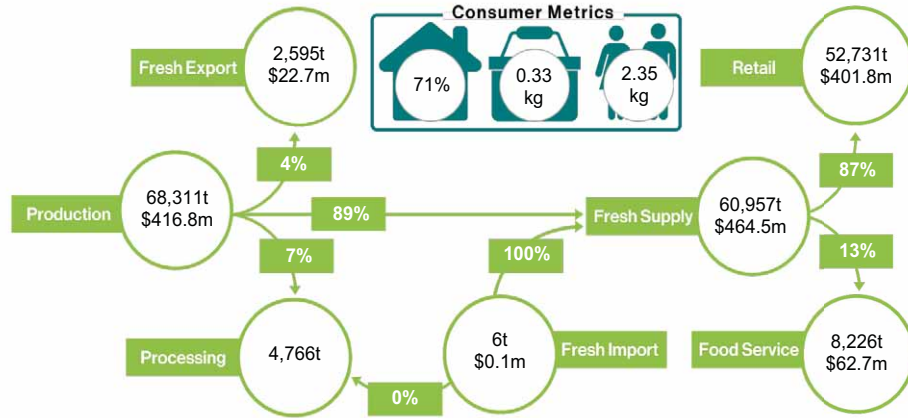




Berries - Strawberries

Fresh Strawberries Overview

FRESH STRAWBERRIES SUPPLY CHAIN – YEAR ENDING JUNE 2022



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

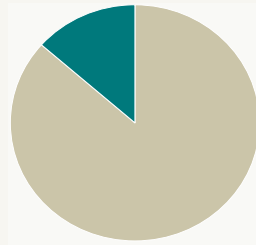
TOTAL PRODUCTION:



\$416.8M

68,311t produced and valued at **\$416.8M** with 7% sent to be processed.

RETAIL VS FOOD SERVICE:



■ Retail 87% ■ Food Service 13%

The wholesale value of the fresh supply was **\$464.5M**, with **\$401.8M** distributed into retail and **\$62.7M** into food service.

CONSUMER METRICS:



71% of Australian households purchased strawberries, buying an average of **335g** per shopping trip.

PER CAPITA CONSUMPTION:



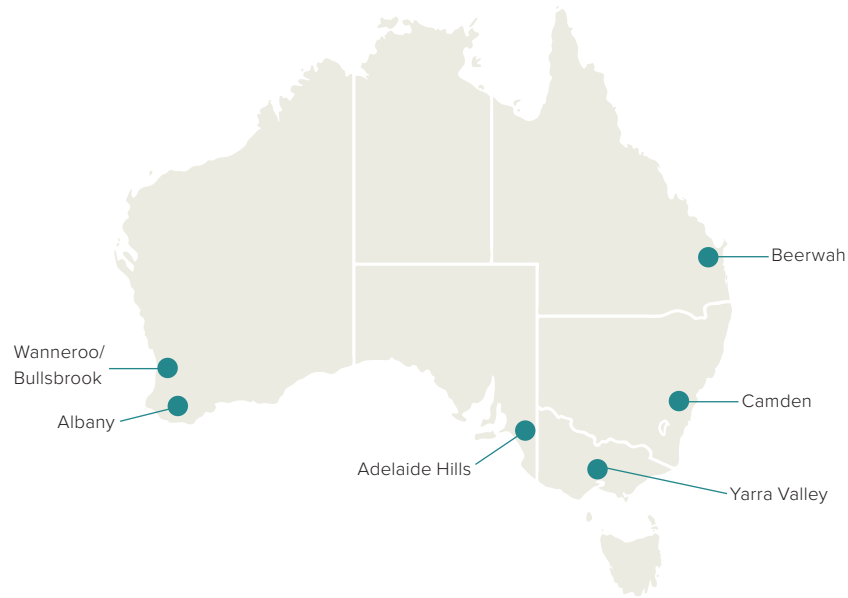
in 2021/22 based on the volume supplied.

