
APAI

Fruit Growers Victoria

August 2026



Governance and Competition Compliance

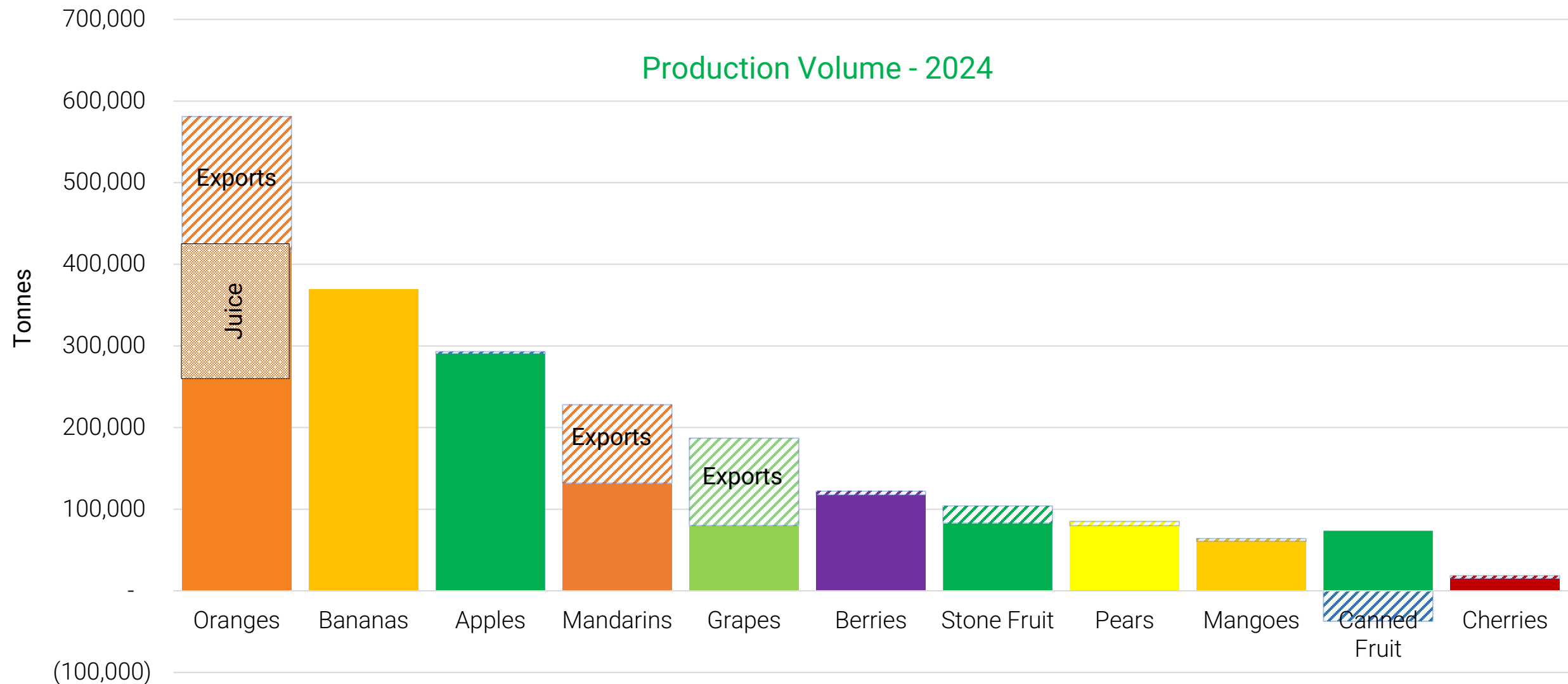
Permissible Topics

- ✓ Discussion about **historical data** and prior levels of production
- ✓ General discussion about **growing the overall market** to meet an aspirational level of demand
- ✓ Discussions about current legislative bills or political developments

