903	Medium	Medium	High	High	Medium	Medium	Medium	Medium	Medium	Medium	Medium	Medium
Victoria	1,944	Medium	Medium	High	High	Medium	Medium	Medium	None	None	Medium	Medium	None
Queensland	470	Medium	High	High	Medium	Medium	Medium	Medium	None	Medium	Medium	None	None
New South Wales	102	Medium	Medium	High	Medium	Medium	Medium	Medium	None	Medium	Medium	None	None
Western Australia	59	Medium	Medium	Medium	Medium	Medium	Medium	Medium	None	Medium	Medium	None	None
South Australia	2	Medium	Medium	Medium	Medium	Medium	Medium	Medium	None	Medium	Medium	None	None

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

Source: AUSVEG

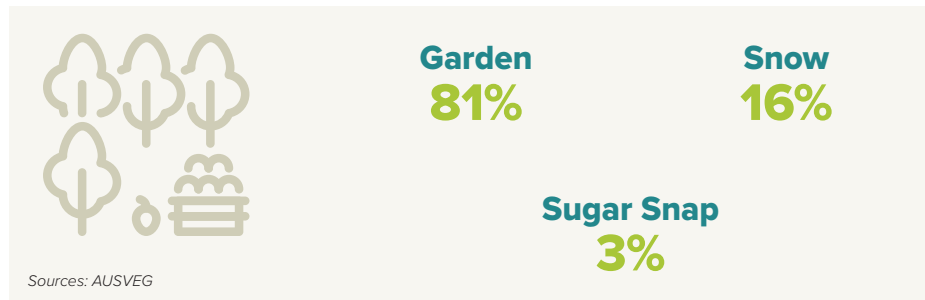
MAIN PEAS VARIETIES

The fresh market accounts for one third of all peas grown in Australia, comprising primarily of two varieties, with garden peas being the most commonly processed variety:

Garden peas, a round pea with a firm pod. These peas are the variety that are most commonly used in processing (frozen and dried), although some enter the fresh market. Garden peas accounted for **81%** of fresh production.

Snow peas, a flat pea with an edible pod and small peas inside, typically with a string that needs to be removed. Snow peas accounted for **16%** of fresh production.

Sugar snap peas, a rounder pea with an edible pod. They are a cross between snow peas and garden peas. Sugar snap peas accounted for **three percent** of fresh production.



2023/24 FRESH PEAS SEASONALITY BY VARIETY

Variety	Volume (t)	Jul	Aug	Sep	Oct	Nov	Dec	Jan	Feb	Mar	Apr	May	Jun
Garden/Processed	15,682	Low	Medium	Medium	Medium	Medium	Medium	Medium	Medium	Medium	Medium	Medium	Medium
Snow Peas	3,191	Low	Medium	Medium	Medium	High	Medium	Medium	Medium	Medium	Medium	Medium	Medium
Sugar Snap	608	Low	Medium	Medium	Medium	High	Medium	Medium	Medium	Medium	Medium	None	None

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

Sources: AUSVEG

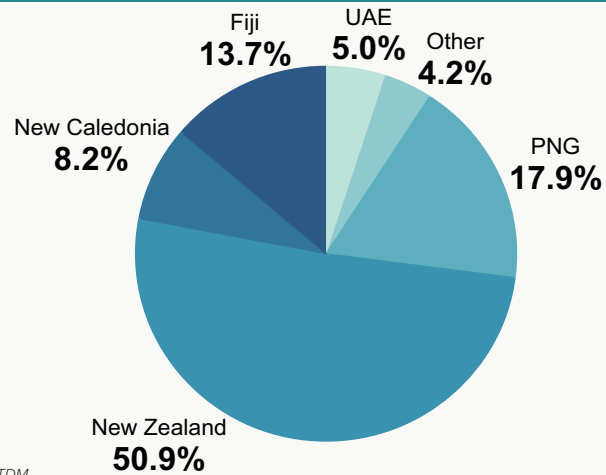
Fresh Peas International Trade

FRESH PEAS INTERNATIONAL TRADE

Australia is a net importer of fresh peas, with only minimal exports. For the year ending in June 2024, Australia imported **538 tonnes** of fresh peas. The exports and imports over the last five financial years are profiled in the graph below, where imports are counted as negative tonnes.



FRESH PEAS EXPORTS



Source: GTA/TDM

For the year ending June 2024, **50.9%** of exported fresh peas 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	2	3	2	New Zealand	1	1	1
Victoria	2	2	1	PNG	< 0.5	< 0.5	< 0.5
New South Wales	< 0.5	1	< 0.5	Fiji	1	< 0.5	< 0.5
Tasmania	-	-	< 0.5	New Caledonia	1	1	< 0.5
Northern Territory	< 0.5	-	-	UAE	< 0.5	< 0.5	< 0.5
Other	2	-	< 0.5	Other	3	3	1
TOTAL	6	6	3	TOTAL	6	6	3

FRESH PEAS IMPORTS

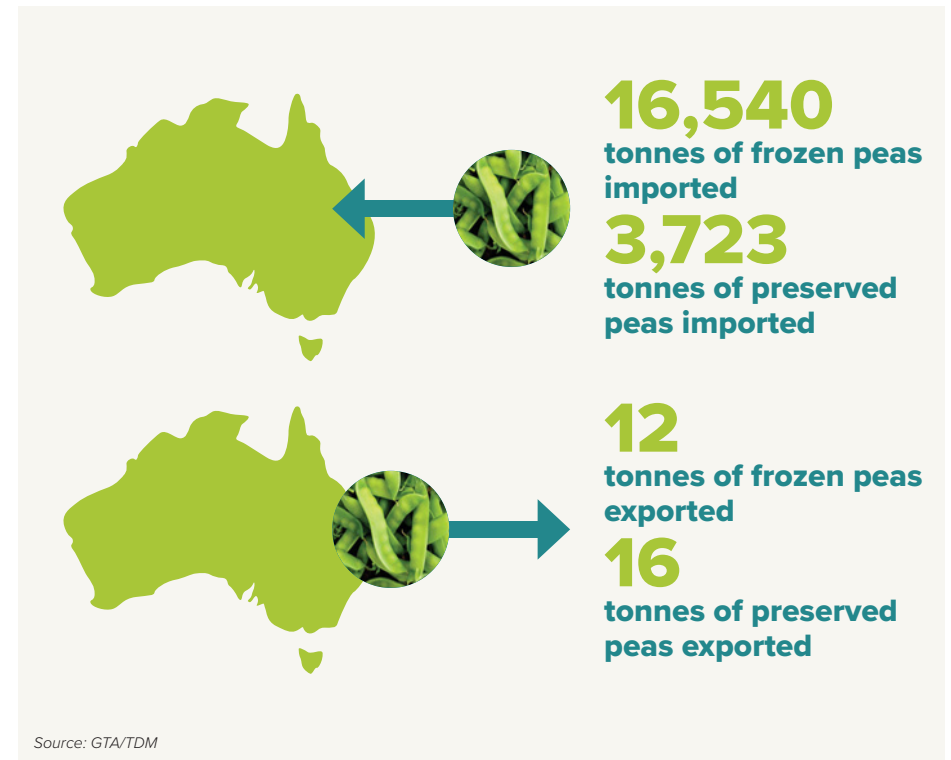
Imports by State Destination (Tonnes)				Imports by Country (Tonnes)			
Year Ending June	2022	2023	2024	Year Ending June	2022	2023	2024
New South Wales	54	87	337	China	213	275	275
Victoria	130	115	138	Canada	-	-	212
Western Australia	64	80	62	New Zealand	23	2	42
TOTAL	248	281	538	Belgium	2	-	5
				Spain	10	-	4
				Other	-0	5	-
				TOTAL	248	281	538

Source: GTA/TDM

Processed Peas International Trade

2023/24 PROCESSED PEAS INTERNATIONAL TRADE

For the year ending June 2024, an additional **16,540 tonnes** of frozen peas was imported, while **12 tonnes** were exported. **3,723 tonnes** of preserved peas were imported and **16 tonnes** were exported.



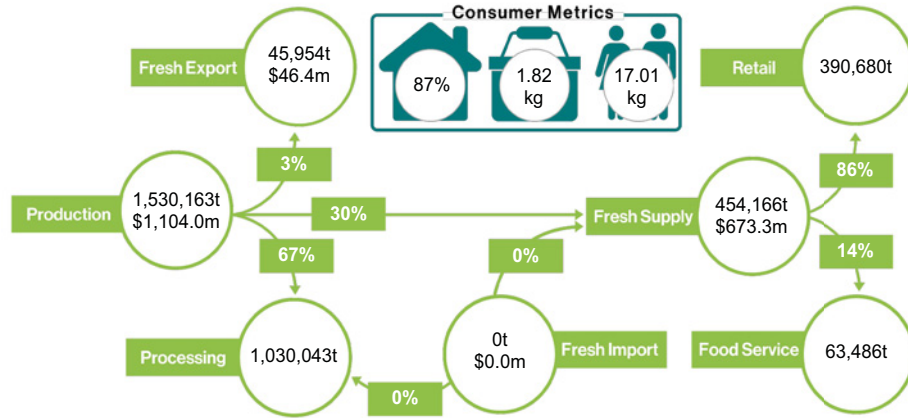
Source: GTA/TDM

Potatoes

A photograph of several yellow potatoes. Some are inside a brown paper bag, and others are scattered on a dark wooden surface. The word "Potatoes" is overlaid in large white text.

