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Horticulture in bloom: can Australia hold its global edge?

Australia's \$19 billion horticulture sector is entering 2025–26 in a position of strength, underpinned by resilient domestic demand and another record-breaking export forecast. However, global competition, climate pressures and shifting market dynamics continue to present complex challenges.

According to ANZ's latest [Agri InFocus report](#), the gross value of Australian horticulture production is forecast to rise from \$18.2 billion in 2024–25 to \$19 billion in 2025–26, surpassing the cattle and wheat sectors in value.

Export earnings are projected to reach \$4.4 billion, marking a continued streak above the \$4 billion threshold, with Asian markets driving much of the growth.

ANZ Executive Director of Agribusiness Insights, Michael Whitehead, said: "Whether it's almonds, grapes, citrus or cherries, Australian produce is earning a strong reputation for quality in the world's fastest-growing markets.

"Maintaining that edge will require constant investment in water, labour and biosecurity, as well as a sharper focus on efficiency and innovation across the supply chain."

Almonds remain Australia's strongest horticultural export, with China and India accounting for the bulk of shipments. Australia is now the world's second-largest almond producer, though water constraints could limit future expansion.

Table grapes are also regaining momentum, driven by demand in China, Vietnam and Indonesia, while citrus growers are enjoying one of their strongest runs in years, with mandarins at record export volumes.

Premium cherries and berries from Tasmania and Queensland continue to gain traction across high-value Asian markets, while avocados are rebounding after a domestic oversupply.

Vegetables such as carrots, onions and leafy greens are consolidating market share in Southeast Asia, supported by reliable shipping, shorter transit times and Australia's strong reputation for food safety.

Labour availability has improved since the pandemic, supported by the Pacific Australia Labour Mobility scheme, although wage costs remain elevated. Fertiliser and energy costs have eased from their 2022 peaks but are still higher than pre-COVID levels.

Globally, the outlook for Australian horticulture is being shaped by rising middle-class demand in Asia, while intensifying competition from countries including Chile, Peru, South Africa and the United States presents growing challenges. Biosecurity threats such as fruit fly and varroa mite, as well as climate variability, remain pressing risks.

"The sector has never been stronger. The challenge now is to stay ahead — protecting Australia's premium reputation and capturing the growth opportunities offered by both domestic and export markets," Mr Whitehead said.

Further insights can be found in the [2025 Spring edition of ANZ's Agri InFocus report](#).

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