IRO 2021 Australian Presentation

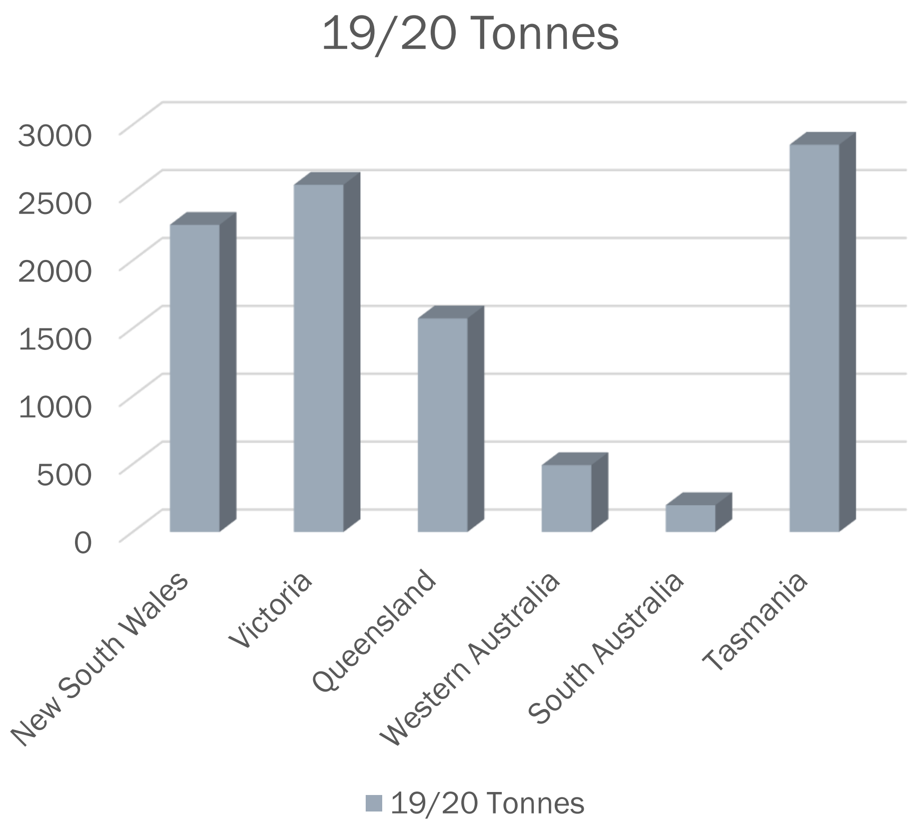
12TH IRO WORLD CONFERENCE POLAND

Australian Berry Production Overview

- *Fresh berry fruit production dominates the grower profile over processing fruit production.*
- *Most Rubus fruit is produced on the Eastern Seaboard of Australia*
- *9932t of Rubus was produced in 2019/2020 and 92% of this was for Fresh Supply*

Sources: 2019\2020 Australian Horticulture Statistics Handbook

Major Australian Production areas



Source: BA

Main Varieties

- Driscoll's raspberries and recently blackberries
- Berry Jewel, Gem, other proprietary varieties from other breeding programs
- Some older varieties grown especially for U-Pick

New Peak industry body:

berries AUSTRALIA

Combining Strawberries, Blueberries and Raspberry and Blackberry Australia.

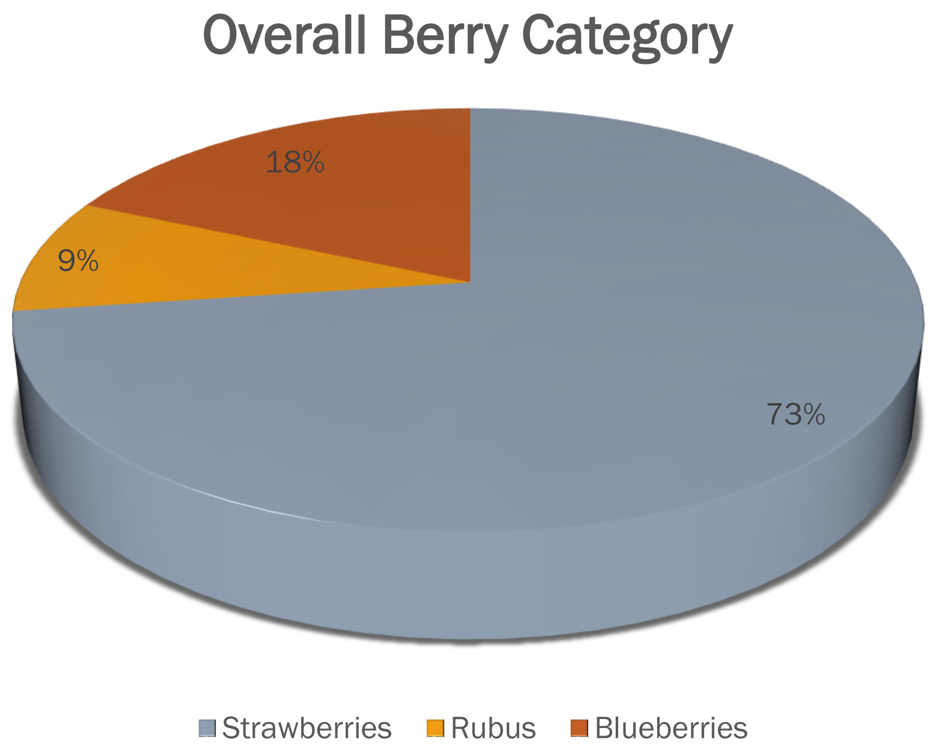
To seek to implement more united focus on areas that affect all soft berry fruit.

