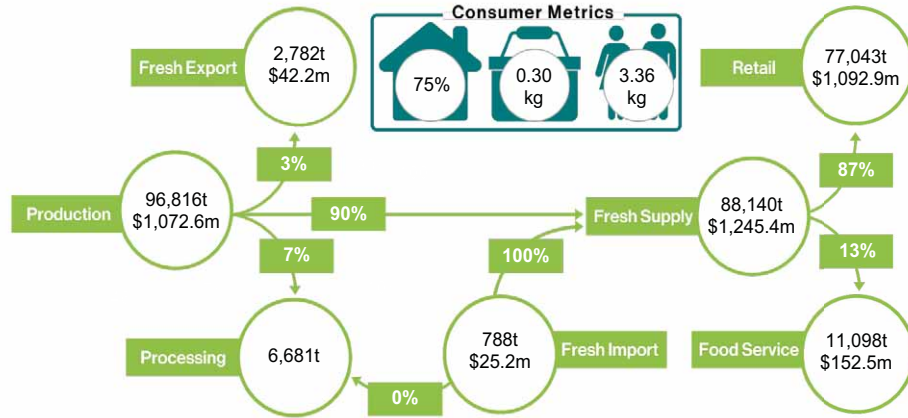




Berries - Overview

Fresh Berries Overview

FRESH BERRIES SUPPLY CHAIN – YEAR ENDING JUNE 2023



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

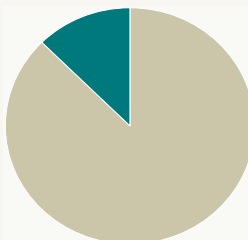
TOTAL PRODUCTION:



\$1,072.6M

96,816t produced and valued at **\$1,072.6M** with 7% sent to be processed.

RETAIL VS FOOD SERVICE:



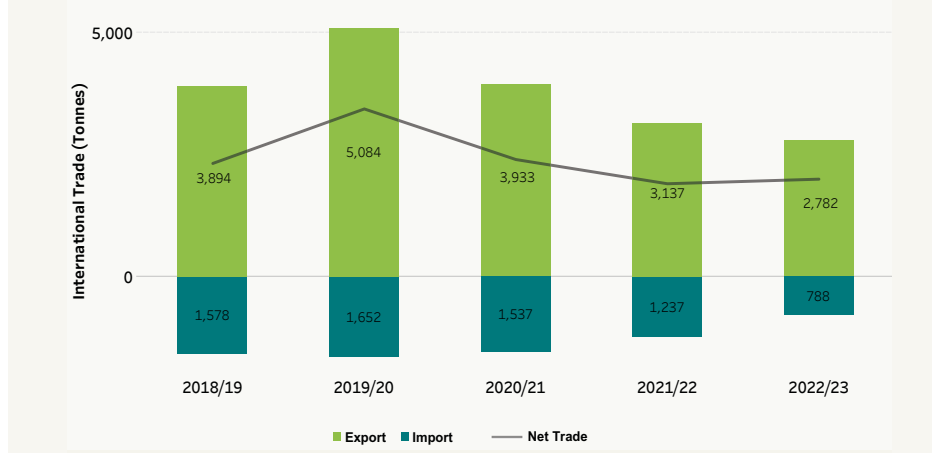
Retail 87% **Food Service 13%**

The wholesale value of the fresh supply was **\$1,245.4M**, with **\$1,092.9M** distributed into retail and **\$152.5M** into food service.

YEAR ENDING JUNE	2021	2022		2023	
	Value	Value	% YoY	Value	% YoY
Production (t)	112,326	97,552	-13%	96,816	>-1%
Production (\$m)	\$1,055.5	\$1,029.3	-2%	\$1,072.6	+4%
Production area (Ha)	-	-	-	-	-
Fresh Export Volume (t)	3,933	3,137	-20%	2,782	-11%
Fresh Export Value (\$m)	\$34.0	\$39.0	+15%	\$42.2	+8%
Fresh Import Volume (t)	1,537	1,237	-20%	788	-36%
Fresh Import Value (\$m)	\$32.3	\$29.1	-10%	\$25.2	-13%
Fresh Supply (t)	101,540	88,336	-13%	88,140	>-1%
Fresh Supply Wholesale Value (\$m)	\$1,246.2	\$1,208.5	-3%	\$1,245.4	+3%
Supply per Capita (kg)	3.94	3.40	-14%	3.36	-1%
Retail Supply (t)	88,728	76,872	-13%	77,043	<-1%
Retail Supply Wholesale Value (\$m)	\$1,096.9	\$1,057.5	-4%	\$1,092.9	+3%
Food Service Supply (t)	12,812	11,465	-11%	11,098	-3%
Food Service Wholesale Value (\$m)	\$149.3	\$150.9	+1%	\$152.5	<-1%

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

FRESH BERRIES INTERNATIONAL TRADE

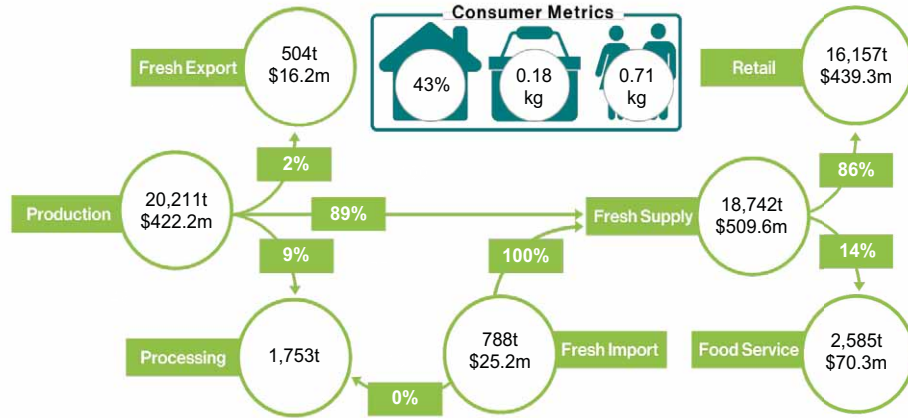




Berries - Blueberries

Fresh Blueberries Overview

FRESH BLUEBERRIES SUPPLY CHAIN – YEAR ENDING JUNE 2023



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

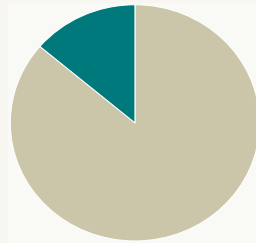
TOTAL PRODUCTION:



\$422.2M

20,211t produced and valued at \$422.2M with 9% sent to be processed.

