



# **TASMANIAN Apples**

## **2022 Export season analysis**

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# Contents

- Australian apple export summary 3
- Australian apple exports by state 4 – 6
- Australian apple exports 10-year trend 7
- Asian apple imports insights by market 8 – 13
- Apple competitor export insights (Chile & NZ) 14 - 15



Australian Apple exports increased 2.0 per cent in 2022 to 2,714 tonnes valued at A\$6.61 million. Unit values decreased 2 per cent or 5c per kg

China increased 428 per cent to 268 tonnes, or 69 per cent of the total Tasmanian exports, which were the only Australian apples exported to China

### January to Dec-22

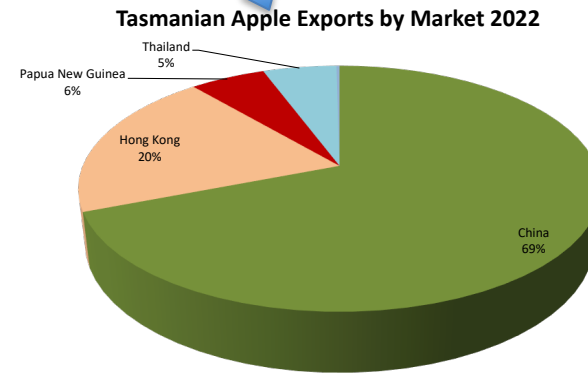
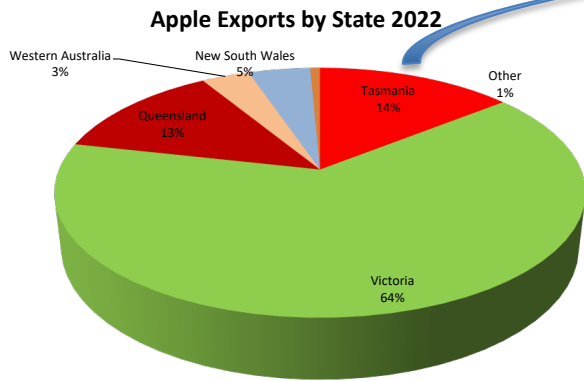
<b>Volume</b>	<b>2,714 tonnes</b>	.....	<b>2.0%</b>	
<b>Value</b>	<b>6.61 million</b>	.....	<b>0.0%</b>	
<b>A\$ per kg</b>	<b>\$2.44</b>	.....	<b>-2%</b>	<b>-\$0.05</b>

Market	Volume Tonnes				Value \$ Million AUD				Jan to Dec-21	Jan to Dec-22
	Jan to Dec-21	Jan to Dec-22	Change to 21	Share %	Jan to Dec-21	Jan to Dec-22	Change to 21	Share %	Jan to Dec-21	Jan to Dec-22
Papua New Guinea	792	701	-12%	26%	1.92	1.61	-16%	24%	2.42	<b>2.30</b>
Thailand	148	268	80%	10%	0.58	1.10	88%	17%	3.93	<b>4.10</b>
Hong Kong	295	288	-3%	11%	0.84	0.99	17%	15%	2.86	<b>3.44</b>
China	51	268	428%	10%	0.12	0.63	444%	10%	2.29	<b>2.36</b>
Italy	486	517	6%	19%	0.68	0.57	-16%	9%	1.40	<b>1.10</b>
Singapore	49	114	133%	4%	0.23	0.43	86%	6%	4.65	<b>3.72</b>
Indonesia	16	134	762%	5%	0.08	0.31	264%	5%	5.44	<b>2.30</b>
United Arab Emirates	43	48	11%	2%	0.22	0.18	-15%	3%	5.00	<b>3.86</b>
New Caledonia	104	110	7%	4%	0.17	0.18	8%	3%	1.61	<b>1.63</b>
Malaysia	20	30	51%	1%	0.06	0.14	112%	2%	3.24	<b>4.55</b>
India	120	85	-30%	3%	0.20	0.11	-45%	2%	1.63	<b>1.28</b>
all other	535	151		6%	1.51	0.37		6%		
<b>TOTAL Apples</b>	<b>2,660</b>	<b>2,714</b>	<b>2.0%</b>	<b>100%</b>	<b>6.61</b>	<b>6.61</b>	<b>0%</b>	<b>100%</b>	2.49	<b>2.44</b>

source : ABS data via IHS Global Trade Atlas, Fresh Intelligence analysis

Tasmania exported 388 tonnes of apples in 2022, growth of 126 per cent accounting for 14 per cent of national apple exports.

The leading markets for Tasmanian apples were China, Hong Kong, and Papua New Guinea, accounting for 95% of the season's apple exports.



