



National Cherry Industry Conference 2026

Imperial College
London

Global Developments in Fresh produce and Implications for the Australian Cherry Sector

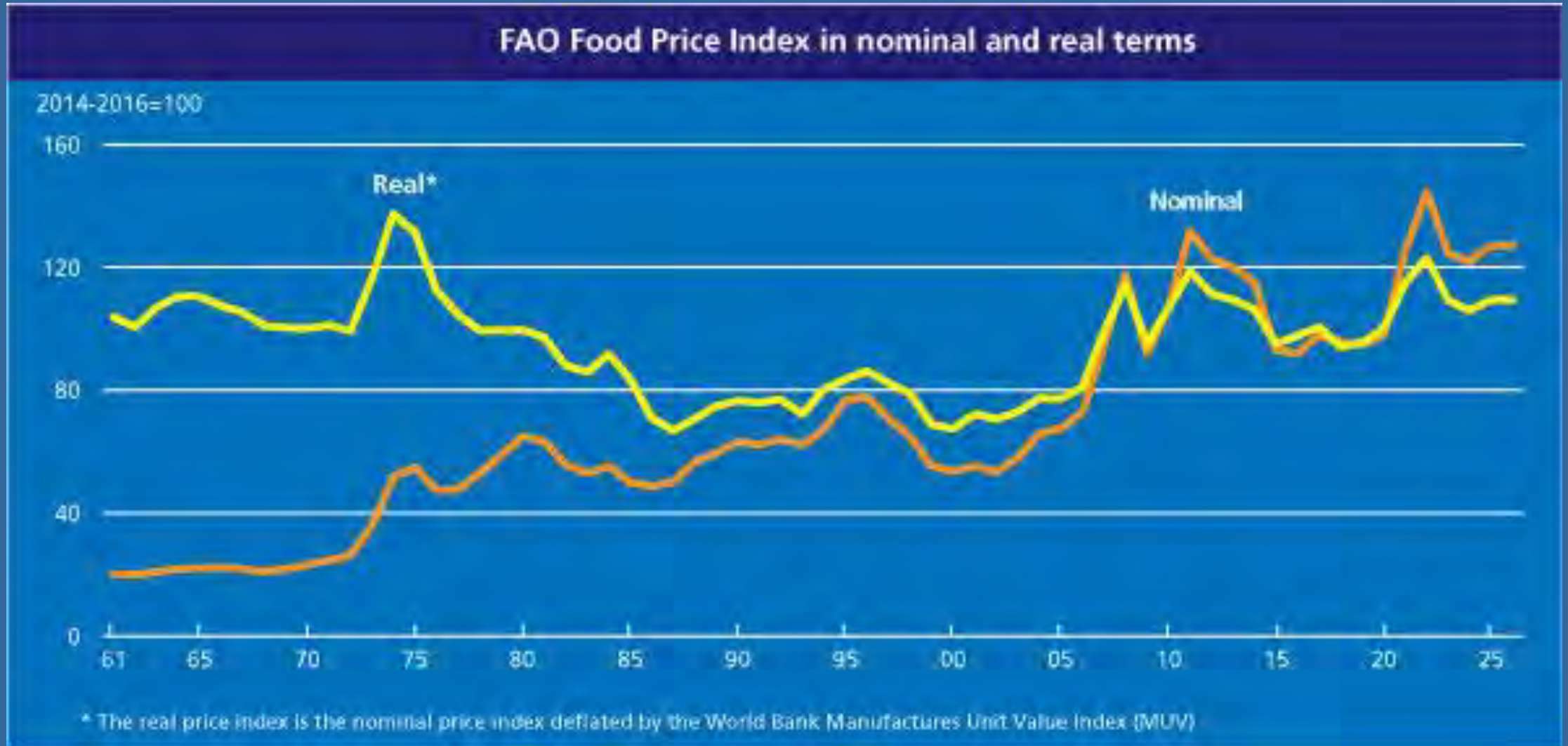
**CHERRY 2026: GROW, CONNECT, AND LEAD THE
FUTURE OF THE AUSTRALIAN CHERRY INDUSTRY**

Adelaide Convention Centre
Adelaide, South Australia
May 31st 2026

Dr. David Hughes
Emeritus Professor of Food Marketing



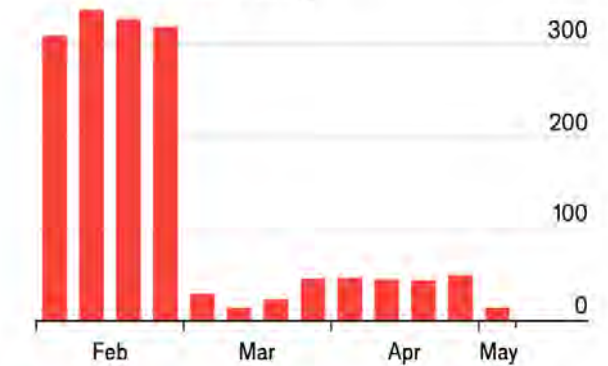
**In April, 2026, The FAO Global Food Price Index was 2% Above the Level of the Year Previous.
But, What's Vexing Consumers is that Global Food Prices are 38% Higher than Pre-Covid and
Most Household Incomes Haven't Seen a Similar Rise! And the Iran War Bump is Still to Come!**





Iran's Southern Coastline is 1,750 kms. long and riddled with caves that can harbour small fast armed boats and drones.

Tankers passing through the Strait of Hormuz, weekly



Food and Energy Strategy Radical Shift:
from “Just in Time”
to “Just in Case”!



Easter 4p veg deals criticised as growers face sharp cost increases

April 2nd, 2026



Retailer promotions will 'warp' price of food in consumer minds, say growers, who face millions in additional standing charges as of today

Easter veg deals that have seen some lines cut to 4p "don't send a good message" at a time when many sectors are preparing to absorb extreme cost increases due to the Iran war and new energy standing costs.



Aldi Looking Expensive with Lidl 1/4 the Price on Veg.!



Some Demographic Trends in Your Key Markets

		Population Growth Rate %	Fertility Rate %*	Population	% 1 & 2 Person HH
	China	-0.1	1.0	1.4bn	52
	Taiwan	-0.1	1.1	23m	51
	Japan	-0.4	1.2	124m	56
	New Zealand	+0.7**	1.8	5.3m	50
	Australia	+1.5**	1.8	28.4m	60

In ALL the Above, the Proportion of 1 & 2 Person Households is Growing.

- * Fertility rate of 2.1 required for population replacement (not incl. immigration).
- ** Australian/NZ population growth driven entirely by immigration (as is UK).
- Where are the new entrants from and implications for fresh produce demand?

December 31st, 2025



People in China will pay a 13% sales tax on contraceptives from 1 January, while childcare services will be exempt, as the world's second-largest economy tries to boost birth rates.

Benefits for Female Fertility

- **Oxidative Stress Reduction:** The antioxidants in cherry juice, such as anthocyanins, help protect egg cells from free radical damage.
- **Hormonal Support:** Cherries are linked to better hormone balance, specifically helping the endocrine system manage estrogen and progesterone levels.

Benefits for Male Fertility

- **Sperm Quality:** Cherries contain zinc and vitamin C, which are essential for sperm production, motility, and morphology.
- **Testosterone Support:** Some animal studies indicate that cherry juice may stimulate the secretion of testosterone and improve overall reproductive ability. [@SID.ir +3](#)

The world's largest maker warns of 20-30 per cent price increases. "The situation is definitely very fragile... We have no choice but to transfer the costs right now to the customers."

Barclays real GDP forecasts



Emerging Asia Share of AU Cherry Exports

	%
Hong Kong	29
China	17
Vietnam	13
Taiwan	13
Singapore	8
Malaysia	6
Thailand	3
Indonesia	3
	92

“Emerging Asia” is expected to have stronger growth than much of the world. That’s Handy!



