

Open for business

Horticulture in the Murraylands and Riverland



Internationally recognised as the **food bowl of South Australia** and certified as a Pest Free Area, the Murraylands and Riverland is renowned for its ability to produce abundant and high-quality, fruit, nuts, vegetables, wine grapes, and perfect balance food products. Our fresh, pristine food and beverages are already enjoyed throughout Australia and overseas, with growing export demand.

Current production volumes and values

FIGURE 1:
Fruit and Nuts

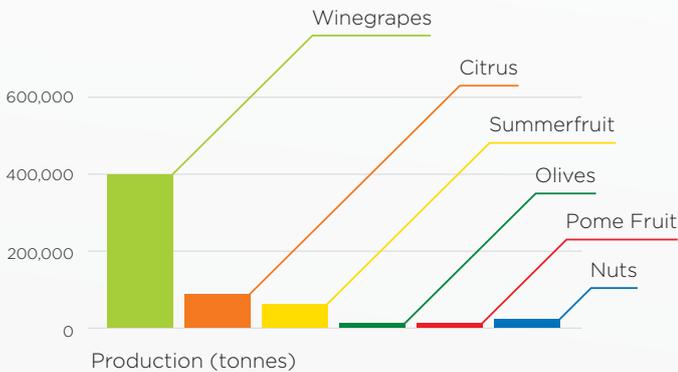


FIGURE 2:
Fruit and Nuts

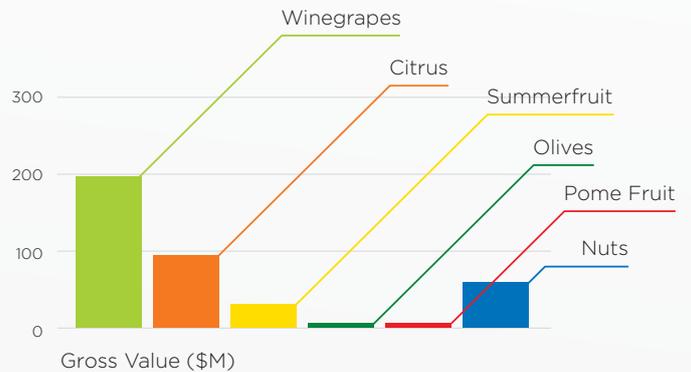


FIGURE 3:
Vegetables

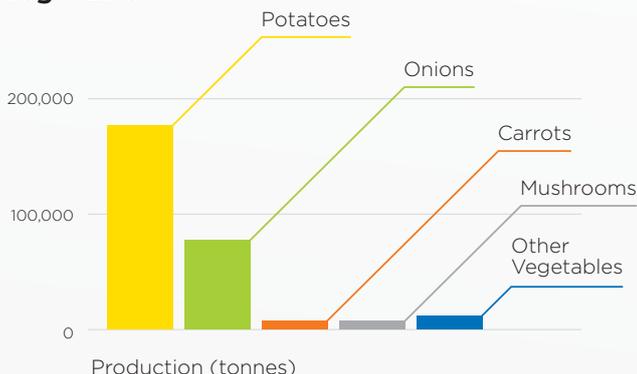
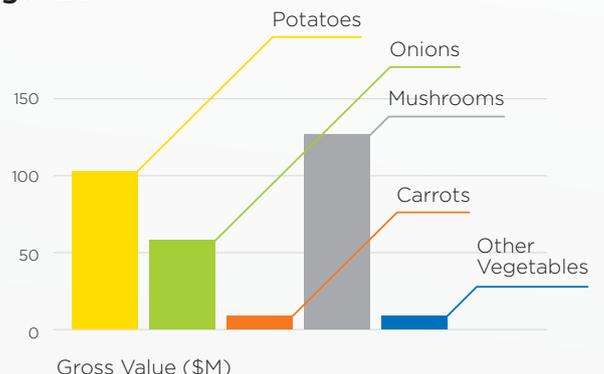


FIGURE 4:
Vegetables





Fresh Fruit

Our summer fruits are made up of apricots, cherries, nectarines, peaches, plums and prunes.