RETAIL VS FOOD SERVICE:



■ Retail 86% ■ Food Service 14%

The wholesale value of the fresh supply was \$509.6M, with \$439.3M distributed into retail and \$70.3M into food service.

CONSUMER METRICS:



43% of Australian households purchased blueberries, buying an average of 183g per shopping trip.

PER CAPITA CONSUMPTION:



0.71kg in 2022/23 based on the volume supplied.

YEAR ENDING JUNE	2021	2022		2023	
	Value	Value	% YoY	Value	% YoY
Production (t)	23,452	19,608	-16%	20,211	+3%
Production (\$m)	\$411.2	\$407.1	-1%	\$422.2	+4%
Fresh Export Volume (t)	342	517	+51%	504	-2%
Fresh Export Value (\$m)	\$8.4	\$15.8	+88%	\$16.2	+3%
Fresh Import Volume (t)	1,531	1,231	-20%	788	-36%
Fresh Import Value (\$m)	\$32.2	\$29.0	-10%	\$25.2	-13%
Fresh Supply (t)	22,606	18,621	-18%	18,742	<1%
Fresh Supply Wholesale Value (\$m)	\$517.9	\$503.8	-3%	\$509.6	+1%
Supply per Capita (kg)	0.88	0.72	-18%	0.71	>-1%
Retail Supply (t)	19,572	16,053	-18%	16,157	<1%
Retail Supply Wholesale Value (\$m)	\$448.4	\$434.3	-3%	\$439.3	+1%
Food Service Supply (t)	3,034	2,568	-15%	2,585	<1%
Food Service Wholesale Value (\$m)	\$69.5	\$69.5	>-1%	\$70.3	+1%

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

Fresh Blueberries Production

MAJOR PRODUCTION AREAS



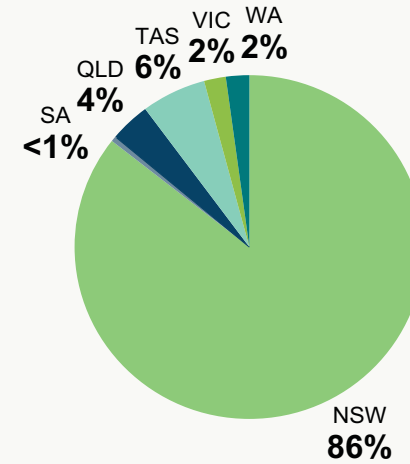
Source: BA

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 WINDOW:



2022/23 FRESH BLUEBERRIES PRODUCTION BY STATE



Source: BA

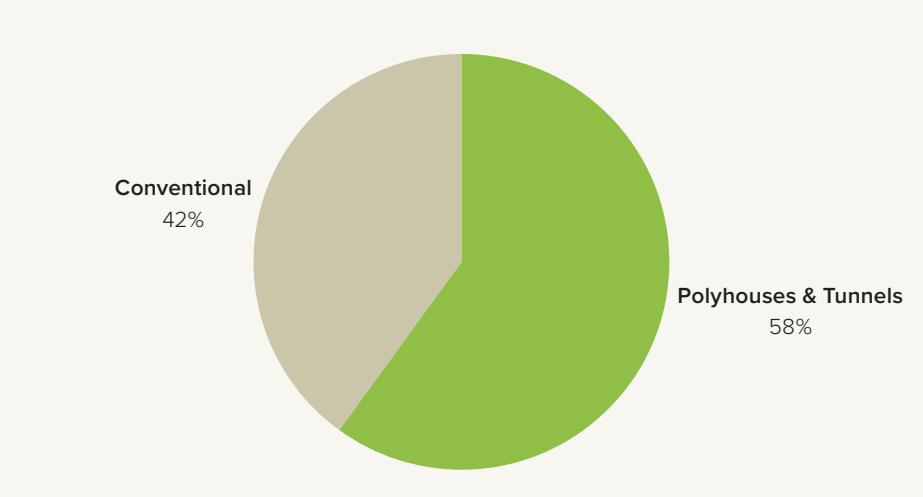
2022/23 FRESH BLUEBERRIES SEASONALITY BY STATE

State	Volume (t)	Value (\$m)	Jul	Aug	Sep	Oct	Nov	Dec	Jan	Feb	Mar	Apr	May	Jun
New South Wales	17,301	\$361.4	High	High	High	High	High	High	High	Medium	Medium	None	None	None
Tasmania	1,213	\$25.3	None	None	None	None	None	None	High	High	High	Medium	None	None
Queensland	758	\$15.8	None	None	None	None	None	Medium	Medium	Medium	Medium	None	None	None
Western Australia	435	\$9.1	None	Low	Low	High	High	Medium	None	None	None	None	None	None
Victoria	404	\$8.4	None	None	None	None	None	Medium	High	High	High	Medium	None	None
South Australia	101	\$2.1	None	None	None	None	None	Medium	High	High	Medium	Medium	Low	None

Availability legend: High Medium Low None

Source: BA

2022/23 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 58%** and **Conventional 42%**.

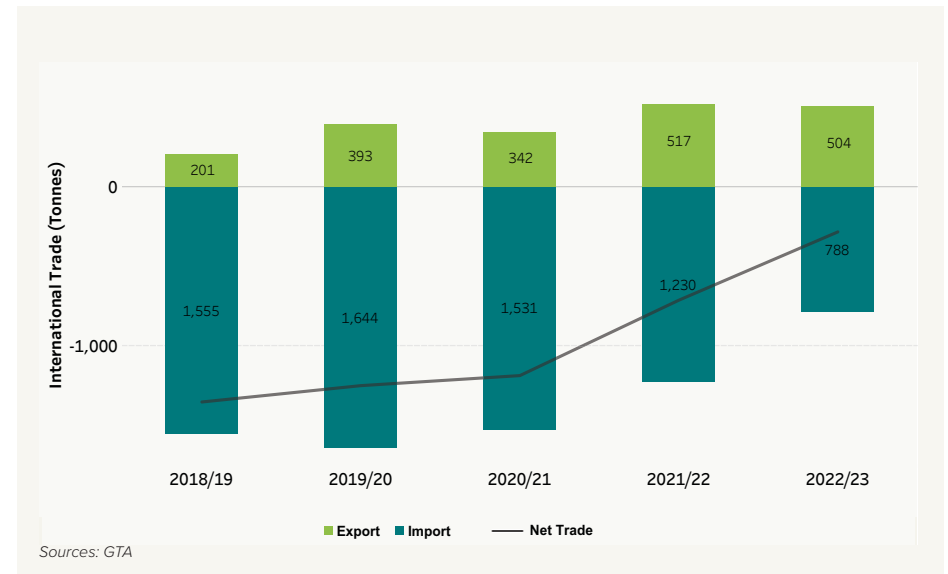
2022/23 FRESH BLUEBERRIES PRODUCTION SYSTEM BY STATE