YEAR ENDING JUNE	2020	2021		2022	
	Value	Value	%YoY	Value	%YoY
Production (t)	82,310	77,751	-6%	68,311	-12%
Production (\$m)	\$435.0	\$417.2	-4%	\$416.8	>-1%
Production area (Ha)	2,337	2,090	-11%	2,279	+9%
Fresh Export Volume (t)	4,678	3,578	-24%	2,595	-27%
Fresh Export Value (\$m)	\$33.4	\$25.5	-24%	\$22.7	-11%
Fresh Import Volume (t)	4	7	+83%	6	-8%
Fresh Import Value (\$m)	< \$0.1	< \$0.1	+74%	< \$0.1	>100%
Fresh Supply (t)	68,166	68,755	<1%	60,957	-11%
Fresh Supply Wholesale Value (\$m)	\$472.6	\$462.1	-2%	\$464.5	<1%
Supply per Capita (kg)	2.64	2.67	+1%	2.35	-10%
Retail Supply (t)	59,275	59,683	<1%	52,731	-12%
Retail Supply Wholesale Value (\$m)	\$410.9	\$401.2	-2%	\$401.8	<1%
Food Service Supply (t)	8,891	9,072	+2%	8,226	-9%
Food Service Wholesale Value (\$m)	\$61.6	\$61.0	-1%	\$62.7	+3%

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

Fresh Strawberries Production

MAJOR PRODUCTION AREAS



Source: SAI

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

PRODUCTION AREA:



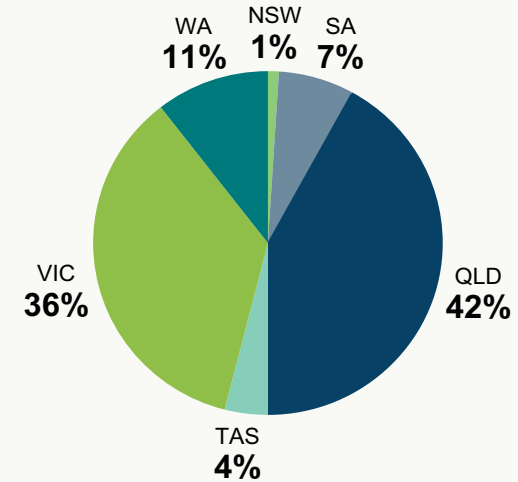
2,279
Ha

PRODUCTION WINDOW:



Year-round

2021/22 FRESH STRAWBERRIES PRODUCTION BY STATE



Source: SAI

2021/22 FRESH STRAWBERRIES SEASONALITY BY STATE

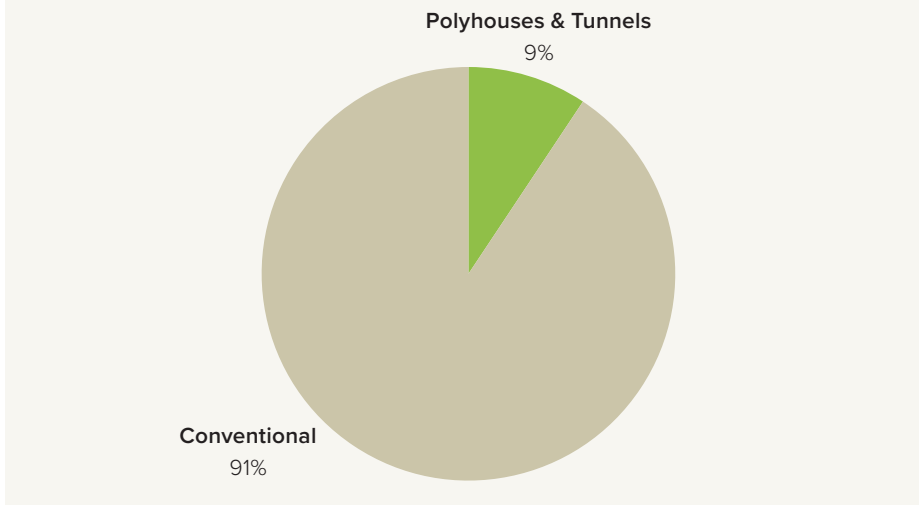
State	Volume (t)	Value (\$m)	Jul	Aug	Sep	Oct	Nov	Dec	Jan	Feb	Mar	Apr	May	Jun
Queensland	28,691	\$175.2	High	High	High	Medium	Medium	None	None	None	Low	Low	Low	Low
Victoria	24,251	\$148.0	None	None	None	Medium	High	High	High	High	High	Medium	Medium	Medium
Western Australia	7,173	\$43.8	High	High	High	Medium	Medium	Low	None	None	None	None	None	Low
South Australia	4,782	\$29.2	None	Low	Low	Medium	High	High	High	High	High	Medium	Medium	Medium
Tasmania	2,732	\$16.7	None	None	None	Medium	Medium	High	High	High	Medium	Medium	Medium	None
New South Wales	683	\$4.2	None	None	None	Medium	Medium	High	High	High	Medium	Medium	Medium	None