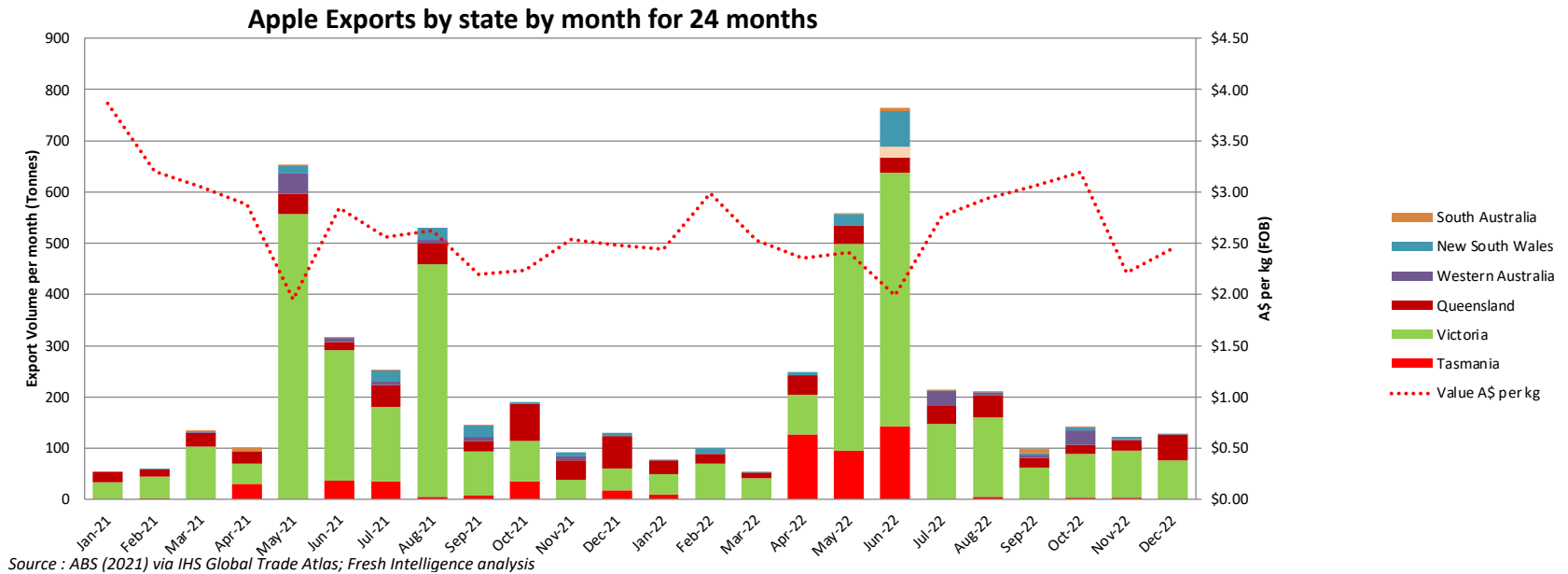
State	Volume Tonnes			
	Jan to Dec-21	Jan to Dec-22	Change to 21	Share %
Tasmania	171	388	126%	14%
Victoria	1,873	1,742	-7%	64%
Queensland	421	347	-17%	13%
Western Australia	77	95	24%	3%
New South Wales	101	122	21%	5%
Other	17	19	16%	1%
<b>TOTAL Apples</b>	<b>2,660</b>	<b>2,714</b>	<b>2.0%</b>	<b>100%</b>

source : ABS data via IHS Global Trade Atlas, Fresh Intelligence analysis

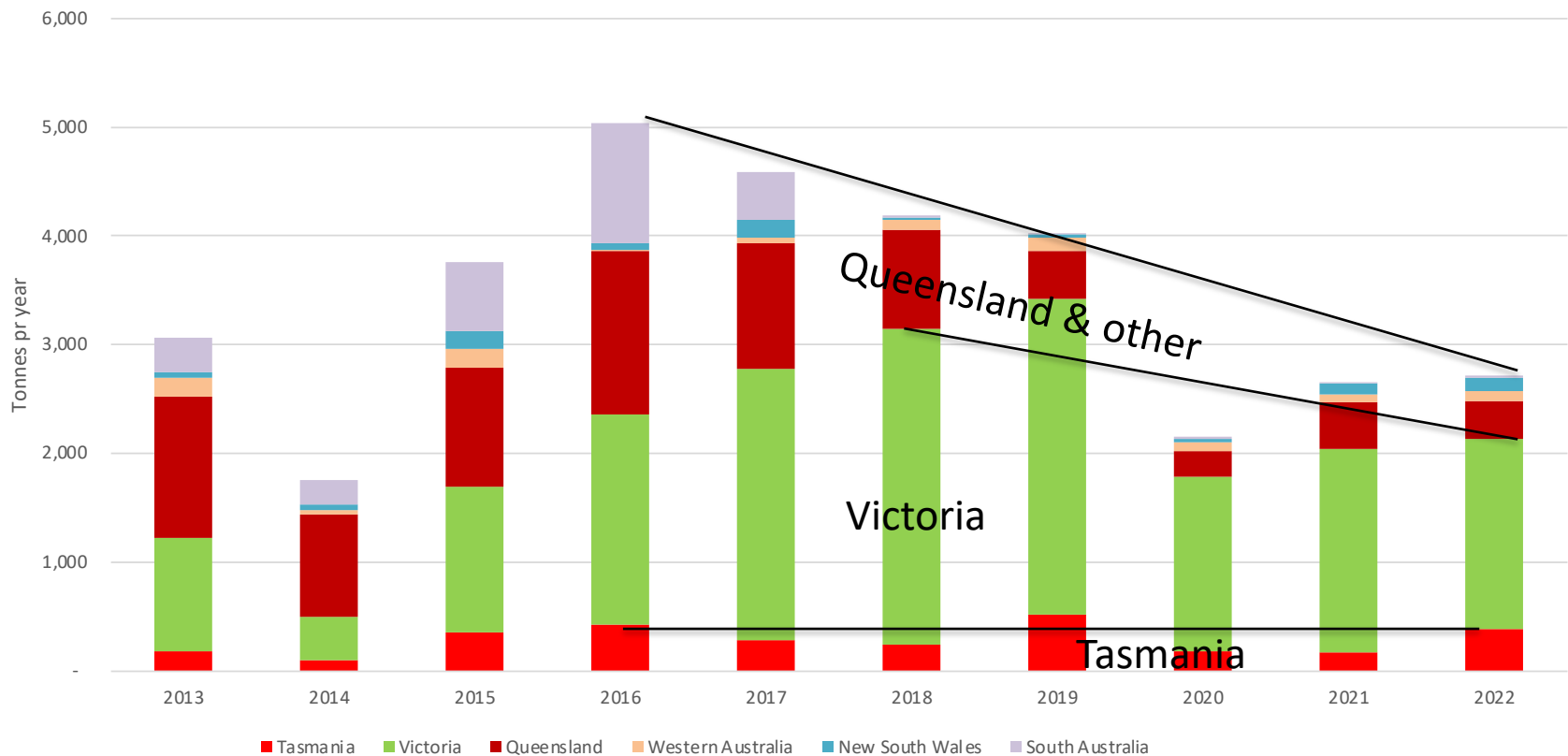
Market	Volume Tonnes			
	Jan to Dec-21	Jan to Dec-22	Change to 21	Share %
China	51	268	428%	69%
Hong Kong	53	76	43%	20%
Papua New Guinea	63	22	-66%	6%
Thailand	0	21		5%
Singapore	0	1		0%
Other	1	0	-100%	0%
<b>Other</b>	<b>171</b>	<b>388</b>	<b>126.4%</b>	<b>100%</b>

source : ABS data via IHS Global Trade Atlas, Fresh Intelligence analysis

Australian Apple exports by month peaked in June with 764 tonnes though remained around 200 tonnes or below for most of the year. All exports to China were from Tasmania from April to June.