State	Polyhouses & Tunnels			Conventional		
	Hectares (Ha)	Volume (t)	Value (\$m)	Hectares (Ha)	Volume (t)	Value (\$m)
New South Wales	1259	10,071	\$243.1	-	7,230	\$118.3
Victoria	29	235	\$5.7	-	169	\$2.8
Queensland	55	441	\$10.7	-	317	\$5.2
Western Australia	32	253	\$6.1	-	182	\$3.0
South Australia	7	59	\$1.4	-	42	\$0.7
Tasmania	88	706	\$17.0	-	507	\$8.3
Northern Territory	0	0	\$-	-	0	\$-

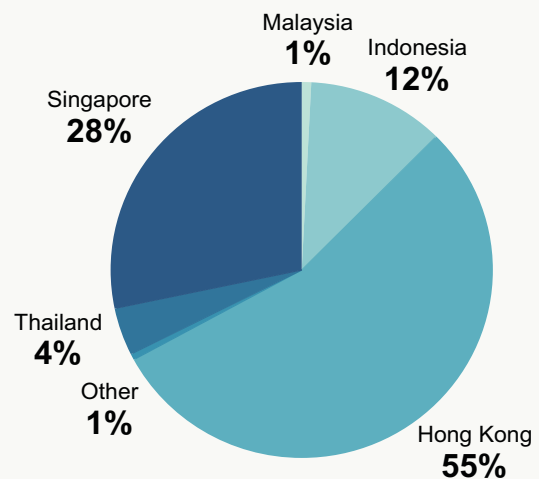
Fresh Blueberries International Trade

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 2023, Australia imported **788 tonnes**. The exports and imports over the last five financial years are profiled in the graph below, where imports are counted as negative tonnes.



2022/23 FRESH BLUEBERRIES EXPORTS BY COUNTRY



Source: GTA

For the year ending June 2023, **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	2021	2022	2023	Year Ending June	2021	2022	2023
New South Wales	835	587	522	New South Wales	249	418	357
Western Australia	249	252	195	Queensland	66	84	138
Victoria	126	179	55	Tasmania	5	2	6
Queensland	321	205	14	Victoria	15	12	2
South Australia	-	8	2	South Australia	2	1	-
TOTAL	1,531	1,230	788	Other	5	< 0.5	< 0.5
				TOTAL	342	517	504

FRESH BLUEBERRIES IMPORTS AND EXPORTS BY COUNTRY

Imports by Country (Tonnes)				Exports by Country (Tonnes)			
Year Ending June	2021	2022	2023	Year Ending June	2021	2022	2023
New Zealand	1,507	1,223	788	Hong Kong	172	283	275
Chile	24	5	-	Singapore	107	190	142
Serbia	-	2	-	Indonesia	35	29	59
TOTAL	1,531	1,230	788	Thailand	24	7	21
				Malaysia	3	4	4
				Other	2	3	3
				TOTAL	342	517	504

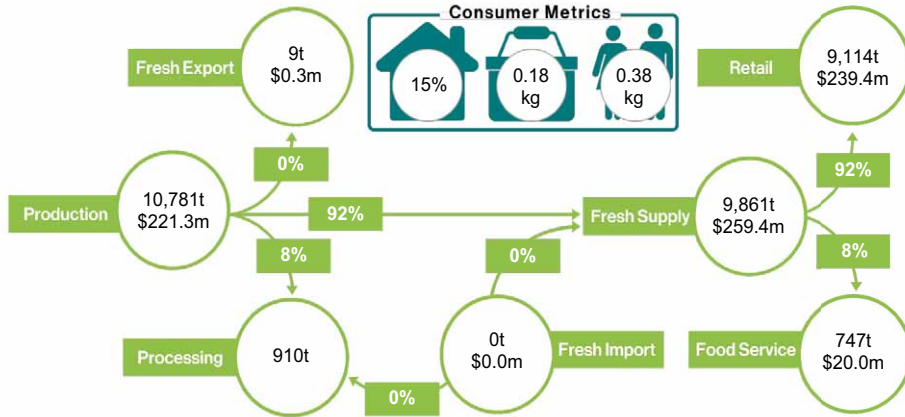
Source: GTA



Berries - Rubus

Fresh Rubus Berries Overview

FRESH RUBUS BERRIES SUPPLY CHAIN – YEAR ENDING JUNE 2023



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

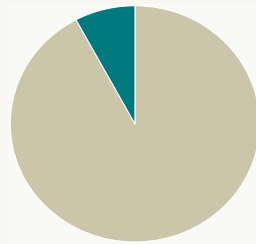
TOTAL PRODUCTION:



\$221.3M

10,781t produced and valued at **\$221.3M** with 8% sent to be processed.

RETAIL VS FOOD SERVICE:



■ Retail 92% ■ Food Service 8%

The wholesale value of the fresh supply was **\$259.4M**, with **\$239.4M** distributed into retail and **\$20M** into food service.

CONSUMER METRICS:



15% of Australian households purchased rubus berries, buying an average of **181g** per shopping trip.