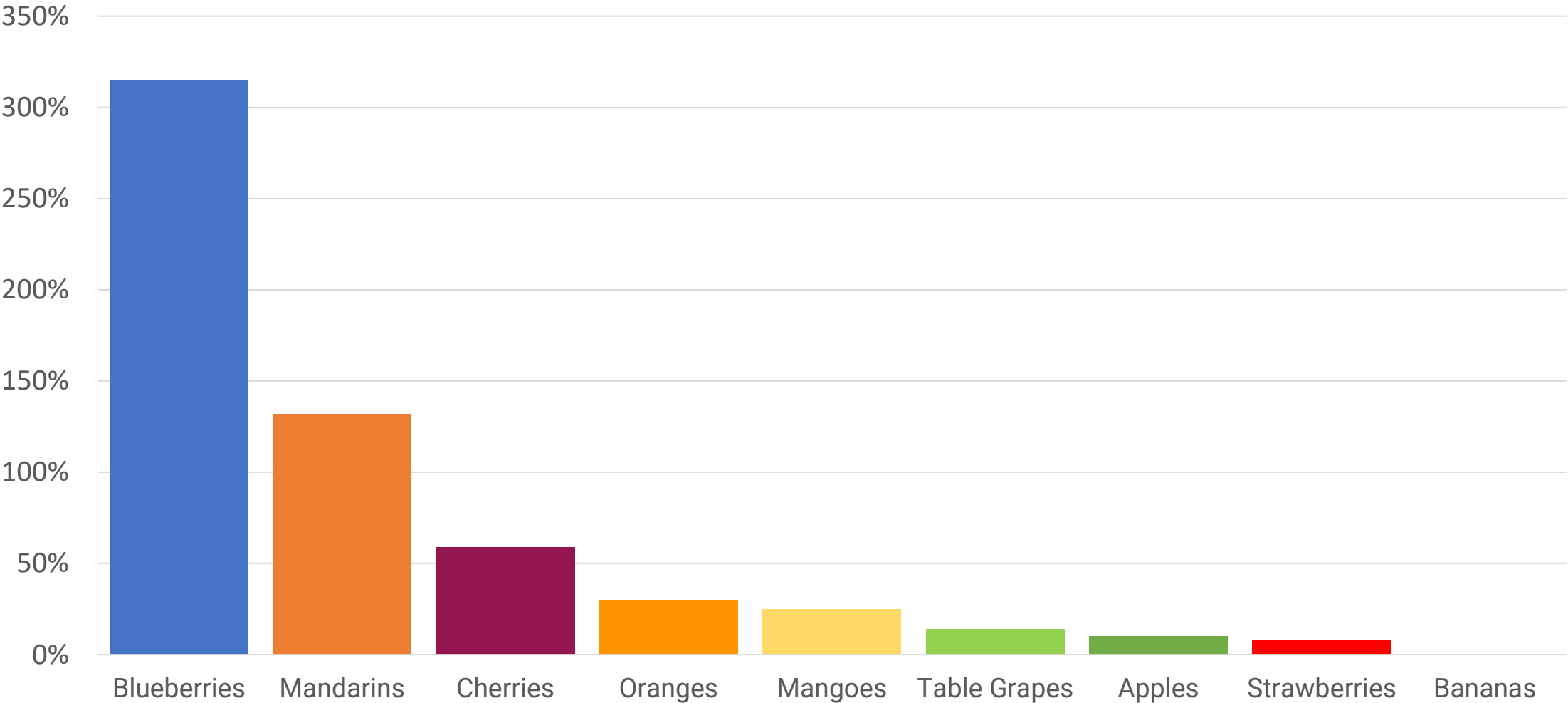
Impermissible Topics

- ✗ Discussion by competitors about **future intentions** in relation to their levels of production, supply, volumes, tenders or pricing in a market
- ✗ Discussion about the **specific volumes** that competitors plan to supply or acquire to meet **expected demand** or **promotional activities**, including at particular times or to particular customers
- ✗ Discussion about the **customers** that competitors plan to target or sell to in a market
- ✗ Coordination of **business strategies** between competitors in response to new legislation, policies or decisions
- ✗ Discussion about competitors' **pricing** or **contractual terms and conditions, or other competitively sensitive information**
- ✗ Suggestions or recommendations which are intended or could lead to **coordination of market behaviour** by competitors

