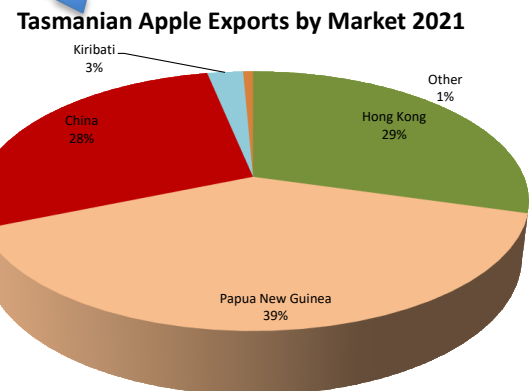
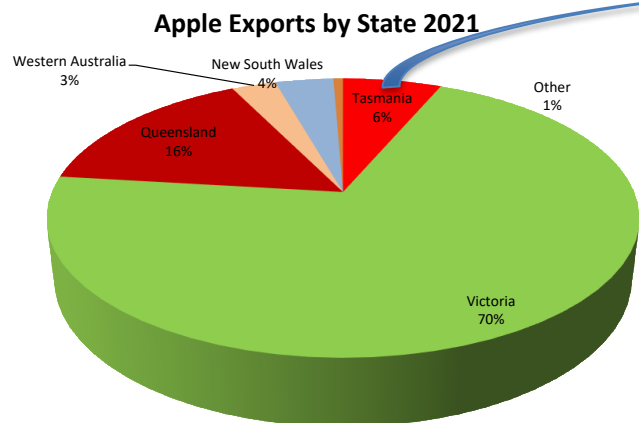


TASMANIAN Apples Pre 2022 season export analysis

Prepared by
Wayne Prowse
Fresh Intelligence Consulting
7 April 2022



Tasmania exported 171 tonnes of apples in 2021, 6 per cent of national volume. The leading markets for Tasmanian apples were China, Hong Kong, and Papua New Guinea, accounting for 97% of the season's apple exports.



| State | Volume Tonnes (season to date) | | | |
|---------------------|--------------------------------|---------------|--------------|-------------|
| | Jan to Dec-20 | Jan to Dec-21 | Change to 20 | Share % |
| Tasmania | 183 | 171 | -6% | 6% |
| Victoria | 1,606 | 1,873 | 17% | 70% |
| Queensland | 232 | 421 | 82% | 16% |
| Western Australia | 83 | 77 | -7% | 3% |
| New South Wales | 25 | 101 | 313% | 4% |
| Other | 23 | 17 | -27% | 1% |
| TOTAL Apples | 2,150 | 2,660 | 23.7% | 100% |

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

| Market | Volume Tonnes (season to date) | | | |
|------------------|--------------------------------|---------------|--------------|-------------|
| | Jan to Dec-20 | Jan to Dec-21 | Change to 20 | Share % |
| Hong Kong | 55 | 53 | -3% | 31% |
| Papua New Guinea | 30 | 63 | 107% | 37% |
| China | 95 | 51 | -47% | 30% |
| Kiribati | 2 | 3 | 83% | 2% |
| Singapore | 1 | 0 | -100% | 0% |
| Other | 0 | 0 | | 0% |
| Other | 183 | 171 | -6.4% | 100% |

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

Australian Apple exports increased 24 per cent in 2021 to 2,660 tonnes, valued at A\$6.61 million. Unit values decreased 8 per cent or 22c per kg.

