

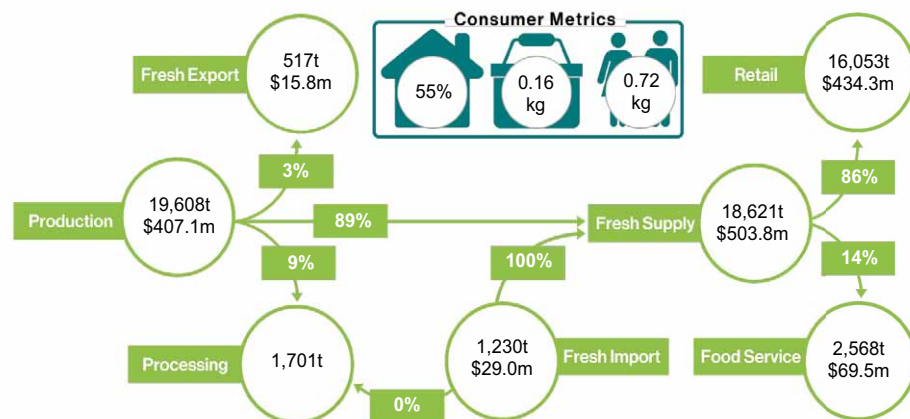


Berries - Blueberries



Fresh Blueberries Overview

FRESH BLUEBERRIES SUPPLY CHAIN – YEAR ENDING JUNE 2022



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

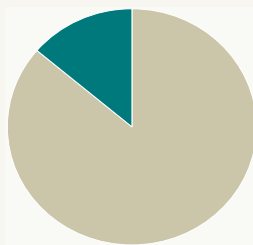
TOTAL PRODUCTION:



\$407.1M

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

RETAIL VS FOOD SERVICE:



■ Retail 86% ■ Food Service 14%

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

CONSUMER METRICS:



55%

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

PER CAPITA CONSUMPTION:

0.72kg



in 2021/22 based on the volume supplied.

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

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



Fresh Blueberries Production

MAJOR PRODUCTION AREAS



Source: BA

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

PRODUCTION AREA:



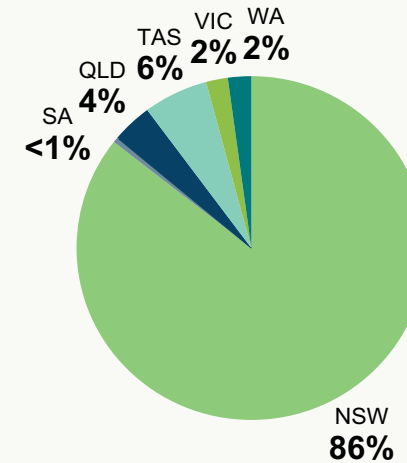
1,375
Ha

PRODUCTION WINDOW:



Year-round

2021/22 FRESH BLUEBERRIES PRODUCTION BY STATE



Source: BA

2021/22 FRESH BLUEBERRIES SEASONALITY BY STATE

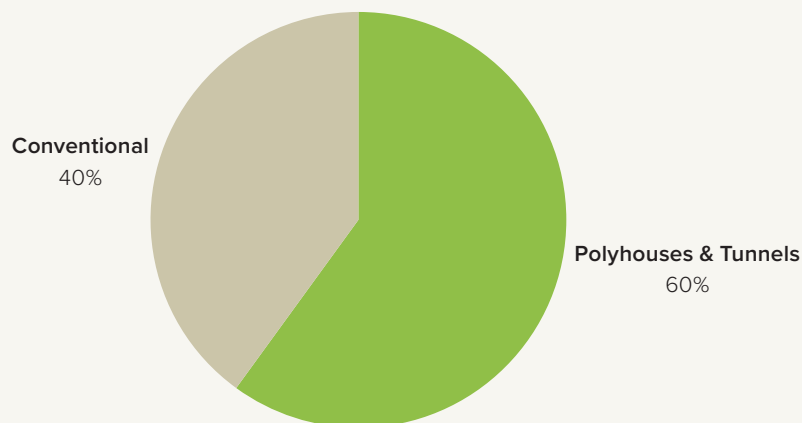
| State | Volume (t) | Value (\$m) | Jul | Aug | Sep | Oct | Nov | Dec | Jan | Feb | Mar | Apr | May | Jun |
|-------------------|------------|-------------|------|--------|--------|------|------|--------|--------|--------|--------|--------|--------|------|
| New South Wales | 16,785 | \$348.4 | High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