In Markets with Money

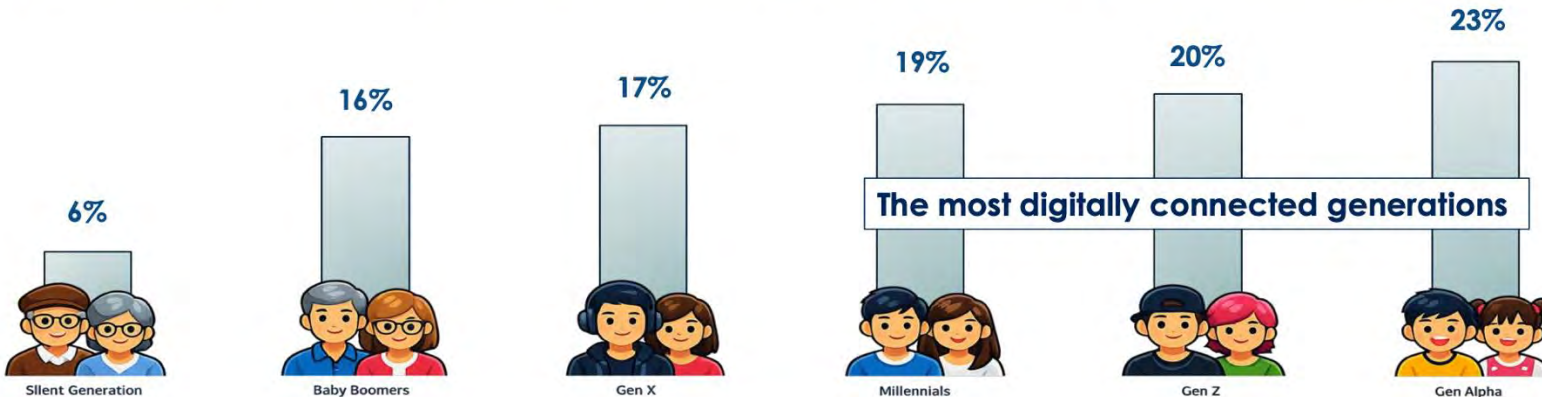
Posh Restaurant for Posh People in Hong Kong.
Little Chairs for the Posh Bags of Posh Clientele!

“Packaging” can be VERY Important.



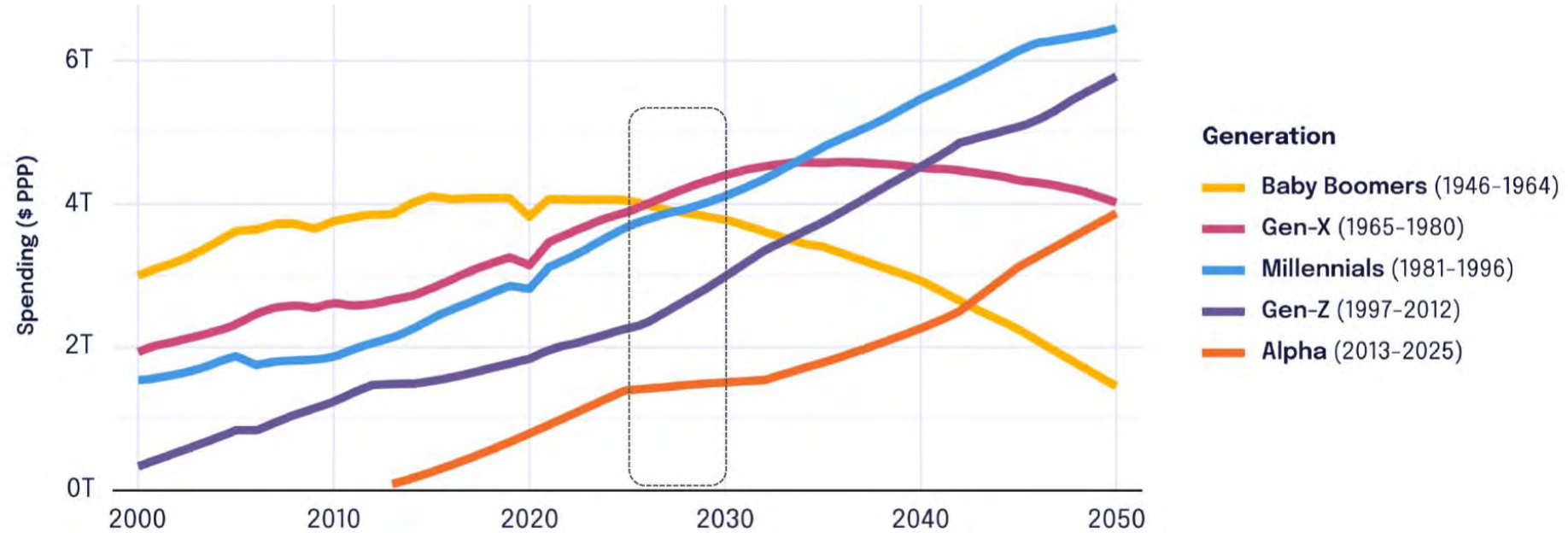
The Demographic Picture in South East Asia

Millennials, Gen Z and Alpha continue to gain share of population, driving much of the growth of the produce industry



Critical shifts in generational spending will occur in the next five years

US Spending by Generation



WORLD DATA LAB

© 2025 Nielsen Consumer LLC. All Rights Reserved.

19

The Younger 3 Groups Account for 62% of Total Pop. in SEA & 51% in AU





Generation Alpha

Digital Natives, who
in adulthood will
Define Convenience
Completely Differently
than Their Parents!

Gen. Z will be significantly more food health conscious
than now, but will they be food health active? If it's easy!

DISCREET. POWERFUL.
PERSONAL.

Advanced biosensors
+ AI health engine

All-day comfort
+ 7 day battery

Water resistant
+ swim proof

**NEXT-GEN
HEALTH COMPANION**

Continuous insights.
Personalized for you.

- Heart Health
ECG, AFib alerts,
HRV trends
- Respiratory
Breathing rate,
SpO₂, lung age
- Metabolic
Glucose trends,
calories, hydration
- Stress & Sleep
Cortisol trends,
sleep stages
- Recovery
Readiness score,
muscle recovery
- Women's Health
Cycle tracking,
hormone insights

24/7 health tracking
that fits your life

Insights you can act on,
in real time

Sleep better.
Live better.

09:42 Vitals

72 bpm
14 brpm
98% SpO₂
Stress Low

09:42 Heart 72 bpm
Resting HR 59 bpm

09:42 ECG Sinus Rhythm Normal

09:42 SpO₂ 98% Normal

09:42 Glucose 110 mg/dL Stable

09:42 Stress 28 Low

09:42 Sleep 7h 45m 85 Score

09:42 Readiness 82 Optimal

09:42 Cycle Day 12 Fertile Window

Demographic Definitions



Lifestage	Definition	Composition
SENIOR COUPLES	2 or more adults 60+	19% of population
ESTABLISHED COUPLES	2 or more adults 35-59	22% of population
INDEPENDENT SINGLES	1 adult >35 with no children	21% of population
YOUNG TRANSITIONALS	Adults <35 with no children	8% of population
BUSTLING FAMILIES	Oldest Child 12-17	14% of population
SMALL SCALE FAMILIES	Oldest Child 6-12	10% of population
START UP FAMILIES	Oldest Child <6	6% of population

62% of Aussie Households Principally Comprise 1 or 2 People
30% Comprise Families with Children
8% Young, Mixed Bunch who Live Together and May/May/Not Eat Together