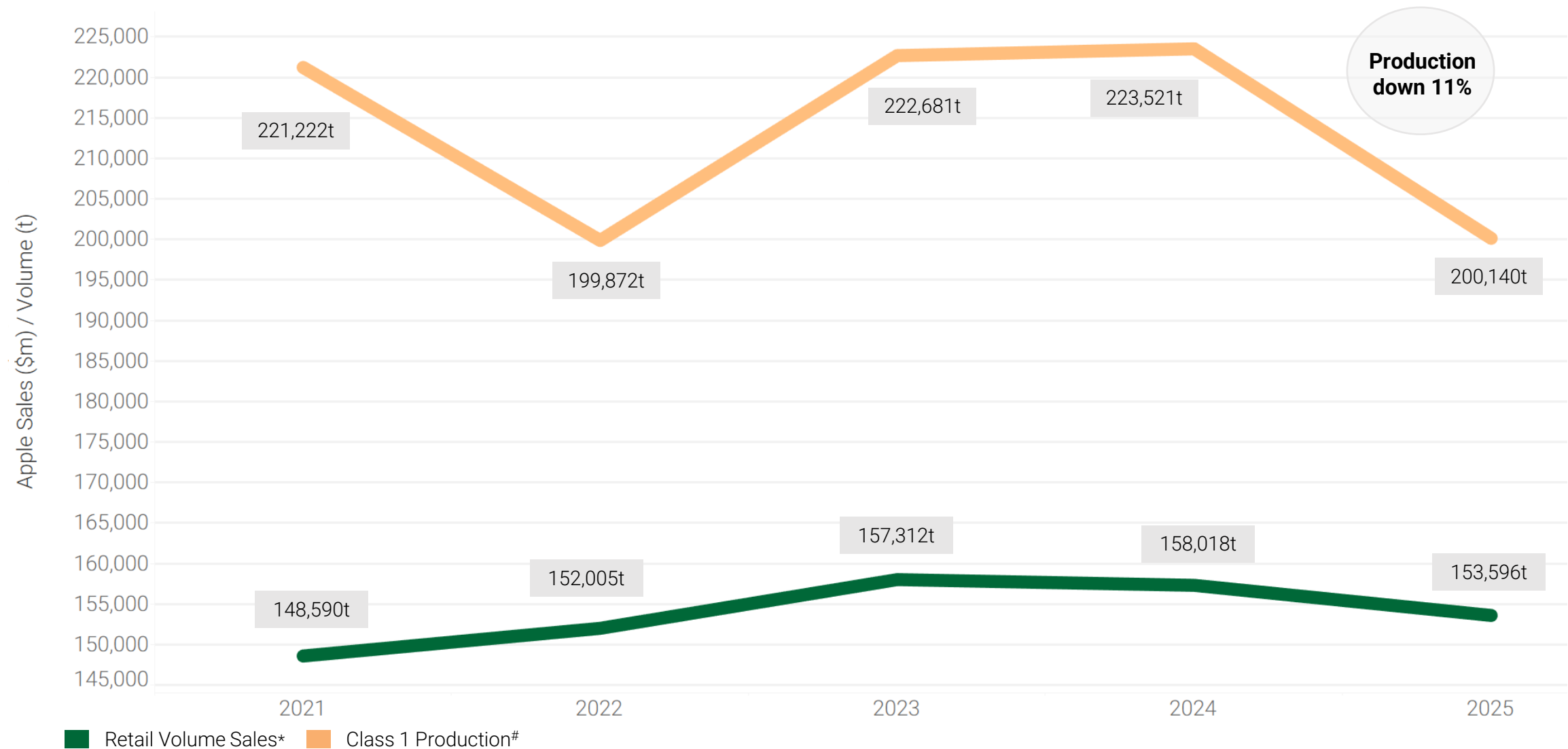
Big 3 – Bananas, apples and oranges



Changes – Last 10 years

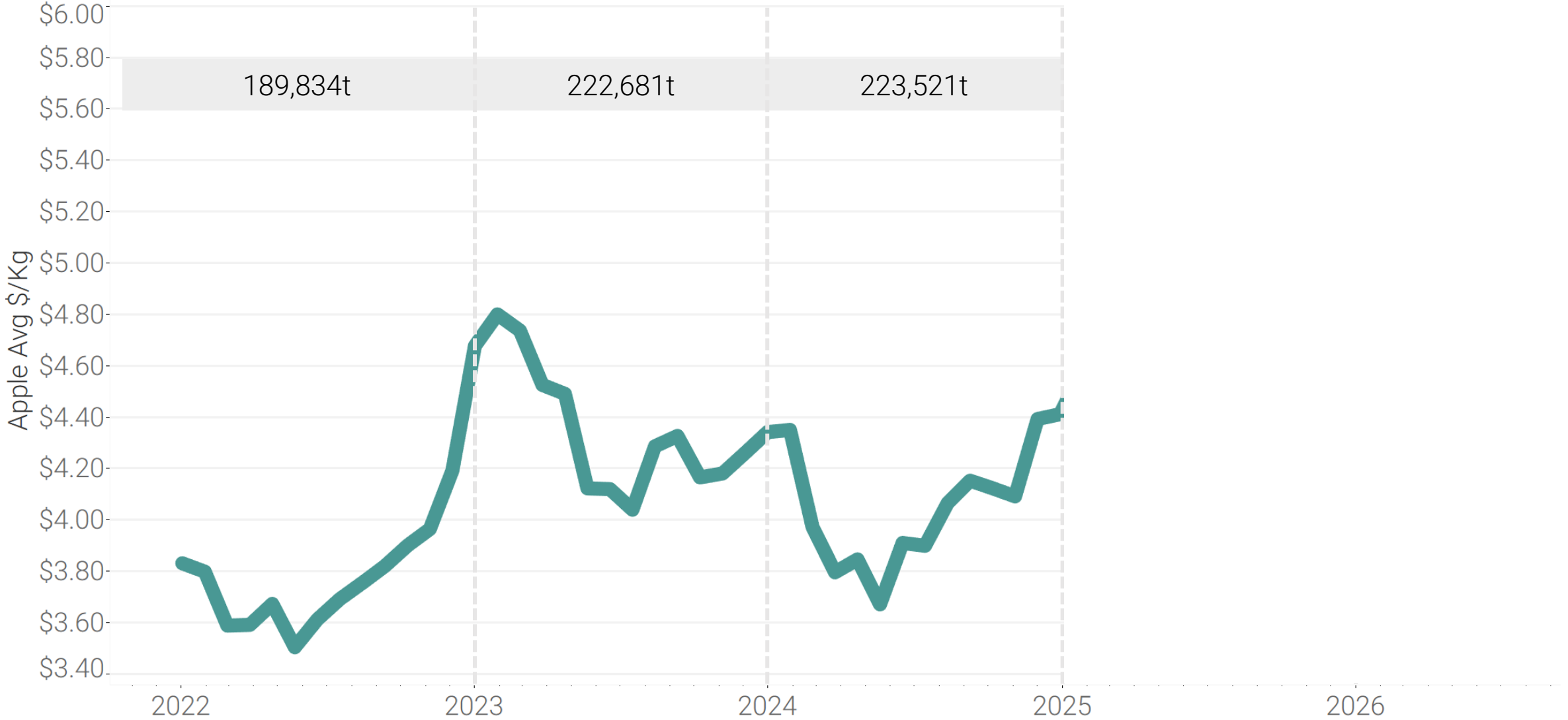


Apples – Last 5 years Supply v Demand

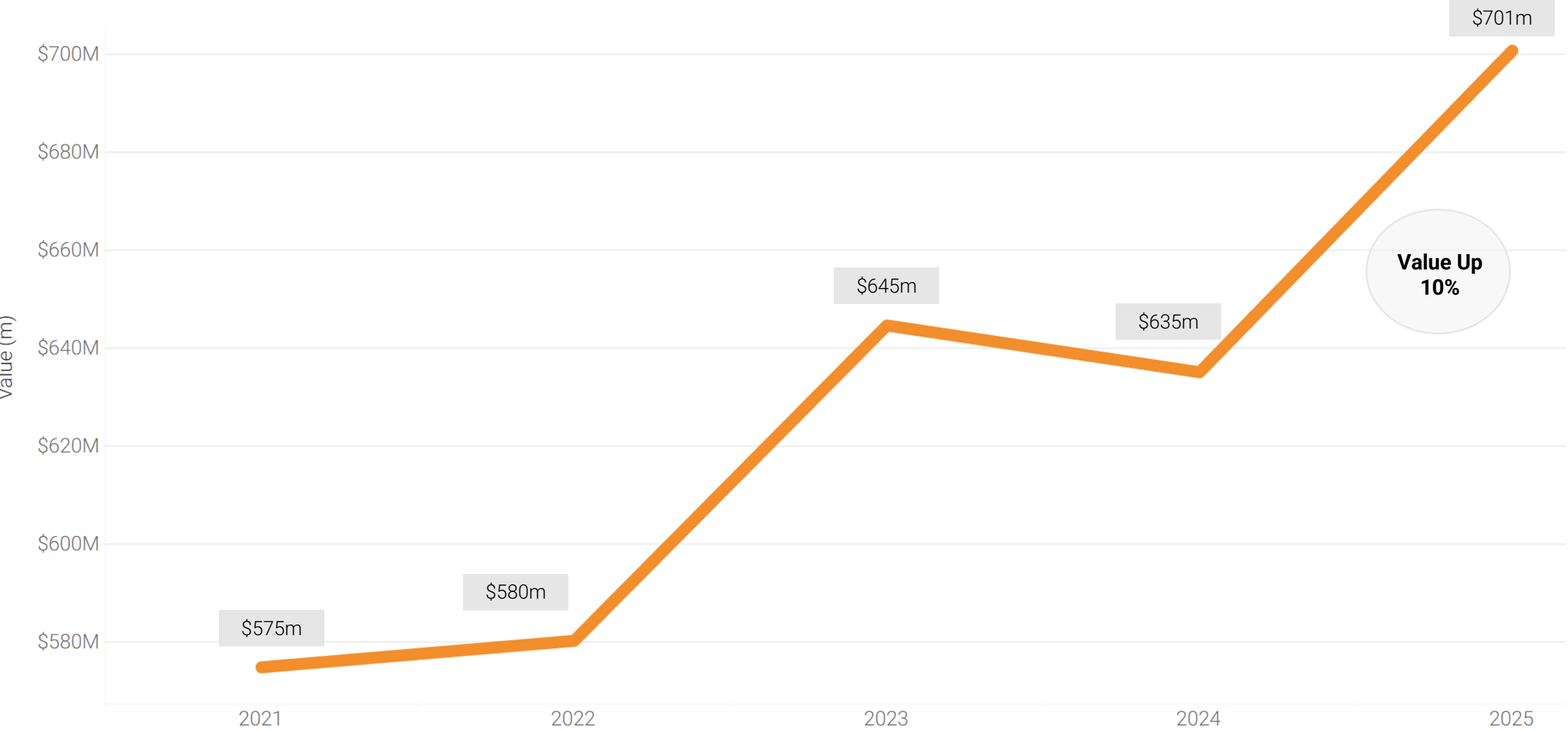


*APAL calculation based in part on data reported by NielsenIQ through its Homescan Service for the fresh fruit category to 12 July 2026, for the Total Australia market, according to the NielsenIQ standard product hierarchy. Copyright © 2025, Nielsen Consumer LLC. #Class 1 Production less wastage and ullage.

