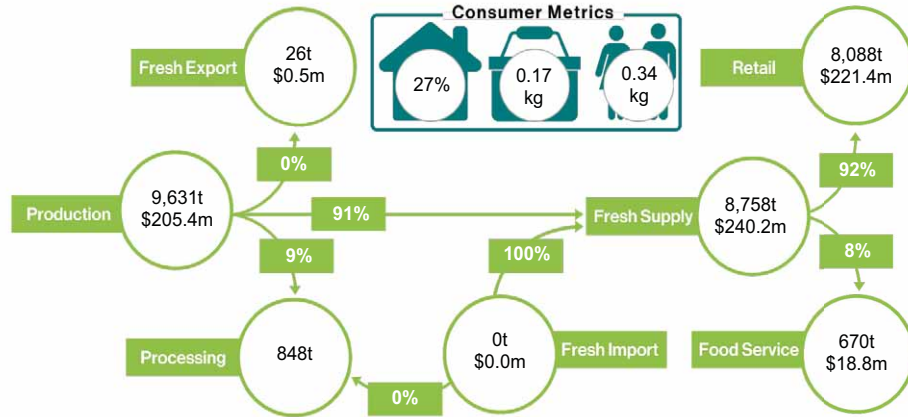




Berries - Rubus

Fresh Rubus Berries Overview

FRESH RUBUS BERRIES SUPPLY CHAIN – YEAR ENDING JUNE 2022



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

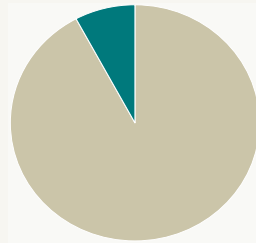
TOTAL PRODUCTION:



\$205.4M

9,631t produced and valued at \$205.4M with 9% sent to be processed.

RETAIL VS FOOD SERVICE:



■ Retail 92% ■ Food Service 8%

The wholesale value of the fresh supply was \$240.2M, with \$221.4M distributed into retail and \$18.8M into food service.

CONSUMER METRICS:



27% of Australian households purchased rubus berries, buying an average of 172g per shopping trip.

PER CAPITA CONSUMPTION:



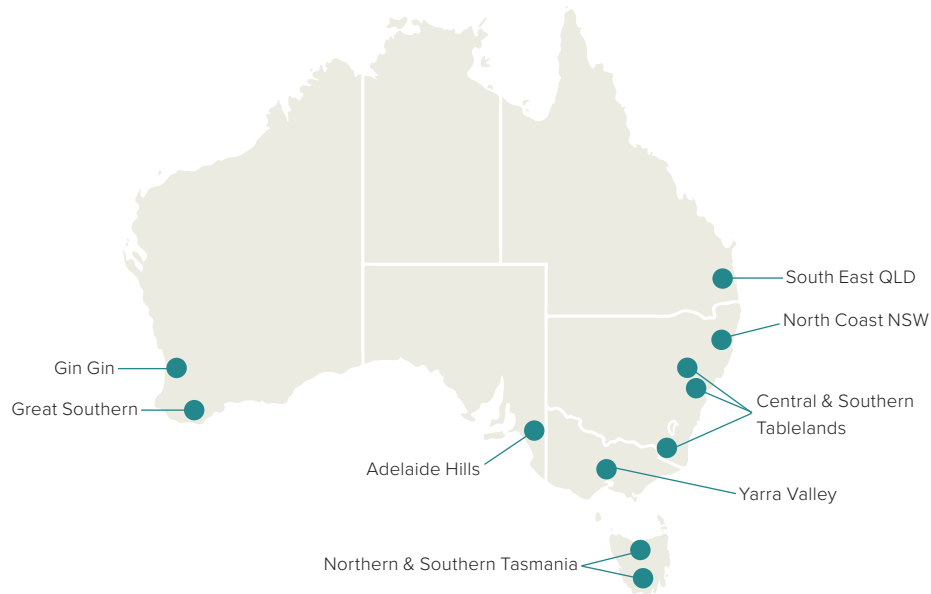
in 2021/22 based on the volume supplied.