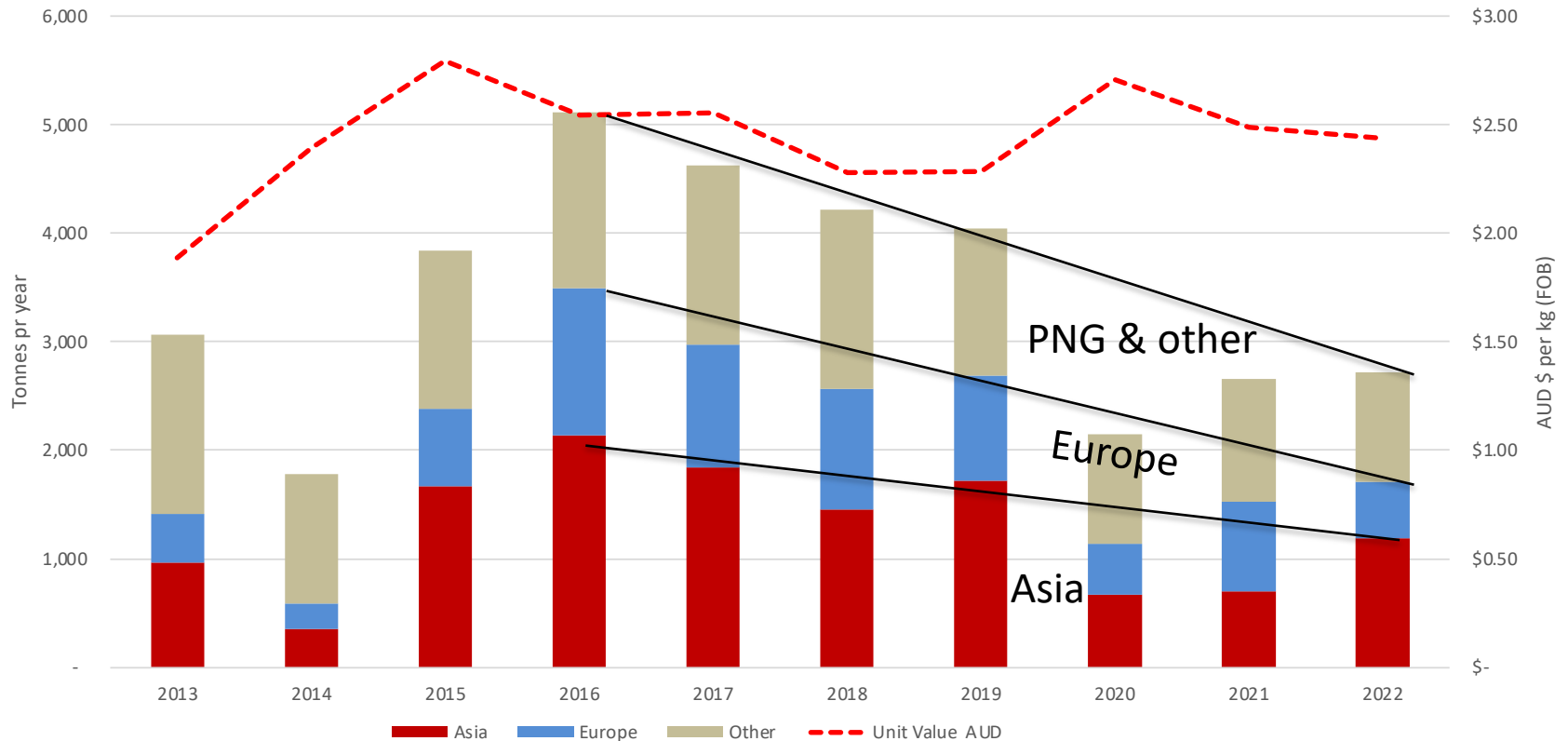


Victoria has been the main export state while Tasmania became the No.2 export state in 2022 after recording 126 per cent growth to 14 per cent share. Queensland had been a key supplier influenced by PNG demand arguably from southern fruit. South Australia has almost disappeared as an export state and WA and NSW volumes remain small.



Source: IHS Global Trade Atlas; Fresh Intelligence analysis

The annual trend for Australian apples has decreased 10 per cent per year over 5 years although has been showing some signs of reversing the trend. In 2022 exports to Asian markets were led by Hong Kong, China and Thailand, all with around 280 tonnes. PNG remains consistently the largest single export market at 700 tonnes. Italy was the only European destination in 2022 with 516 tonnes.



