



## Key facts:

- \* Raspberry production in Australia was **1,448 tonnes** for the year ending June 2013.
- \* **Tasmania** is the second largest producer of raspberries in Australia with **31%** of national production, behind **Victoria** with **54%**.
- \* Australian raspberry exports are negligible.
- \* Processed raspberry imports were **5,105 tonnes** for the year ending June 2013. Raspberries are also imported in a mixed berry form, where they are combined with multiple other berry types.
- \* The current domestic retail market value of fresh raspberries purchased by consumers is **\$37 million**.
- \* Total fresh and processed raspberry consumption per capita for 2012/13 was **0.27 kg**.

## Distribution channels and markets

Locally produced and imported raspberries are distributed into export, processing, local retail and foodservice distribution channels, as outlined in Figure 1.

### Supply chain flow to market

Local Australian raspberry production was **1,448 tonnes** for the year ending June 2013. This was supplemented with a further **5,105 tonnes** of imported product.

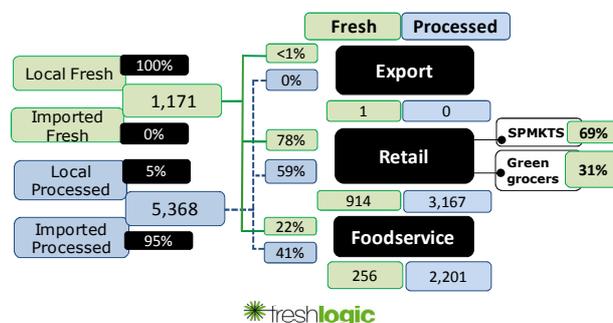
Fresh raspberries do not currently have import access. In addition to processed or frozen raspberries, raspberries are imported in a mixed berry form where they are combined with other berries e.g. blackberries, mulberries, loganberries, currants and gooseberries.

Chile is currently the primary source of raspberry imports into Australia, accounting for 53% of the total processed imports, followed by China with 20%.

Overall, 18% of total domestic supply (or 1,171 tonnes) was used in a fresh form. About 78% of sales of fresh raspberries were distributed through the retail channel, while the remainder went through the foodservice channel.

Approximately 5,368 tonnes of raspberries (or 82% of total domestic supply) was used in a processed form, of which 5,104 tonnes was sourced from imported product. There were also 2,535 tonnes of frozen mixed berry imports which may contain some raspberries, which have not been included in this number. The retail channel was the largest buyer of processed raspberries, generating 59% of sales. However the foodservice channel was also a large buyer, generating 41% of sales, as seen in Figure 1.

Figure 1 Raspberry supply chain (tonnes)



### Retail channel

The retail channel distributed 914 tonnes of fresh raspberries, or 745 tonnes after waste and shrinkage. This generated an annual retail value of \$37 million, at an average retail price of \$50.30 per kg.

All product is sold in 125 g punnets, which is one of the smallest pre-packs available in the Australian fresh retail market. This use of portion size has reduced retail waste, and potentially attracted more consumers and captured significant additional value.

While raspberries are generally available year round, the sales of raspberries are seasonal and reflect the differences in supply volumes between the peak summer/autumn season, and the winter/spring season when volumes are lower. This results in sizeable fluctuations in price which can typically range from \$40 to \$60+ per kg throughout the year.

The total retail sales volume for frozen processed product is

significantly larger than fresh sales and would suggest that this product form has been widely accepted by consumers. This is supported by the extended shelf life and portion control provided with frozen product.



### Retail promotional activity

Compared to other fruit, raspberries have a relatively low level of promotional activity. Further, retailer promotional activity is dominated by advertisements for frozen product, with few, if any, advertisements for fresh raspberries. In 2012/13, there were 18 promotions for fresh raspberries.

### Foodservice channel

Approximately 38% (or 2,457 tonnes) of raspberry sales are made through the foodservice channel. Sales were dominated by the processed product form which accounted for 2,201 tonnes (or 90%), compared to those in a fresh form which accounted for 256 tonnes.

The use of raspberries in foodservice ranges widely and includes; desserts, muffins/cakes, juices and breakfasts.

### Processing Channel

Processed raspberries are used in manufactured goods such as desserts, as well as being sold as a frozen product through retail and foodservice channels.

The growth in sales of frozen berries over the past few years would suggest that this form of product has been welcomed by consumers. Inconsistencies in supply volumes of locally grown product has led processors to rely more heavily on imported frozen product.

## Consumers

### Per capita consumption

The per capita consumption for the year ending June 2013 of fresh raspberries purchased through retail for home consumption is 0.03 kg. The per capita consumption of fresh raspberries purchased and consumed in foodservice away from home is 0.01 kg, and for processed raspberry products purchased through retail for home and foodservice consumption it is 0.23 kg. Therefore the total raspberry consumption per capita is 0.27 kg.

### Consumption profile

The main consumption occasion for raspberries is centered around dessert, as seen in Figure 2. This may be as a fresh product or as part of a cooked dessert. Raspberries are also suited to snacking occasions but are limited by their portability, meaning that berries are more likely to be consumed at home as a grazing snack.

Berries are a popular addition to smoothies and this use has become a large driver of frozen product sales. Berries, including raspberries, may also be added to a breakfast meal e.g. with muesli and yoghurt, or waffles and pancakes.