YEAR ENDING JUNE	2020	2021		2022	
	Value	Value	%YoY	Value	%YoY
Production (t)	9,932	11,123	+12%	9,631	-13%
Production (\$m)	\$216.0	\$227.2	+5%	\$205.4	-10%
Production area (Ha)	-	-	-	-	-
Fresh Export Volume (t)	13	13	+3%	26	+93%
Fresh Export Value (\$m)	\$0.2	\$0.2	-31%	\$0.5	>100%
Fresh Import Volume (t)	-	-	-	-	-
Fresh Import Value (\$m)	\$-	\$-	-	\$-	-
Fresh Supply (t)	9,100	10,179	+12%	8,758	-14%
Fresh Supply Wholesale Value (\$m)	\$252.9	\$266.2	+5%	\$240.2	-10%
Supply per Capita (kg)	0.35	0.40	+12%	0.34	-13%
Retail Supply (t)	8,498	9,472	+11%	8,088	-15%
Retail Supply Wholesale Value (\$m)	\$236.0	\$247.4	+5%	\$221.4	-10%
Food Service Supply (t)	602	706	+17%	670	-5%
Food Service Wholesale Value (\$m)	\$16.9	\$18.8	+11%	\$18.8	>-1%

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

Fresh Rubus Berries Production

MAJOR PRODUCTION AREAS



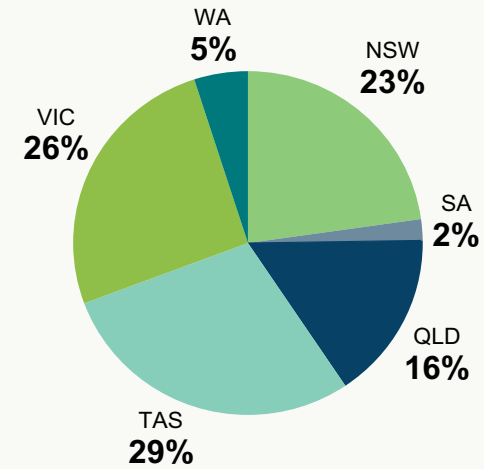
Source: BA

Rubus berries includes raspberries, blackberries and other berries such as boysenberries and silvanberries. Production occurs all along the Eastern seaboard of Australia, with the majority of production centred on Victoria and Tasmania.

PRODUCTION WINDOW:



2021/22 FRESH RUBUS BERRIES PRODUCTION BY STATE



Source: BA

2021/22 FRESH RUBUS BERRIES SEASONALITY BY STATE

State	Volume (t)	Value (\$m)	Jul	Aug	Sep	Oct	Nov	Dec	Jan	Feb	Mar	Apr	May	Jun
Tasmania	2,766	\$59.0					Low	High	High	High	High	Low	Low	
Victoria	2,480	\$52.9				Low	High	High	High	High	Low	Low		
New South Wales	2,193	\$46.8	High	High	High	Low	Low	Low	Low	Low	Low	High	High	High
Queensland	1,526	\$32.5	High	High	High	Low	Low				Low	Low	High	High
Western Australia	477	\$10.2				Low	Low	Low	Low	Low	Low			
South Australia	191	\$4.1				Low	Low	Low	Low	Low	Low			

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

Source: BA

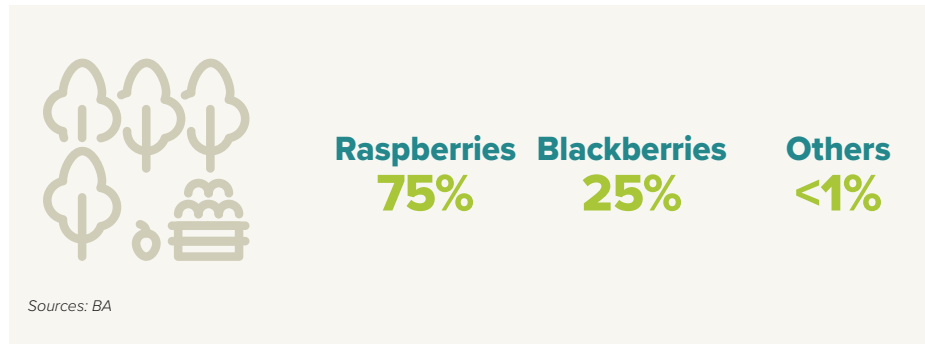
MAIN RUBUS BERRIES TYPES

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

Raspberries, a bright red aggregate fruit with a hollow core. Raspberries accounted for **75%** of fresh production.