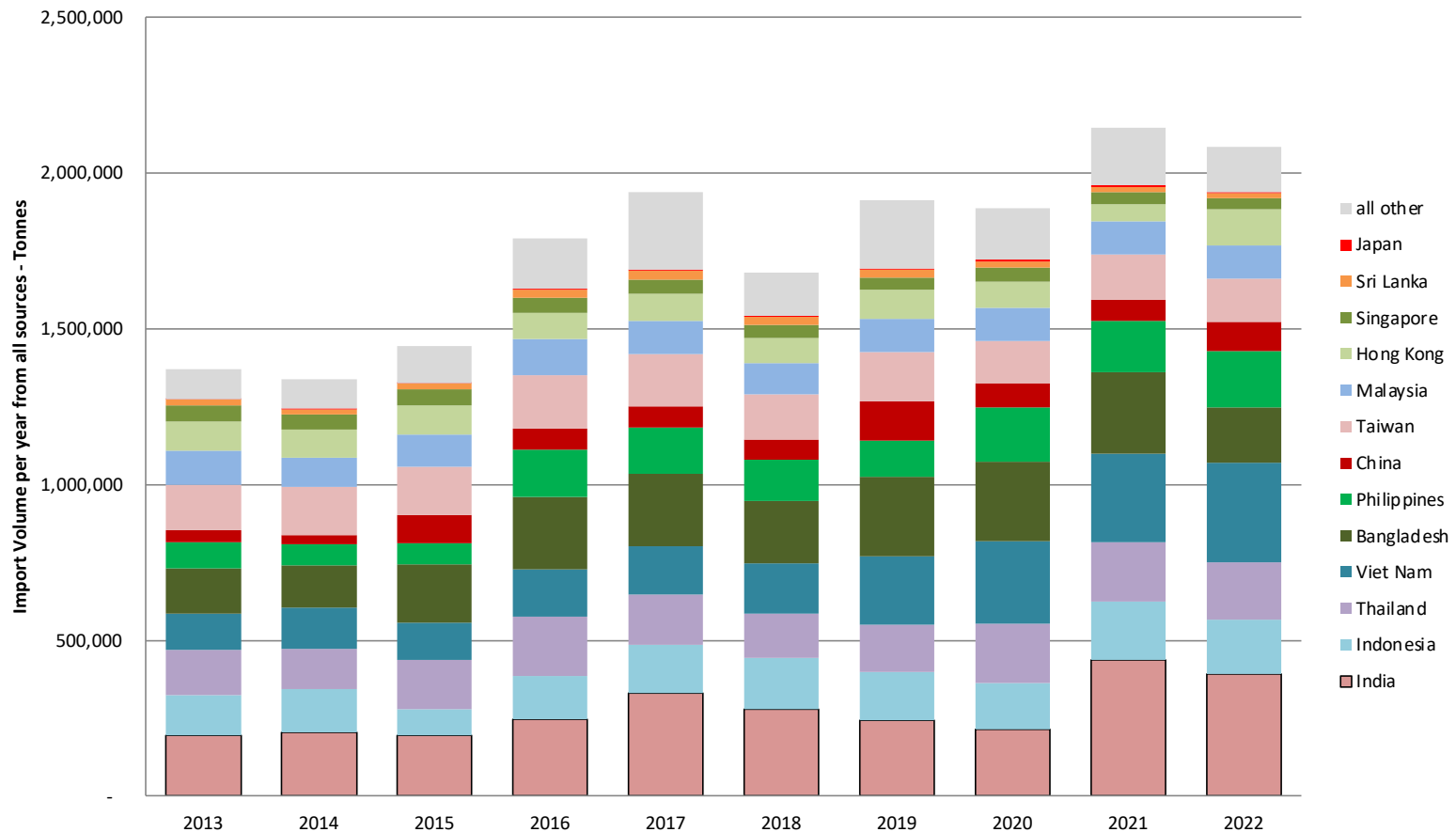
Source: IHS Global Trade Atlas; Fresh Intelligence analysis

Imports of apples by **Asian markets** were 2.1 million tonnes, of which over 50 per cent is supplied from China.

India, the largest importer of apples in Asia, decreased 10 per cent to 392,000 tonnes after a 100 per cent increase in 2021. China increased 40 per cent to 95,000 tonnes.

Japan imported 5,000 tonnes and South Korea does not import any apples.

**Asian import growth for Apples from all sources 2013 - 2022**



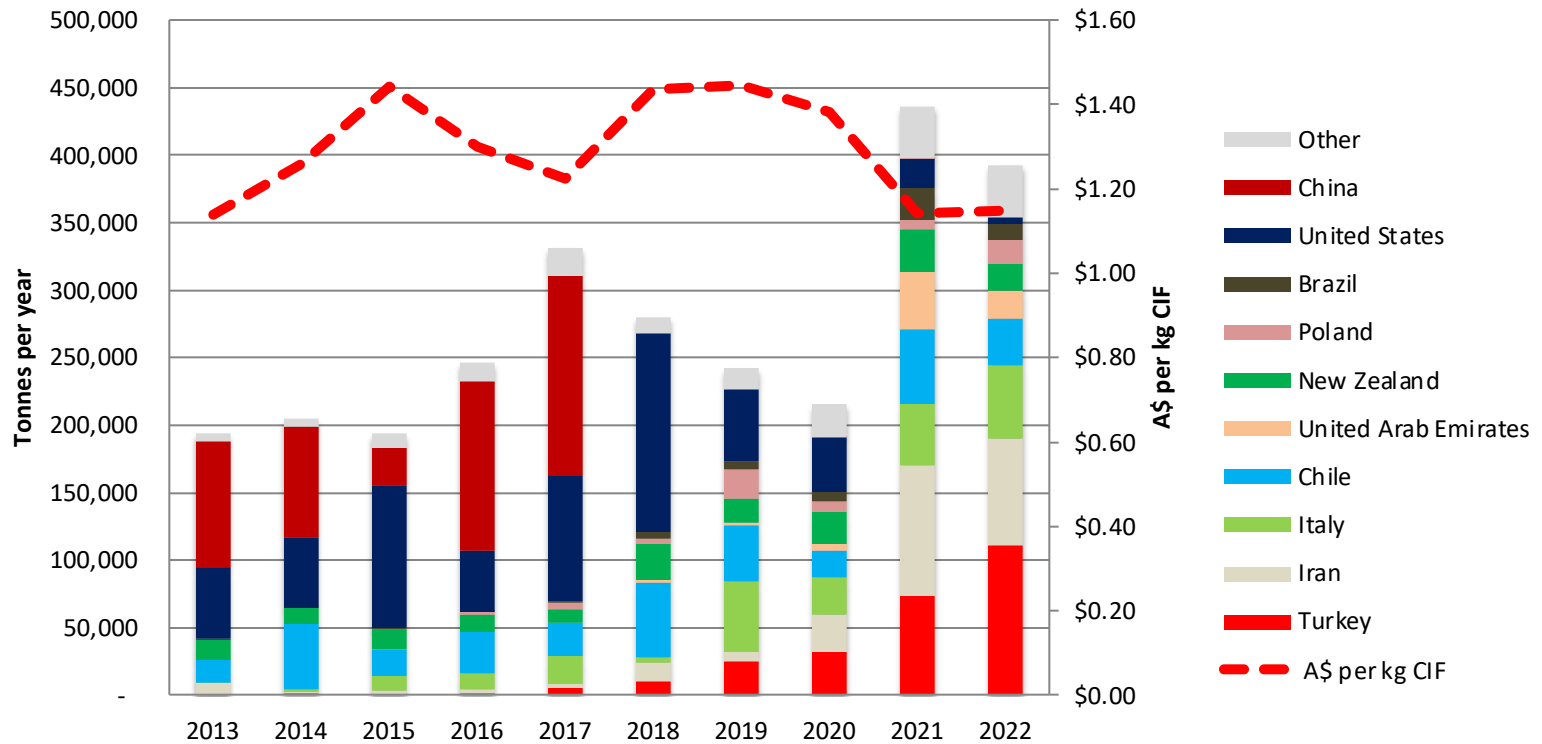
Source : ITC Trademap; Fresh Intelligence analysis





**India** imported 392,000 tonnes of apples in 2022, down 10 per cent after 100 per cent growth last year. Turkey became the largest supplier while China remains banned and the US supply has dwindled with higher tariffs, competition and logistics. Average unit values were low at A\$1.15 kg Chile and New Zealand are the main southern suppliers.