PER CAPITA CONSUMPTION:



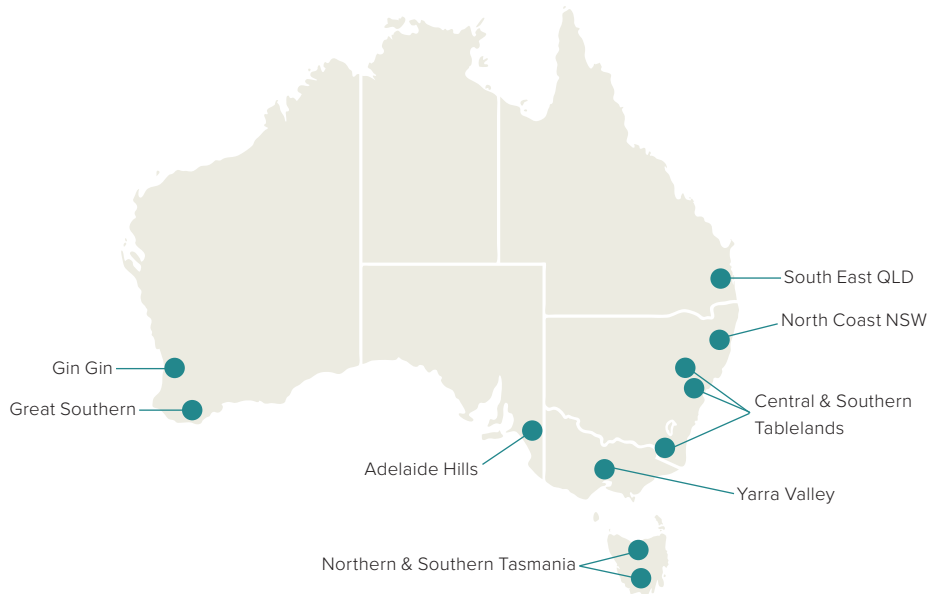
in 2022/23 based on the volume supplied.

YEAR ENDING JUNE	2021	2022		2023	
	Value	Value	% YoY	Value	% YoY
Production (t)	11,123	9,632	-13%	10,781	+12%
Production (\$m)	\$227.2	\$205.3	-10%	\$221.3	+8%
Fresh Export Volume (t)	13	26	+93%	9	-65%
Fresh Export Value (\$m)	\$0.2	\$0.5	>100%	\$0.3	-38%
Fresh Import Volume (t)	-	-	-	-	-
Fresh Import Value (\$m)	\$-	\$-	-	\$-	-
Fresh Supply (t)	10,179	8,758	-14%	9,861	+13%
Fresh Supply Wholesale Value (\$m)	\$266.2	\$240.2	-10%	\$259.4	+8%
Supply per Capita (kg)	0.40	0.34	-15%	0.38	+11%
Retail Supply (t)	9,472	8,088	-15%	9,114	+13%
Retail Supply Wholesale Value (\$m)	\$247.4	\$221.4	-10%	\$239.4	+8%
Food Service Supply (t)	706	670	-5%	747	+11%
Food Service Wholesale Value (\$m)	\$18.8	\$18.8	>-1%	\$20.0	+7%

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

Fresh Rubus Berries Production

MAJOR PRODUCTION AREAS



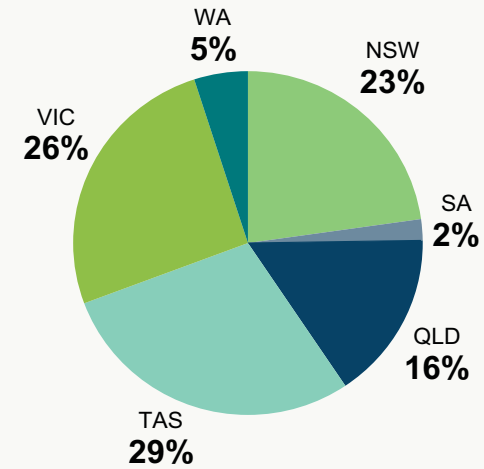
Source: BA

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:



2022/23 FRESH RUBUS BERRIES PRODUCTION BY STATE



Source: BA

2022/23 FRESH RUBUS BERRIES SEASONALITY BY STATE

State	Volume (t)	Value (\$m)	Jul	Aug	Sep	Oct	Nov	Dec	Jan	Feb	Mar	Apr	May	Jun
Tasmania	3,095	\$63.5					Low	High	High	High	High	Low	Low	
Victoria	2,775	\$57.0				Low	High	High	High	High	Low	Low		
New South Wales	2,455	\$50.4	High	High	High	Low	Low	Low	Low	Low	Low	High	High	High
Queensland	1,708	\$35.1	High	High	High	Low	Low				Low	Low	High	High
Western Australia	534	\$11.0				Low	Low	Low	Low	Low	Low			
South Australia	213	\$4.4				Low	Low	Low	Low	Low	Low			