Potatoes Overview

POTATOES SUPPLY CHAIN – YEAR ENDING JUNE 2024



Consumer Metrics

- 87% (Household icon)
- 1.82 kg (Shopping bag icon)
- 17.01 kg (Person icon)

Sources: ABS; AC; AUSVEG; Potato Processing Association of Australia (PPAA); CFVIWA; GTA/TDM; MP & DD (Freshlogic Analysis)

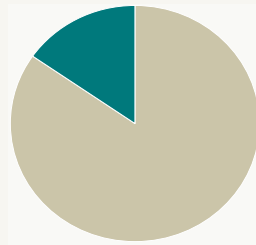
TOTAL PRODUCTION



\$1,104.0m

1,530,163t produced and valued at \$1,104.0m with 67% sent to be processed.

RETAIL VS FOOD SERVICE



■ Retail 86% ■ Food Service 14%

The fresh supply was 454,166t, with 390,680t distributed into retail and 63,486 into food service.

CONSUMER METRICS



87% of Australian households purchased potatoes, buying an average of 1.82kg per shopping trip.

PER CAPITA CONSUMPTION



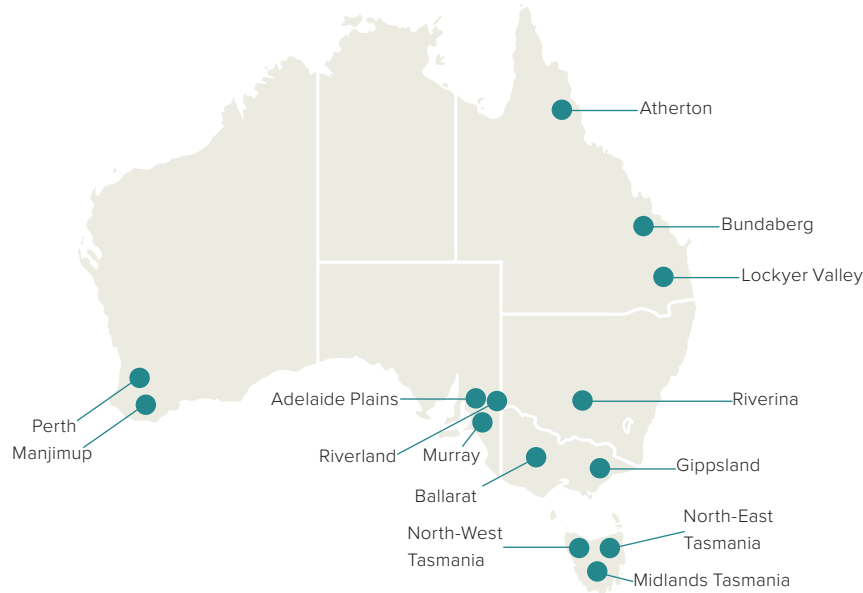
17.01kg in 2023/24 based on the volume supplied.

YEAR ENDING JUNE	2022	2023		2024	
	Value	Value	% YoY	Value	% YoY
Production (t)	1,462,065	1,462,975	<1%	1,530,163	+5%
Production (\$m)	\$830.2	\$1,033.5	+24%	\$1,104.0	+7%
Fresh Export Volume (t)	45,661	40,672	-11%	45,954	+13%
Fresh Export Value (\$m)	\$36.2	\$39.2	+8%	\$46.4	+18%
Fresh Import Volume (t)	-	-	-	-	-
Fresh Import Value (\$m)	\$-	\$-	-	\$-	-
Fresh Supply (t)	433,705	429,304	-1%	454,166	+6%
Fresh Supply Wholesale Value (\$m)	\$526.3	\$626.6	+19%	\$673.3	+7%
Supply per Capita (kg)	17.01	16.64	-2%	17.01	+2%
Retail Supply (t)	367,235	369,293	<1%	390,680	+6%
Retail Supply Wholesale Value (\$m)	\$445.7	\$539.0	+21%	\$579.2	+7%
Food Service Supply (t)	66,470	60,010	-10%	63,486	+6%
Food Service Wholesale Value (\$m)	\$80.7	\$87.6	+9%	\$94.1	+7%

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

Potatoes Production

MAJOR PRODUCTION AREAS



Source: AUSVEG; PPAA;

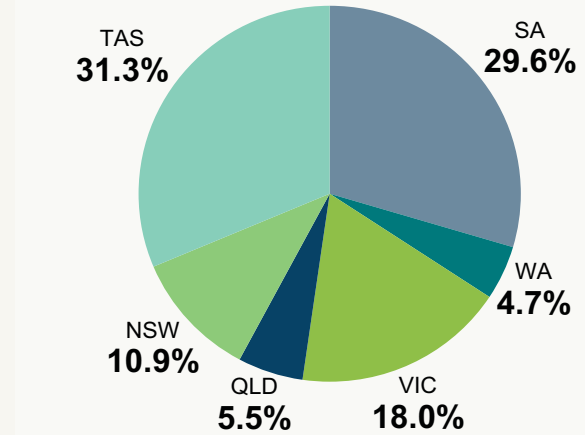
Potatoes are grown across Australia, with the majority of production occurring in South Australia and Tasmania.

PRODUCTION WINDOW



Year-round

2023/24 POTATOES PRODUCTION BY STATE



Source: ABS; AUSVEG; PPAA;

2023/24 POTATOES SEASONALITY BY STATE

State	Volume (t)	Jul	Aug	Sep	Oct	Nov	Dec	Jan	Feb	Mar	Apr	May	Jun
Tasmania	479,327	High	High	High	High	Medium	Medium	Low	None	None	None	None	None
South Australia	452,894	High	High	High	High	High	Medium	Low	None	None	None	None	None
Victoria	275,674	High	High	High	High	High	Medium	Low	None	None	None	None	None
New South Wales	166,188	High	High	High	High	High	Medium	Low	None	None	None	None	None
Queensland	84,678	High	High	High	High	High	Medium	Low	None	None	None	None	None
Western Australia	71,402	High	High	High	High	High	Medium	Low	None	None	None	None	None

Availability legend: High Medium Low None

Source: AUSVEG; PPAA;

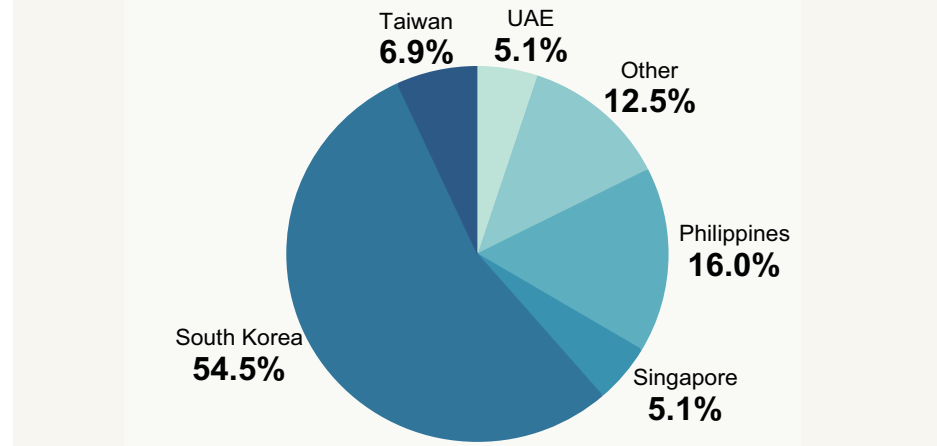
Fresh Potatoes International Trade

FRESH POTATOES INTERNATIONAL TRADE

Australia is a net exporter of fresh potatoes. For the year ending June 2024, Australia exported **45,954 tonnes** of fresh potatoes. The exports and imports over the last five financial years are profiled in the graph below.



FRESH POTATOES EXPORTS



Source: GTA/TDM

For the year ending June 2024, **54.5%** of exported fresh potatoes were sent to **South Korea**, as profiled in the chart above.

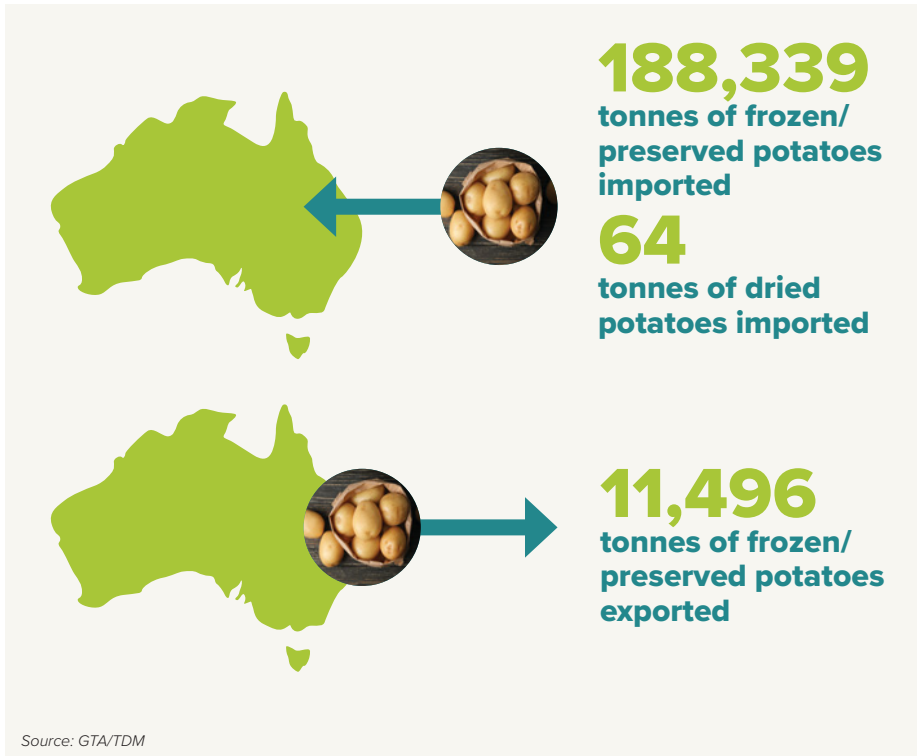
Exports by State of Production Origin (Tonnes)				Exports by Country (Tonnes)			
Year Ending June	2022	2023	2024	Year Ending June	2022	2023	2024
New South Wales	18,459	16,131	21,555	South Korea	17,856	20,223	25,029
South Australia	19,784	19,467	17,751	Philippines	7,797	8,681	7,338
Western Australia	4,986	3,993	4,215	Taiwan	2,049	2,837	3,167
Victoria	2,354	1,024	2,335	Singapore	2,582	2,488	2,345
Queensland	73	54	90	UAE	1,525	1,404	2,323
Other	4	2	7	Other	13,854	5,038	5,752
TOTAL	45,661	40,672	45,954	TOTAL	45,661	40,672	45,954