Australia's Income and Wealth Distribution

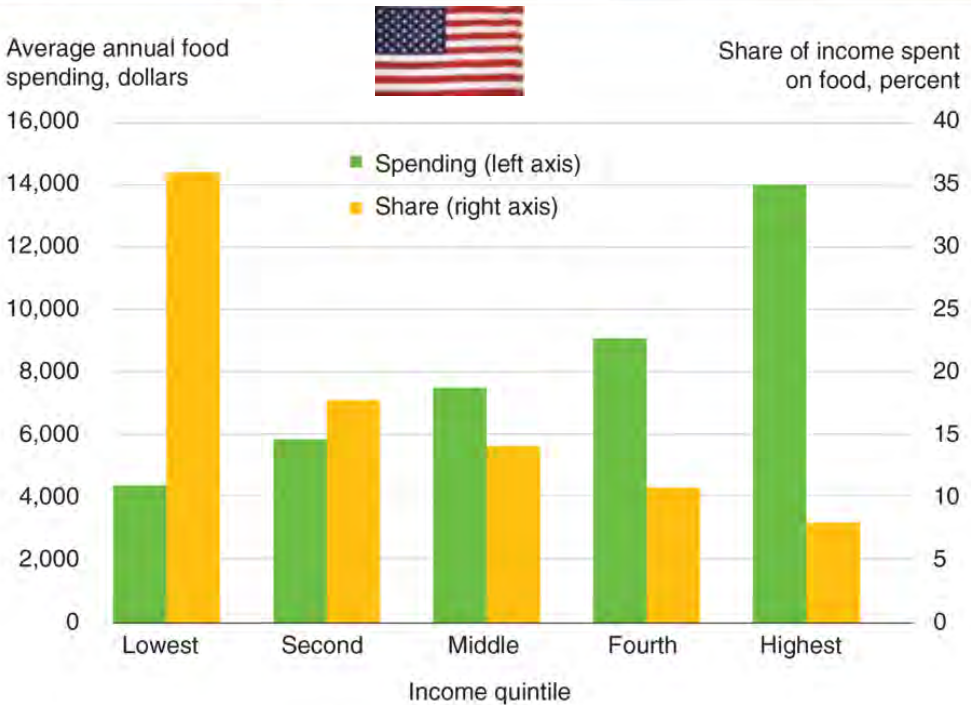
Data for 2023

Annual household income

By household quintiles



Food spending and share of income spent on food by U.S. households, 2019



Source: USDA, Economic Research Service using data from the U.S. Bureau of Labor Statistics, Consumer Expenditure Survey 2019.

The Lowest 20% of Households Spend 37% of Their Income on Food Whereas the Top 20% Spend 7% of Their Income on Food

Living standards gap widens

July 2025



The poorest 10% of UK households saw living standards fall by 1.3% in 2024–25, now 10% below pre-Covid levels. While middle-and high-income groups may see modest gains in 2025–26, the poorest are set to decline further as rising housing and food costs outpace income growth.



Take Your Pick on Where the Cherries are From!



Tesco Cherry Punnet Large 400G
★ ★ ★ ☆ ☆ 2.9 stars (51 Reviews)
£4.50 £11.25/kg
1 **Add**

If They're British, There'll Be a Big Sign Saying So!

\$21/kg.

Produce of Argentina, Belgium, Canada, Chile, Spain, France, United Kingdom,

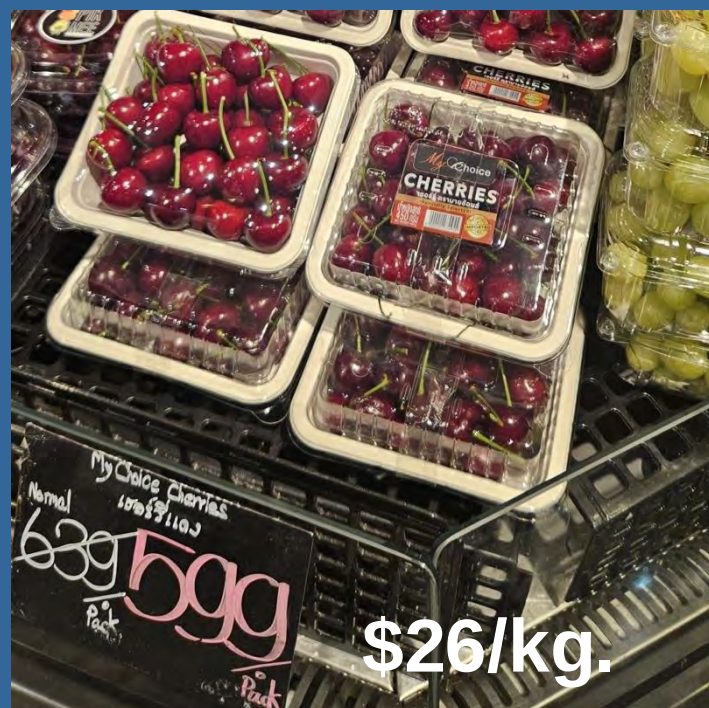
Greece, Italy, Turkey, USA, South Africa



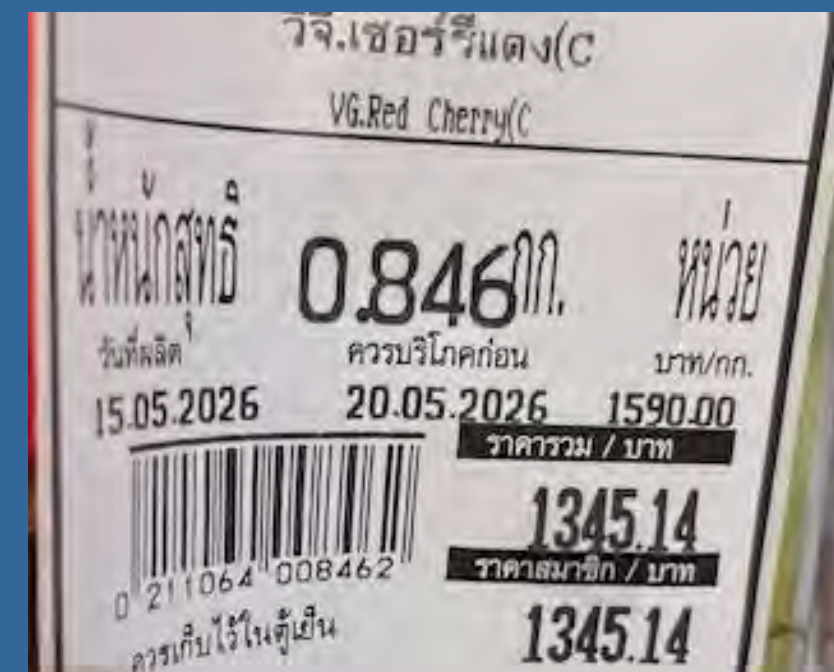
M&S Collection King Cherries
★ ★ ★ ☆ ☆ (76)
Life 2d+ Product life guaranteed for 2 days excluding delivery day.
300g (£20.00 per kilo)
£6.00
Add

\$37/kg.

Country of origin
Chile, Patagonia, USA, Spain, UK, Canada, South Africa



**\$58/Gift Box
(\$68/kg.)**



Dollars are A\$

Bangkok May 2026

Imperial College
London



A Boxed Gift Set of
6 Mandarins for \$43
(\$86/kg.)



USA \$40/kg.

In May, Cherries are for the “Income Haves”
in Thailand & Vietnam!



China \$36/kg.



\$7 to \$8/pack
(approx. \$32/kg.)



“Affordable” Weekend
Gifts in HCM City.
Nice Enviro Packaging.
Berries grown in VN.



\$48/pack



HCMC VN
May 2026



NO Surprise, Chocolates are
Popular Gift Items

\$56 for 2 packs on offer.



Size, Quality of and Packaging Count.
Red & Gold is the Order of The Day for
Festive Premium Produce!