Availability legend: High Medium Low None

Source: BA

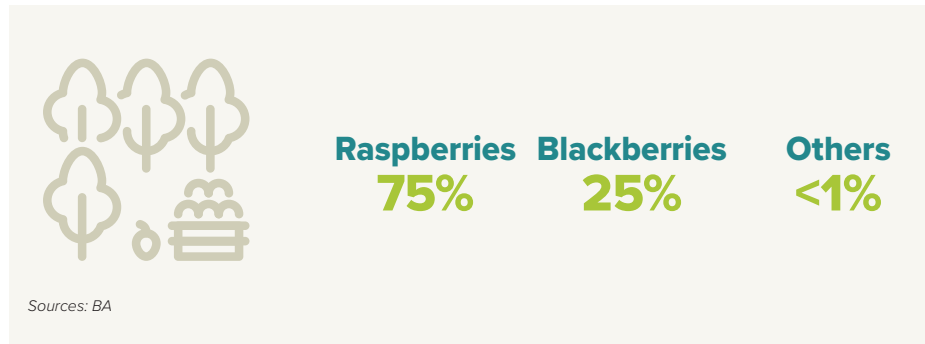
MAIN RUBUS BERRIES TYPES

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



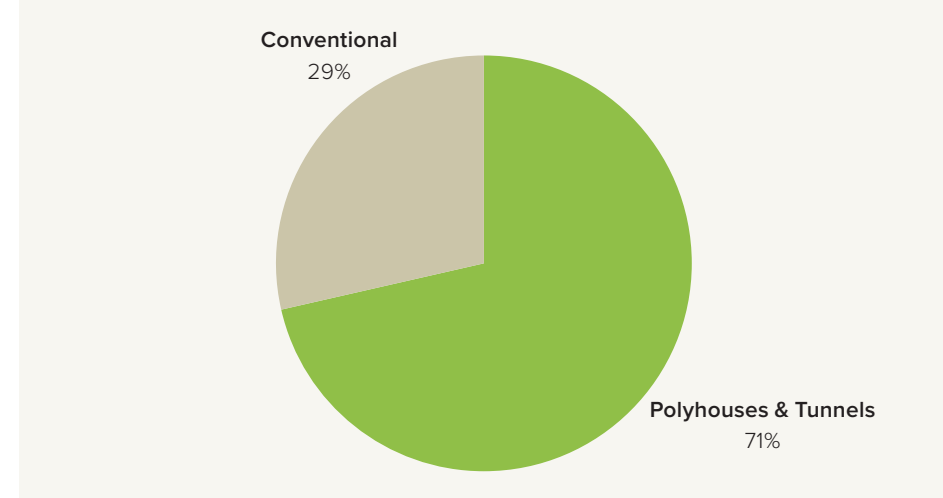
2022/23 FRESH RUBUS BERRIES SEASONALITY BY VARIETY

Variety	Volume (t)	Jul	Aug	Sep	Oct	Nov	Dec	Jan	Feb	Mar	Apr	May	Jun
Raspberries	7,138	Medium	Medium	Medium	High	High	High	High	High	High	High	Medium	Medium
Blackberries	3,594	None	None	None	None	Low	High	High	Medium	None	None	None	None
Other	49	None	None	None	None	Low	Low	Low	Low	None	None	None	None

Availability legend: High Medium Low None

Source: BA

2022/23 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 71%** and **Conventional 29%**.

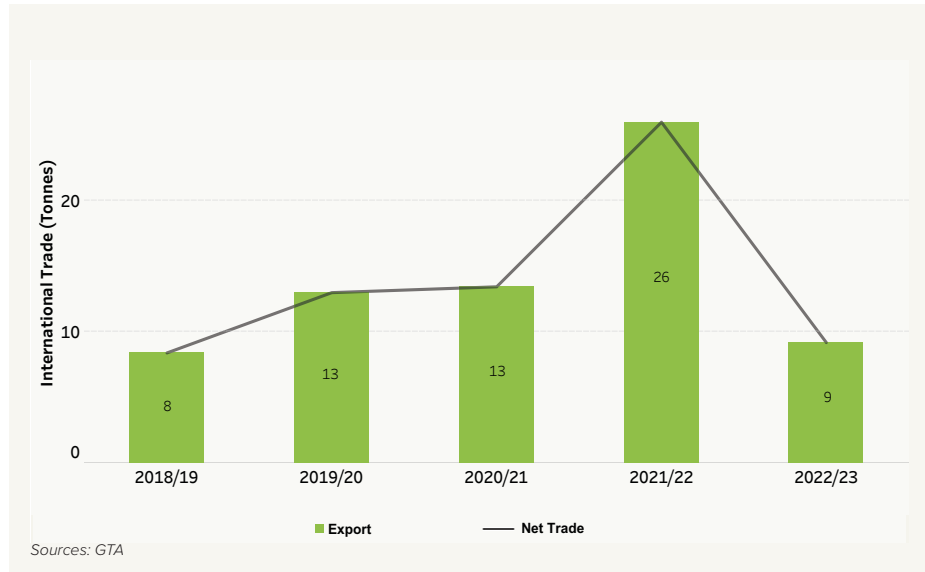
2022/23 FRESH RUBUS BERRIES PRODUCTION SYSTEM BY STATE

State	Polyhouses & Tunnels			Conventional		
	Hectares (Ha)	Volume (t)	Value (\$m)	Hectares (Ha)	Volume (t)	Value (\$m)
New South Wales	219	1,753	\$39.3	0	702	\$11.1
Victoria	248	1,982	\$44.5	0	793	\$12.5
Queensland	152	1,220	\$27.4	0	488	\$7.7
Western Australia	48	381	\$8.6	0	153	\$2.4
South Australia	19	152	\$3.4	0	61	\$1.0
Tasmania	276	2,211	\$49.6	0	885	\$14.0
Northern Territory	0	0	\$-	0	0	\$-

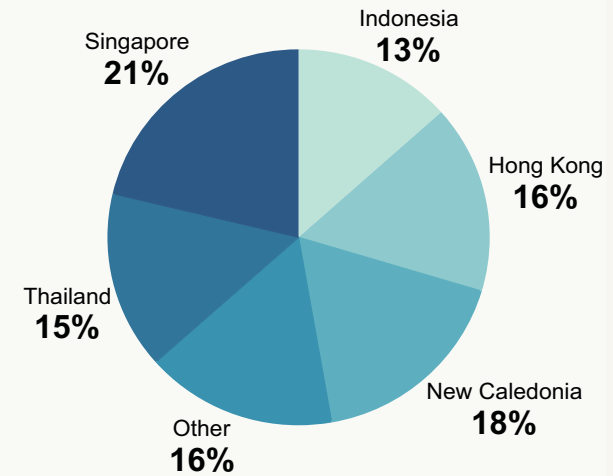
Fresh Rubus Berries International Trade

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.



2022/23 FRESH RUBUS BERRIES EXPORTS BY COUNTRY



Source: GTA

For the year ending June 2023, **21%** 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	2021	2022	2023
Victoria	10	11	4
New South Wales	2	10	4
Queensland	1	3	1
Tasmania	< 0.5	1	< 0.5
Northern Territory	< 0.5	-	-
Other	< 0.5	1	< 0.5
TOTAL	13	26	9