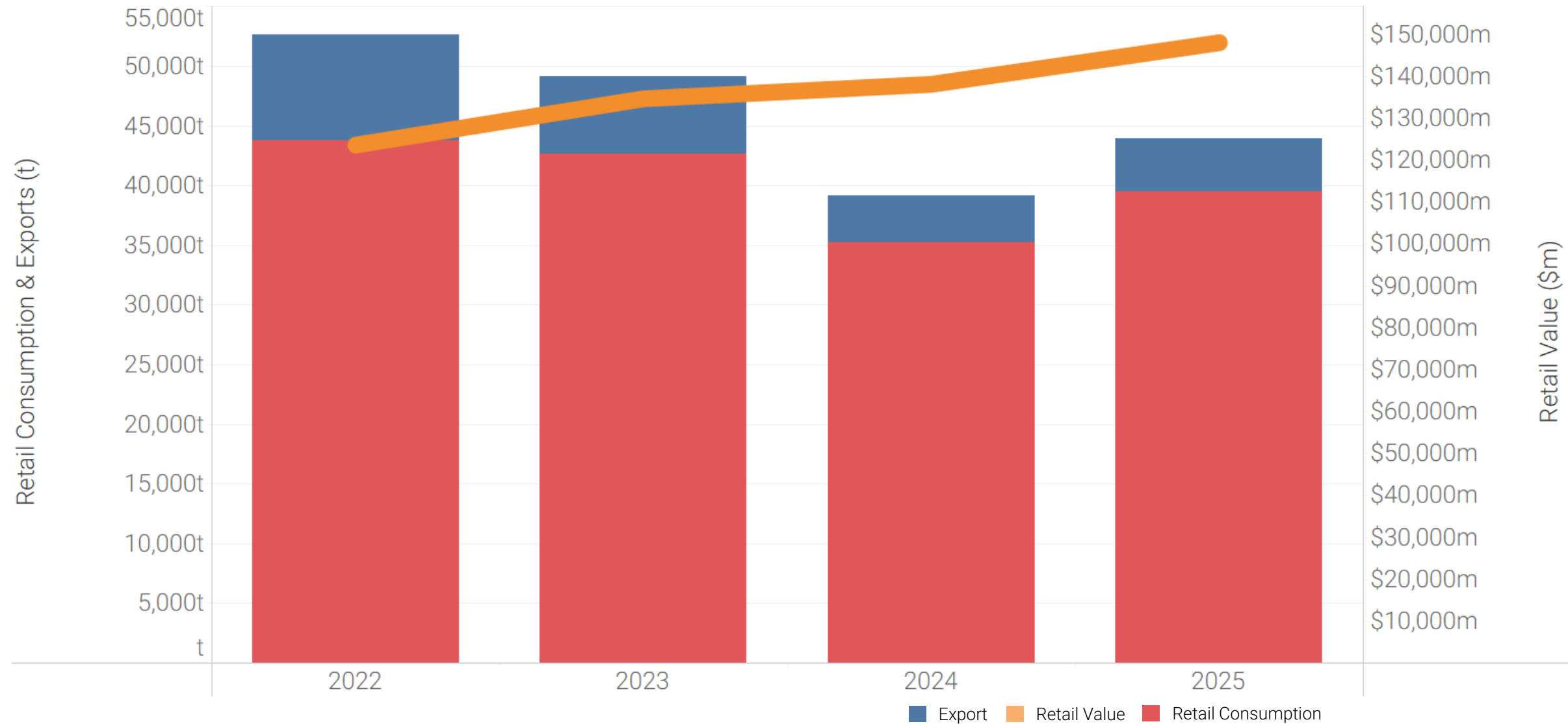
Retail Price



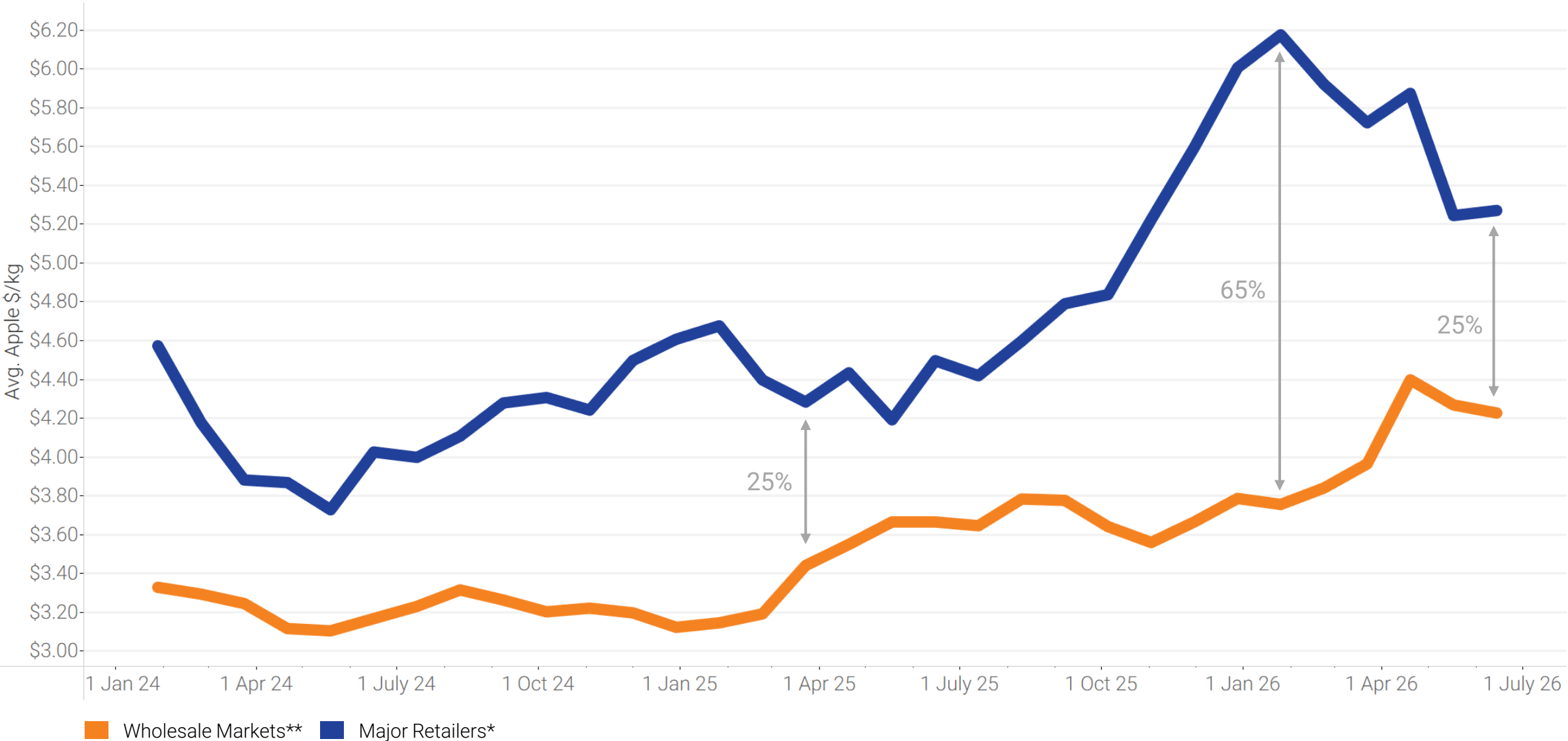
Apples – Last 5 years Value



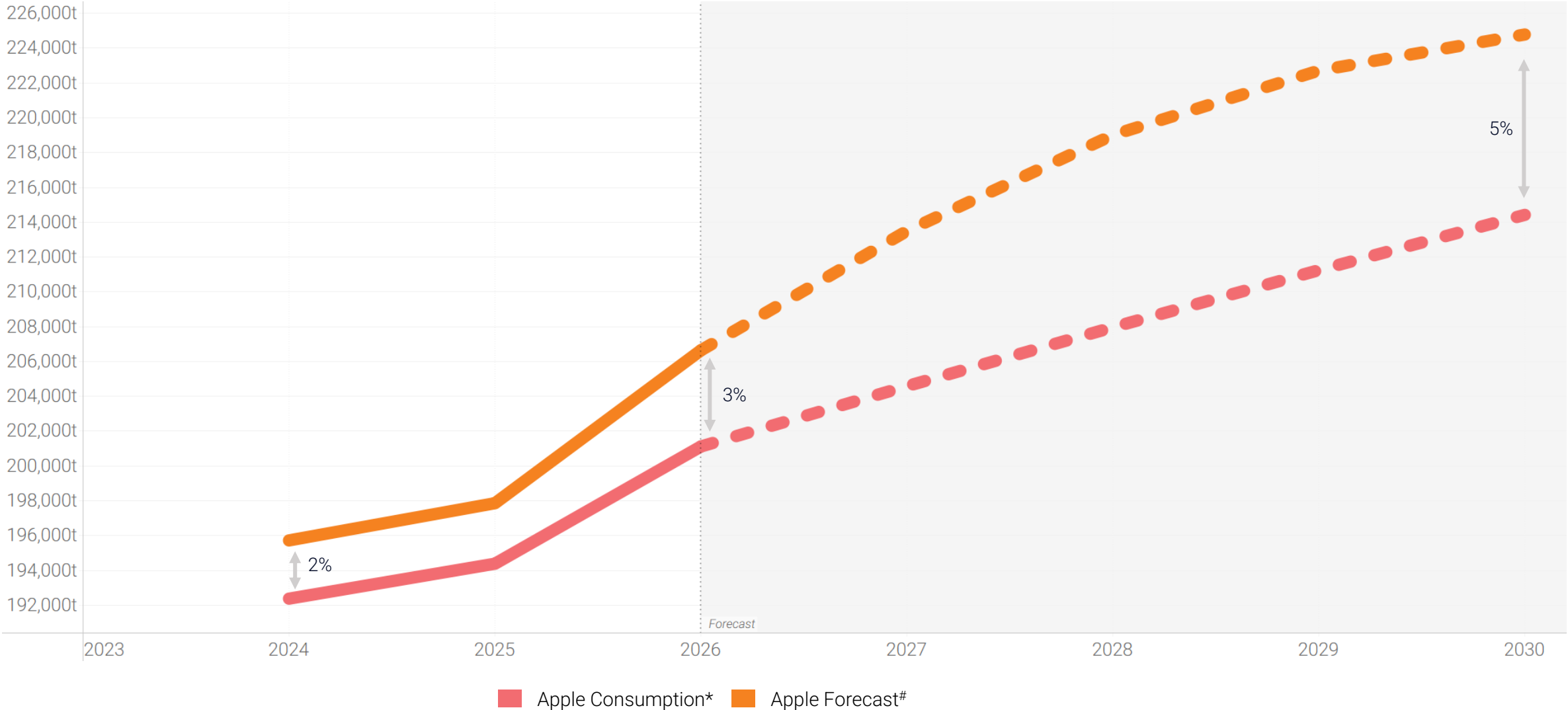
Domestic Pear Consumption and Export Volume



Who gets the higher margins?