### India Imports of Apples 2013 - 2022

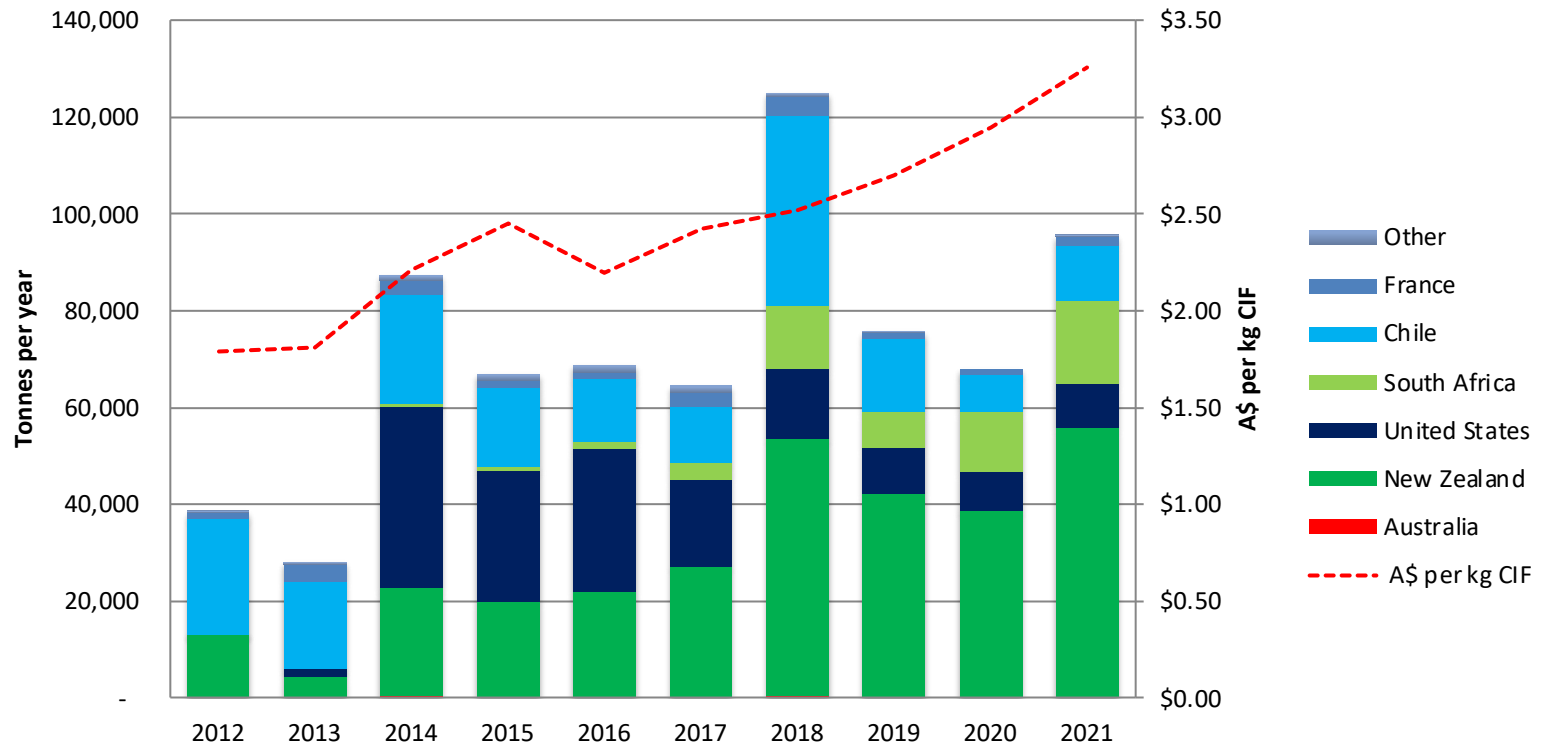


Source: IHS Global Trade Atlas, Decofruit; Fresh Intelligence analysis



**China** has imported 95,000 tonnes in 2022, mostly from New Zealand from March to June. The US imports have declined since the additional tariffs were applied to the US in 2018. South Africa and Chile supplement southern season supplies. In context China produced 46 million tonnes and exported 1 million tonnes in 2022.

## China Imports of Apples 2013 - 2022



Source: China Customs via IHS Global Trade Atlas, Decofruit; Fresh Intelligence analysis