FRESH RUBUS BERRIES EXPORTS BY COUNTRY

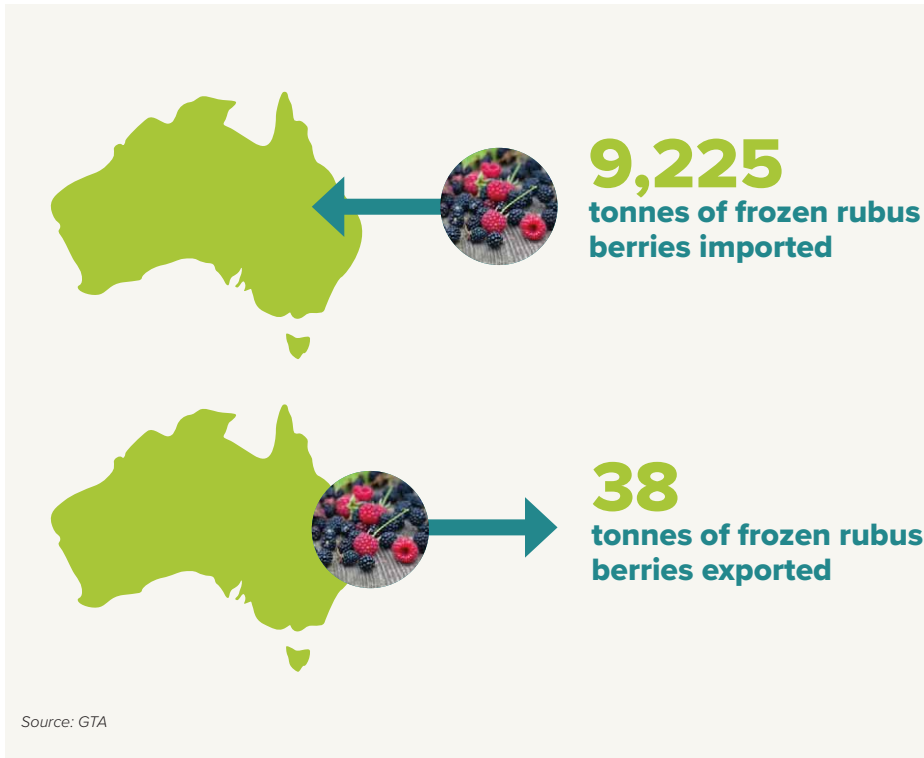
Exports by Country (Tonnes)			
Year Ending June	2021	2022	2023
Singapore	2	14	2
New Caledonia	< 0.5	1	2
Hong Kong	1	1	1
Thailand	-	-	1
Indonesia	-	1	1
Other	10	10	1
TOTAL	13	26	9

Source: GTA

Processed Rubus Berries International Trade

2022/23 PROCESSED RUBUS BERRIES INTERNATIONAL TRADE

For the year ending June 2023, an additional **9,225 tonnes** of frozen rubus berries were imported, while **38 tonnes** were exported.

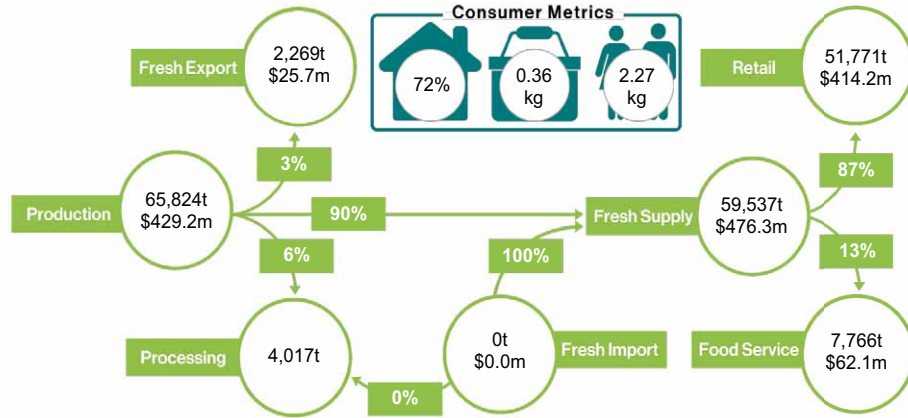




Berries - Strawberries

Fresh Strawberries Overview

FRESH STRAWBERRIES SUPPLY CHAIN – YEAR ENDING JUNE 2023



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

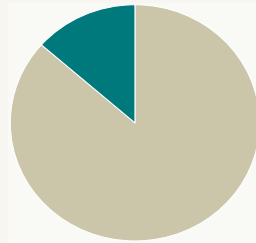
TOTAL PRODUCTION:



\$429.2M

65,824t produced and valued at \$429.2M with 6% sent to be processed.

RETAIL VS FOOD SERVICE:



■ Retail 87% ■ Food Service 13%

The wholesale value of the fresh supply was \$476.3M, with \$414.2M distributed into retail and \$62.1M into food service.

CONSUMER METRICS:



72% of Australian households purchased strawberries, buying an average of 364g per shopping trip.

PER CAPITA CONSUMPTION:



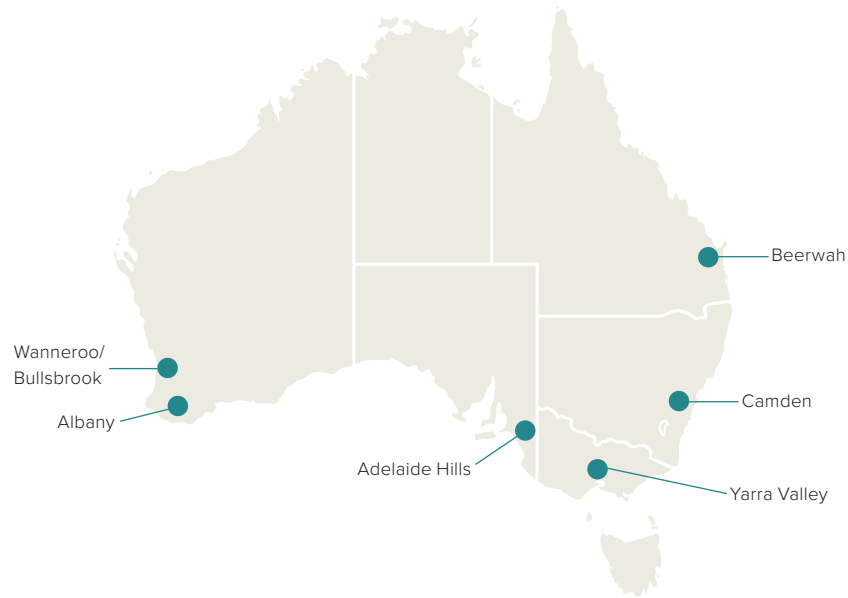
in 2022/23 based on the volume supplied.