Supply & demand forecast



*APAL calculation based in part on data reported by NielsenIQ through its Homescan Service for the fresh fruit category to 29 Dec 2024, for the Total Australia market, according to the NielsenIQ standard product hierarchy. Copyright © 2025, Nielsen Consumer LLC. Consumption includes 23% additional volume from wholesale markets. # Apple forecast excludes wastage (5%) and ullage (5%)

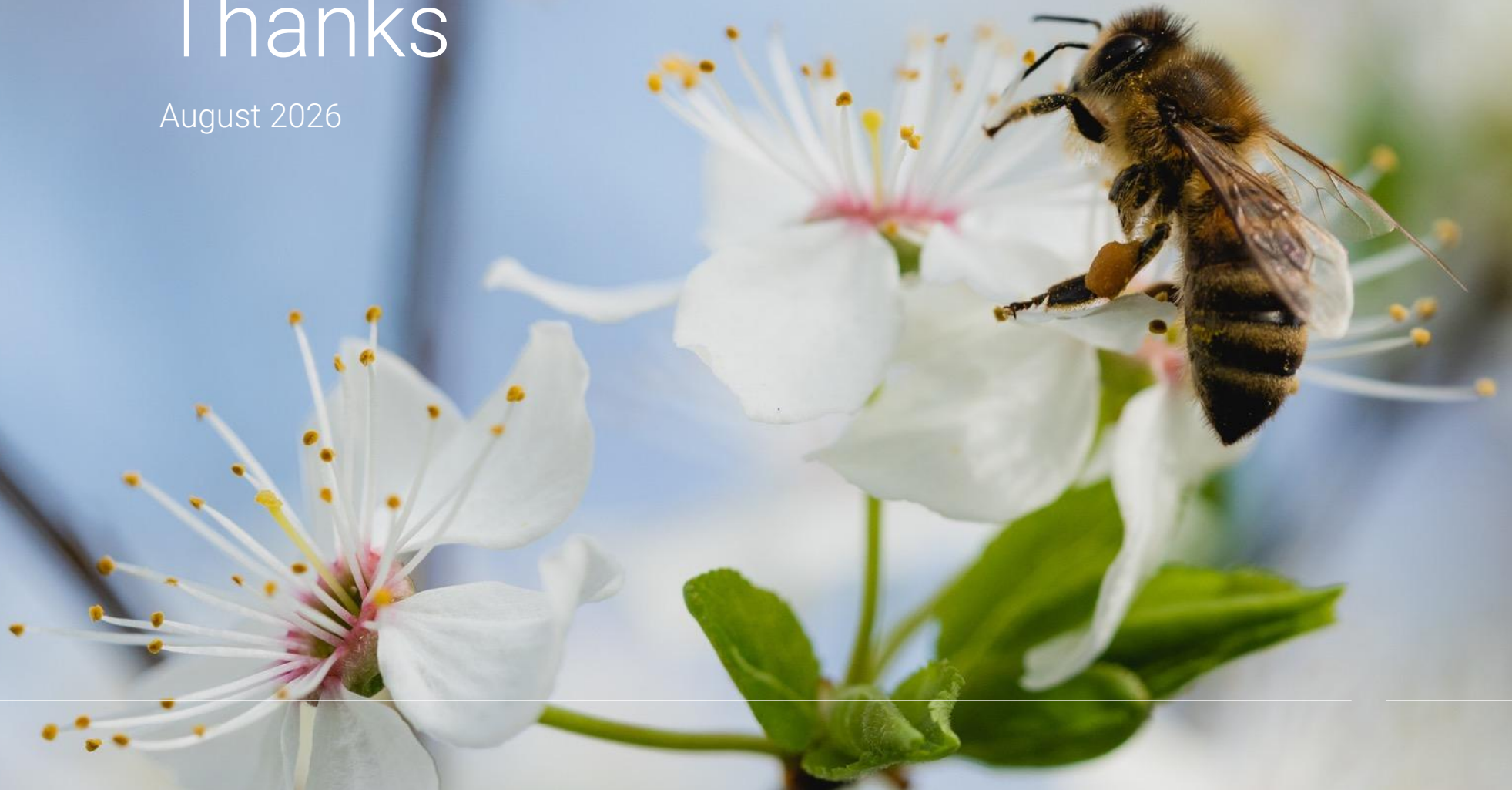
Key takeouts – Supply and Demand Matters