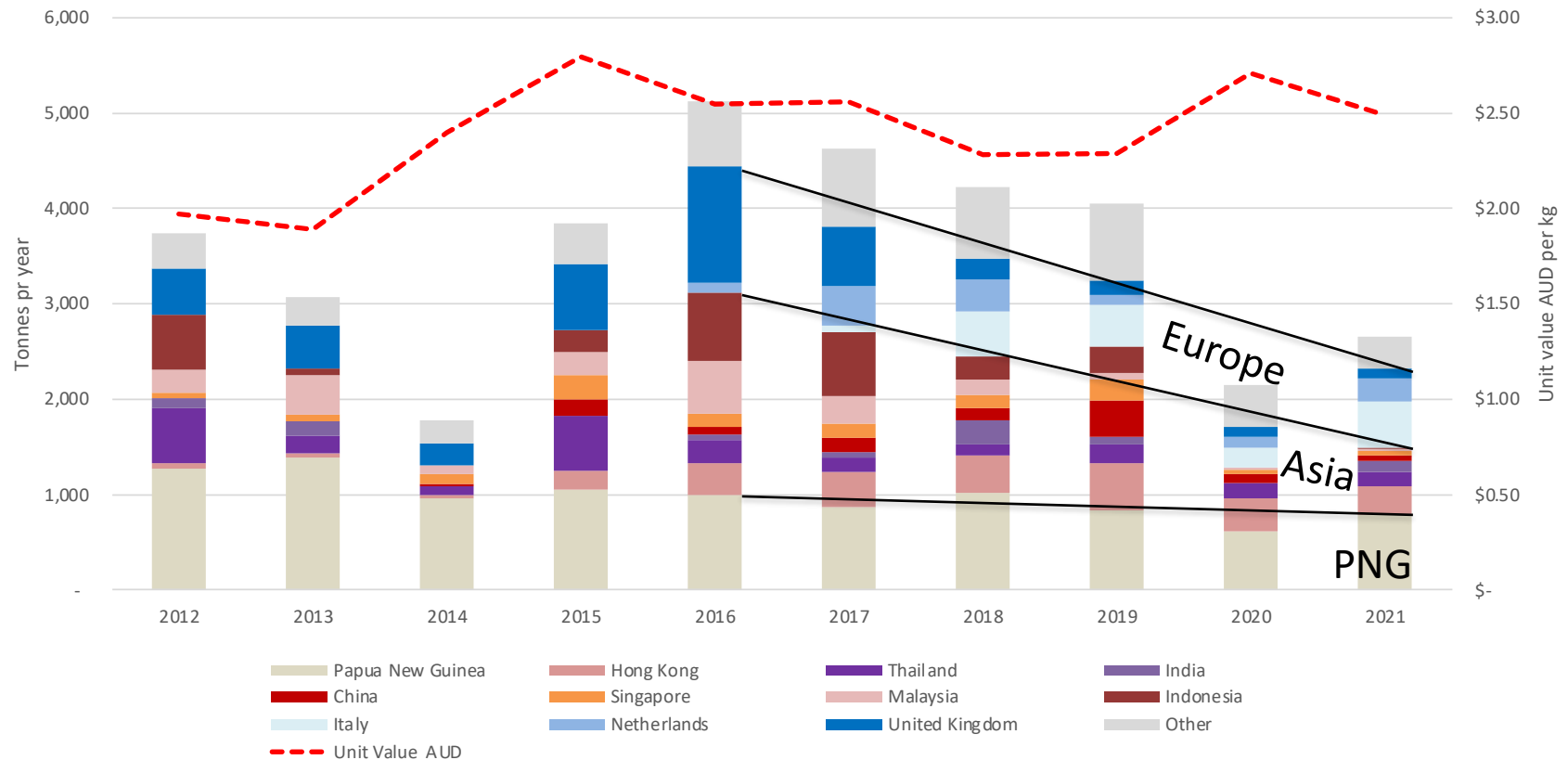
January to Dec-21

Volume 2,660 tonnes 23.7%
 Value 6.61 million 13.7%
 A\$ per kg \$2.49 -8% -\$0.22

| | Volume Tonnes | | | | Value \$ Million AUD | | | | | |
|----------------------|---------------|---------------|--------------|-------------|----------------------|---------------|--------------|-------------|---------------|---------------|
| Market | Jan to Dec-20 | Jan to Dec-21 | Change to 20 | Share % | Jan to Dec-20 | Jan to Dec-21 | Change to 20 | Share % | Jan to Dec-20 | Jan to Dec-21 |
| Papua New Guinea | 615 | 792 | 29% | 30% | 1.60 | 1.92 | 20% | 29% | 2.61 | 2.42 |
| Hong Kong | 351 | 295 | -16% | 11% | 1.09 | 0.84 | -22% | 13% | 3.10 | 2.86 |
| Netherlands | 110 | 236 | 115% | 9% | 0.37 | 0.71 | 93% | 11% | 3.34 | 3.00 |
| Italy | 213 | 486 | 128% | 18% | 0.22 | 0.68 | 216% | 10% | 1.01 | 1.40 |
| Thailand | 156 | 148 | -5% | 6% | 0.52 | 0.58 | 12% | 9% | 3.33 | 3.93 |
| United Kingdom | 102 | 105 | 3% | 4% | 0.30 | 0.32 | 8% | 5% | 2.95 | 3.10 |
| Singapore | 43 | 49 | 15% | 2% | 0.19 | 0.23 | 20% | 3% | 4.43 | 4.65 |
| United Arab Emirates | 33 | 43 | 31% | 2% | 0.23 | 0.22 | -5% | 3% | 6.88 | 5.00 |
| India | 0 | 120 | | 5% | - | 0.20 | | 3% | | 1.63 |
| New Caledonia | 10 | 104 | 928% | 4% | 0.04 | 0.17 | 371% | 3% | 3.52 | 1.61 |
| China | 95 | 51 | -47% | 2% | 0.24 | 0.12 | -51% | 2% | 2.48 | 2.29 |
| all other | 422 | 230 | | 9% | 1.03 | 0.63 | | 9% | | |
| TOTAL Apples | 2,150 | 2,660 | 23.7% | 100% | 5.82 | 6.61 | 14% | 100% | 2.71 | 2.49 |