(\$20)



- 1kg Gift Box | Size Options & Prices
- 30mm+ — RM178 (\$63)
 - 32mm+ — RM228
 - 34mm+ — RM288
 - 36mm+ — RM338 (\$120)





Zespri is **HUGELY** Active in SE Asia



Bangkok and HCM City, May 2026

Imperial College
London



And NZ Rockit Promotions and Apples are on EVERY Premium Retail Shelf



Chile's cherry industry pivots its strategy as Chinese consumer expectations tighten



April 21st, 2026



Iván Marambio
Pres. Frutas de Chile

“We are ambassadors of the Chile brand—we need to commit to it. We must differentiate ourselves from brands in other countries in our sector, ideally building one as strong as those in Australia and New Zealand,” he said.

Marambio explained that the best way to achieve this is through coordinated, unified action across the whole cherry industry, not just among sector associations. He emphasized that producers, exporters, and everyone involved in logistics **need to work together to face upcoming challenges.**



A more demanding and digital-forward consumer

The Chinese market, which buys nearly 90 percent of Chile's cherry exports, now has **more educated consumers**—they have new ways of enjoying cherries and are less willing to accept defects.

Cherries now compete directly with local fruits such as blueberries and strawberries, which offer high-quality standards.

The **role of social media cannot be discounted**, as it can quickly spread news of any fruit issues. “Negative news or quality failures spread much faster and have a greater impact,” Soler explained. On platforms where e-commerce is important, like TikTok and the leading Chinese short-video platform Douyin, a **five percent complaint rate led half of retailers to stop selling Chilean cherries** during a key sales period.



China: ‘consumption increasingly driven by personal use rather than by gifting, stronger emphasis on “value with consistent quality”’.

Rabobank Global Cherry Report
May 2026

Southern hemisphere cherries are missing out on a \$800 million opportunity



April 23rd, 2026



Patrick Haines



In front of a packed Arena Monticello in Santiago, Chile, Kroger's VP of fresh sourcing, Patrick Haines, painted a clear and mesmerizing picture: the US market as a land of untapped opportunity for Southern Hemisphere producers.

“In Winter, cherries disappear from shelves for months and American shoppers often stop looking for them”.

The final piece of the puzzle, Haines said, is "re-awakening" the consumer. Because cherries disappear from shelves for months, shoppers often stop looking for them.

In this regard, the executive suggested that the industry needs to create a US-based tradition for cherries, similar to their association with the Lunar New Year in China.

“I can imagine a link with Thanksgiving (last Thursday of Nov.) and, certainly, a tie in with celebrations over Christmas and The New Year”.



Bangkok, May 2026



What's Provenance Worth? Lots!
Best Make Sure the Source of
Production is Crystal Clear – on the
Pack and on the Shelf!



Where's the Veg. from?!

There's Shopper Apprehension About Chinese Produce. Mind You, Back 60 Years Ago or So, We were Dismissive About Any Products from Japan!

Bangkok, May 2026

Strawberries at \$7/each



\$200/Mango



\$280+ for a
Box of 40
Cherries



Perfect Shape, Colour, Symmetry & Sugar Content
Provenance & Packaging Like LVMH Products!

Imperial College
London



Gold Kangaroo

Available Fruit Sizes

1 kg • 26mm+/28mm+/30mm+/32mm+
2 kg • 30mm+/32mm+/34mm+



Red Kangaroo

Available Fruit Sizes

2 Kg • 26mm+/28mm+/30mm+/32mm+
5 Kg • 24mm+/26mm+/28mm+/30mm+



Signature Collection

Available Fruit Sizes

2 Kg • 34mm+



Kraft (Class II)

Available Fruit Sizes

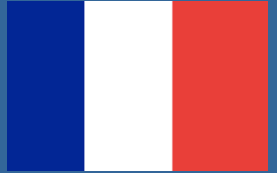
5 kg • 24mm+/26mm+/28mm+/30mm+
/32mm+



OUR 75 MAISONS

LVMH is home to 75 distinguished Maisons rooted in six different sectors. True to tradition, each of our brands builds on a specialty legacy while keeping an unwavering focus on the exquisite caliber of its products.

LVMH
MOËT HENNESSY • LOUIS VUITTON



Home to 75 Distinguished Maisons.
The *Maisons* are independent, prestigious brands spanning six luxury sectors.



2013-2020

Imperial College
London

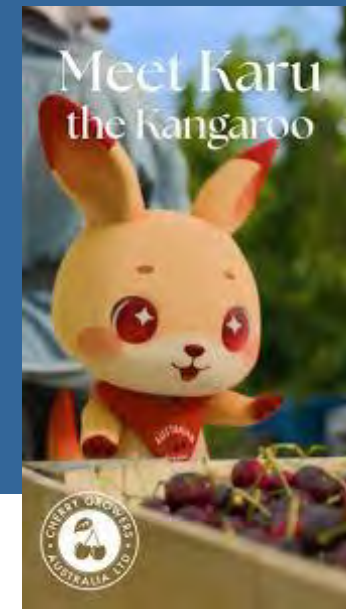


Home of Australia's Premier Cherry Estates



LVMH: “Home to 75 distinguished Maisons ...”

New Zealand has the edge on
“Environmental Pristineness”.
While Aussie national messaging
has been more focused on
friendliness, the ocean, warm weather
& range of tourist activities .





Tesco swapping barcodes for QR codes in UK 'first' - here's why

The supermarket giant says the change - on some own brand-products - will give shoppers more nutritional information and help reduce waste.

Tesco introducing “QR codes powered by GS1” on fresh produce & meat with view to exiting traditional barcodes by end of 2027. Will give access to info. on product nutrition, recipes and “stories” for premium products!



The QR codes will be applied to Tesco's own-brand range of sausages. Pic: PA

sky news

April 17th, 2026



CHERRY-PICKED PRECISION:
**TRACKING
THE PERFECT
HARVEST
FROM TREE
TO TABLE**



- The main use cases for the GS1 Powered QR code in this pilot was
- Provenance and story telling
- Consumer engagement with 2 way feedback from the consumer to the grower
- Product authentication to prevent food fraud (We caught 4 counterfeit cases within the first 4 days – in Australia!!!)

Bye Bye Bar Codes by end of 2027 a distinct possibility in SE Asian markets, too.

Imperial College
London

Ups and Downs in the UK Retail Fruit Cabinet from 2005 to 2026: Proportion of Retail Spend by Fruit Category

UP

From 13%
to 31% of
Fruit Sales



Per Cap. Consumption
of Fruit has Struggled to
Increase Over 20+ Years*

DOWN

From 20%
to 13% of
Fruit Sales



From 5% to 3%
of Fruit Sales

- Overall UK population grown by 9m (+15%) between 2005 and 2025 supporting weak market growth. Similar story in Australia – population increased from 21 to 28 million accounting for your market growth.

Drivers of Category Growth : The Case of Berries



Year-round Availability

Berries went from being highly seasonal to available at reasonable prices year-round

On Consumer Trend

Berry category has been perfect for Changing Consumer Lifestyles:

- Convenient
- Healthy
- Kid-friendly

Berry Patch

Berries have gotten, and continue to get, better. That is not true for many other fruits.