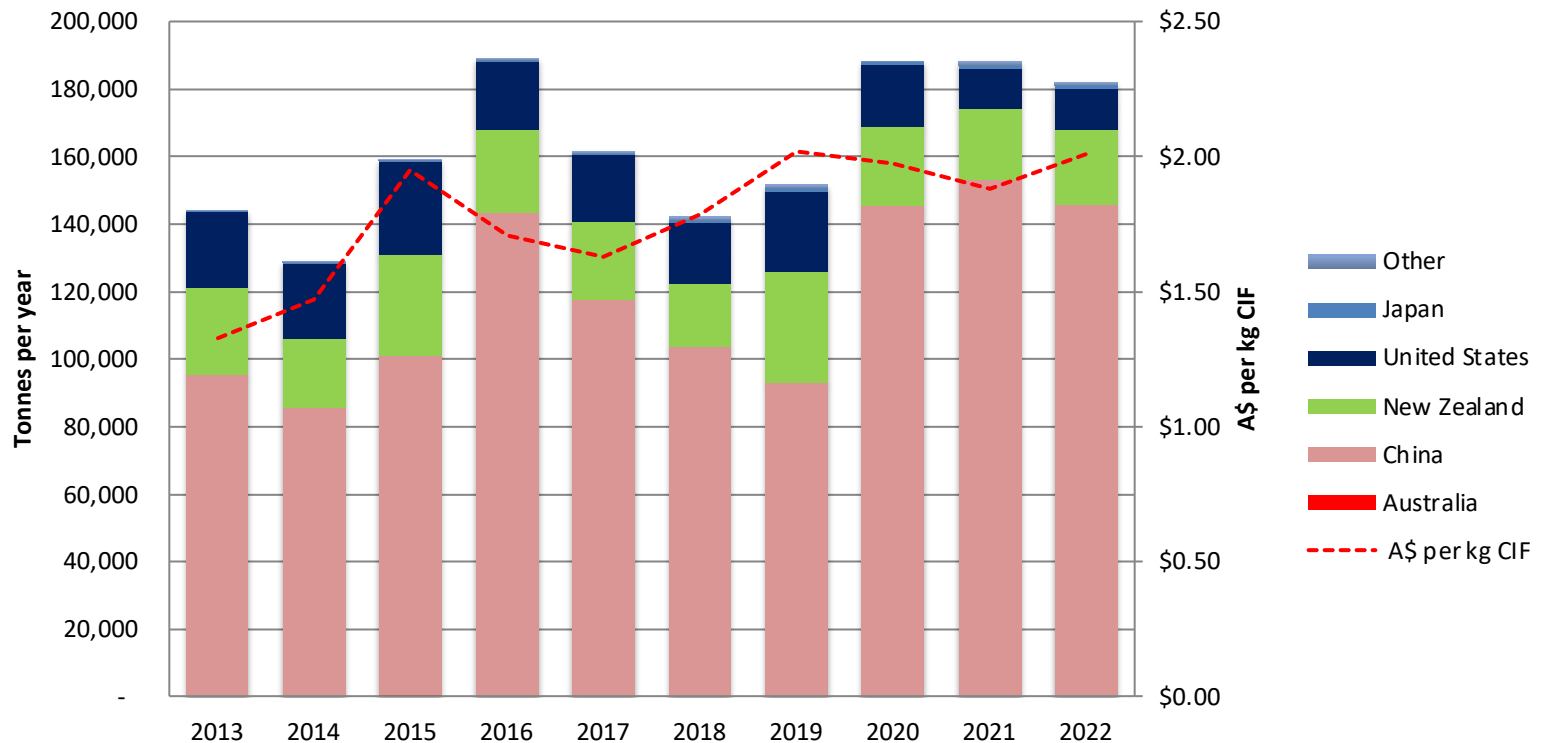


**Thailand** has imported around 185,000 tonnes per year over the last 3 years, mostly from China with New Zealand holding a significant southern share. The US also holds a small share.

Unit values have been increasing to A\$2.00 per kg.

Thailand has no recorded production of apples, thus imports represent total consumption

## Thailand Imports of Apples 2013 - 2022

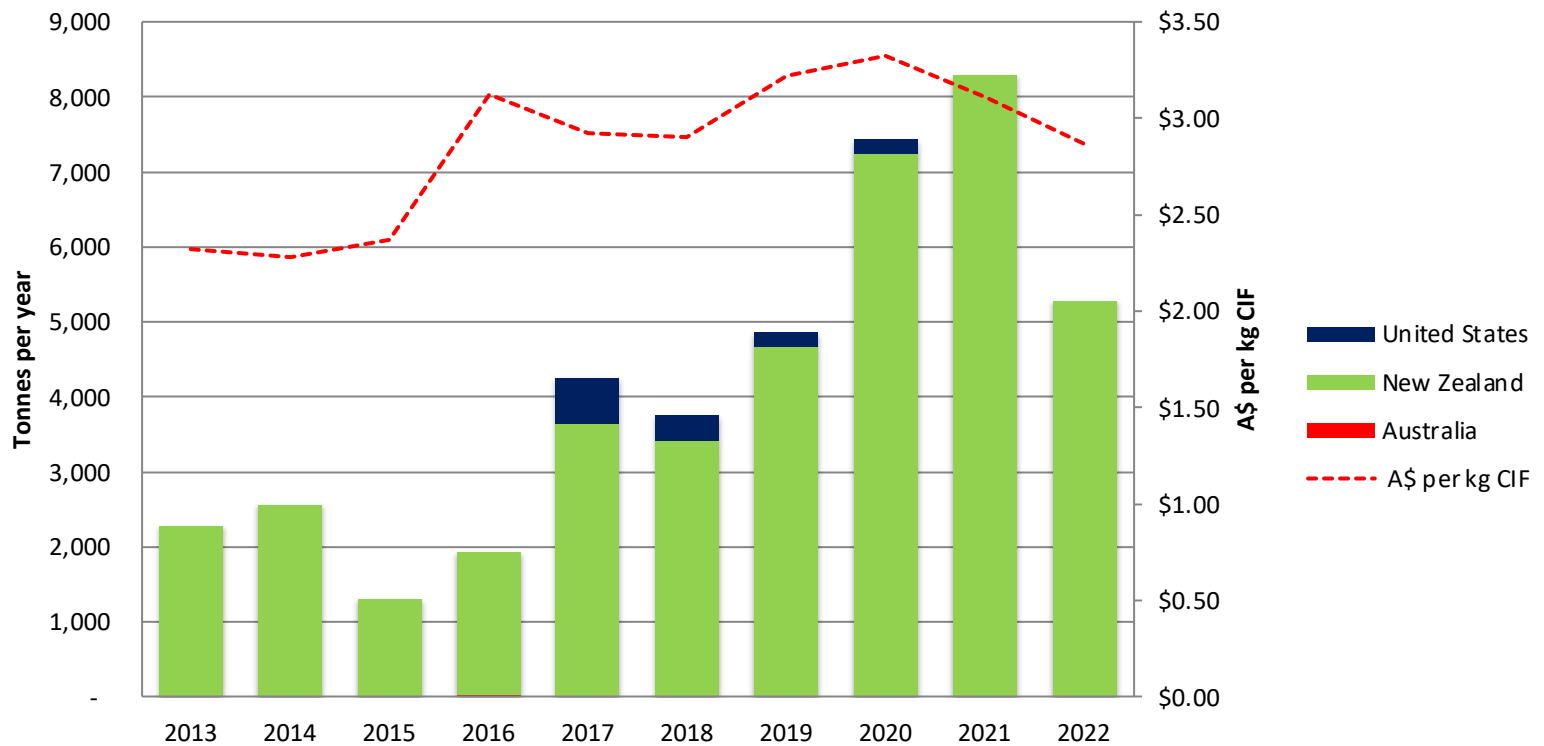


Source: IHS Global Trade Atlas, Decofruit; Fresh Intelligence analysis

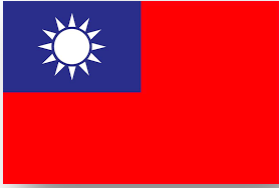


**Japan** imported around 5,000 tonnes in 2022, all from New Zealand and decreased 36 per cent last year. This is small in context to the 765,000 tonnes of mostly Fuji apples grown in Japan.