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

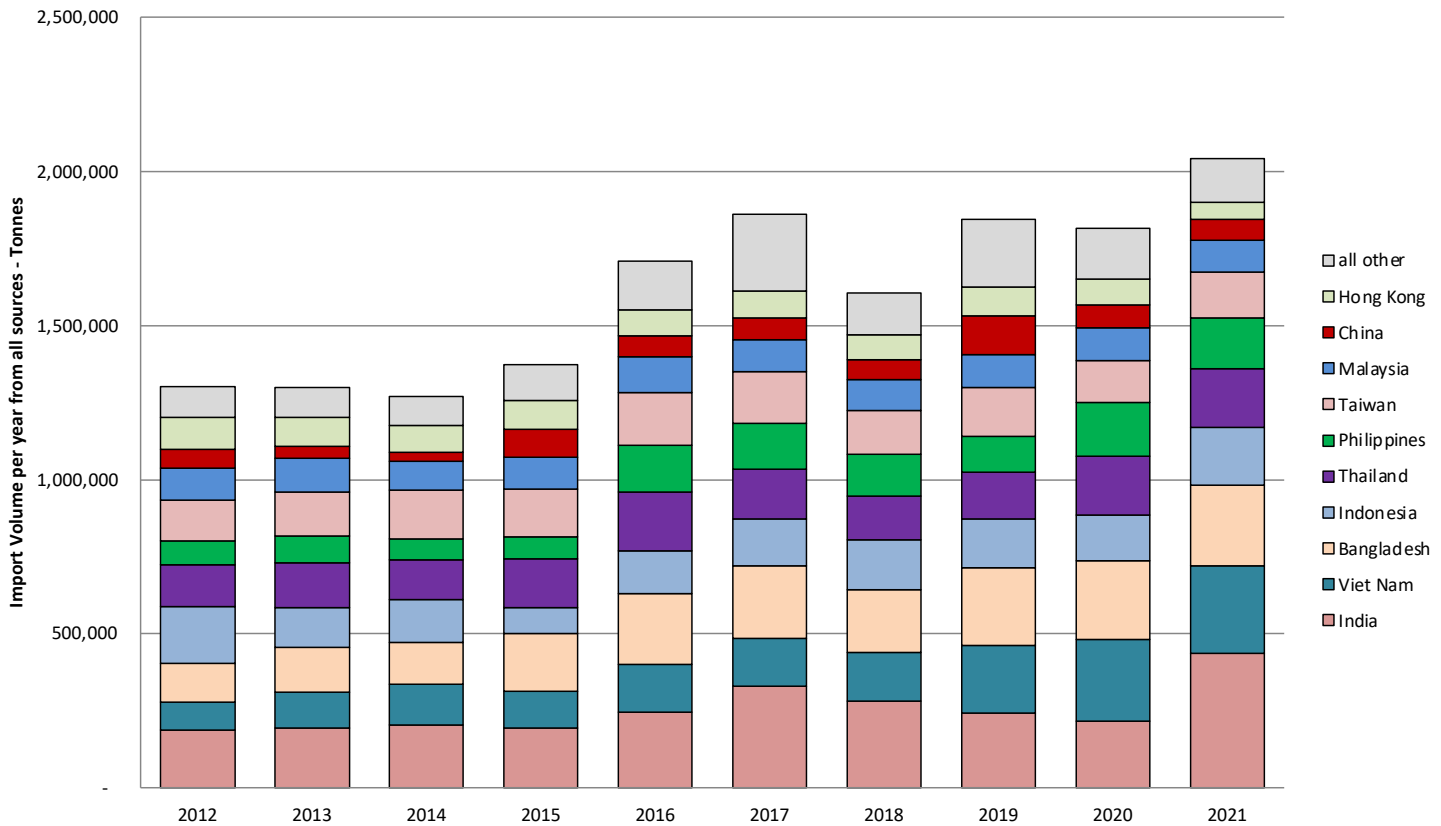
The 10 year moving annual total (MAT) trend for Australian apples with recorded price points highlights the influence of Asian and European markets. In 2021 exports to European markets exceeded exports to Asian markets, while PNG remains consistently the largest export market.



Source: IHS Global Trade Atlas; Fresh Intelligence analysis

Imports of apples by **Asian markets** exceed 2.0 million tonnes, of which over 50 per cent is supplied from China. Indian imports increased over 50 per cent in 2021. Japan imports less than 10,000 tonnes and South Korea does not import any apples, to protect local growers.