Figure 2 Use profile

|                               |                      |           |   |
|-------------------------------|----------------------|-----------|---|
| Raspberry consumption profile | Breakfast            | ✓         |   |
|                               | Lunchbox             |           |   |
|                               | Mobile snack         | ✓         |   |
|                               | Grazing & platters   | ✓         |   |
|                               | Spread               |           |   |
|                               | Salad                | ✓         |   |
|                               | Beverage             | ✓         |   |
|                               | Cooked component     | ✓         |   |
|                               | After dinner dessert | ✓         |   |
| Minor use                     | ✓                    | Major use | ✓ |

## Production

Australian raspberry production volumes have grown rapidly in recent years, with expectations of further growth. Victoria is the largest producer of raspberries for the domestic market, producing 54% of the total production, as seen in Figure 3. The main production regions in Victoria are based in south west Victoria including the Yarra Valley and the Dandenong Ranges.

There has been some expansion of the industry in south western Queensland and northern New South Wales. This has been driven by plans to extend the seasonal availability of raspberries for the domestic market. This expansion has been supported by an increase in the adoption of protective cropping practices. While significant costs are involved in this capital expansion, it provides growers with greater certainty around quality and yield outputs.

Australian raspberry production involves several large growers which operate in multiple locations and supply the majority of production, as well as a large number of smaller growers, many of whom are operating mixed enterprises with a variety of products. There are approximately 140 commercial growers in Australia with farms ranging in size from 2 hectares to 40 hectares.

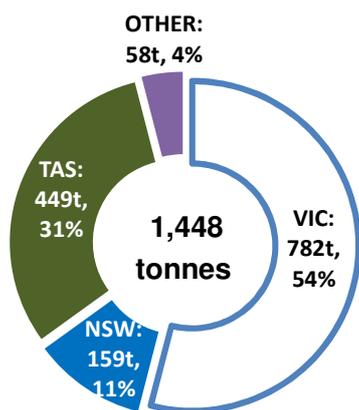
## Tasmanian Production

Tasmania is the second largest producer of raspberries in the domestic market, supplying 31% of national production. One large grower accounts for approximately 80% of Tasmania's fresh raspberry volume from two sites, and has further plans to expand plantings in coming years.

The majority of fresh volume is being produced in the northern Midlands around Dunorlan and Deloraine, and in the northwest around Ulverstone. A significant volume of raspberries is being grown in the Derwent Valley for the processing market. There are also a large number of smaller growers spread throughout the state who supply to niche markets within the state as well as on the mainland. These niche markets include local independent retailers and farmers markets.

The cool temperate climate of Tasmania is beneficial for growing raspberries. The cooler conditions favour better quality fruit with a longer shelf life.

**Figure 3 National production by state**



## International trade

Australia imported 5,105 tonnes of processed (frozen or pulped) raspberries in 2012/13. These imports are used in manufactured goods (e.g. jams and desserts) as well as in frozen retail products. The bulk of imported product is arriving from Chile (53%), China (20%) and Serbia (10%).

Exports and imports of fresh product are minimal due to the highly perishable nature of the fruit.

## Seasonal supply

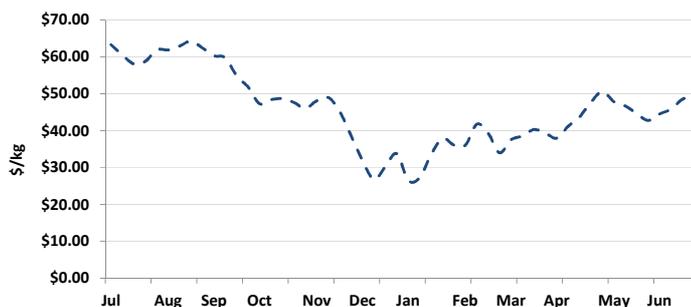
Fresh Australian raspberries are available all year round, however the peak growing seasons are summer and autumn, when there are higher volumes available, and generally lower prices. The majority of this production is sourced from southern states, mainly Victoria and Tasmania. In winter and spring, fruit is generally supplied from northern New South Wales and south-western Queensland. As illustrated in Figure 4, volumes during winter and spring attract much greater value.

### Wholesale

Wholesale prices are profiled in Figure 4 using state central market prices for red raspberries that are weighted by population, to calculate a national price.

For the year ending June 2013, raspberries had a wholesale price range of \$26.36 to \$64.33 per kg, with an average of \$45.84 per kg.

**Figure 4 Average raspberry wholesale price**



## Outlook for sector

- The raspberry industry is experiencing rapid growth of production volumes and an extension of seasonal availability.
- There has been a shift towards more undercover production for raspberries destined to be sold in a fresh form.
- The sales volumes of frozen raspberries are significantly larger than that of fresh raspberries. This is attributed to the convenience, value and versatility of frozen product.
- Imports are competing directly with locally produced frozen product.
- The large variation in the price of fresh raspberries during the year inhibits their regular inclusion on home menus. Extended availability may flow on to reduce variations and increase consumption overall.
- The 125 g punnet has worked for the supply chain and has been accepted by consumers. It also provides a packaging platform to convey usage and brand messages.
- At around \$6.00 for a 125 g punnet, raspberries are amongst the highest value fruits. Consistent quality needs to be ensured to maintain repeat purchases. There is minimal promotional support for fresh and frozen product. There may be potential to incorporate cross-promotional activity (e.g. cereal, yoghurt and ice-cream).

## Data sources

- Mealpulse™ consumer panel Freshlogic
- Adwatch™ retailer promotional data Freshlogic
- DFAT import and export data
- Wholesale market pricing data
- ABARES
- ABS
- Freshlogic ThruChain™ model

## Further information

1. Raspberries and Blackberries Australia

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3. Tasmanian Institute of Agriculture (TIA)

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