Pooling of resources to provide industry wide approach to all aspects of growing and marketing Australian berryfruit.

Excellent website, grower meetings and conferences.

[Berries Australia – Welcome to Berries Australia – the body representing the Australian berry industries]

Overall Berry Category



Total overall production

Strawberries - 82,310 t
Blueberries - 20,783 t
Rubus - 9,932 t

Total value in AUD of $1,041 m

Similar production from previous years, with an expectation this will be similar or slightly less due to COVID for the 2021 year.

Fresh Supply Metrics

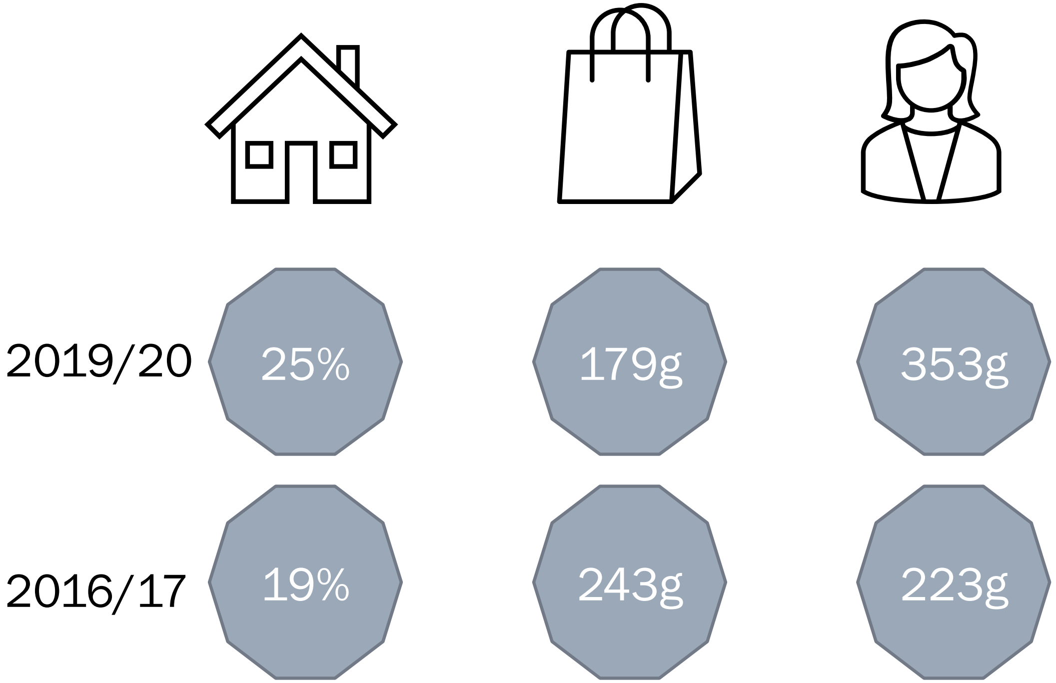
Year Ending June 2020	2018	2019		2020	
	Value	Value	%YOY	Value	%YOY
Production (t)	6,922	9,478	+37%	9,932	+5%
Production ($m)	$175.1	$207.5	+18%	$216.0	+4%
Fresh Supply	6,391	8,825	+38%	9,100	+3%
Supply per Capita (kg)	0.26	0.35	+37%	0.35	+4%
Fresh Export Volume (t)	3	8	>100%	13	+55%