Asian import growth for Apples from all sources 2012 - 2021

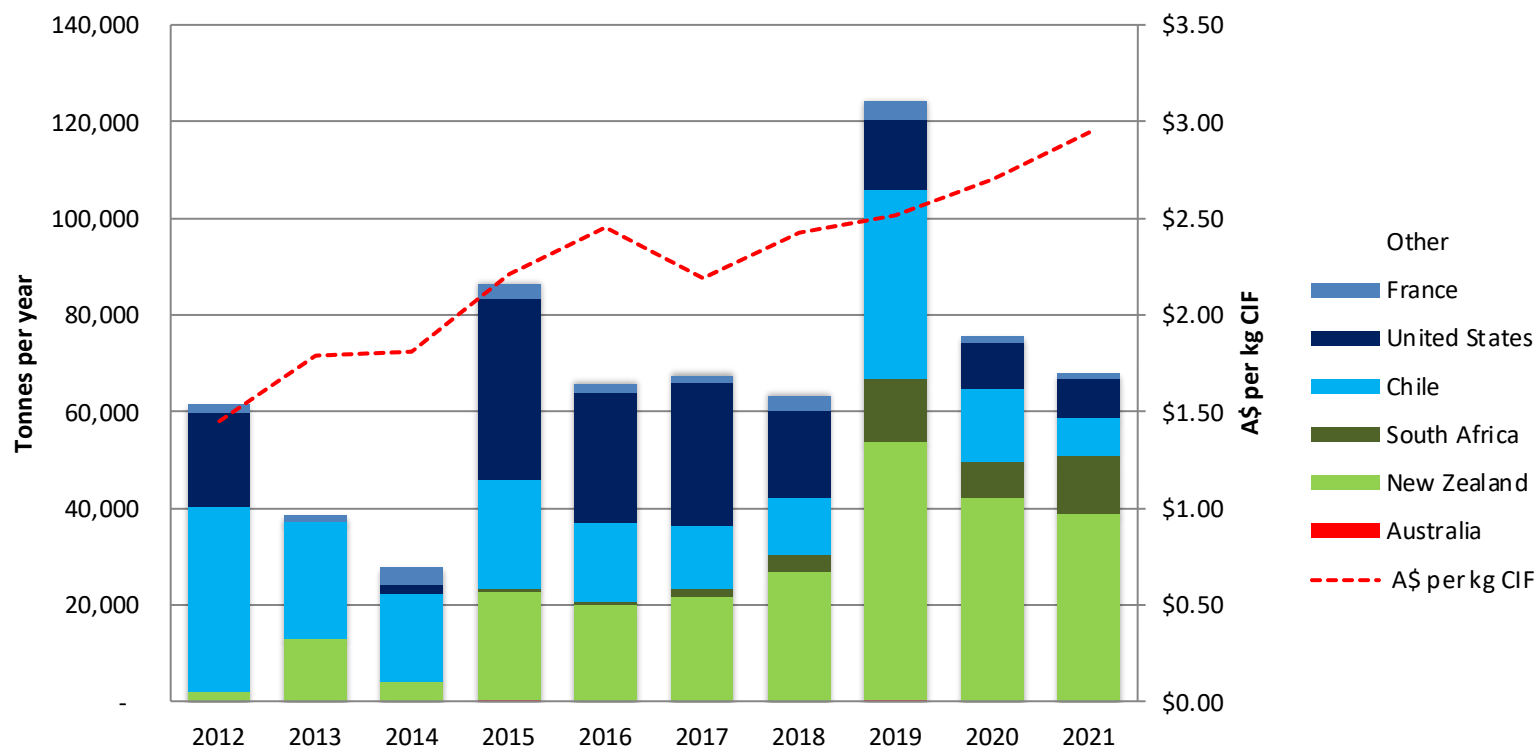


Source : ITC Trademap; Fresh Intelligence analysis



China has imported around 65,000 tonnes per year since 2015, mostly from New Zealand and Chile from March to June. The US imports have declined since the additional tariffs were applied to the US in 2018. In context China produces 45 million tonnes and exported over 1 million tonnes in 2021.