Blackberries, a black aggregate fruit with a white core. Blackberries accounted for **25%** of fresh production

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



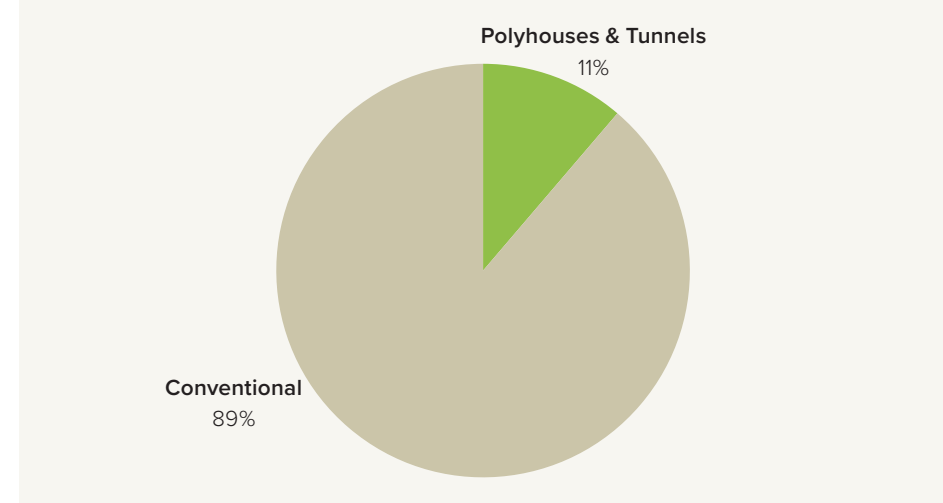
2021/22 FRESH RUBUS BERRIES SEASONALITY BY VARIETY

Variety	Volume (t)	Jul	Aug	Sep	Oct	Nov	Dec	Jan	Feb	Mar	Apr	May	Jun
Raspberries	6,428	Medium	Medium	Medium	High	High	High	High	High	High	High	Medium	Medium
Blackberries	2,156	None	None	None	None	Low	High	High	Medium	None	None	None	None
Other	39	None	None	None	None	Low	Low	Low	Low	None	None	None	None

Availability legend: High Medium Low None

Source: BA

2021/22 FRESH RUBUS BERRIES PRODUCTION BY SYSTEM



Production of rubus berries in Australia occurs in two different types of farming systems. These systems and their contribution to production are **Polyhouses & Tunnels 11%** and **Conventional 89%**.

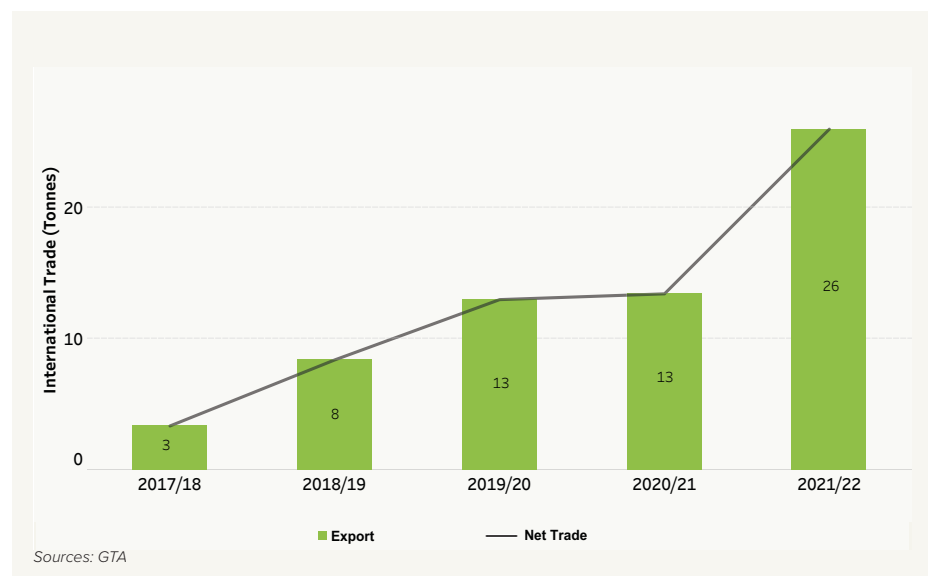
2021/22 FRESH RUBUS BERRIES PRODUCTION SYSTEM BY STATE

