

Horticulture



November Monthly Update



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Key Watchpoints – November

- Avocado pricing remain depressed with supply this season outpacing earlier industry forecasts across North Queensland and Western Australia
- Citrus harvest yields across the Sunraysia and Riverland regions have come in around 10-15% above last season with strong quality also reported.
- Table grapes in the region have also seen strong flowering which is positioning growers for another large crop early in the new year.

Regions in Focus

In this month's update, we've decided to take a specific look across a couple of key horticultural production regions to explore how their respective spring/summer seasons are developing. This month's deep dive will focus on Sunraysia and the South Australian Riverland regions.

Sunraysia and Riverland

Citrus

The fresh citrus harvest across both Sunraysia and the Riverland has now concluded. Growers have reported that yields were approximately 10-15 per cent higher than last season, with fruit quality also reported as favourable. A high proportion of first grade and export quality (KCT) fruit was achieved. Market prices remained relatively stable, comparable to those of last season which added further confidence to the sector and should enable grower to continue reinvesting in on farm improvements and expansion. The Valencia juice harvest is still underway, with picking expected to finish soon. There continues to be an oversupply of orange juice in the market, a situation that has continued from last season. This ongoing surplus has placed downward pressure on factory juice prices, which remains low.

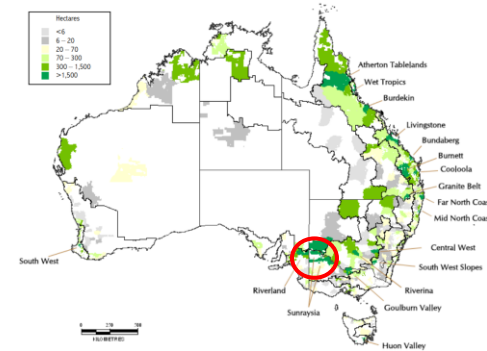
Almonds

Almond crops across Sunraysia and Riverland are tracking strongly with yields looking similar to last year's levels. Growers are optimistic that high grade packouts will be maintained. Strong pricing has also been indicated by processes due to China's elevated tariffs on US growers throughout 2025 adding further confidence to the sector. A 35% tariff on US almonds remains in place which will ensure Australian almond exports retain an advantage into the Chinese market

Grapes

Table grape crops are looking promising across Sunraysia, supported by reports of strong flowering. Growers are monitoring for powdery mildew, but overall vineyard health appears good. Prices are forecast to sit at a similar level to last season however this is dependent on Queensland harvest yields. The Australian Table Grape Association is forecasting national production of around 230,000 which is in line with last season's volumes. Winegrape crops are looking reasonable, however low prices continue to present challenges. Some growers are deciding to reduce or mothball red varieties due to ongoing unprofitability and sustained low returns consistent with recent seasons. Dried grapes crops are looking promising, and growers remain optimistic that prices will stay high, continuing the positive trend from last year.

Figure 11 Perennial Horticultural Crops



Source: ABS AgStats 1996-97, with non-agricultural land mask from Distribution of Agricultural Land Use in Australia (BRS 1994).

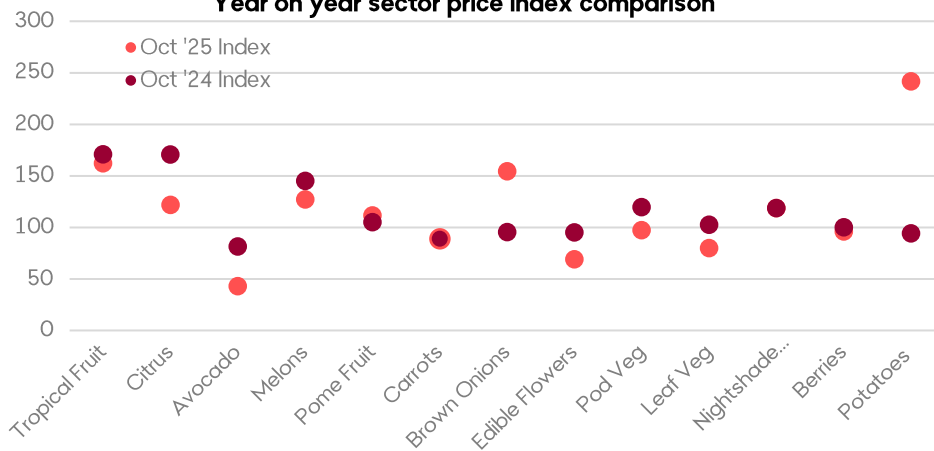
How are fruit and vegetable prices positioned heading into November?