Source: GTA/TDM

Processed Potatoes International Trade

2023/24 PROCESSED POTATOES INTERNATIONAL TRADE

For the year ending June 2024, an additional **188,339 tonnes** of frozen or preserved potatoes and **64 tonnes** of dried potatoes were imported, while **11,496 tonnes** of frozen or preserved potatoes were exported.

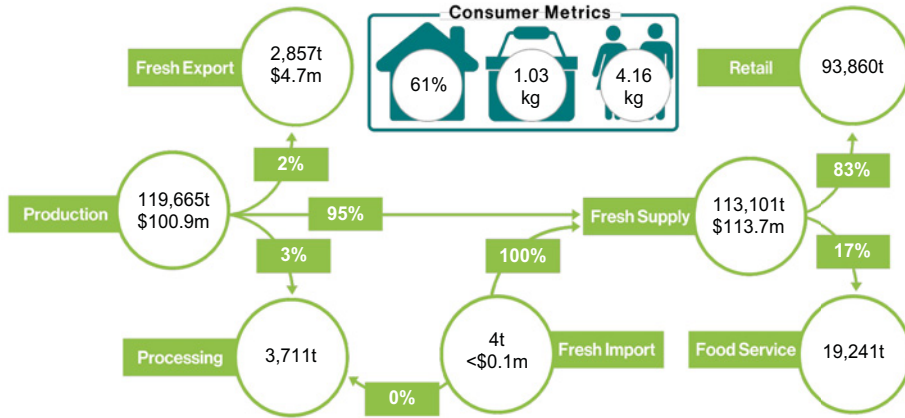




Pumpkins

Fresh Pumpkins Overview

FRESH PUMPKINS SUPPLY CHAIN – YEAR ENDING JUNE 2024



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

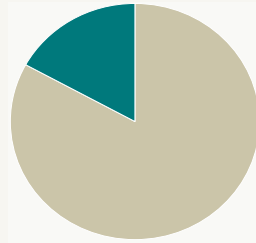
TOTAL PRODUCTION



\$100.9m

119,665t produced and valued at \$100.9m with 3% sent to be processed.

RETAIL VS FOOD SERVICE



■ Retail 83% ■ Food Service 17%

The fresh supply was 113,101t, with 93,860t distributed into retail and 19,241t into food service.

CONSUMER METRICS



61% of Australian households purchased pumpkins, buying an average of 1.03 kg per shopping trip.

PER CAPITA CONSUMPTION



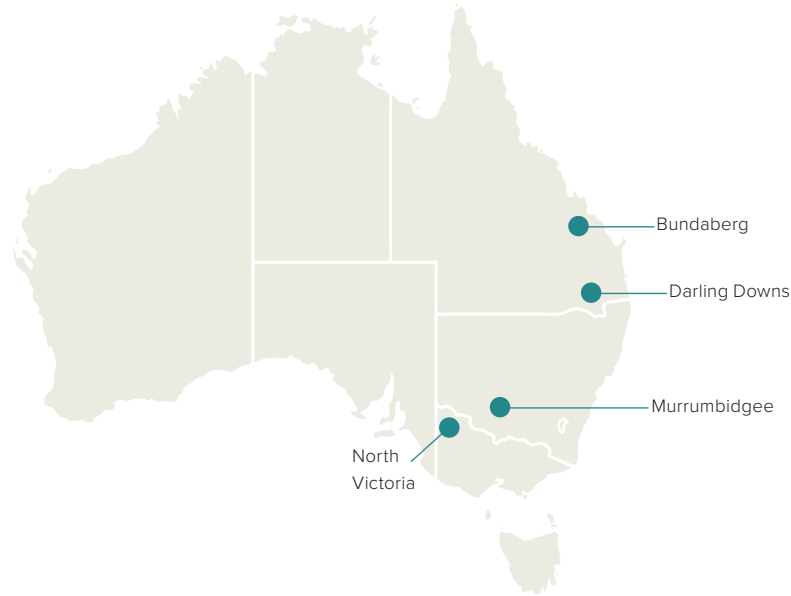
4.16kg in 2023/24 based on the volume supplied.

YEAR ENDING JUNE	2022	2023		2024	
	Value	Value	% YoY	Value	% YoY
Production (t)	112,895	118,278	+5%	119,665	+1%
Production (\$m)	\$106.5	\$94.1	-12%	\$100.9	+7%
Fresh Export Volume (t)	2,628	2,711	+3%	2,857	+5%
Fresh Export Value (\$m)	\$3.8	\$4.1	+6%	\$4.7	+16%
Fresh Import Volume (t)	-	7	-	4	-46%
Fresh Import Value (\$m)	\$-	< \$0.1	-	< \$0.1	-75%
Fresh Supply (t)	106,766	111,907	+5%	113,101	+1%
Fresh Supply Wholesale Value (\$m)	\$121.1	\$106.3	-12%	\$113.7	+7%
Supply per Capita (kg)	4.11	4.26	+4%	4.16	-2%
Retail Supply (t)	88,603	92,869	+5%	93,860	+1%
Retail Supply Wholesale Value (\$m)	\$100.5	\$88.2	-12%	\$94.3	+7%
Food Service Supply (t)	18,164	19,038	+5%	19,241	+1%
Food Service Wholesale Value (\$m)	\$20.6	\$18.1	-12%	\$19.3	+7%

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

Fresh Pumpkins Production

MAJOR PRODUCTION AREAS



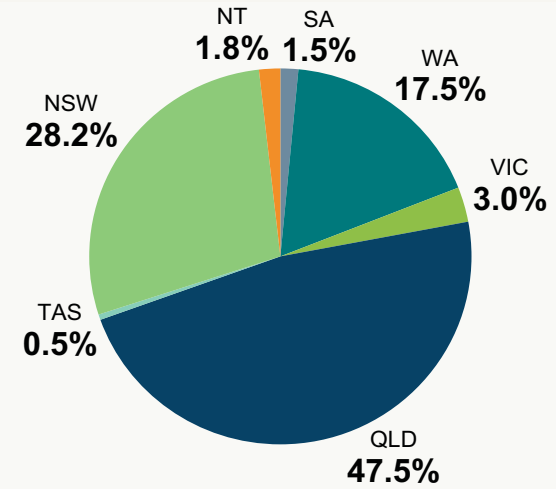
Source: AUSVEG

Pumpkins are grown in many states of Australia, with the majority of production occurring in New South Wales and Queensland.

PRODUCTION WINDOW



2023/24 FRESH PUMPKINS PRODUCTION BY STATE



Source: ABS

2023/24 FRESH PUMPKINS SEASONALITY BY STATE

State	Volume (t)	Jul	Aug	Sep	Oct	Nov	Dec	Jan	Feb	Mar	Apr	May	Jun
Queensland	56,841	High	Medium	Low	None	None	None	None	None	None	High	High	High
New South Wales	33,751	High	Medium	Low	None	None	None	None	None	None	None	None	High
Western Australia	20,989	Medium	Low	None	None	None	None	None	High	High	High	Medium	Low
Victoria	3,590	Medium	Low	None	None	None	None	None	None	None	None	None	None
Northern Territory	2,130	Medium	Low	None	None	None	None	None	None	None	High	High	Medium
South Australia	1,795	Medium	Low	None	None	None	None	None	None	None	None	None	None
Tasmania	569	Medium	Low	None	None	None	None	None	None	None	None	None	None

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

Source: ABS

MAIN PUMPKINS VARIETIES

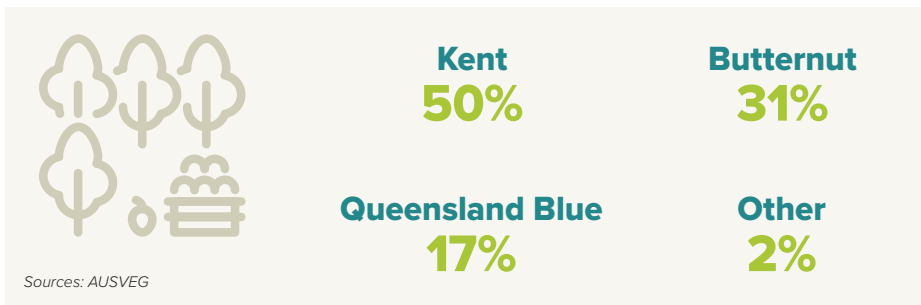
There are large number of pumpkin varieties grown in Australia for the fresh market for the year ending in June 2024. Some of the major varieties include:

Kent, also known as jap pumpkins, an oval pumpkin with mottled green skin. Kent pumpkins accounted for **50%** of fresh production.