Availability legend: High Medium Low None

Source: SAI



2021/22 FRESH STRAWBERRIES PRODUCTION BY SYSTEM



Production of strawberries in Australia occurs in two different types of farming systems. These systems and their contribution to production are **Polyhouses & Tunnels 9%** and **Conventional 91%**.

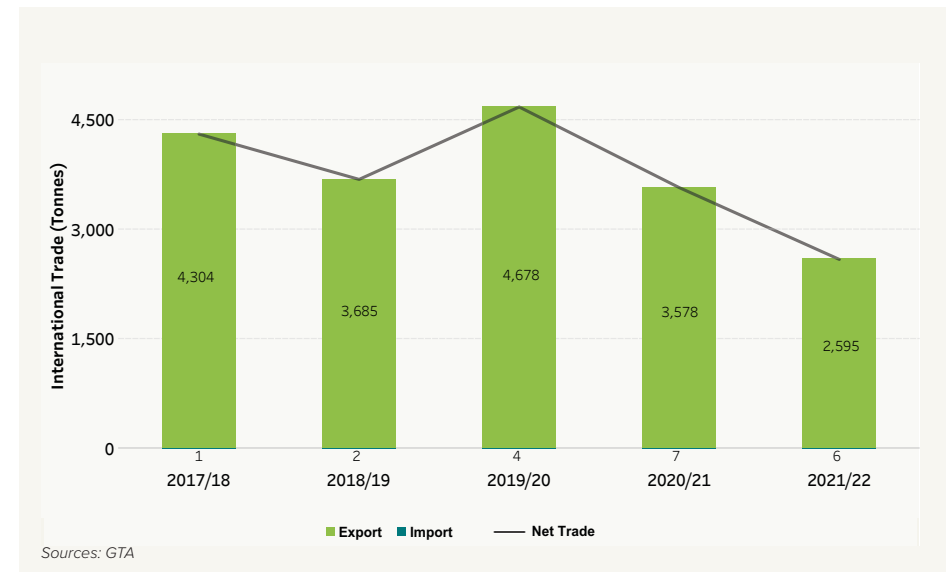
2021/22 FRESH STRAWBERRIES PRODUCTION SYSTEM BY STATE

State	Polyhouses & Tunnels			Conventional		
	Hectares (Ha)	Volume (t)	Value (\$m)	Hectares (Ha)	Volume (t)	Value (\$m)
New South Wales	4	64	\$0.4	-	619	\$3.7
Victoria	151	2,265	\$15.7	-	21,985	\$132.4
Queensland	179	2,680	\$18.5	-	26,011	\$156.6
Western Australia	45	670	\$4.6	-	6,503	\$39.2
South Australia	30	447	\$3.1	-	4,335	\$26.1
Tasmania	17	255	\$1.8	-	2,477	\$14.9
Northern Territory	0	0	\$-	-	0	\$-

Fresh Strawberries International Trade

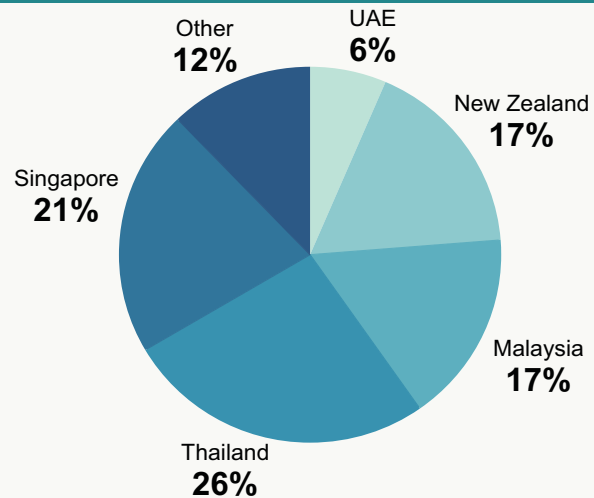
FRESH STRAWBERRIES INTERNATIONAL TRADE

Australia has traditionally been a net exporter of fresh strawberries. For the year ending June 2022, Australia exported **2,595 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 STRAWBERRIES EXPORTS BY COUNTRY