State	Polyhouses & Tunnels			Conventional		
	Hectares (Ha)	Volume (t)	Value (\$m)	Hectares (Ha)	Volume (t)	Value (\$m)
New South Wales	31	247	\$6.1	0	1,947	\$40.7
Victoria	35	279	\$6.9	0	2,200	\$46.0
Queensland	21	172	\$4.3	0	1,354	\$28.3
Western Australia	7	54	\$1.3	0	423	\$8.8
South Australia	3	21	\$0.5	0	169	\$3.5
Tasmania	39	311	\$7.7	0	2,454	\$51.3
Northern Territory	0	0	\$-	0	0	\$-

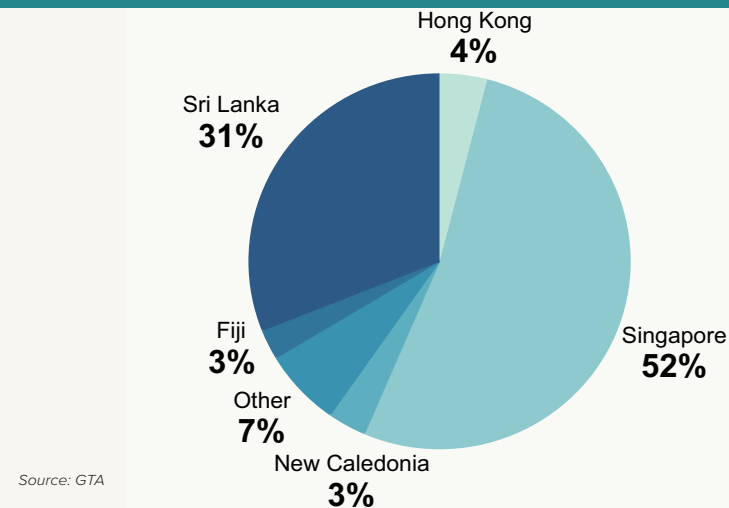
Fresh Rubus Berries International Trade

FRESH RUBUS BERRIES INTERNATIONAL TRADE

Due to the perishable nature of the fruit, there is limited trade of fresh rubus berries, compared to trade in processed and frozen rubus berries. There are currently **no fresh rubus berry imports**. The exports over the last five financial years are profiled in the graph below.



2021/22 FRESH RUBUS BERRIES EXPORTS BY COUNTRY



For the year ending June 2022, **52%** of exported fresh rubus berries were sent to **Singapore**, as profiled in the chart above.

FRESH RUBUS BERRIES EXPORTS BY STATE

Exports by State of Production Origin (Tonnes)			
Year Ending June	2020	2021	2022
Victoria	3	10	11
New South Wales	10	2	10
Queensland	< 0.5	1	3
Tasmania	< 0.5	< 0.5	1
Northern Territory	-	< 0.5	-
Other	< 0.5	< 0.5	1
TOTAL	13	13	26

FRESH RUBUS BERRIES EXPORTS BY COUNTRY

Exports by Country (Tonnes)			
Year Ending June	2020	2021	2022
Singapore	9	2	14
Sri Lanka	-	8	8
Hong Kong	1	1	1
New Caledonia	< 0.5	< 0.5	1
Fiji	< 0.5	< 0.5	1
Other	3	2	2
TOTAL	13	13	26

Source: GTA

Processed Rubus Berries International Trade

2021/22 PROCESSED RUBUS BERRIES INTERNATIONAL TRADE

For the year ending June 2022, an additional **8,939 tonnes** of frozen rubus berries were imported, while **21 tonnes** were exported.