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

Consumer Metrics

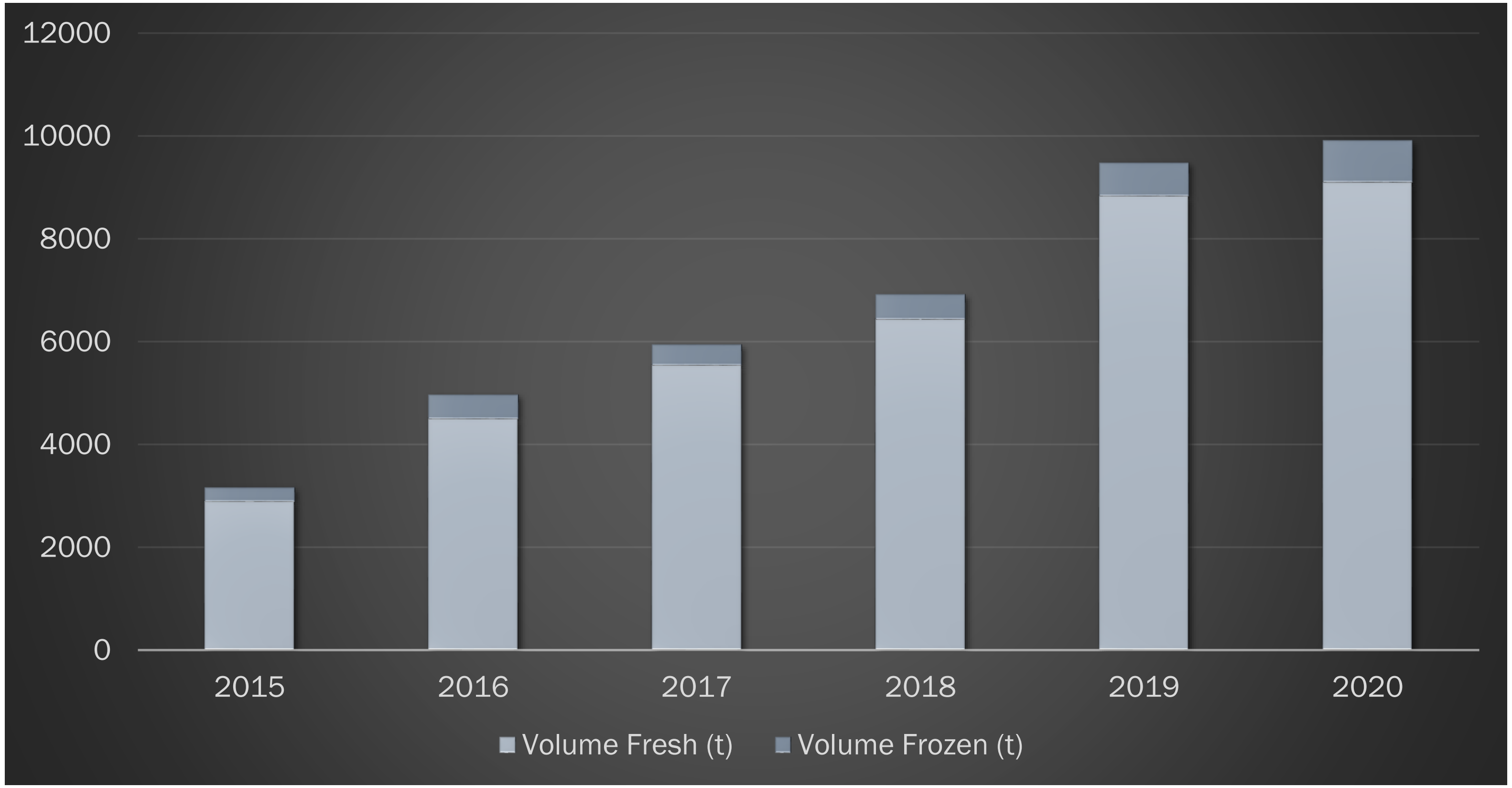
25% of Australian households purchased fresh rubus berries, buying an average of 179 g per shopping trip.

The supply per capita was 353 g, based on the volume of supply.



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

Processing Berries in Australia



92% of production is for fresh fruit.

Processing mostly tends to be the 2nd grade fruit from fresh varieties.

Only very small amounts grown directly for processing.

Imported Processed Rubus Berries

At the end of June 2020 there had been **9,009** tonnes of frozen rubus berries imported into Australia.

This is the same volume as was produced locally for fresh supply.

This is compared to **41** tonnes of frozen rubus berries exported out of Australia.