### Japan Imports of Apples 2013 - 2022

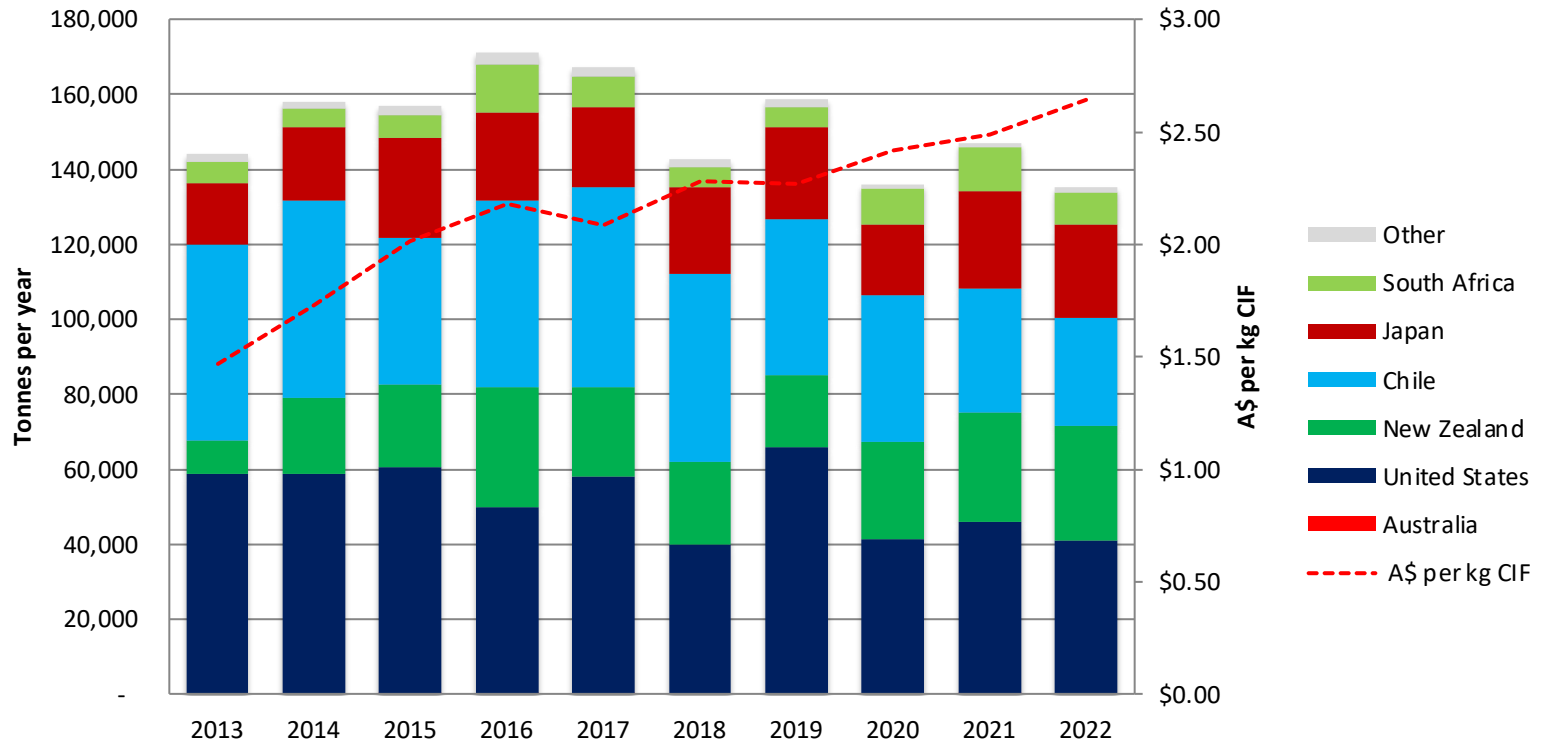


Source: IHS Global Trade Atlas, Decofruit; Fresh Intelligence analysis



**Taiwan** has imported up to 170,000 tonnes of apples in 2016 though has eased to 135,000 tonnes in 2022. Four main suppliers include US, Chile, New Zealand and Japan. A 20 per cent tariff applies to all except New Zealand. Australia has access from Tasmania only where there has been no measurable trade since 2017. Unit values have been steadily increasing.

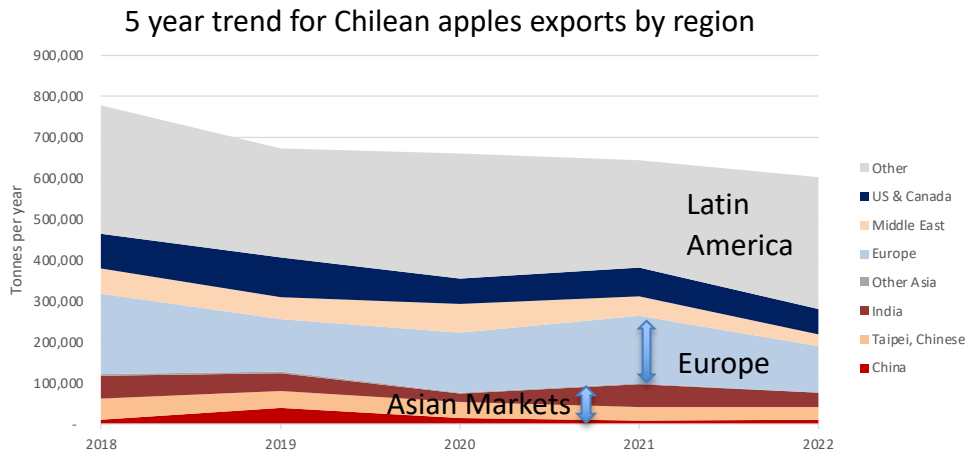
### Taiwan Imports of Apples 2013 - 2022



Source: IHS Global Trade Atlas, Decofruit; Fresh Intelligence analysis



**Chile** has exported 600,000 tonnes in 2022 albeit falling 6.5 per cent per year over 5 years. Asian markets account for 12.8 per cent falling 11 per cent per year over 5 years. Europe remains the larger destination though decreased 31 per cent last year. Trade to North America decreased 12.6 per cent last year. All other markets include other Latin American markets that take 53 per cent of Chilean apple exports, and is growing.