Availability legend: High Medium Low None

Source: BA



2021/22 FRESH BLUEBERRIES PRODUCTION BY SYSTEM



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

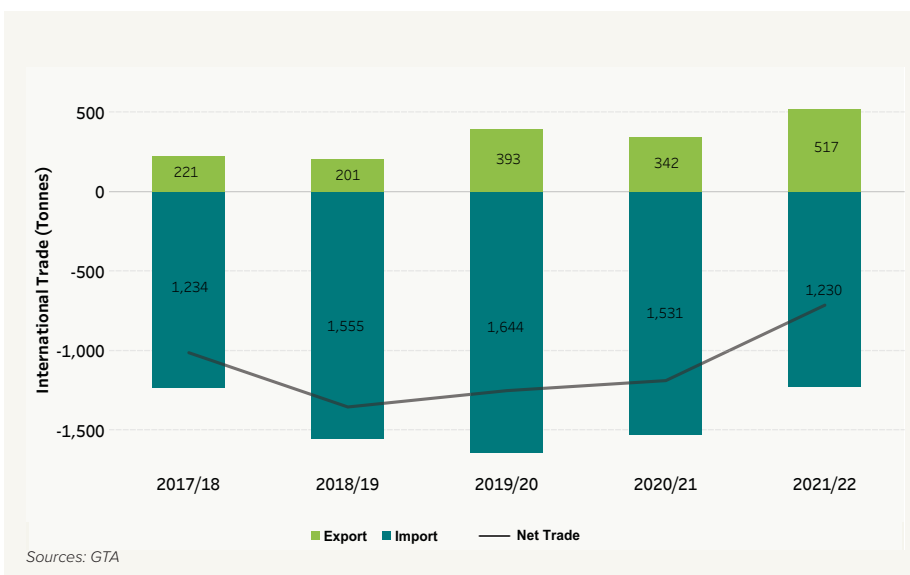
2021/22 FRESH BLUEBERRIES PRODUCTION SYSTEM BY STATE

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

Fresh Blueberries International Trade

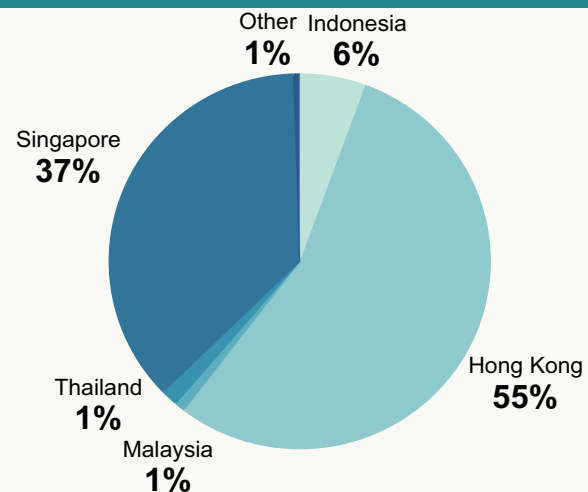
FRESH BLUEBERRIES INTERNATIONAL TRADE

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





2021/22 FRESH BLUEBERRIES EXPORTS BY COUNTRY



Source: GTA

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

FRESH BLUEBERRIES IMPORTS AND EXPORTS BY STATE

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

FRESH BLUEBERRIES IMPORTS AND EXPORTS BY COUNTRY

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

Source: GTA