Butternut, a long pumpkin with a creamy yellow skin. Butternut pumpkins accounted for **31%** of fresh production.

Queensland blue, also known as grey pumpkins, a squat pumpkin with a blueish grey skin colour. Queensland blue pumpkins accounted for **17%** of fresh production.

Other varieties accounted for **two percent** of fresh production.



2023/24 FRESH PUMPKINS SEASONALITY BY VARIETY

Variety	Volume (t)	Jul	Aug	Sep	Oct	Nov	Dec	Jan	Feb	Mar	Apr	May	Jun
Jap/Kent	57,977	High	High	High	High	None	None	None	High	High	High	High	High
Butternut	35,946	High	High	High	High	High	High	High	High	High	High	High	High
Grey	19,712	High	High	High	High	None	None	High	High	High	High	High	High
Other	2,319	None	None	High	High	High	High	High	High	High	High	None	None
Processing	3,711	High	High	High	High	High	High	High	High	High	High	High	High

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

Sources: AUSVEG

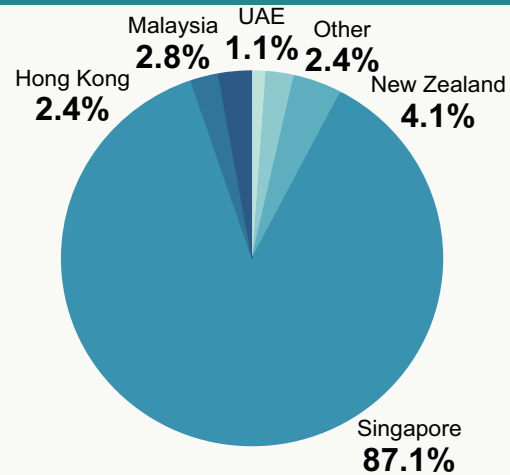
Fresh Pumpkins International Trade

FRESH PUMPKINS INTERNATIONAL TRADE

Australia is a net exporter of fresh pumpkins, with only minimal imports. For the year ending June 2024, Australia exported **2,857 tonnes** of fresh pumpkins. The exports and imports over the last five financial years are profiled in the graph below, where imports are counted as negative tonnes.



FRESH PUMPKINS IMPORTS



Source: GTA/TDM

For the year ending June 2024, **87.1%** of exported fresh pumpkins 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
Queensland	1,205	1,796	1,510	Singapore	2,392	2,307	2,489
Northern Territory	28	154	525	New Zealand	-	-	118
Victoria	736	254	443	Malaysia	70	100	81
New South Wales	261	115	143	Hong Kong	83	60	67
South Australia	108	188	111	UAE	14	26	32
Other	291	203	124	Other	70	217	70
TOTAL	2,628	2,711	2,857	TOTAL	2,628	2,711	2,857

FRESH PUMPKINS IMPORTS

Imports by State Destination (Tonnes)				Imports by Country (Tonnes)			
Year Ending June	2022	2023	2024	Year Ending June	2022	2023	2024
Western Australia	-	1	4	China	-	1	4
New South Wales	-	7	-	Bangladesh	-	7	-
TOTAL	-	7	4	TOTAL	-	7	4

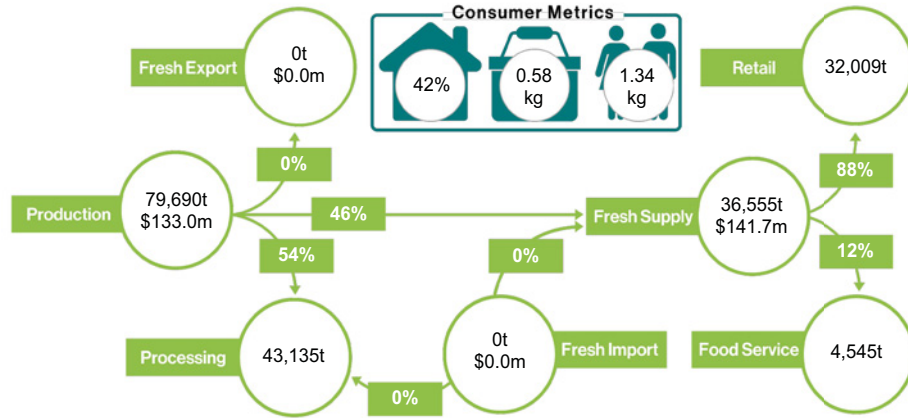
Source: GTA/TDM



Sweet Corn

Fresh Sweet Corn Overview

FRESH SWEET CORN SUPPLY CHAIN – YEAR ENDING JUNE 2024



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

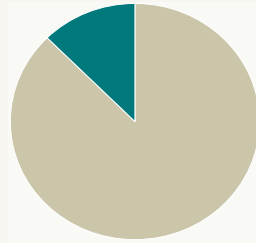
TOTAL PRODUCTION



\$133.0m

79,690t produced and valued at \$133.0m with 54% sent to be processed.

RETAIL VS FOOD SERVICE



■ Retail 88% ■ Food Service 12%

The fresh supply was 36,555t, with 32,009t distributed into retail and 4,545t into food service.

CONSUMER METRICS



42% of Australian households purchased sweet corn, buying an average of 576g per shopping trip.

PER CAPITA CONSUMPTION



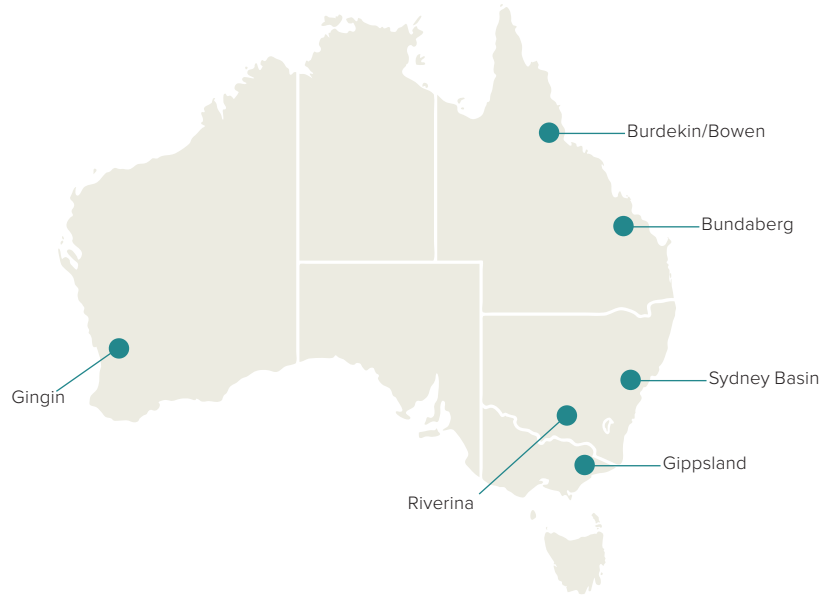
1.34kg in 2023/24 based on the volume supplied.

YEAR ENDING JUNE	2022	2023		2024	
	Value	Value	% YoY	Value	% YoY
Production (t)	74,685	76,296	+2%	79,690	+4%
Production (\$m)	\$149.8	\$117.6	-21%	\$133.0	+13%
Fresh Export Volume (t)	-	-	-	-	-
Fresh Export Value (\$m)	\$-	\$-	-	\$-	-
Fresh Import Volume (t)	-	-	-	-	-
Fresh Import Value (\$m)	\$-	\$-	-	\$-	-
Fresh Supply (t)	34,259	34,998	+2%	36,555	+4%
Fresh Supply Wholesale Value (\$m)	\$159.6	\$125.3	-21%	\$141.7	+13%
Supply per Capita (kg)	1.32	1.33	<1%	1.34	<1%
Retail Supply (t)	29,999	30,646	+2%	32,009	+4%
Retail Supply Wholesale Value (\$m)	\$139.7	\$109.7	-21%	\$124.1	+13%
Food Service Supply (t)	4,260	4,352	+2%	4,545	+4%
Food Service Wholesale Value (\$m)	\$19.8	\$15.6	-21%	\$17.6	+13%

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

Fresh Sweet Corn Production

MAJOR PRODUCTION AREAS



Source: AUSVEG

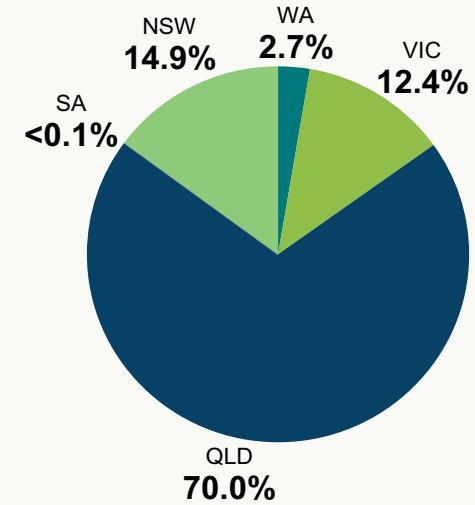
Sweet corn refers to the sweet variety of corn that is grown for direct human consumption, and does not include maize or other similar broadacre corn crops. The majority of production occurs in Queensland.