Source: ITC Trademap; Fresh Intelligence analysis



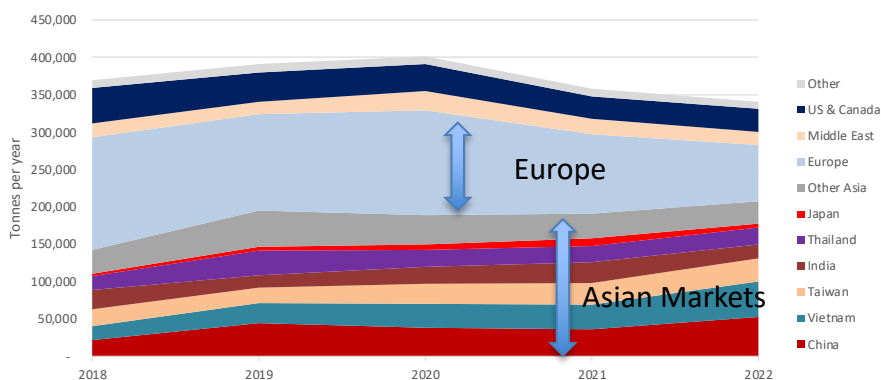
Chile - Exports of Apples 2022				
	2021	1 yr chg	5 yr CAGR	share
	Tonnes	%	& CAGR	%
India	35,003	-37.8%	-11.1%	5.8%
Taiwan	29,432	-13.7%	-12.5%	4.9%
China	11,497	50.4%	-0.3%	1.9%
Thailand	244	-74.6%	-25.6%	0.0%
Hong Kong	608	-6.1%	-1.9%	0.1%
Bangladesh	22	-96.6%	-71.6%	0.0%
Vietnam	-	0.0%	0.0%	0.0%
Malaysia	-			0.0%
Singapore	-			0.0%
Japan	-			0.0%
Indonesia	-			0.0%
Philippines	-			0.0%
<b>Sub Total Asia</b>	<b>76,996</b>	<b>-23.3%</b>	<b>-11.1%</b>	<b>12.8%</b>
<b>United States &amp; Canada</b>	<b>62,684</b>	<b>-12.6%</b>	<b>-7.3%</b>	<b>10.4%</b>
<b>EUROPE</b>	<b>112,745</b>	<b>-31.1%</b>	<b>-12.7%</b>	<b>18.7%</b>
<b>MIDDLE EAST</b>	<b>28,438</b>	<b>-40.0%</b>	<b>-17.7%</b>	<b>4.7%</b>
<b>all other</b>	<b>321,718</b>			<b>53.4%</b>
<b>Total Exports -Tonnes</b>	<b>602,581</b>	<b>-6.4%</b>	<b>-6.2%</b>	<b>100%</b>

Source: Chile Customs via ITC Trademap; Fresh Intelligence analysis



**New Zealand** exported 340,000 tonnes of apples last year after rising to 400,000 in 2020 and easing in 2021 with the 5 year trend down 2.0 per cent per year. Over 60 per cent is now destined to Asian markets including China, Vietnam, Taiwan and India. Trade to Asia has increased 10 per cent per year over 5 years while trade to other regions have declined. Once dominant, the trade to Europe has contracted 16 per cent per year over 5 years and now accounts for 22 per cent share of exports.

5 year trend for New Zealand apples exports by region



Source: ITC Trademap; Fresh Intelligence analysis

New Zealand - Exports of Apples 2022				
	2022	1 yr chg	5 yr CAGR	share
	Tonnes	%	& CAGR	%
<b>China</b>	53,287	48.6%	24.5%	15.6%
<b>Vietnam</b>	47,223	41.1%	27.0%	13.9%
<b>Taiwan</b>	31,183	6.7%	8.6%	9.2%
<b>India</b>	18,074	-35.3%	-8.5%	5.3%
<b>Thailand</b>	22,486	6.5%	4.8%	6.6%
<b>Hong Kong</b>	12,398	-9.9%	-3.1%	3.6%
<b>Japan</b>	5,317	-48.9%	12.0%	1.6%
<b>Singapore</b>	5,950	-18.4%	-4.5%	1.7%
<b>Malaysia</b>	4,767	-20.0%	2.9%	1.4%
<b>Indonesia</b>	3,965	-22.2%	-0.6%	1.2%
<b>Philippines</b>	1,040	30.3%	1.2%	0.3%
<b>Bangladesh</b>	2,121	622.9%	25.7%	0.6%
<b>Sub Total Asia</b>	<b>207,810</b>	<b>8.7%</b>	<b>10.0%</b>	<b>61.0%</b>
<b>United States &amp; Canada</b>	30,590	0.9%	-10.1%	9.0%
<b>EUROPE</b>	75,458	-29.1%	-15.9%	22.1%
<b>MIDDLE EAST</b>	17,299	-13.5%	-2.5%	5.1%
<b>all other</b>	9,606			2.8%
<b>Total Exports - Tonnes</b>	<b>340,762</b>	<b>-4.8%</b>	<b>-2.0%</b>	<b>100%</b>

Source: NZ Customs via ITC Trademap; Fresh Intelligence analysis



## REFERENCES

- International Trade Centre, TRADE MAP [www.trademap.org/](http://www.trademap.org/)
- IHS Global Trade Atlas

## DISCLAIMER

- Fresh Intelligence Consulting collated the data for Fruit Growers Tasmania from data provided by the international trade databases as referenced.
- While every effort is made to ensure that the data is a true reflection of the trade, some errors may occur due to the reporting and Fresh Intelligence Consulting takes no responsibility for any losses that may occur as a result of decisions based on this data.
- Views expressed are personal and may not reflect the same views of Fruit Growers Tasmania.

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