- Supply and Demand is critical
 - Maximise limited marketing budget
 - Focus on quality
 - Create new demand via Exports (even if only small)
- Understand national plantings and consumer demand – make informed decisions
- Review unproductive orchards

APAAL

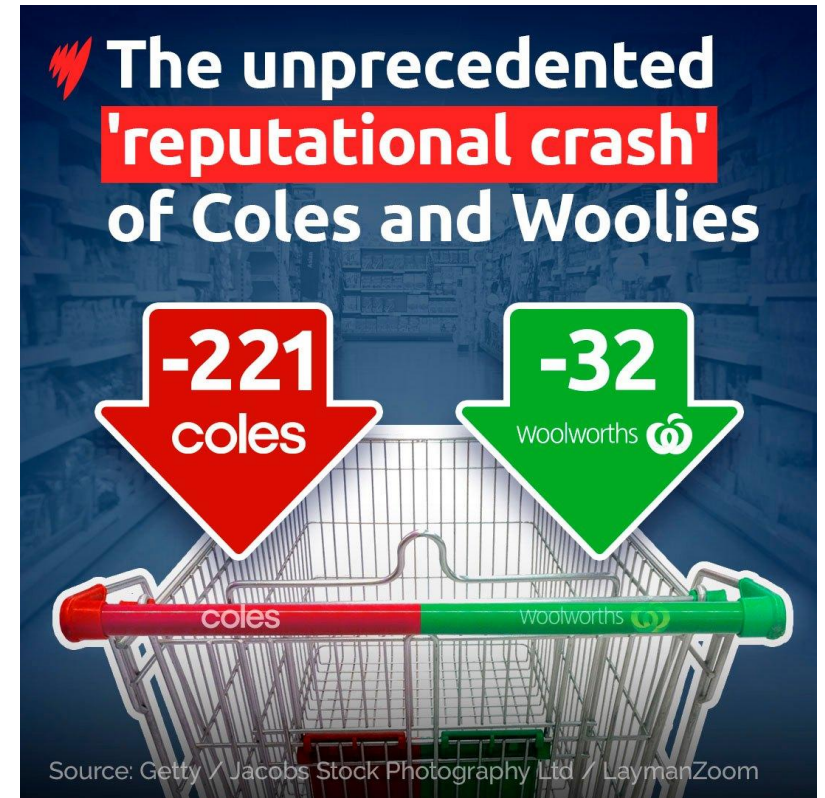
Thanks

August 2026



Competition Policy

1. No magic bullet
2. However, the operating environment changed
3. Supermarkets are under pressure
4. Process of “continuous legislative change” has commenced
5. ACCC pursuing Coles and Woolworths
6. Industry role: keep pressure on the supermarkets



March 2026

Woolworths remains Australia's most distrusted brand, **Coles** is the 4th most distrusted.

US Apples

- Into 8th year
- Govt advised it had met with USA
- USA has not provided any material new information
- APAL remains highly cautious
- Any approval needs to have highly effective biosecurity measures
- Issue linked to Australian citrus growers' ability to export.
- An independent report found that there is very little commercial upside to this increased access for citrus.
- Conversely, the risk to the entire Australian apple industry could be severe.



Industry Data – Major Priority

Major focus of APAL

1. Orchard Census
2. Forecasting
3. Real Time Stock on Hand
4. Profitability Benchmarking
5. Supply Side Mapping
6. Retail Pricing
7. Consumer Consumption

Variety Mix by Area



Variety and Age by Area