PRODUCTION WINDOW



Year-round

2023/24 FRESH SWEET CORN PRODUCTION BY STATE



Source: AUSVEG

2023/24 FRESH SWEET CORN SEASONALITY BY STATE

State	Volume (t)	Jul	Aug	Sep	Oct	Nov	Dec	Jan	Feb	Mar	Apr	May	Jun
Queensland	55,783	High	High	High	High	High	High	High	High	High	High	High	High
New South Wales	11,866	Medium	Medium	Medium	Medium	Medium	High	High	High	High	High	High	High
Victoria	9,920	Medium	Medium	Medium	Medium	Medium	High	High	High	High	High	High	High
Western Australia	2,120	Medium	Medium	Medium	Medium	Medium	High	High	High	High	High	High	High
South Australia	1	Medium	Medium	Medium	Medium	Medium	Medium	Medium	Medium	Medium	Medium	Medium	Medium

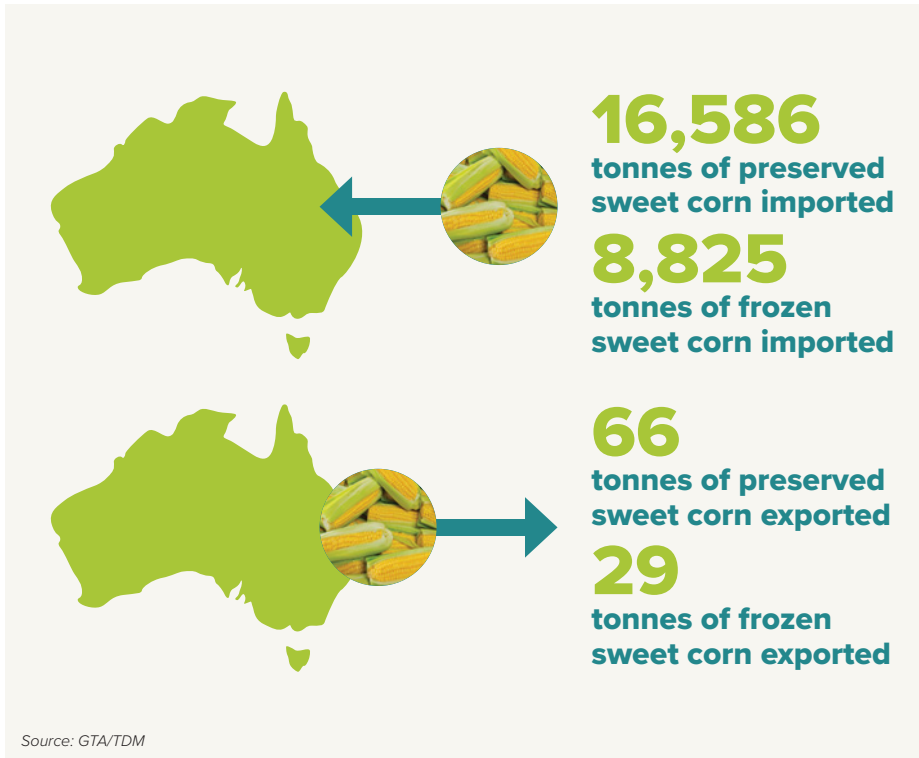
Availability legend: High (Dark Blue), Medium (Light Green), Low (Yellow), None (Grey)

Source: AUSVEG

Processed Sweet Corn International Trade

2023/24 PROCESSED SWEET CORN INTERNATIONAL TRADE

For the year ending June 2024, an additional **16,586 tonnes** of preserved sweet corn was imported, while **66 tonnes** of preserved sweet corn was exported. An additional **8,825 tonnes** of frozen sweet corn were imported, and **29 tonnes** of frozen sweet corn were exported.

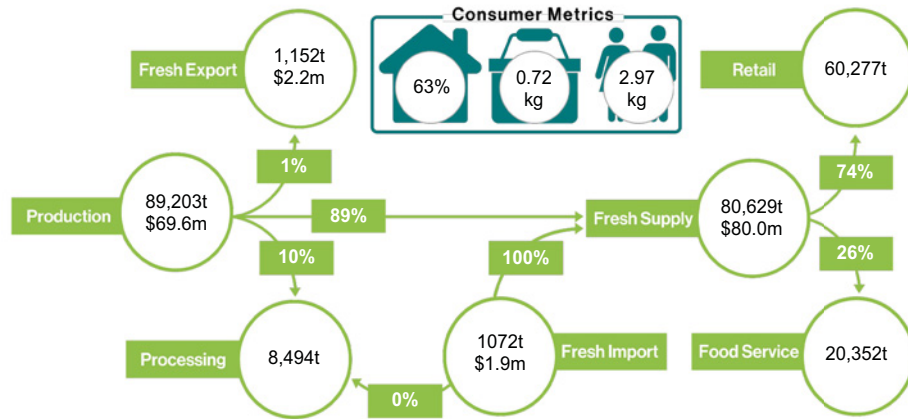


Sweetpotato

A photograph of several sweetpotatoes on a wooden surface. One large sweetpotato is in the background, and several slices are in the foreground, showing the orange flesh. The word 'Sweetpotato' is overlaid in large white text.

Fresh Sweetpotato Overview

FRESH SWEETPOTATO SUPPLY CHAIN – YEAR ENDING JUNE 2024



Sources: AC, Australian Sweet Potato Association (ASPGA); CFVIWA; GTA/TDM; MP & DD (Freshlogic Analysis)

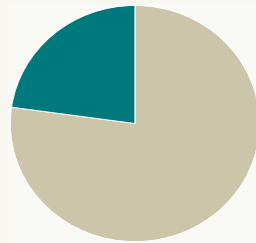
TOTAL PRODUCTION



\$69.6m

89,203t produced and valued at \$69.6m with 10% sent to be processed.

RETAIL VS FOOD SERVICE



■ Retail 74% ■ Food Service 26%

The fresh supply was 80,629t, with 60,277t distributed into retail and 20,352t into food service.

CONSUMER METRICS



63% of Australian households purchased sweetpotato, buying an average of 723g 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)	93,172	91,458	-2%	89,203	-2%
Production (\$m)	\$66.5	\$69.2	+4%	\$69.6	<1%
Fresh Export Volume (t)	1,170	987	-16%	1,152	+17%
Fresh Export Value (\$m)	\$2.4	\$1.9	-20%	\$2.2	+16%
Fresh Import Volume (t)	1,120	1,081	-3%	1,072	>-1%
Fresh Import Value (\$m)	\$1.3	\$1.8	+36%	\$1.9	+6%
Fresh Supply (t)	84,250	82,844	-2%	80,629	-3%
Fresh Supply Wholesale Value (\$m)	\$76.2	\$79.8	+5%	\$80.0	<1%
Supply per Capita (kg)	3.25	3.15	-3%	2.97	-6%
Retail Supply (t)	62,984	61,933	-2%	60,277	-3%
Retail Supply Wholesale Value (\$m)	\$57.0	\$59.7	+5%	\$59.8	<1%
Food Service Supply (t)	21,266	20,911	-2%	20,352	-3%
Food Service Wholesale Value (\$m)	\$19.2	\$20.1	+5%	\$20.2	<1%

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

Fresh Sweetpotato Production

MAJOR PRODUCTION AREAS



Source: ASPGA

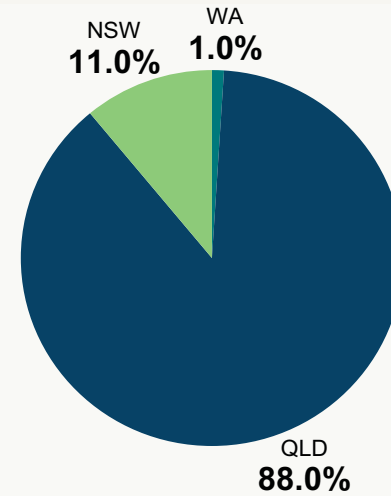
The majority of sweetpotato grown in Australia are produced in Queensland, with smaller volumes grown in Western Australia, Northern New South Wales and the Northern Territory.

PRODUCTION WINDOW



Year-round

2023/24 FRESH SWEETPOTATO PRODUCTION BY STATE



Source: ASPGA

2023/24 FRESH SWEETPOTATO SEASONALITY BY STATE

State	Volume (t)	Jul	Aug	Sep	Oct	Nov	Dec	Jan	Feb	Mar	Apr	May	Jun
Queensland	78,498	High	High	High	High	High	High	High	High	High	High	High	High
New South Wales	9,812	None	None	None	None	None	None	Low	Medium	High	Medium	Medium	Medium
Western Australia	892	None	None	None	Low	Medium	Medium	Medium	Medium	High	Medium	Medium	Medium

Availability legend: High Medium Low None

Source: AUSVEG

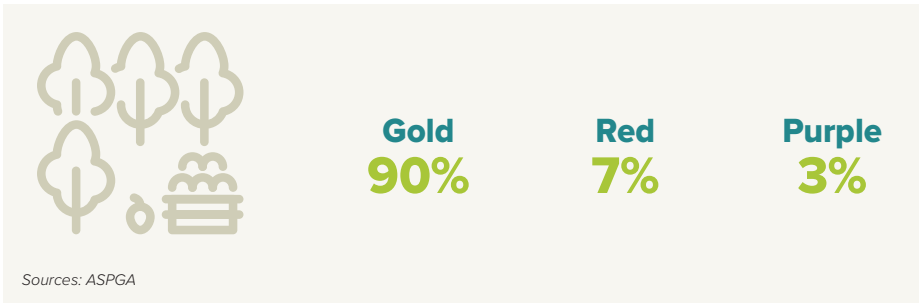
MAIN SWEETPOTATO VARIETIES

There are three main sweetpotato varieties grown in Australia for the fresh market. These varieties includes:

Gold sweetpotato, also known as the beauregard which has a rose/gold smooth skin with a moderate deep orange flesh. Gold sweetpotato are accounted for **90%** of fresh production.