China Imports of Apples 2012 - 2021



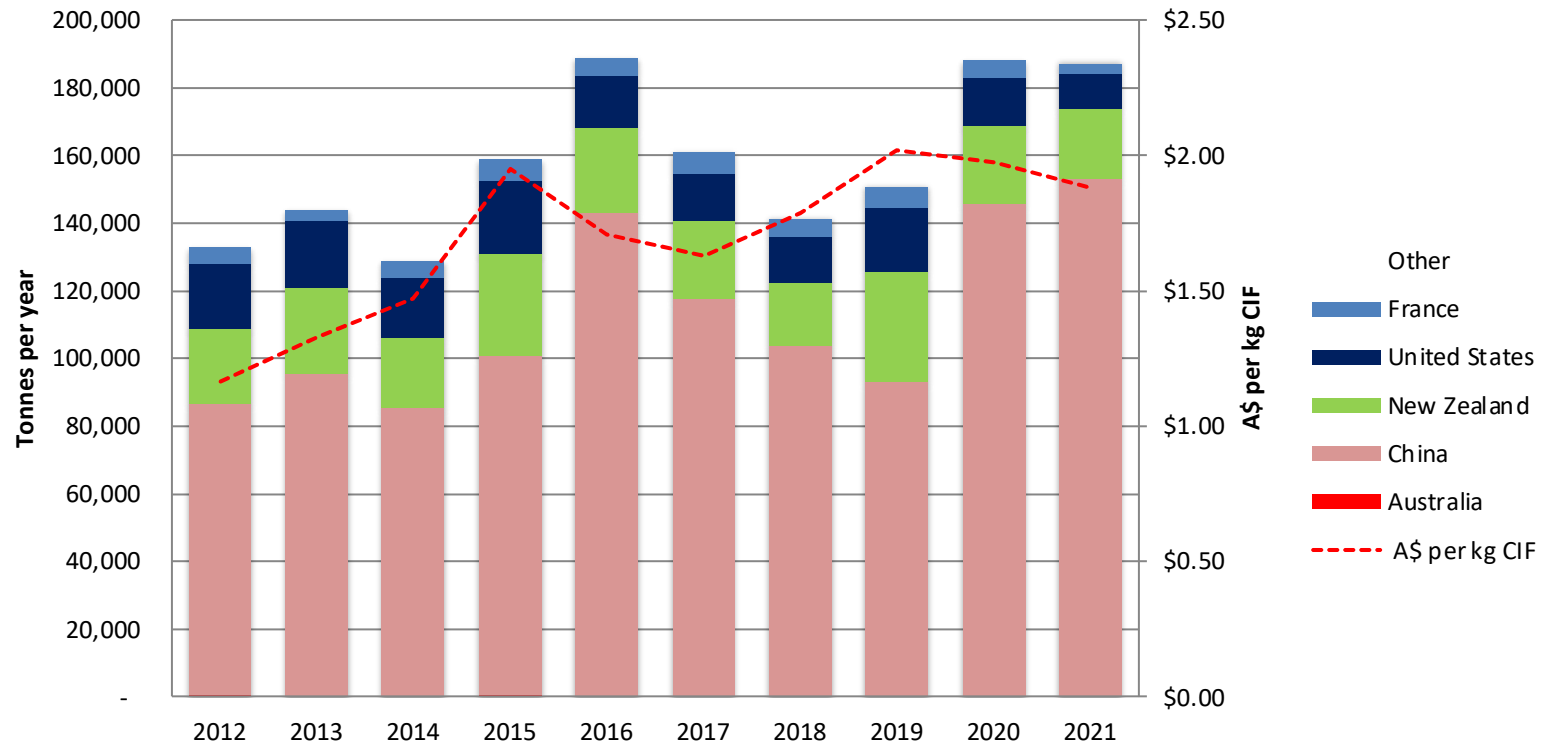
Source: China Customs via IHS Global Trade Atlas, Decofruit; Fresh Intelligence analysis

Note: CIF or Cost, Insurance and Freight, the seller delivers the goods, cleared for export, onboard the vessel at the port of shipment, pays for the transport of the goods to the port of destination, and also obtains and pays for minimum insurance coverage on the goods through their journey to the named port of destination.



Thailand has imported around 186,000 tonnes per year over the last 2 years, mostly from China with New Zealand holding a significant southern share. The US also holds a small share.