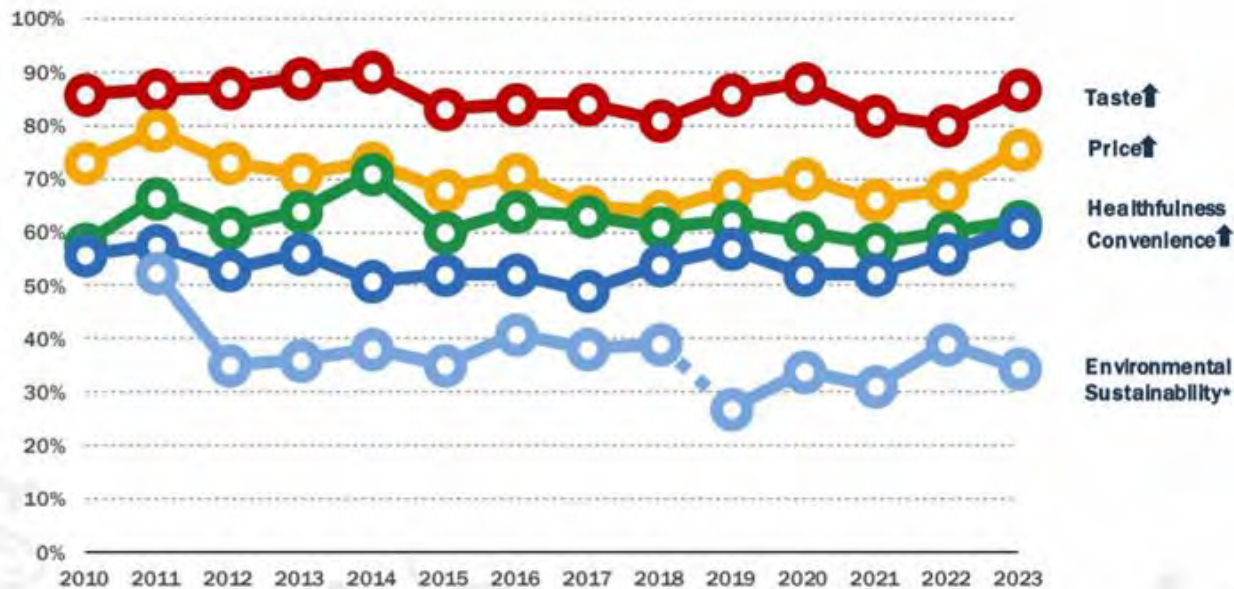
Delight/ Flavour

The rise of berries as a category ensure presence (shelf space), promotability,



Taste #1 Purchase Driver

Purchase Drivers Over Time
(% 4-5 Impact out of 5)



[TREND] Q6 How much of an impact do the following have on your decision to buy foods and beverages? SUMMARY: TOP 2 (Great Impact/Somewhat of an Impact); (n=1,022)
Note: Prior to 2019, "Environmental Sustainability" was addressed as "Sustainability"



2023 Food and Health Survey

International Food Information Council

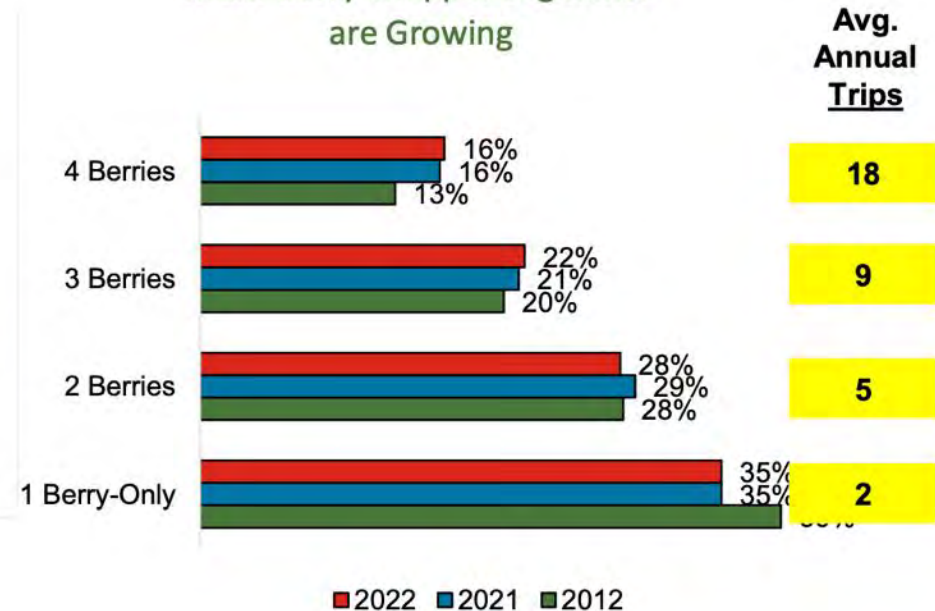
The Value of the Berry Patch

The Full Berry Patch is Incredibly Powerful for Retailers



Driscoll's
Only the Finest Berries™

Multi-Berry Shopper Segments
are Growing



Costa scales up Laos berry operation

April 30th, 2026



Following a successful first season, the company is set to ramp up production in 2026/27 after completing stage two of its plantings

Major international berry company Costa recently completed the first production season for its new growing operation in Laos, making successful trial shipments of blueberries to a number of South-East Asian markets.

The project is located in Southern Laos on the Bolaven Plateau in Paksong, which is known as the 'coffee capital of Laos'. Paksong sits at an elevation of around 1,200 metres above sea level and it has a microclimate that enables a blueberry production window spanning October to March. The harvest season begins around three months earlier than peak production from China's Yunnan province, where Costa has been growing berries for the past decade.



Costa has planted 75ha on 150ha of land on the Bolaven Plateau in Paksong

Image: Costa

Blueberries May Be Cherries Closest Competition. The World is Increasingly Awash with Blues!
But, at the top end, there are “Blues” as big as medium cherries!



Tesco Blueberries 500G
★★★★☆ 3.8 stars (111 Reviews)
£4.55 £9.10/kg
 Add

3+ days

TESCO
BLUEBERRIES
sweet & plump

500g



4+ days

Rosedene Farms
Blueberries 150G
★★★★☆ 4 (89)
More like this >

Aldi Price Match

£1.31
£8.73/kg **Add**



From a UK Consumer Perspective, We have NO Seasons for Fresh Produce. Where Do the Blueberries Come From? One or More of 19 Countries!



Tesco Blueberries 500G
★★★★☆ 3.8 stars (111 Reviews)
£4.55 £9.10/kg
1 Add

Rosedene Farms Blueberries 150G
★★★★☆ 4 (89)
More like this >
Aldi Price Match
£1.31 £8.73/kg Add

Tesco Finest Blueberries 150G
★★★★☆ 4.4 (320)
More like this >
Clubcard Price
Any 2 for £4 Clubcard...
Offer valid for delivery from 13/03/2026 until 20/04/2026
£2.60 £17.33/kg Add

Tesco Organic Blueberries 150G
★★★★☆ 3.7 (53)
More like this >
Clubcard Price
Any 2 for £4 Clubcard...
Offer valid for delivery from 13/03/2026 until 20/04/2026
£2.90 £19.33/kg Add

**Blueberries Price Range: £9 - £20/kg.
A\$17 – A\$38/kg.**

Produce of Chile, Egypt, Spain, France, United Kingdom, Croatia, Italy, Morocco, Mexico, Peru, Poland, Portugal, Romania, Turkey, Uruguay, South Africa, Zambia, Zimbabwe, Serbia

Source: Tesco.com April 12th, 2026

UK imports 84% of its fresh fruit and 50% of its fresh vegetables.

International Acquisitions of Fruit Companies with Significant Cherry Offers:



Expect The Major Global Berry Companies to express interest in specialty cherry businesses to complement their strengths in particularly strawberries and blueberries.

Their vision will be to be leaders in the world of fast-growing Super Premium berries & cherries.



Let The Branding Begin!

Driscoll's is the second largest consumer brand in the food and beverage category in the US
February 12th, 2025



Driscoll's Europe



Driscoll's "Berry Patch"
Kroger, USA



Driscoll's Pop Up Shop
in Soho, London
June 2025



Sun World to launch first global branded grape campaign

August 18th, 2023



In 2023, Sun World decided that 'what was next' was to launch an ambitious consumer marketing effort to support AUTUMNCRISP® - the first-ever global campaign for a branded grape.