Red sweetpotato, also known as northern star which has a red purple skin, with bright white flesh. Red sweetpotato accounted for **seven percent** of fresh production.

Purple sweetpotato, has white skin, with white and purple flesh. Purple sweetpotato are accounted for **three percent** of fresh production.



2023/24 FRESH SWEETPOTATO SEASONALITY BY VARIETY

Variety	Volume (t)	Jul	Aug	Sep	Oct	Nov	Dec	Jan	Feb	Mar	Apr	May	Jun
Gold	80,282	Medium	Medium	Medium	Medium	Medium	Medium	Medium	High	High	High	Medium	Medium
Red	6,244	Medium	Medium	Medium	Medium	Medium	Medium	Medium	Medium	High	Medium	Medium	Medium
Purple	2,676	Medium	Medium	Medium	None	None	None	None	None	None	None	None	None

Availability legend: High Medium Low None

Sources: ASPGA

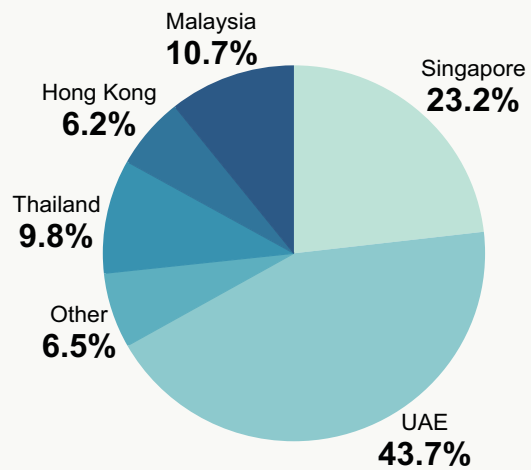
Fresh Sweetpotato International Trade

FRESH SWEETPOTATO INTERNATIONAL TRADE

Australia is a net exporter of fresh sweetpotato, with smaller amounts of imports. For the year ending June 2024, Australia exported **1,152 tonnes** of fresh sweetpotato. The exports and imports over the last five financial years are profiled in the graph below, where imports are counted as negative tonnes.



FRESH SWEETPOTATO EXPORTS



Source: GTA/TDM

For the year ending June 2024, **43.7%** of exported fresh sweetpotato 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	911	761	999	UAE	502	324	503
New South Wales	233	131	93	Singapore	335	307	267
Victoria	22	42	52	Malaysia	85	91	123
South Australia	4	53	8	Thailand	77	82	113
Northern Territory	-	-	< 0.5	Hong Kong	66	75	71
Other	< 0.5	< 0.5	< 0.5	Other	105	108	75
TOTAL	1,170	987	1,152	TOTAL	1,170	987	1,152

FRESH SWEETPOTATO 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	315	895	954	Thailand	-	551	874
Victoria	29	53	74	Vietnam	62	69	105
Western Australia	146	66	26	Spain	127	58	39
Queensland	630	64	18	China	904	289	20
South Australia	1	4	1	Tonga	1	32	15
TOTAL	1,120	1,081	1,072	Other	26	82	18
				TOTAL	1,120	1,081	1,072

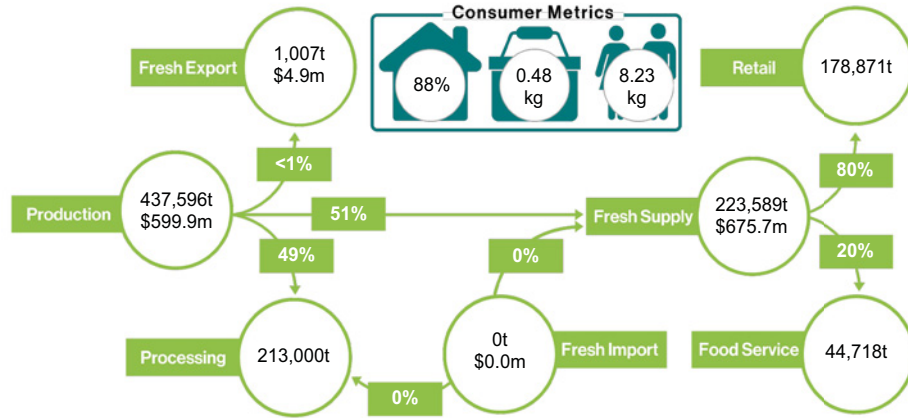
Source: GTA/TDM



Tomatoes

Fresh Tomatoes Overview

FRESH TOMATOES SUPPLY CHAIN – YEAR ENDING JUNE 2024



Sources: ABS; AC; Australian Processing Tomato Research Council (APTRC); AUSVEG; CFVIWA; GTA/TDM; MP & DD (Freshlogic Analysis)

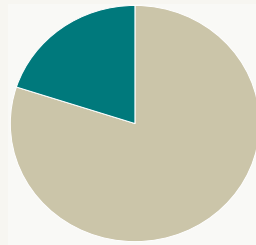
TOTAL PRODUCTION



\$599.9m

437,596t produced and valued at \$599.9m with 49% sent to be processed.

RETAIL VS FOOD SERVICE



■ Retail 80% ■ Food Service 20%

The fresh supply was 223,589t, with 178,871t distributed into retail and 44,718t into food service.

CONSUMER METRICS



88% of Australian households purchased tomatoes, buying an average of 480g per shopping trip.

PER CAPITA CONSUMPTION



8.23kg in 2023/24 based on the volume supplied.

YEAR ENDING JUNE	2022	2023		2024	
	Value	Value	% YoY	Value	% YoY
Production (t)	441,175	321,736	-27%	437,596	+36%
Production (\$m)	\$645.6	\$570.6	-12%	\$599.9	+5%
Fresh Export Volume (t)	1,036	1,086	+5%	1,007	-7%
Fresh Export Value (\$m)	\$5.5	\$6.1	+10%	\$4.9	-20%
Fresh Import Volume (t)	-	-	-	-	-
Fresh Import Value (\$m)	\$-	\$-	-	\$-	-
Fresh Supply (t)	213,700	210,029	-2%	223,589	+6%
Fresh Supply Wholesale Value (\$m)	\$724.0	\$646.6	-11%	\$675.7	+5%
Supply per Capita (kg)	8.24	8.00	-3%	8.23	+3%
Retail Supply (t)	170,960	168,023	-2%	178,871	+6%
Retail Supply Wholesale Value (\$m)	\$579.2	\$517.3	-11%	\$540.6	+5%
Food Service Supply (t)	42,740	42,006	-2%	44,718	+6%
Food Service Wholesale Value (\$m)	\$144.8	\$129.3	-11%	\$135.1	+5%

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

Fresh Tomatoes Production

MAJOR PRODUCTION AREAS



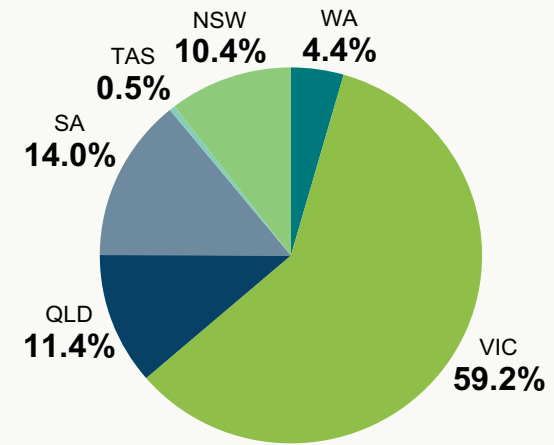
Source: AUSVEG

Tomatoes are grown in most states of Australia, with the majority of production occurring in Victoria and South Australia. Traditionally most tomatoes were produced outdoors in Queensland. In recent years, more tomatoes have been grown in high-tech glasshouses.

PRODUCTION WINDOW



2023/24 FRESH TOMATOES PRODUCTION BY STATE



Source: AUSVEG

2023/24 FRESH TOMATOES SEASONALITY BY STATE

State	Volume (t)	Jul	Aug	Sep	Oct	Nov	Dec	Jan	Feb	Mar	Apr	May	Jun
Victoria	259,227	High	High	High	High	Medium	Medium	Medium	Medium	Medium	High	High	High
South Australia	61,341	High	High	Medium	Medium	Medium	Medium	Medium	Medium	Medium	High	High	High
Queensland	49,847	High	High	High	High	High	High	High	High	High	High	High	High
New South Wales	45,530	High	High	High	High	Medium	Medium	Medium	Medium	Medium	High	High	High
Western Australia	19,440	High	High	High	High	Medium	Medium	Medium	Medium	Medium	High	High	High
Tasmania	2,210	Low	Low	Low	Low	Low	Low	Low	Low	Low	Low	Low	Low

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

Source: AUVEG

MAIN TOMATOES TYPES

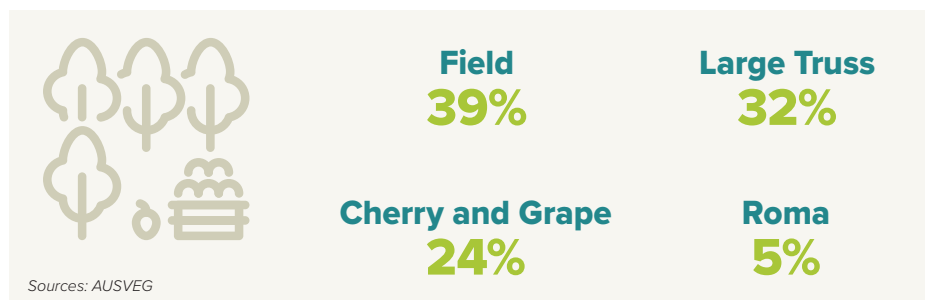
A variety of tomato types are grown in Australia. These major types encompass numerous varieties and include:

Field, a round to oval tomato with a red skin. These varieties are most commonly grown outdoors, and accounted for **39%** of fresh production in 2023/24.