Thailand Imports of Apples 2012 - 2021

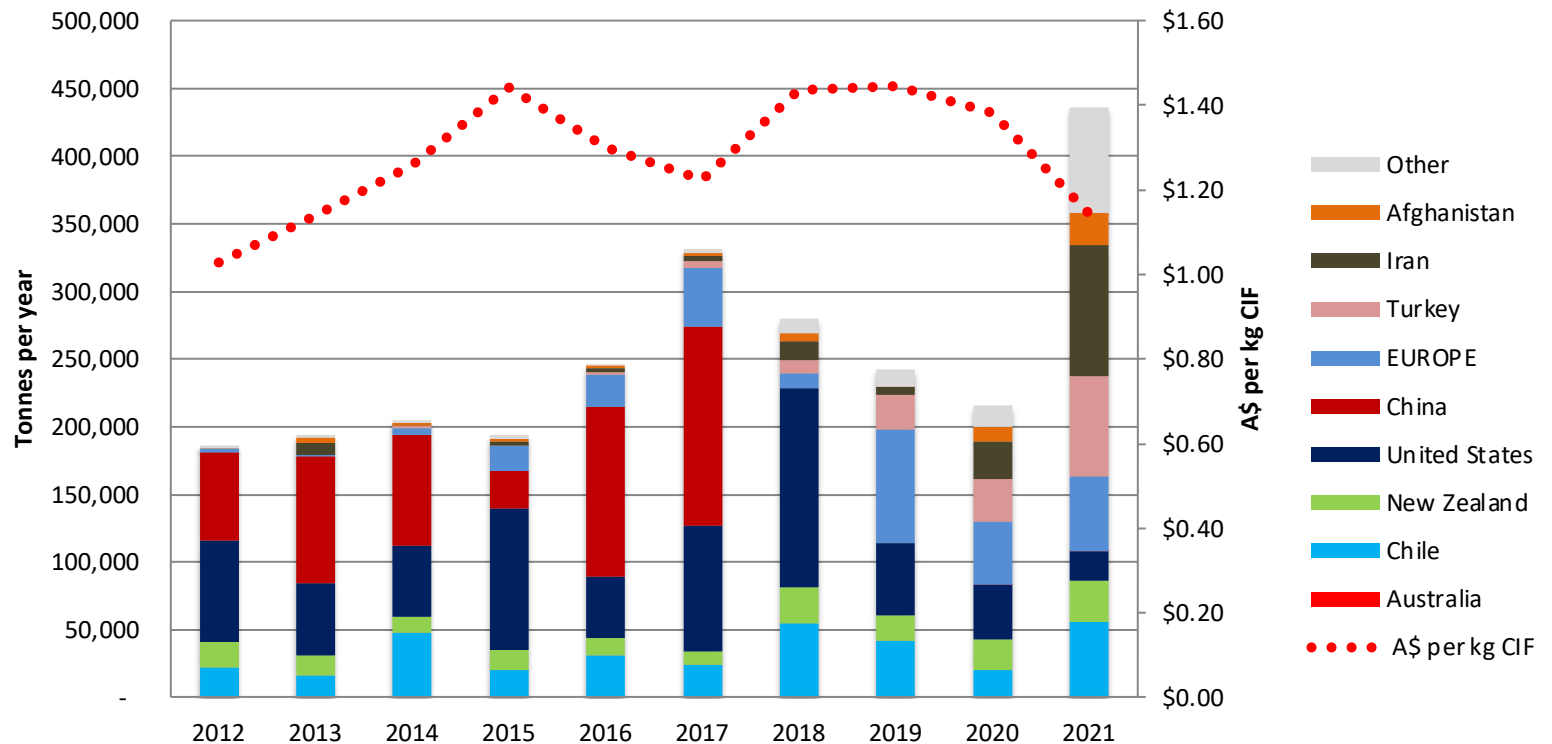


Source: IHS Global Trade Atlas, Decofruit; Fresh Intelligence analysis



India has imported around 436,000 tonnes in 2021, up 102 per cent in one year. Iran became the largest supplier while China remains banned and the US supply has dwindled with higher tariffs, competition and logistics. Chile and New Zealand are the main southern suppliers.