YEAR ENDING JUNE	2021	2022		2023	
	Value	Value	% YoY	Value	% YoY
Production (t)	77,751	68,312	-12%	65,824	-4%
Production (\$m)	\$417.2	\$416.9	>-1%	\$429.2	+3%
Fresh Export Volume (t)	3,578	2,595	-27%	2,269	-13%
Fresh Export Value (\$m)	\$25.5	\$22.8	-11%	\$25.7	+13%
Fresh Import Volume (t)	7	6	-8%	<1	-100%
Fresh Import Value (\$m)	< \$0.1	< \$0.1	>100%	\$-	-100%
Fresh Supply (t)	68,755	60,957	-11%	59,537	-2%
Fresh Supply Wholesale Value (\$m)	\$462.1	\$464.5	<1%	\$476.3	+3%
Supply per Capita (kg)	2.67	2.35	-12%	2.27	-4%
Retail Supply (t)	59,683	52,731	-12%	51,771	-2%
Retail Supply Wholesale Value (\$m)	\$401.2	\$401.8	<1%	\$414.2	+3%
Food Service Supply (t)	9,072	8,226	-9%	7,766	-6%
Food Service Wholesale Value (\$m)	\$61.0	\$62.7	+3%	\$62.1	>-1%

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

Fresh Strawberries Production

MAJOR PRODUCTION AREAS



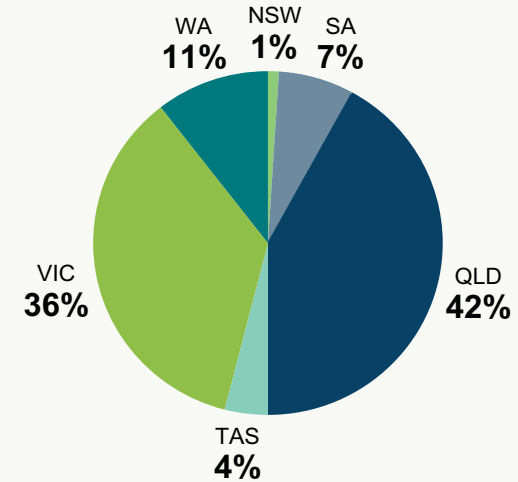
Source: SAI

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

PRODUCTION WINDOW:



2022/23 FRESH STRAWBERRIES PRODUCTION BY STATE



Source: SAI

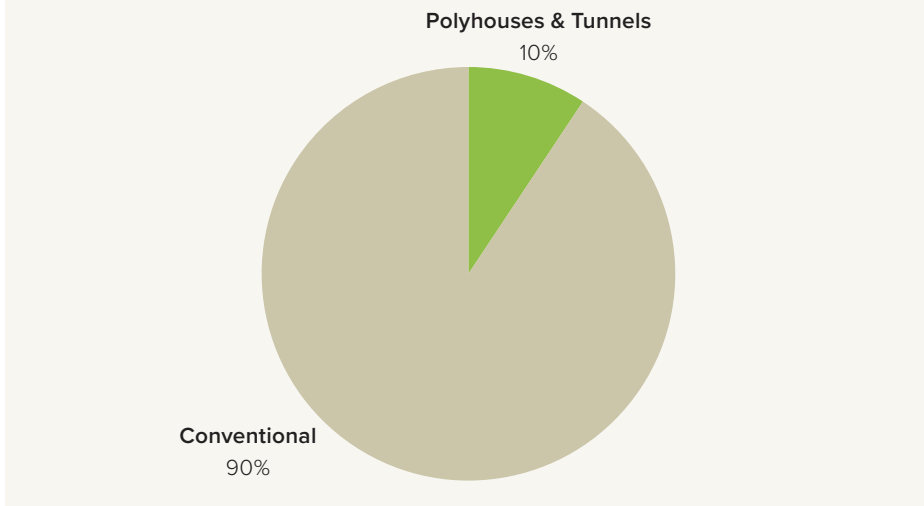
2022/23 FRESH STRAWBERRIES SEASONALITY BY STATE

State	Volume (t)	Value (\$m)	Jul	Aug	Sep	Oct	Nov	Dec	Jan	Feb	Mar	Apr	May	Jun
Queensland	27,646	\$180.2	High	High	High	Medium	Medium	None	None	None	Low	Low	Low	Low
Victoria	23,368	\$152.3	None	None	None	Medium	High	High	High	High	High	Medium	Medium	Medium
Western Australia	6,912	\$45.1	High	High	High	Medium	Medium	Low	None	None	None	None	None	Low
South Australia	4,608	\$30.0	None	Low	Low	Medium	High	High	High	High	High	Medium	Medium	Medium
Tasmania	2,633	\$17.2	None	None	None	Medium	Medium	High	High	High	Medium	Medium	Medium	None
New South Wales	658	\$4.3	None	None	None	Medium	Medium	High	High	High	Medium	Medium	Medium	None

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

Source: SAI

2022/23 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 10%** and **Conventional 90%**.

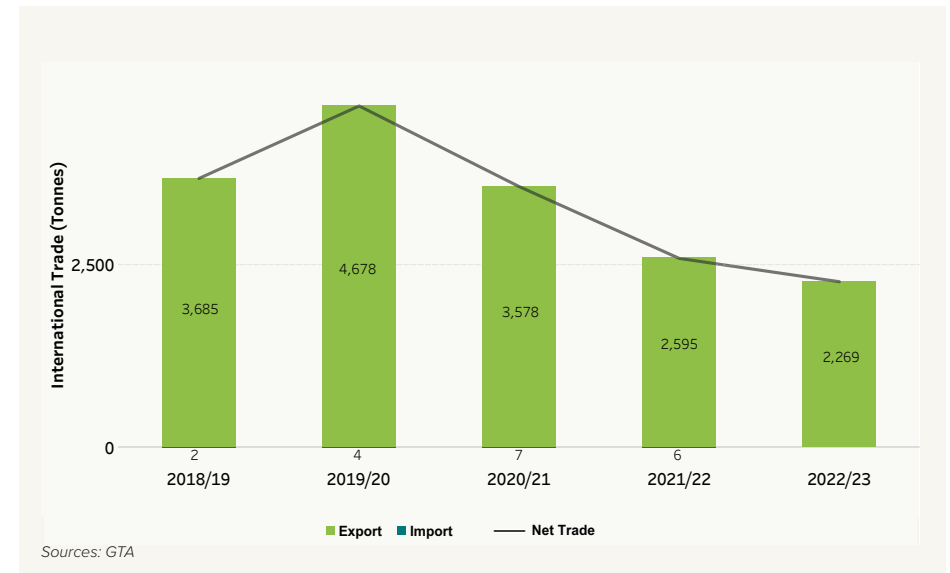
2022/23 FRESH STRAWBERRIES PRODUCTION SYSTEM BY STATE