South Australia produces more than 10,000 tonnes of summer fruit annually. The Murraylands and Riverland produce more than 78% of SA's summer fruit crop. This includes 97% of the State's apricots, 98% of the State's nectarines, 98% of the State's peaches for processing, 94% of peaches for the State's fresh market, and 82% of the State's plums.

Our region's summer fruit industry is centralised in the Riverland, a designated Pest Free Area Zone, where it produces 2,913 tonnes of apricots, 2,409t of nectarines, 1,985t of peaches (66% for fresh market and 34% for processing), 43t of cherries and 748t of plums.

Murraylands and Riverland Industry Scale

Product	Number of Enterprises	Production (tonnes)
Nectarines	90	2,409
Peaches	123	1,985
Plums and Prunes	103	749
All other stone fruit	16	nec

Exports

Major summer fruit export markets include Hong Kong, United Arab Emirates (UAE), Singapore, Malaysia and China.



Pome Fruit: Apples and Pears

The apple and pear industry in the Murraylands and Riverland is also centralised in the Riverland, a designated Pest Free Area Zone. The region produces more than 6,300 tonnes of apples and 203t of pears. The region has 24 enterprises growing apples and 29 with pears.

Import and export

Apples

Import competition is an important factor in the juice market, resulting in low prices attained by growers for fruit that is only suitable for processing. Only about 1.5% of the fresh apple crop is exported overseas. No fresh apple imports occur at present.

In 2018, Australian apple exports are limited to high value Pink Lady apples to the United Kingdom and commodity style apples are exported to some Asian markets.

Pears

The pear industry is subject to import competition from China, although the level of imports remains low.

In recent times the industry has exported approximately 4% of its pear production.



Citrus

The South Australian citrus industry based in the Riverland, a designated Pest Free Area Zone, contributes 30% of the national citrus fruit crop. Citrus fruit is the biggest component of Australia's fresh fruit export commodity with a growing value of around \$200 million. Citrus fruits are also the biggest fresh fruit export for South Australia totalling around \$65 million worth of exports annually to around 40 export destinations across the world. The industry has a farm-gate value of approximately \$90m and a value of more than \$350m to the South Australian economy.

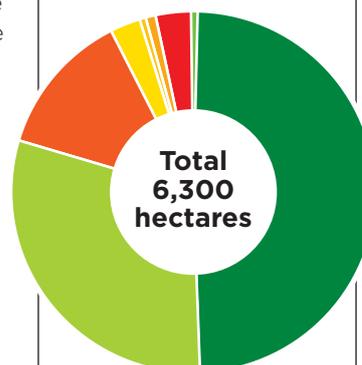
Comprising approximately 2.5 million trees on 6,300 hectares, the industry is made up of about 400 growers who produce 200,000 tonnes of citrus annually.

Murraylands and Riverland production

Producing almost all of South Australia's citrus, the Riverland is the home of our State's citrus industry with a gross value of \$93 million. Oranges are the largest citrus product produced, with more than 57m kg of Navel and almost 27m kilograms of Valencia produced in 2010-11.

The region has more than 2.8m fruit trees and a reported 376 businesses with orchards. Figure 5 shows the relative production of the various citrus varieties.

FIGURE 5



Exports

The Australian citrus industry is one of the largest fresh fruit industries nationally, and certainly the largest fresh fruit exporter, with a peak export volume of 170,000 tonnes and a value of \$190m. Australia exports citrus to 32 countries with Japan and Hong Kong strengthening as Australia's main export destinations.

The value of South Australian citrus exports is approximately \$66m. This represents half of South Australia's horticultural exports.



Olives

There are more than 60 olive producers in the Murraylands and Riverland who produce greater than 5,400 tonnes of olives from more than 370,000 trees, with a gross value of \$7 million. This represents approximately 55% of total South Australian olive production. Much of the region's olive industry is clustered around Coonalpyn, where there is access to underground aquifers. There is also a smaller production area in the Riverland.