India Imports of Apples 2012 - 2021

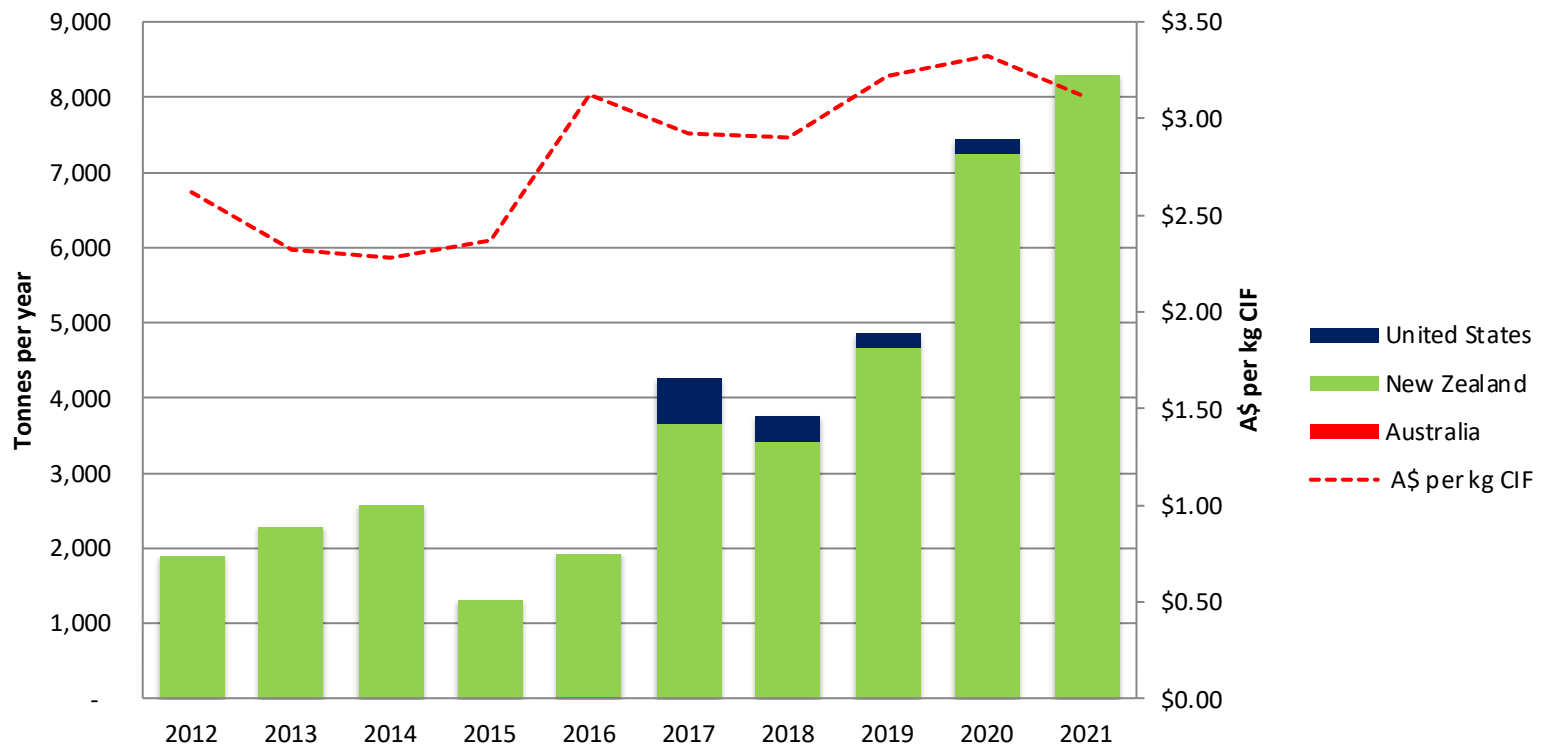


Source: IHS Global Trade Atlas, Decofruit; Fresh Intelligence analysis

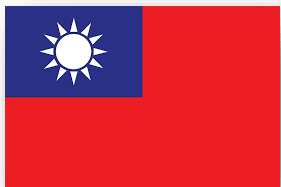


Japan imported around 8,000 tonnes in 2021, all from New Zealand and has been steadily increasing 23 per cent per year since 2011. This is small in context to the 900,000 tonnes of mostly Fuji apples grown in Japan.

Japan Imports of Apples 2012 - 2021

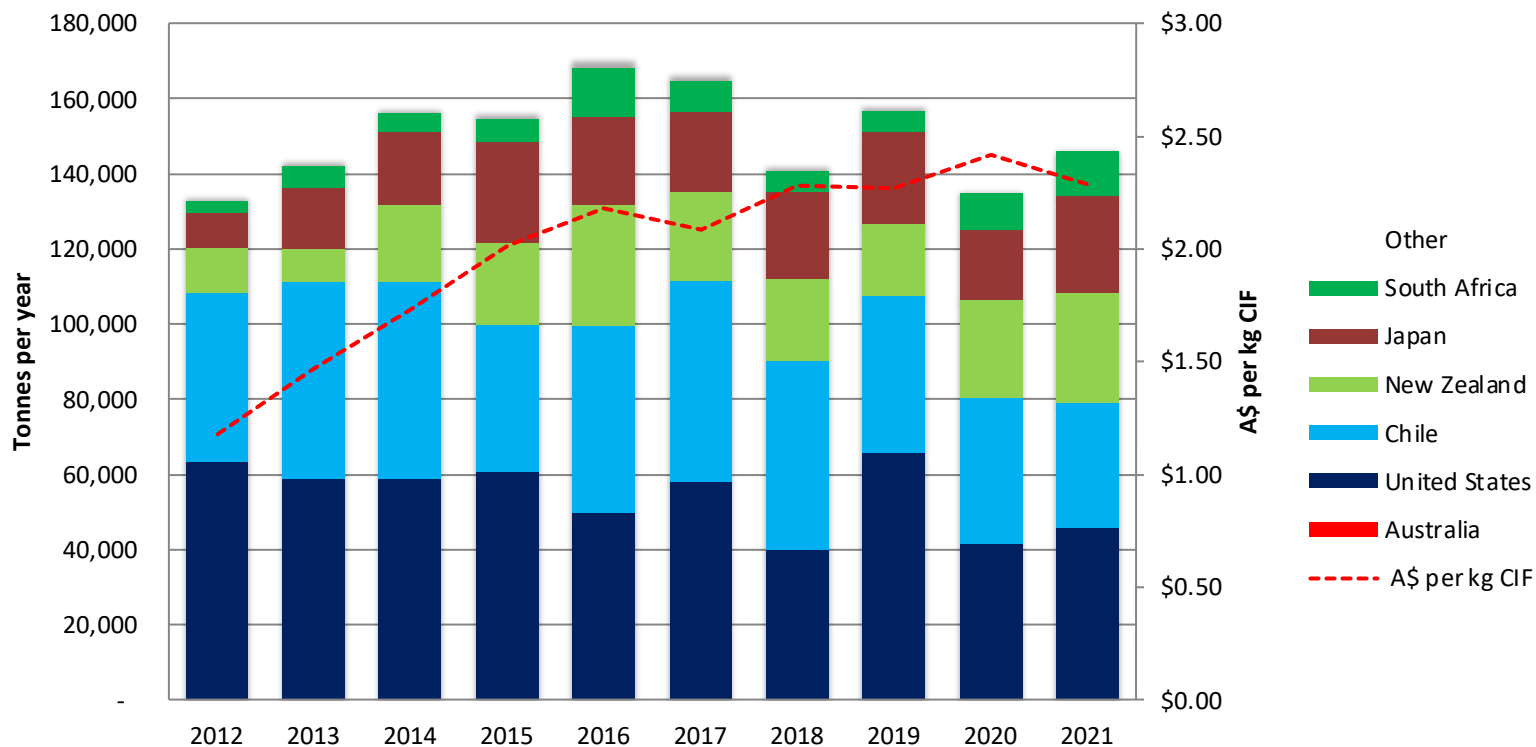


Source: IHS Global Trade Atlas, Decofruit; Fresh Intelligence analysis



Taiwan has imported up to 170,000 tonnes of apples in 2016 though has eased to 146,000 tonnes in 2021. 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.