Most of the newer varieties come from major international breeding companies, such as US-based SunWorld, which holds more than 200 table grape patents, and Bloom Fresh, which holds the licence for Cotton Candy™

- Identifiably different (It's Pink!)
- Clear marketing vision (premium)
- Strong communication between brand owner, growers & marketers
- In tune with consumers' values (e.g. charitable contributions)
- 52 week availability
- High profile promotions (e.g. TikTok, Valentine's Day)
- Associated products (e.g. Pink Lady juice/chips)
- Have a FMCG company "feel"



Apple Fruit Market Share
Decreased from 18% in
2014 to 15% in 2025.
Pink Lady has 22% and
Increasing Share of UK
Retail Apple Market.

Tesco.com Retail Prices for Apples



Tesco Finest Pink Lady Apple 4
Pack

[Write a review](#) >

[Rest of shelf](#) >

£3.00 £0.75/each

Tesco.com May 6th



Rosedene Farms Small
Apple 6 Pack

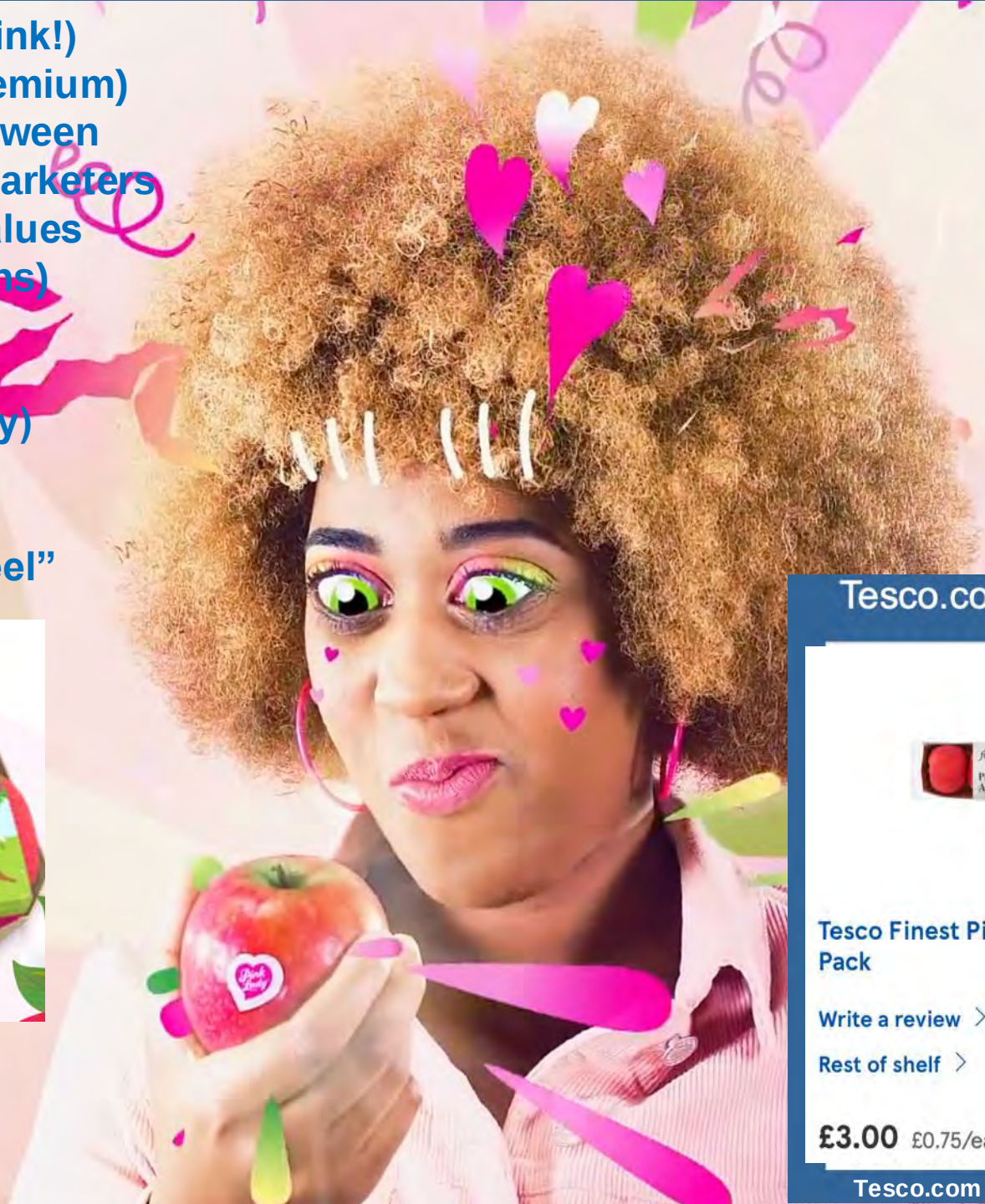
[Write a review](#) >

[Rest of shelf](#) >



Aldi Price Match

£0.99 £0.16/each



Pink Lady® has completely renewed its packaging
range by choosing recyclable or compostable
materials, as part of an eco-design approach.

Amfresh and EQT acquire IFG, launch new global breeding company

August 16th, 2023

Amfresh Group, in partnership with EQT Future and Paine Schwartz Partners, has acquired IFG, a global table grape and cherry breeding company. Together they have formed a new entity: Bloom Fresh International.



Stamford Street Co. Mixed Seedless Grapes

★ 4.1/5 (38)

Aldi Price Match*

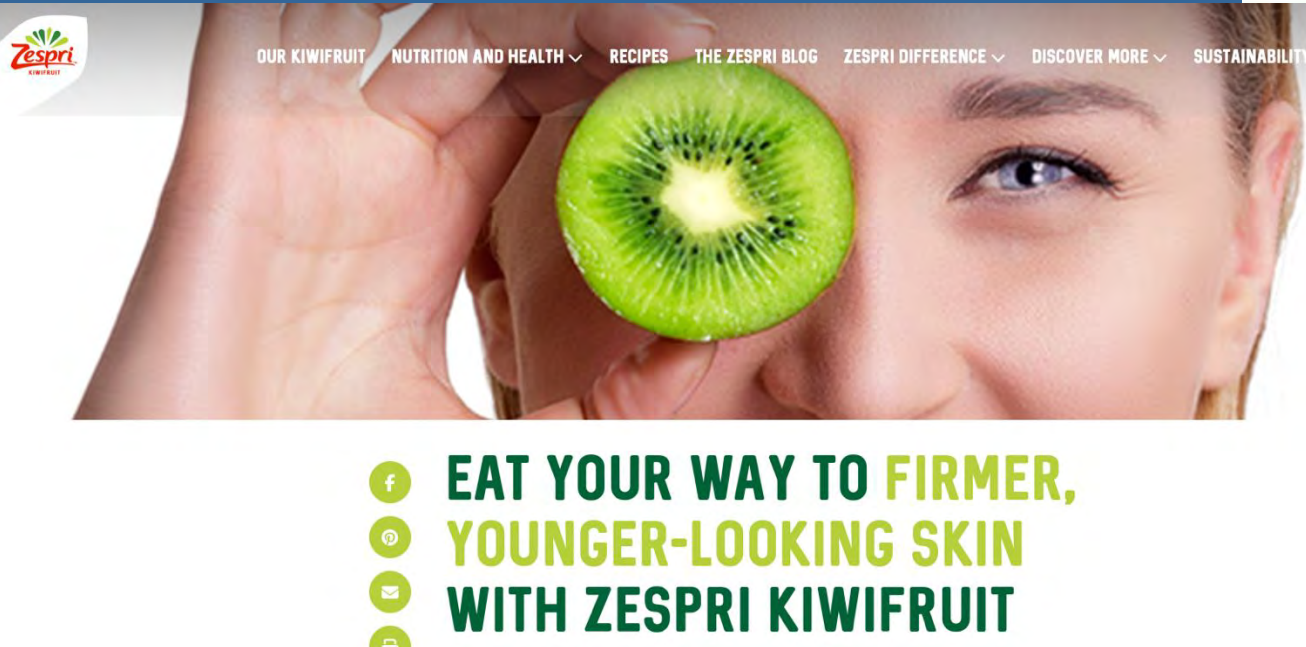
£1.37 £2.74 / kg



Sainsbury's Cotton Candy Seedless Grapes, Taste the...

