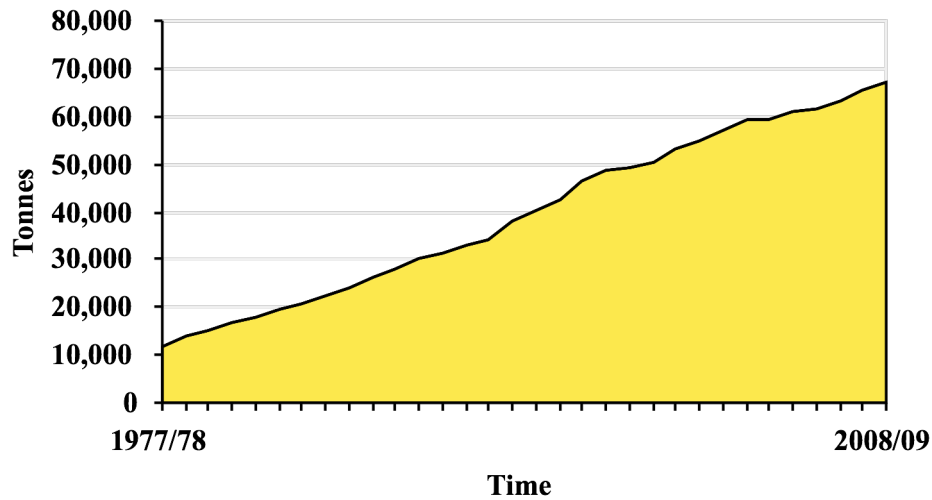


State of the Australian Mushroom Industry

(Source: AMGA – 2008/09 Statistics)

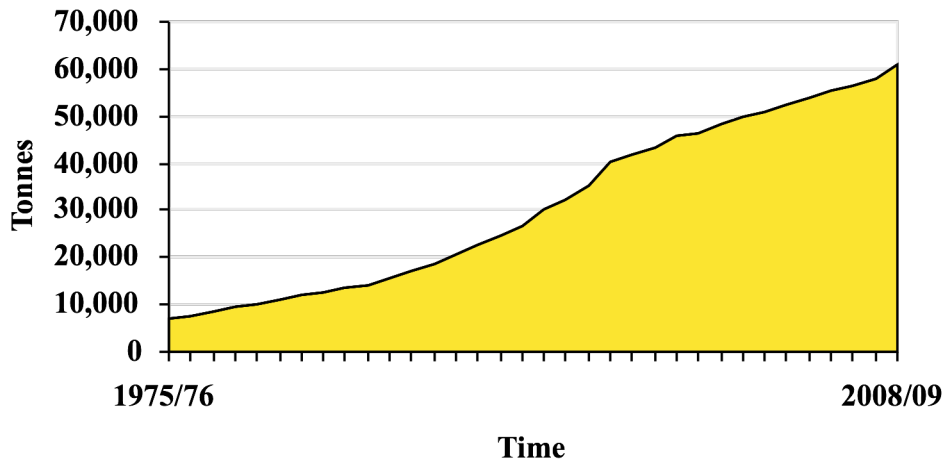
- Mushrooms are the sixth most valuable horticultural crop and third most valuable fresh produce item in supermarkets (Source: ABS). Most mushrooms produced in Australia are the white button type (*Agaricus bisporus*) although there are small amounts of exotic types now grown.

Total Mushroom Market (includes domestic production and imports)



- The total mushroom industry in Australia is made up of domestic and imported *Agaricus*, domestic and imported exotic mushrooms, dried and in-liquid value-added products. The total market is 67,000 tonnes with a farm gate value of \$315million; a GVP at first point of sale of \$390 million; a retail value of almost \$0.7 billion retail.
- Industry expansion is likely to be from existing growers utilizing new technology and advanced management to achieve the increased production capacity and productivity. Because of the complexity and capital requirements of the business, new entrants are unlikely to contribute significantly to immediate growth.
- Future growth of the category will be underpinned by the industry's substantial investment in medical research around the world on the health benefits of consuming 100 grams of fresh *agaricus* mushrooms daily. Consumption growth is likely to be driven in the short term by a new mushroom that provides 100% of the adequate daily intake of Vitamin D. By eating just three medium button mushrooms a day, Australians will have a simple and pleasurable way to overcome widespread Vitamin D insufficiency.

Historical *Agaricus* Production



- The Australian mushroom industry is dominated by domestic *Agaricus* mushroom production. 2008/09 annual *Agaricus* production was 61,000 tonnes valued at \$300 million at farm gate with a GVP of \$355 million.
- There are 77 commercial *Agaricus* growers in Australia. 3 companies produce +50% of production; and 15 companies produce 75% of production. The industry directly employs 4,000 people around Australia
- About 98% of domestic production is eaten as fresh mushrooms, with only small quantities going to processing.
- Australian annual per capita mushroom consumption jumped from 0.6 kg in 1974 to 3.1 kg in 2008/09. Australian *Agaricus* consumption of 2.8 kg/head is over double US levels, on par with several European countries but is way behind China at 10kg per head.
- 75% of fresh *Agaricus* domestic production is sold through retail outlets with 23% going to food service market and 2% going to processing.

Did You Know?

- ◆ 80% of Australian households buy mushrooms.
- ◆ 88% of consumers love mushrooms in a stir-fry.
- ◆ 83% of consumers love mushrooms in a salad.
- ◆ 74% of mushroom eaters would probably order a mushroom entrée in a restaurant.
- ◆ 98% of mushroom eaters believe mushrooms add something special to a dish.