Large Truss, a round to oval tomato with a red skin and typically sold with the vine still attached. Large truss tomatoes are most commonly grown in glasshouses, and accounted for **32%** of fresh production.

Cherry and Grape, small round to oval shaped tomatoes with a red skin, these varieties are grown both outdoors or more commonly in glasshouses. These types accounted for **24%** of fresh production.

Roma, including baby roma tomatoes are an oval egg-shaped tomato with red skin. These varieties accounted for **five percent** of fresh production.



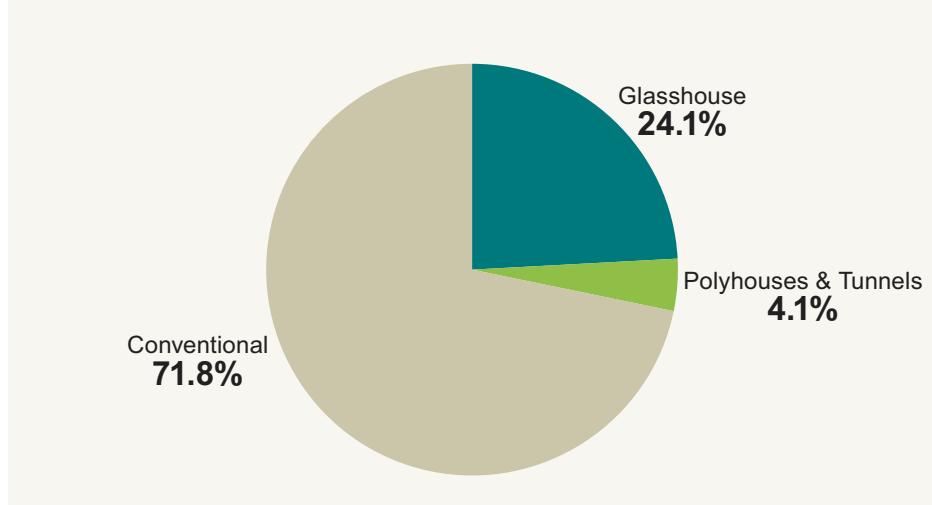
2023/24 FRESH TOMATOES SEASONALITY BY TYPE

Variety	Volume (t)	Jul	Aug	Sep	Oct	Nov	Dec	Jan	Feb	Mar	Apr	May	Jun
Field	87,398	High	High	High	High	High	Medium	Medium	Medium	Medium	None	None	None
Large Truss	71,003	High	High	High	High	High	High	High	High	High	High	High	High
Cherry/Grape	54,770	High	High	High	High	High	High	High	High	High	High	High	High
Roma	11,424	Medium	Medium	Medium	Medium	Medium	Medium	Medium	Medium	Medium	Medium	Medium	Medium
Processing	213,000	High	High	High	High	High	High	High	High	High	High	High	High

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

Sources: APTRC; AUSVEG; (Freshlogic Analysis)

2023/24 FRESH TOMATOES PRODUCTION BY SYSTEM



Production of tomatoes in Australia occurs in three different types of farming systems. These systems and their contribution to production are **Glasshouse 24.1%**, **Polyhouses & Tunnels 4.1%** and **Conventional 71.8%**.

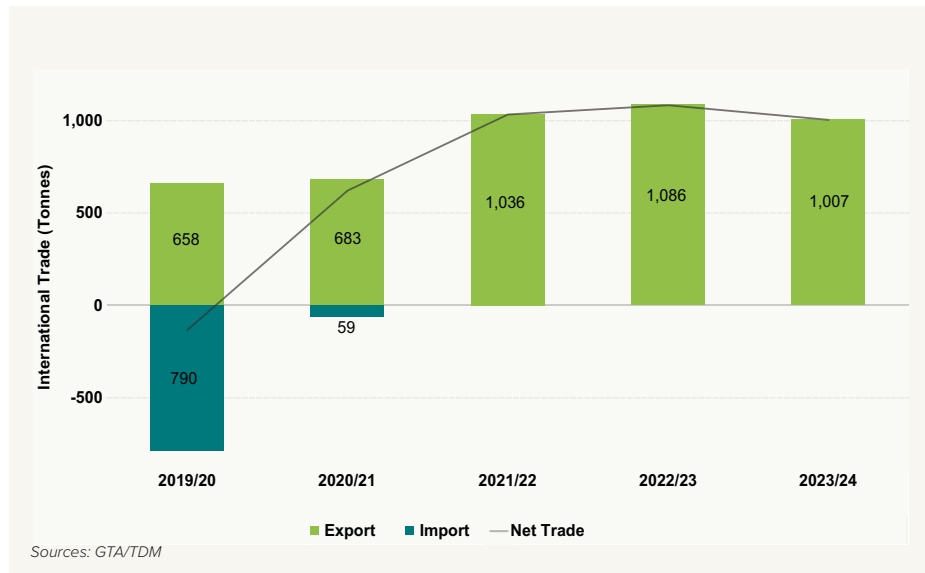
2023/24 FRESH TOMATOES PRODUCTION SYSTEM BY STATE

State	Glasshouse		Polyhouses & Tunnels		Conventional	
	Hectares (Ha)	Volume (t)	Hectares (Ha)	Volume (t)	Hectares (Ha)	Volume (t)
New South Wales	44	19,910	11	2,500	-	23,120
Victoria	81	36,335	6	1,200	-	221,692
Queensland	7	2,342	10	2,000	-	45,505
Western Australia	4	1,790	11	3,250	-	14,400
South Australia	94	44,980	32	8,120	-	8,241
Tasmania	1	308	4	800	-	1,102
Northern Territory	0	0	0	0	-	0
Total	230	105,665	74	17,870	-	314,061

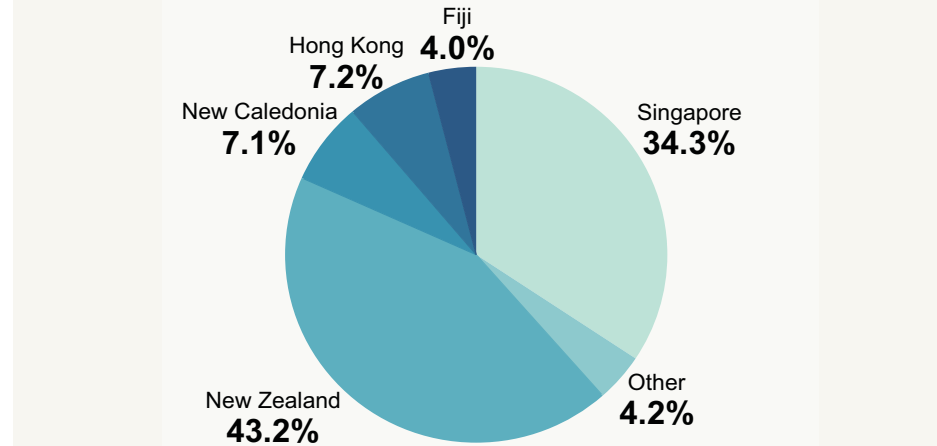
Fresh Tomatoes International Trade

FRESH TOMATOES INTERNATIONAL TRADE

Australia has traditionally been a net importer of fresh tomatoes, with imports decreasing in years. For the year ending June 2024, Australia exported **1,007 tonnes** of fresh tomatoes. The exports and imports over the last five financial years are profiled in the graph below, where imports are counted as negative tonnes.