Wholesale prices across most key fruit and vegetable sectors remain in line to slightly lower year on year with a couple of key exceptions. Both brown onion and potato prices are still sitting at a significant premium to 12 months ago. These outliers are a result of production and sizing issues out of South Australia, a key production region for both of these staple vegetables, following drought conditions seen across the first half of the year. As seen in the state price comparison chart below, South Australia has been the only state to record an increase in the overall vegetable price index as a result of those challenging conditions which impacted winter yields. The coming months should prove more positive from both a grower and consumer perspective. November is expected to see supply of brown onions and potatoes stabilise as the harvest of spring crops begins to hit store shelves.

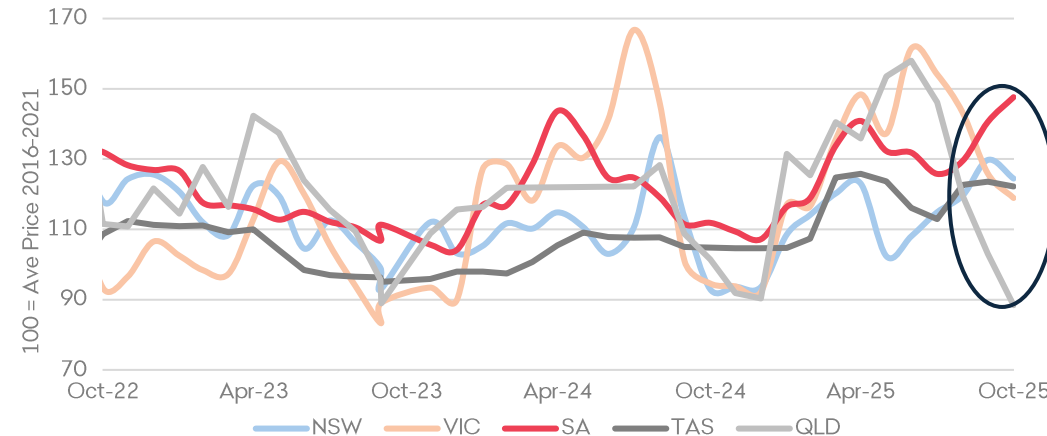
Mangoes, berries and stonefruit are now becoming more abundant on store shelves, a key sign that the start of summer isn't far off. Mango pricing has finally started to ease after a slow start to the season compared to prior years. Wholesale prices are currently around average with KP mangoes at a decile 5.7 with R2E2 mangoes a little more expensive at a decile 6.2. Prices should come under further pressure across November with supply out the Katherine and Kununurra at its peak and Queensland volumes picking up. Nectarines and peaches are also slowly coming to market, though in smaller volumes than usual for this time of year which is keeping prices high. Stonefruit pricing should also drop quickly over coming weeks as volumes come to market with early season cherries also starting to pop up.

Hass avocado pricing remains low (albeit well above the 2021 when producers dumped stocks) with supply this season outpacing earlier industry forecasts, particularly across North Queensland and Western Australia. Our avocado sector price index currently sits at 43 compared to 81.7 at the same time last year. With an all time record Western Australian crop on the horizon, pricing is expected remain under pressure into 2026. The low prices will likely see annual domestic consumption per capita lift above 5kg per person for the first time. However, with production growth continuing to outpace domestic consumption increases, further expansion of export volumes will be required to ensure margins remain sustainable. The industry remains hopeful that negotiations between the Australian and Chinese governments will allow market access for producers sooner rather than later, with the industry forecast to see production hit over 170,000 tonnes by 2027 up from just over 150,000 tonnes in 2025.

Year on year sector price index comparison



Vegetable price index state comparison



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