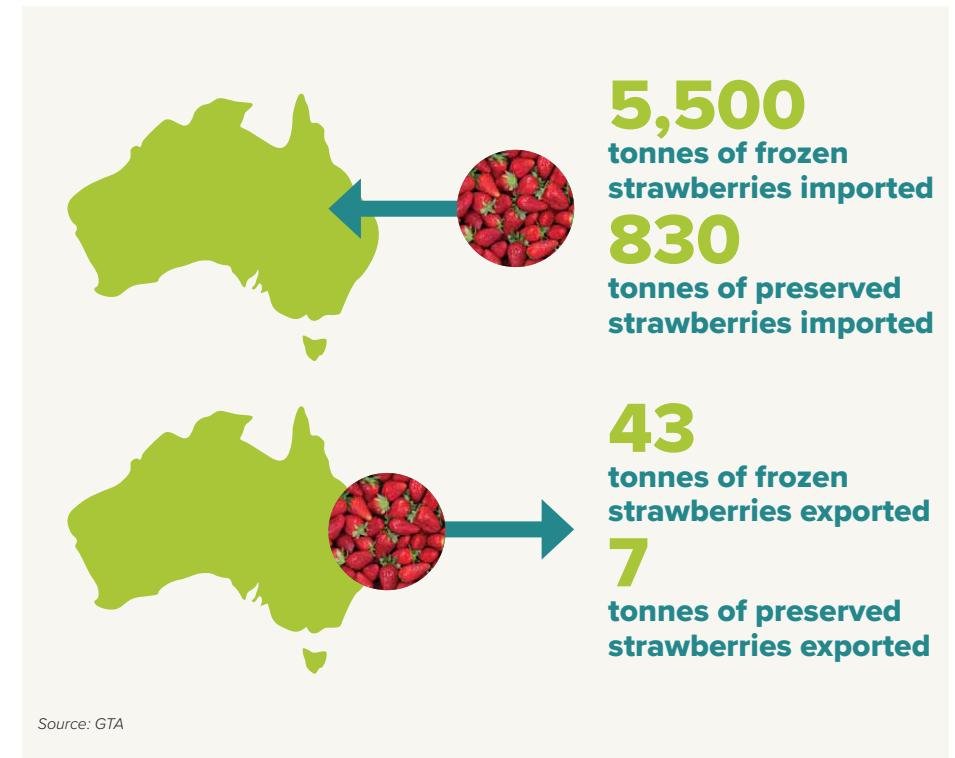
Source: GTA

For the year ending June 2022, **26%** of exported fresh strawberries were sent to **Thailand**, as profiled in the chart above.

Processed Strawberries International Trade

2021/22 PROCESSED STRAWBERRIES INTERNATIONAL TRADE

For the year ending June 2022, an additional **5,500 tonnes** of frozen strawberries were imported, while **43 tonnes** were exported. Australia also imported **830 tonnes** of preserved strawberries, while exporting **7 tonnes** of preserved strawberries.



Source: GTA

FRESH STRAWBERRIES 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
Victoria	-	< 0.5	5	Western Australia	3,576	2,548	1,890
Queensland	-	-	1	Queensland	616	689	597
New South Wales	-	< 0.5	1	New South Wales	419	279	70
South Australia	3	6	-	Victoria	66	59	29
Western Australia	< 0.5	-	-	Northern Territory	-	< 0.5	8
Other	< 0.5	< 0.5	-	Other	< 0.5	2	-
TOTAL	4	7	6	TOTAL	4,678	3,578	2,595

FRESH STRAWBERRIES 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
Spain	-	3	5	Thailand	951	891	682
Sth. Korea	-	< 0.5	1	Singapore	1,006	783	552
Japan	-	< 0.5	< 0.5	New Zealand	675	584	449
Chile	-	3	-	Malaysia	461	519	429
Germany	2	-	-	UAE	709	281	167
Other	2	< 0.5	< 0.5	Other	878	519	316
TOTAL	4	7	6	TOTAL	4,678	3,578	2,595

Source: GTA