★ 3.9/5 (41)

£2.50 £6.25 / kg



Promotional Focus Shifting: Nutrition and Taste. “With Jam-Packed”, we want to shift the narrative around Zespri from being just a delicious fruit to being a nutrition powerhouse, densely packed with 20 vitamins & minerals in one small fruit”!





Driscoll's strikes deal to acquire Australia's Costa Group

Feb. 26th, 2024



Driscoll's are a Cherry Business in The UK & Europe?!

Agroberries acquires BerryWorld Group becoming the world's second largest berry company

September 19th, 2024



The combined company will commercialise approximately 150,000 tonnes of blueberries, strawberries, raspberries and blackberries per year

Agroberries has acquired BerryWorld Group to create an “industry champion with a diversified global footprint” and the second-largest berry company in the world.

The combined company will commercialise approximately 150,000 tonnes of blueberries, strawberries, raspberries and blackberries per year.

The berries will be sourced from its agricultural production footprint, which spans over 3,000 hectares from associated growers across 30 countries.

The company has unique propriety breeding programmes and long-term partnerships with leading breeders around the world.

It said it would leverage its marketing platforms and distribution facilities located near key production and sourcing areas and near end-markets to ensure the highest-quality, traceability and service leads to its clients.

Agroberries had previously acquired a minority stake in BerryWorld Group in 2023.

Around the World of Avocados, the Biggest Players are Just Getting Bigger Through Organic Growth and Acquisition.



Sun World and Mission Produce team up to reshape the future of mango supply

April 13th, 2026



The partnership seeks to leverage the breeder's global genetics pipeline with the distributor's vast sourcing network and grower base, Sun World President and CEO Bernardo Calvo told **FreshFruitPortal.com**.

The companies expect the model to streamline the rollout of varieties, particularly in **major mango-exporting countries such as Peru, Brazil, and Mexico.**



Sun World International acquires Biogold

August 1st, 2024



Deal expands the breeding and licensing company's portfolio with inclusion of citrus and subtropicals

Sun World International has acquired Biogold Group, a major South Africa-based global fruit variety rights manager, trading as Citrogold in South Africa. The deal further expands Sun World's product portfolio to incorporate citrus and subtropicals.



Sun World's Global Partner Network keeps on growing

December 17th, 2024

More new marketers and importers join licensee community in the past year

Sun World International appointed marketers from nine countries in 2024, expanding its network to more than 2,700 licensed growers, 180 licensed marketers and 35 North American importers worldwide.



Zespri red kiwifruit licences fetch NZ\$457,000 per hectare



May 5th, 2026

Strong demand drives up price at first auction for new variety, as cost of SunGold licence also increases by 22 per cent

Licences for the first ever hectares of Red80, a new red-fleshed kiwifruit variety due to be marketed as Zespri RubyRed, have been auctioned online in New Zealand for an average price of NZ\$457,000.

According to Zespri, strong demand saw a total of 50.73ha allocated to 22 buyers after 16 rounds of bidding, in what's called an 'unrestricted pool' auction open to all registered bidders.



Zespri RubyRed kiwifruit on sale in Toronto, Canada

Image: Fruitnet

Innovation in the Global Horticultural Industry Accelerating; Deep Pockets Help!

Bubblegum pink blueberries are disrupting an increasingly price-pressured Chinese market

April 27th, 2026



In partnership with agricultural biotech company Pairwise, Sun World is working to bring the first-ever pitless cherry to market.



ONE BY ONE THEY STOPPED FLYING



FIG.1.

Spheniscus monodactylus - Penguin.
Stopped flying 65 million years ago.

FIG.2.



Strigops habroptilus - Kakapo.
Stopped flying 60 million years ago.

FIG.3.



Dromaius novaehollandiae - Emu.
Stopped flying 10 million years ago.

FIG.4.



Struthio camelus - Ostrich.
Stopped flying 10 million years ago.

FIG.5.



Nannopterum harrisi - Galapagos cormorant.
Stopped flying 3 million years ago.

FIG.6.



Aptornis alba - Kiwi.
Stopped flying 3 months ago.

To reduce the climate impact, we are the first nationwide food chain to stop transporting fruit and vegetables by air. That's Lidl!



This illustrated Lidl print ad cleverly conveys the retailer's promise to stop transporting fruit and vegetables by air in Sweden.



February 2023



Albert Heijn stops flying in fruit and vegetables

Kenya Set to Export Fresh Produce to The Netherlands By Sea to Reduce Carbon Emissions April 23rd, 2023

- Kenya and Netherlands are working on a programme that will see the former export fresh produce to the European country through the sea



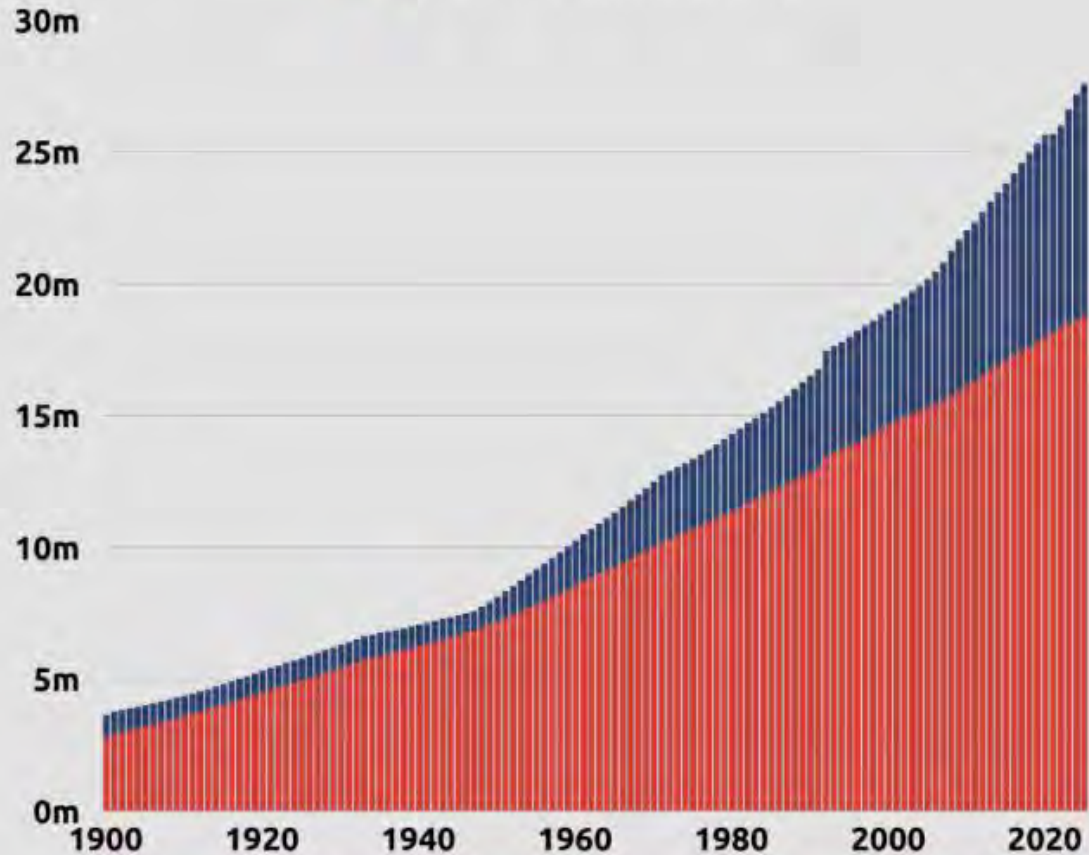
January 2022

UK: Compass Group bans air-freighted fruit to reach net-zero emissions by 2030



Australia's overseas-born population

● Number of Australian-born
● Number of overseas-born



Data prior to 1992 is based on Census counts. 1992 to 2024 uses estimated resident population.