Exports

Australia exports more than 150t of table olives each year, with a total value of close to \$1m. The average value of exports was \$6.34 per kilogram, with the major export destinations being New Zealand, Spain, UAE, and smaller exports to Asian markets.

Olive oil exports amount to 3,800 tonnes, with an average value of about \$6.80 per kg and major markets include USA, New Zealand, Japan and China.

The major export markets for olives include New Zealand, China, Greece, Fiji, and Japan. The average value of exports was recently recorded at \$3.83 per kg.



Carrots

South Australian production

Total production in South Australia is about 28,925 tonnes with a gross value of \$25.6 million. South Australia produces almost 13% of the Australian carrot crop.

Murraylands and Riverland production

The Murraylands and Riverland produces 34% of the South Australian carrot crop. There are four major carrot producers in the region with a total of 285 hectares in production yielding 9,896t, with a gross value of \$8.8m.

Exports

Australian exports are exclusively fresh, with markets developed in the Pacific region (Singapore and Malaysia). Australia is benefiting from the development of new markets in the Middle East such as UAE and Saudi Arabia.



Mushrooms

South Australian production

There are five commercial mushroom growers in South Australia. Of this crop, 60% is sold locally and approximately 40% is exported to Victoria and Western Australia.

The farms are all family owned, employ around 250 people and generate \$47 million in farm gate revenue each year for the State's economy. SA's share of this production is 2,789 tonnes with a gross value of \$19.3m.

Murraylands and Riverland production

The Murraylands and Riverland has one Mushroom Producer producing almost 132t a week of fresh mushrooms purely for domestic consumption. This is about 80% of South Australia's total mushroom crop.



Potatoes

Total potato production in Australia stands at 1.128 million tonnes with a gross value of \$552.9 million. South Australia is the nation's largest potato producer – producing more than 80% the nation's fresh washed potatoes.

South Australian production

The SA potato industry employs more than 2000 people in approximately 80 businesses, of which approximately 50 are growers. There are more than 11,900 hectares under cultivation. To support the production there are eight key grower/washer/packing facilities nearby.

Major production zones are located around the Murraylands and Riverland, with 41% of the State's production comprising 5,149ha under cultivation. The region produces around 173,000 tonnes of potatoes with a gross value of \$104.6 million from 38 enterprises.

Exports

Australian potato exports totalled 48,730 tonnes for the year ending December 2011. This included 34,857t fresh product and 13,873t for processing.

Potatoes (fresh or chilled) are the second largest type of vegetable exports totaling more than 34,700t, with an annual value of \$28 million. The majority of Australia's potatoes (fresh or chilled) were exported to Asian countries – with Indonesia and South Korea being Australia's largest export destinations.



Onions

Total onion production in Australia is 330,847 tonnes with a gross value of \$274 million.

South Australian production

South Australia produces 34% of the Australian onion crop, more than 124 tonnes each year.

Murraylands and Riverland production

The Murraylands and Riverland produce 19% of Australia's total onion production and 48% of the South Australian onion production with 1,014 hectares under cultivation yielding 62,728t. This delivers a gross value of \$65.2m of onions from 19 major producers.

Exports

Approximately 30% (80,000t) of the Australian onion crop is exported on an annual basis. The total value of exports stands at about \$27m and has varied little over the last decade.

Australia's key export markets are Germany, Netherlands, Belgium, France and the United Kingdom. Product is also sent to Hong Kong, Japan, Indonesia, Taiwan and Malaysia.



Other vegetables

Our region produces smaller quantities of other premium vegetables, including 2,327 tonnes of lettuce, 5,182t of melons, 4,155t of pumpkins, and smaller quantities of tomatoes, sweetcorn, broccoli, cauliflower and capsicums.

These boutique varieties have growth potential.



Almonds

The Australian almond industry is one of the fastest growing in the world and Australia is now the second largest producer in the world, experiencing rapid expansion since 2001 with export sales in 2014 worth \$445 million.