Frozen Imports

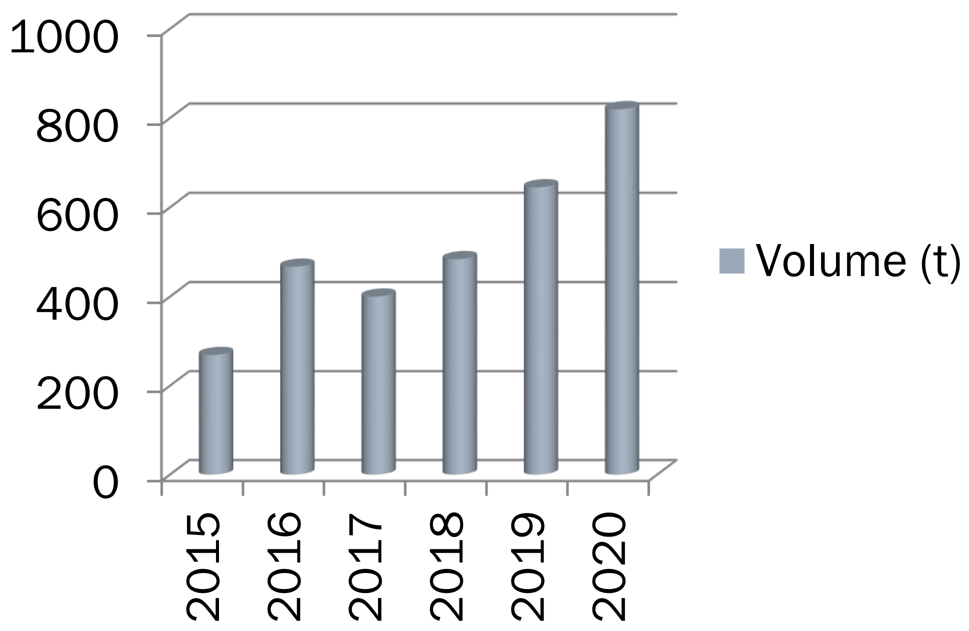
- 9,009t
- $40.9m
- Approx. $4,500 per t

Frozen Exports

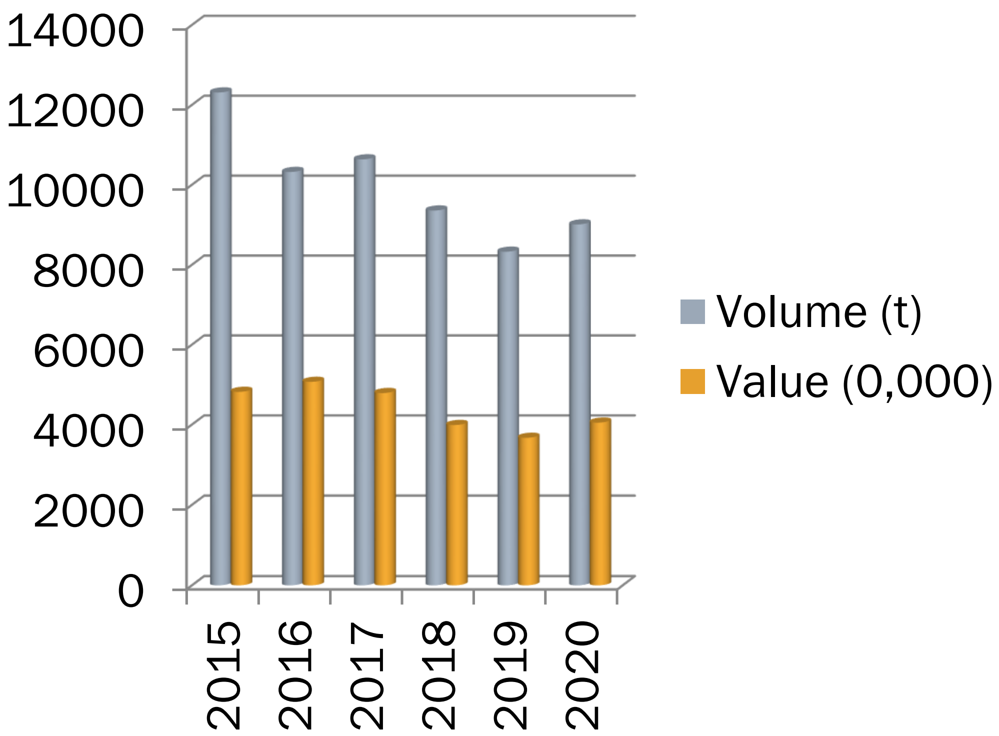
- 41t
- $243,612
- Approx. $5900 per t

Frozen Local Production versus Frozen Imports Vol (Metric TONS) for year end June 2020

LOCAL FROZEN PRODUCTION



RUBUS FROZEN IMPORTS



Future Challenges

- COVID-19, whilst under control in Australia, has had an impact over the past year. As most production is for domestic fresh consumption sales have continued well, though it remains uncertain if this will continue.
- Labour, due to restrictions of international arrivals, has proven more difficult, especially for more remote areas. A reduction in backpackers and Pacific Island workers has made a more difficult harvest season.
- Increased growth in blackberry demand, although raspberries are still the predominant part of the rubus category.
- Continued desire for local frozen fruit has seen some increase in retail sales, though still very small. Focus upon seeking fresh export opportunities into South East Asia for the peaks of local production