State	Polyhouses & Tunnels			Conventional		
	Hectares (Ha)	Volume (t)	Value (\$m)	Hectares (Ha)	Volume (t)	Value (\$m)
New South Wales	4	64	\$0.5	-	594	\$3.8
Victoria	151	2,265	\$16.8	-	21,102	\$135.6
Queensland	179	2,680	\$19.9	-	24,966	\$160.4
Western Australia	45	670	\$5.0	-	6,242	\$40.1
South Australia	30	447	\$3.3	-	4,161	\$26.7
Tasmania	17	255	\$1.9	-	2,378	\$15.3
Northern Territory	0	0	\$-	-	0	\$-

Fresh Strawberries International Trade

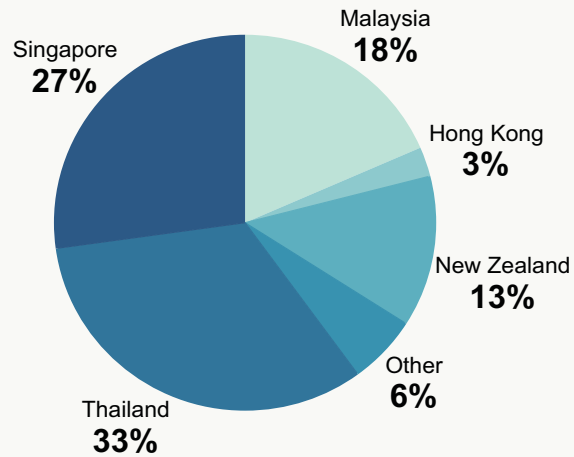
FRESH STRAWBERRIES INTERNATIONAL TRADE

Australia has traditionally been a net exporter of fresh strawberries. For the year ending June 2023, Australia exported **2,269 tonnes**. The exports and imports over the last five financial years are profiled in the graph below, where imports are counted as negative tonnes.





2022/23 FRESH STRAWBERRIES EXPORTS BY COUNTRY



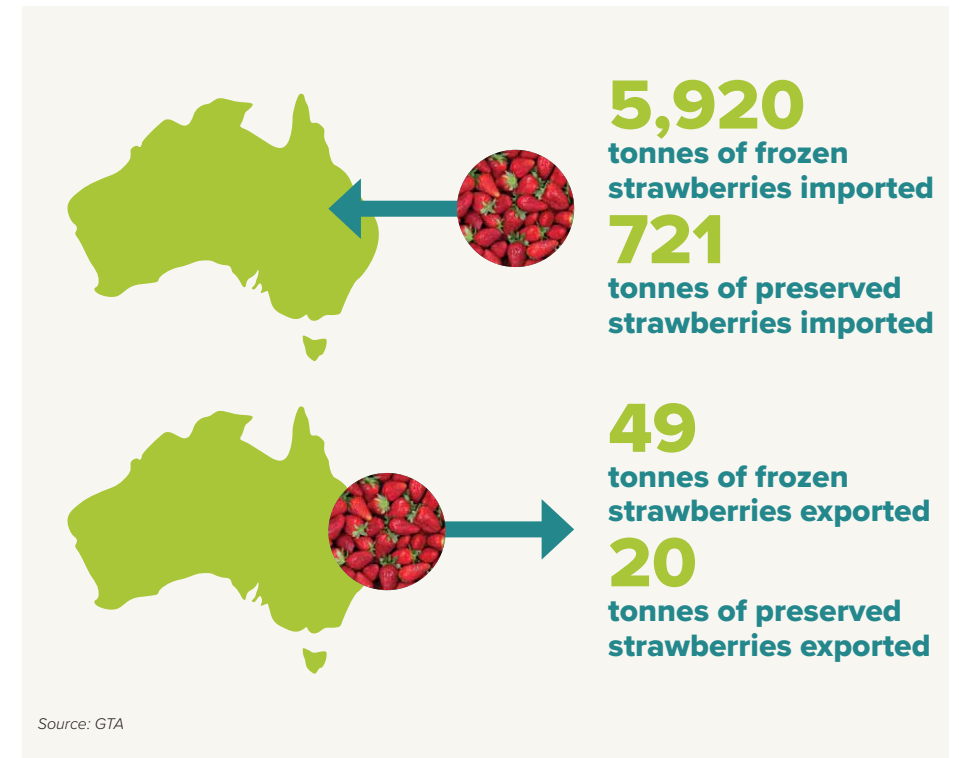
Source: GTA

For the year ending June 2023, **33%** of exported fresh strawberries were sent to **Thailand**, as profiled in the chart above.

Processed Strawberries International Trade

2022/23 PROCESSED STRAWBERRIES INTERNATIONAL TRADE

For the year ending June 2023, an additional **5,920 tonnes** of frozen strawberries were imported, while **49 tonnes** were exported. Australia also imported **721 tonnes** of preserved strawberries, while exporting **20 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	2021	2022	2023	Year Ending June	2021	2022	2023
Queensland	-	1	< 0.5	Western Australia	2,548	1,890	1,898
Victoria	< 0.5	5	-	Queensland	689	597	321
New South Wales	< 0.5	1	-	Victoria	59	29	42
South Australia	6	-	-	New South Wales	279	70	7
Other	< 0.5	-	< 0.5	Tasmania	-	-	1
TOTAL	7	6	0	Other	2	8	-
				TOTAL	3,578	2,595	2,269

FRESH STRAWBERRIES IMPORTS AND EXPORTS BY COUNTRY

Imports by Country (Tonnes)				Exports by Country (Tonnes)			
Year Ending June	2021	2022	2023	Year Ending June	2021	2022	2023
India	-	-	< 0.5	Thailand	891	682	746
Spain	3	5	-	Singapore	783	552	617
Sth. Korea	< 0.5	1	-	Malaysia	519	429	419
Japan	< 0.5	< 0.5	-	New Zealand	584	449	296
Chile	3	-	-	Hong Kong	340	135	58
Other	< 0.5	< 0.5	< 0.5	Other	461	348	134
TOTAL	7	6	0	TOTAL	3,578	2,595	2,269

Source: GTA