South Australian production

South Australia produces 29% of the Australian almond crop. In the Murraylands and Riverland most almond production is located in the Riverland, a designated Pest Free Area Zone. There are two major processing facilities in the state, with the major one located in the Riverland.

Murraylands and Riverland production

The Murraylands and Riverland region currently produces 9,488 tonnes of almonds, almost 95% of the South Australian almond crop.

The Riverland is also home to almond processing facilities.

Exports

Despite an expanding domestic market, most of the new almond production will be exported. Almond exports are projected to be valued at about \$750m by 2020.

Australian almonds are exported to more than 40 countries. These exports include kernel, in-shell almonds, blanched meal and almond cuts. Top export destinations include India, Spain, Germany, New Zealand, France, United Kingdom, Hong Kong, and the Netherlands.



Viticulture: Wine Grapes

The Riverland, located on the banks of the Murray River – Australia's largest fresh waterway, features some of our nation's best-known wine brands, as well as the single largest winery in the southern hemisphere (*Berri Estates*). We are Australia's largest wine-producing region, and home to more than 25 wineries including internationally recognised and boutique brands. The Riverland produces approximately 60% of South Australia's wine by volume each year and more than two thirds of total production.

The region is known for high quality mass wine production, producing much of the source material for SA and other wineries across the country. Riverland grape growers and winemakers are also encouraging new styles and making full-bodied wines, which are increasing in global popularity.

The SA Wine industry has strict biosecurity controls in place to prevent pest incursions and is one of the few places in the world free of the vine destroying pest – Phylloxera.

Murraylands and Riverland production

The Riverland produces 99.5 % of the region's total wine grape production. The wine region sits in the 'Lower Murray' Geographical Indication Zones Map for wine grape production.

The Riverland is historically known for its bulk wine production, producing above average yields per area unit compared to the more 'boutique' regions. More recently the region has been recognised for its use of more unusual varieties which are found in small plantings across the Riverland. Currently Mediterranean varieties such as Montepulciano and Vermentino are showing great promise and winning industry accolades.

Exports

Australia ranks in the top four of the world's largest wine exporters in terms of value and volume (behind Italy, Spain and France). In recent years, bulk exports have exceeded bottled exports for the first time. This is a reflection, that more and more Australian exporters prefer to bottle in the country they're sold. Currently white wine exports sit at 276 million litres, red wine exports at 430m litres and sparkling wine exports at 13m litres.



Viticulture: Table Grapes

Australian table grape growers have earned a strong reputation as reliable suppliers of fresh sweet grapes of a high standard. In 2016, Australian table grapes were the leading horticulture export industry with close to 115,000 tonnes and \$400 million of Australian grapes exported to 52 countries around the globe. This equated to 65% of the total production.

The value of the industry continues to grow with increased demand in northern hemisphere markets from countries seeking fruit all year round. As a southern hemisphere producer, Australia is an ideal counter-seasonal supplier.

Asia is the primary export region due to its proximity to Australia. China, Hong Kong, Indonesia, Vietnam, Singapore,

Malaysia and Thailand account for over 80% of Australia's exported grapes.

There is significant scope for investment into the growth of this industry, with only two producers in the Riverland growing commercial quantities of table grapes (and exporting modest volumes), plus the proven suitability of the region to grape production.

We are open for business

There are significant opportunities within the Murraylands and Riverland region. Our products and services are some of the best in the world, and there is no doubt there is substantial demand for them in expanding international markets.

We offer a supportive business environment, with advice and assistance on the development and investment processes, government grants and tax incentives, workforce planning and development and industry networks.

Our team works with investors to connect them with investment-ready businesses, to assess potential development locations and opportunities, and to coordinate government approvals.

If you are considering importing product from our region or investing, contact us to maximise benefits to your business and to the region.

To find out more, contact us today!

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**Regional
Development
Australia**

MURRAYLANDS & RIVERLAND INC.
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