Source: ABS

Close to One-Third of Australia's Current Population were Born Overseas. The Equivalent Figure for Japan is 3.3%.



Top 5 Overseas Born by Country

India



UK



China



NZ



Philippines



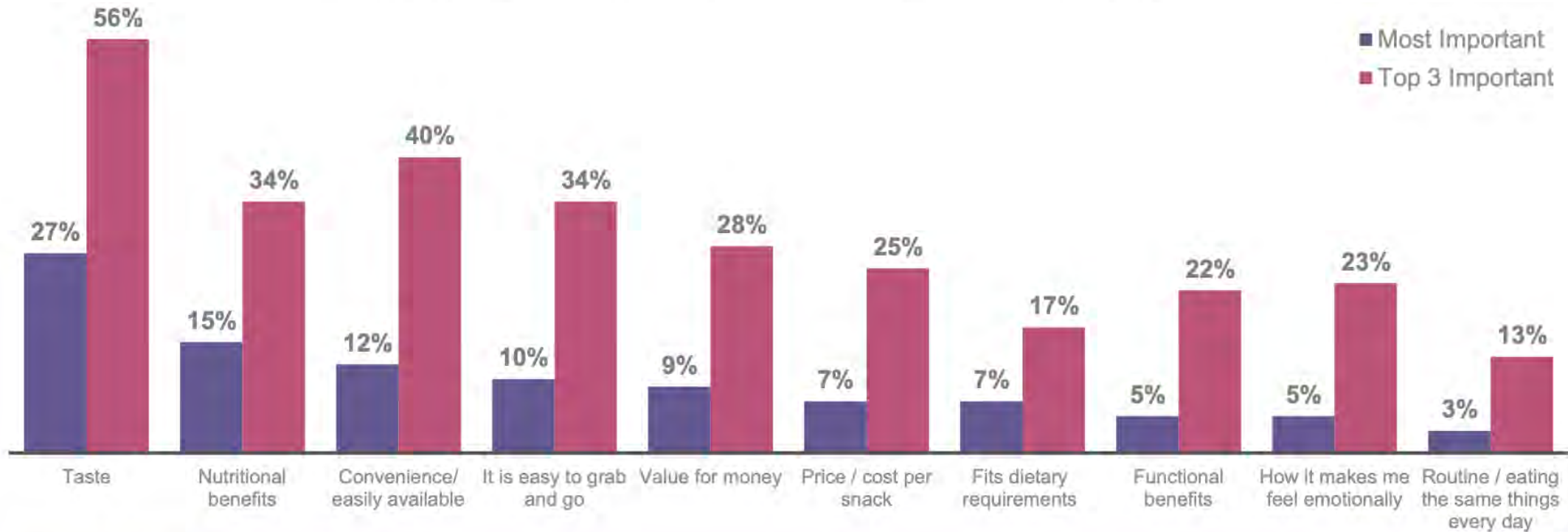
Cherries are Forgotten 'til Xmas!

Imperial College
London

While in snacking taste is king, nutrition, convenience, portability and value are secondary considerations that can be used to win occasions.



When choosing what to snack on, which of the following are most important to you?



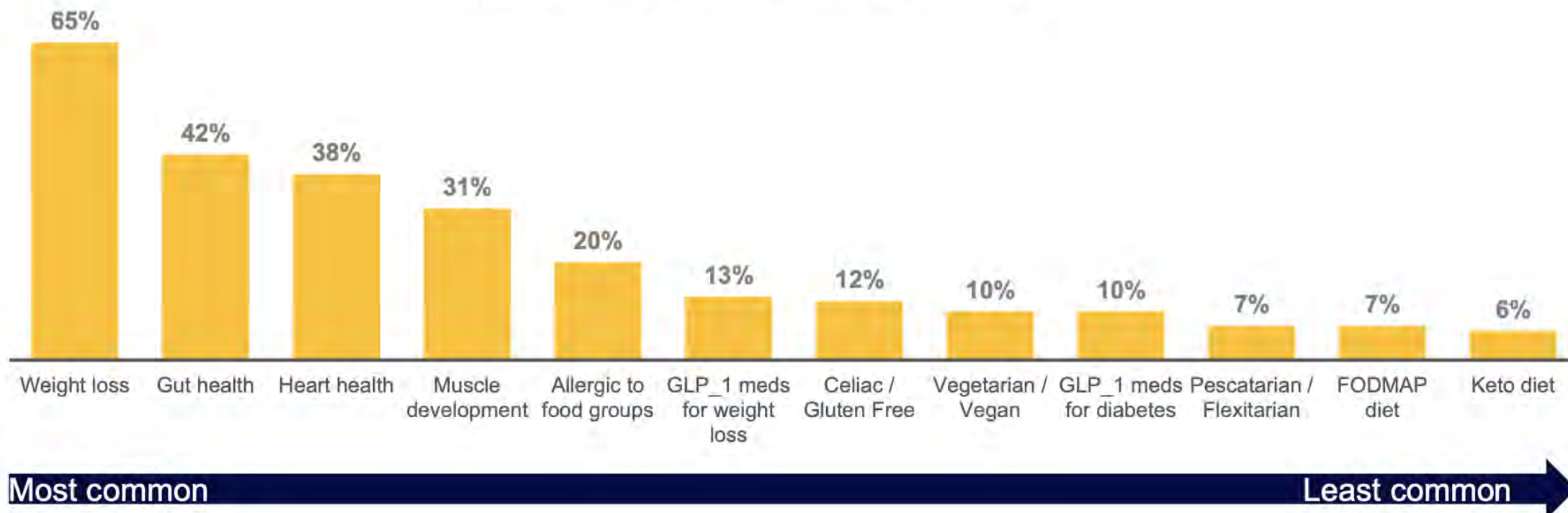
Most important Least important

Base: All snackers n = 4,161
Q3 When choosing what to snack on, which of the following are most important to you? Please rank the top 3 attributes most important to you

With clear demand, we will continue to see a swing toward snacking choices that offer functional health benefits that align with consumer health and wellness goals.



Are you, or others in your household, doing the following?



Base: All snackers n = 4,161

Q5 Are you, or others in your household, doing any of the following?

If You've Got Trucks on the Road, Promote the Product!



That's Enough of Berries. Get Cherries on the Delivery Vans



Summary Thoughts to Finish

- Expect more competition from Chile at the premium end of your key export markets.
- Marketing comms must reinforce that Australia is “Home of the Premier Cherry Estates”.
- But, be encouraged by Chile diversifying into the North American Winter period.
- Berries and, particularly, blueberries are your major fruit competitor and it’s not helpful that the world is awash with them!
- Through time, the seasonality of cherry supply will decline and move to 365 day on-shelf, driving global consumption but diluting the “specialness’ of fresh cherries.
- Large, branded fresh produce companies will look to acquire well-positioned cherry supply companies – not least, the Big Berry Barons attracted by increasing efficiencies in their supply chains and the attractiveness to retailers of a “berry & cherry patch”.
- Domestically, consumer purchases will move on from just a Christmas special buy to “an indulgent treat that I deserve”!