FRESH TOMATOES EXPORTS



Source: GTA/TDM

For the year ending June 2024, **43.2%** of exported fresh tomatoes 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	482	579	563	New Zealand	370	309	435
New South Wales	359	343	300	Singapore	340	404	345
Victoria	166	153	130	Hong Kong	123	81	72
South Australia	13	6	14	New Caledonia	113	200	72
Western Australia	1	5	< 0.5	Fiji	32	47	40
Other	15	-	< 0.5	Other	58	45	42
TOTAL	1,036	1,086	1,007	TOTAL	1,036	1,086	1,007

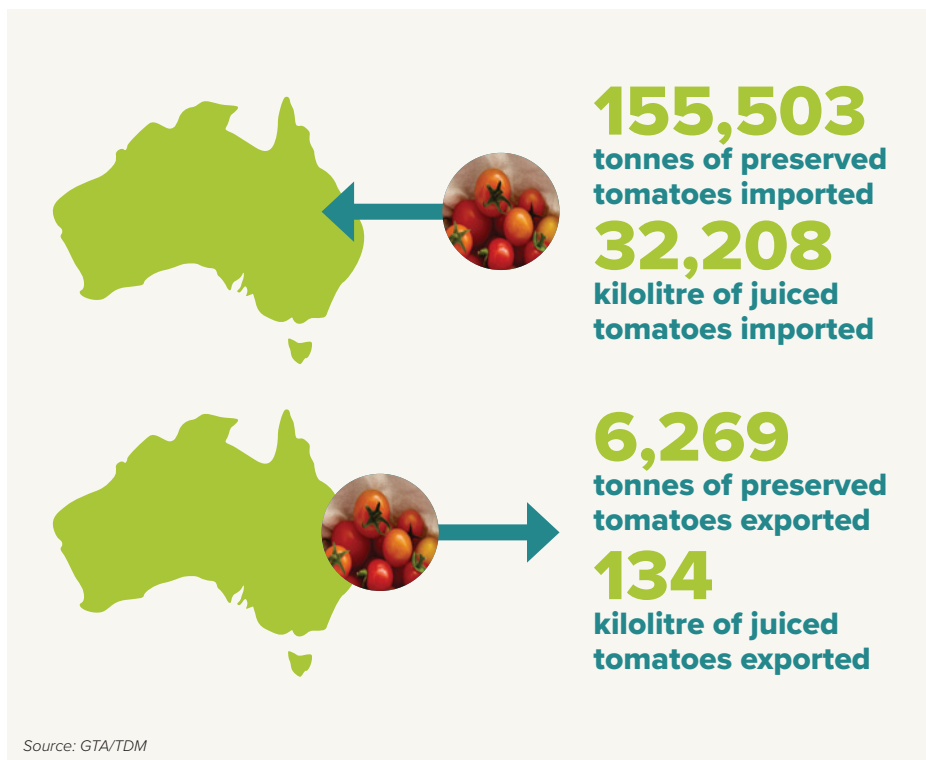
Source: GTA/TDM



Processed Tomatoes International Trade

2023/24 PROCESSED TOMATOES INTERNATIONAL TRADE

For the year ending June 2024, an additional **155,503 tonnes** of preserved tomatoes and **32,208 kilolitre** of juiced tomatoes were imported. An additional **6,269 tonnes** of preserved tomatoes and **134 kilolitre** of juiced tomatoes were exported.

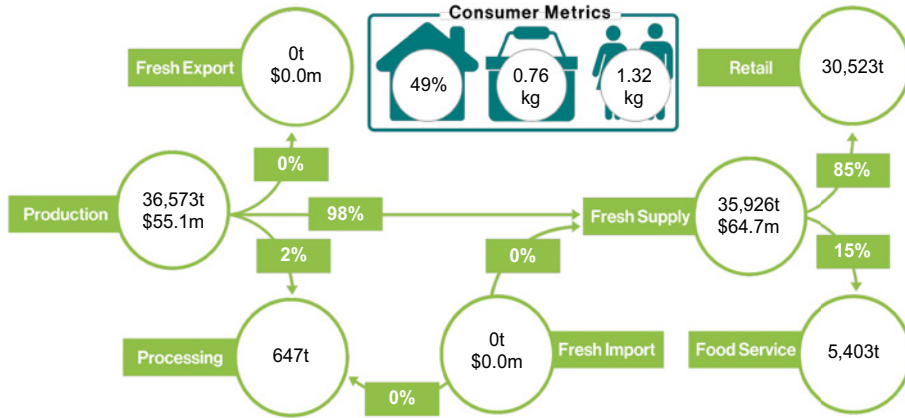




Zucchini

Fresh Zucchini Overview

FRESH ZUCCHINI SUPPLY CHAIN – YEAR ENDING JUNE 2024



Consumer Metrics

49%
0.76 kg
1.32 kg

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

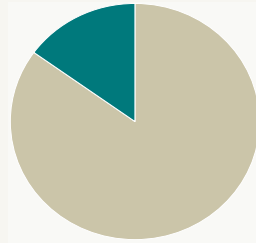
TOTAL PRODUCTION



\$55.1m

36,573t produced and valued at \$55.1m with 2% sent to be processed.

RETAIL VS FOOD SERVICE



■ Retail 85% ■ Food Service 15%

The fresh supply was 35,926t, with 30,523t distributed into retail and 5,403t into food service.

CONSUMER METRICS



49% of Australian households purchased zucchini, buying an average of 761g per shopping trip.

PER CAPITA CONSUMPTION



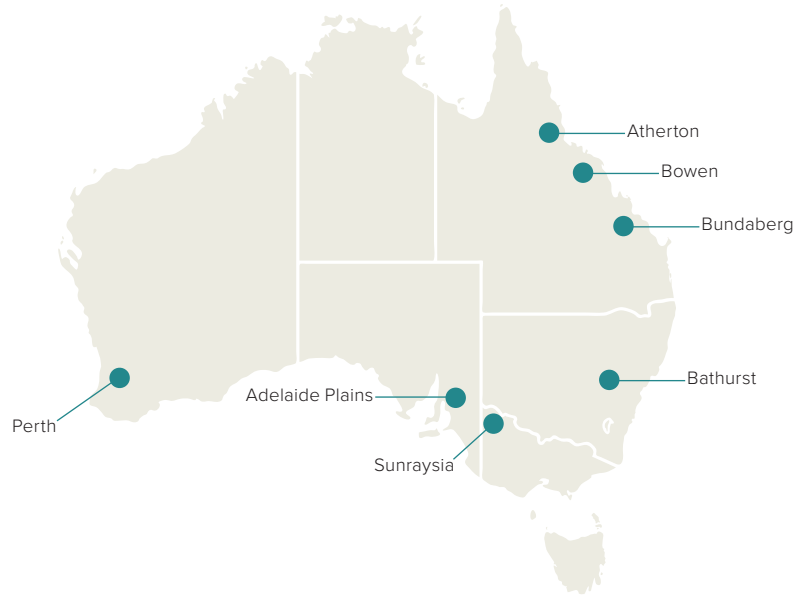
in 2023/24 based on the volume supplied.

YEAR ENDING JUNE	2022	2023		2024	
	Value	Value	% YoY	Value	% YoY
Production (t)	38,850	37,139	-4%	36,573	-2%
Production (\$m)	\$80.0	\$64.9	-19%	\$55.1	-15%
Fresh Export Volume (t)	-	-	-	-	-
Fresh Export Value (\$m)	\$-	\$-	-	\$-	-
Fresh Import Volume (t)	-	-	-	-	-
Fresh Import Value (\$m)	\$-	\$-	-	\$-	-
Fresh Supply (t)	38,163	36,482	-4%	35,926	-2%
Fresh Supply Wholesale Value (\$m)	\$94.0	\$76.2	-19%	\$64.7	-15%
Supply per Capita (kg)	1.47	1.39	-6%	1.32	-5%
Retail Supply (t)	32,424	30,996	-4%	30,523	-2%
Retail Supply Wholesale Value (\$m)	\$79.8	\$64.8	-19%	\$55.0	-15%
Food Service Supply (t)	5,739	5,486	-4%	5,403	-2%
Food Service Wholesale Value (\$m)	\$14.1	\$11.5	-19%	\$9.7	-15%

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

Fresh Zucchini Production

MAJOR PRODUCTION AREAS



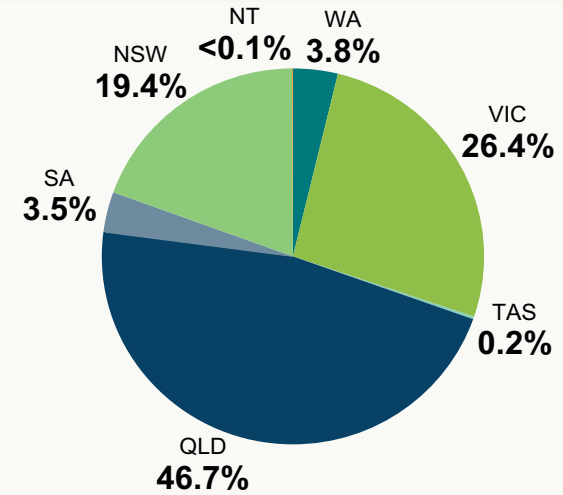
Source: AUSVEG

Zucchini is grown in most states of Australia, with the majority of production occurring in Queensland and Victoria.

PRODUCTION WINDOW



2023/24 FRESH ZUCCHINI PRODUCTION BY STATE



Source: AUSVEG

2023/24 FRESH ZUCCHINI SEASONALITY BY STATE

State	Volume (t)	Jul	Aug	Sep	Oct	Nov	Dec	Jan	Feb	Mar	Apr	May	Jun
Queensland	17,068	High	High	High	High	Medium	Medium	Medium	Medium	Medium	Medium	High	High
Victoria	9,662	High	High	High	High	Medium	Medium	Medium	Medium	Medium	Medium	High	High
New South Wales	7,094	High	High	High	High	Medium	Medium	Medium	Medium	Medium	Medium	High	High
Western Australia	1,381	High	Medium	Medium	Medium	Medium	Medium	Medium	Medium	Medium	Medium	High	High
South Australia	1,265	High	Medium	Medium	Medium	None	None	None	Medium	Medium	Medium	High	High
Tasmania	82	Medium	Medium	Medium	None	None	None	None	None	None	None	Medium	Medium
Northern Territory	20	Medium	Medium	None	None	None	None	None	None	None	None	Medium	Medium

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

Source: AUSVEG