Taiwan Imports of Apples 2012 - 2021

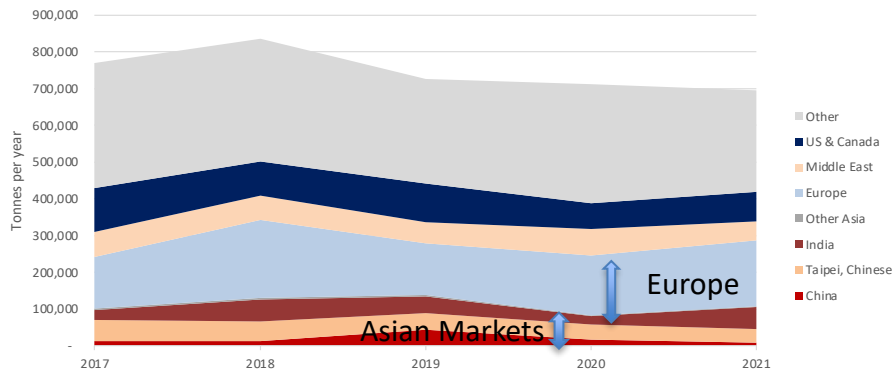


Source: IHS Global Trade Atlas, Decofruit; Fresh Intelligence analysis



Chile has exported around almost 700,000 tonnes in 2021 albeit falling 2.5 per cent per year over 5 years. Asian markets account for 15.6 per cent rising slowly over 5 years though dipped in 2020 arguably due to logistics. Europe remains the larger destination and has increased 6 per cent per year. Trade to North America lifted 14 per cent last year though is in a longer term decline. All other markets include other Latin American markets that take 40 per cent of Chilean apple exports.

5 year trend for Chilean apples exports by region



| Chile - Exports of Apples 2021 | | | | |
|-----------------------------------|----------------|---------------|--------------|--------------|
| | 2021 | 1 yr chg | 5 yr CAGR | share |
| | Tonnes | % | & CAGR | % |
| India | 60,729 | 173.0% | 24.0% | 8.7% |
| Taiwan | 36,850 | -12.3% | -10.4% | 5.3% |
| China | 8,310 | -50.8% | -11.8% | 1.2% |
| Thailand | 1,024 | 161.9% | 16.3% | 0.1% |
| Hong Kong | 721 | 87.8% | 4.3% | 0.1% |
| Bangladesh | 713 | -56.4% | -35.6% | 0.1% |
| Vietnam | 190 | 313.0% | | 0.0% |
| Malaysia | 67 | | -16.4% | 0.0% |
| Singapore | - | 0.0% | 0.0% | 0.0% |
| Japan | - | | | 0.0% |
| Indonesia | - | | | 0.0% |
| Philippines | - | | -100.0% | 0.0% |
| Sub Total Asia | 108,604 | 29.9% | 1.6% | 15.6% |
| United States & Canada | 79,180 | 14.2% | -9.6% | 11.4% |
| EUROPE | 179,338 | 11.2% | 6.4% | 25.8% |
| MIDDLE EAST | 51,133 | -30.7% | -7.2% | 7.3% |
| all other | 278,133 | | | 39.9% |
| Total Exports - Tonnes | 696,388 | -2.3% | -2.5% | 100% |

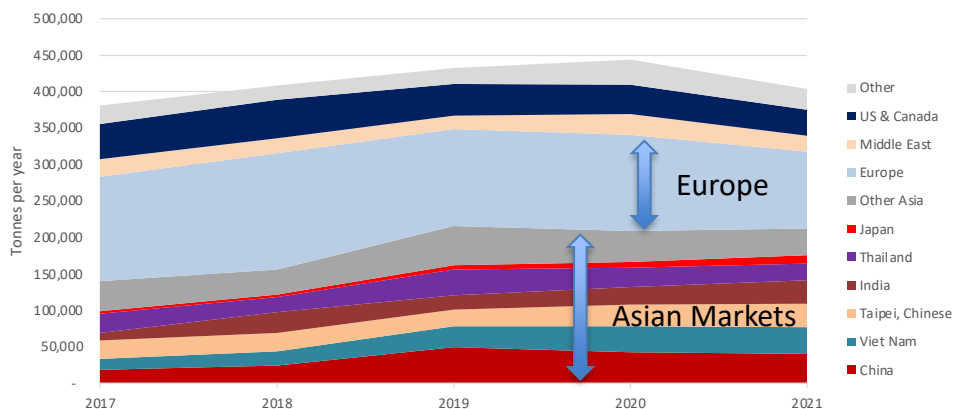
Source: Chile Customs via ITC Trademap; Fresh Intelligence analysis





New Zealand has exported around 400,000 tonnes per year albeit rising to 446,000 in 2020 and easing in 2021 with the 5 year trend up 1.4 per cent. Over 50 per cent is now destined to Asian markets including China, Vietnam, Taiwan and India. Trade to Asia has increased 11 per cent per year over 5 years. Once dominant, the trade to Europe has contracted 20 per cent per year over 5 years as New Zealand is refocussed on Asia.

5 year trend for New Zealand apples exports by region



Source: ITC Trademap; Fresh Intelligence analysis



New Zealand - Exports of Apples 2021

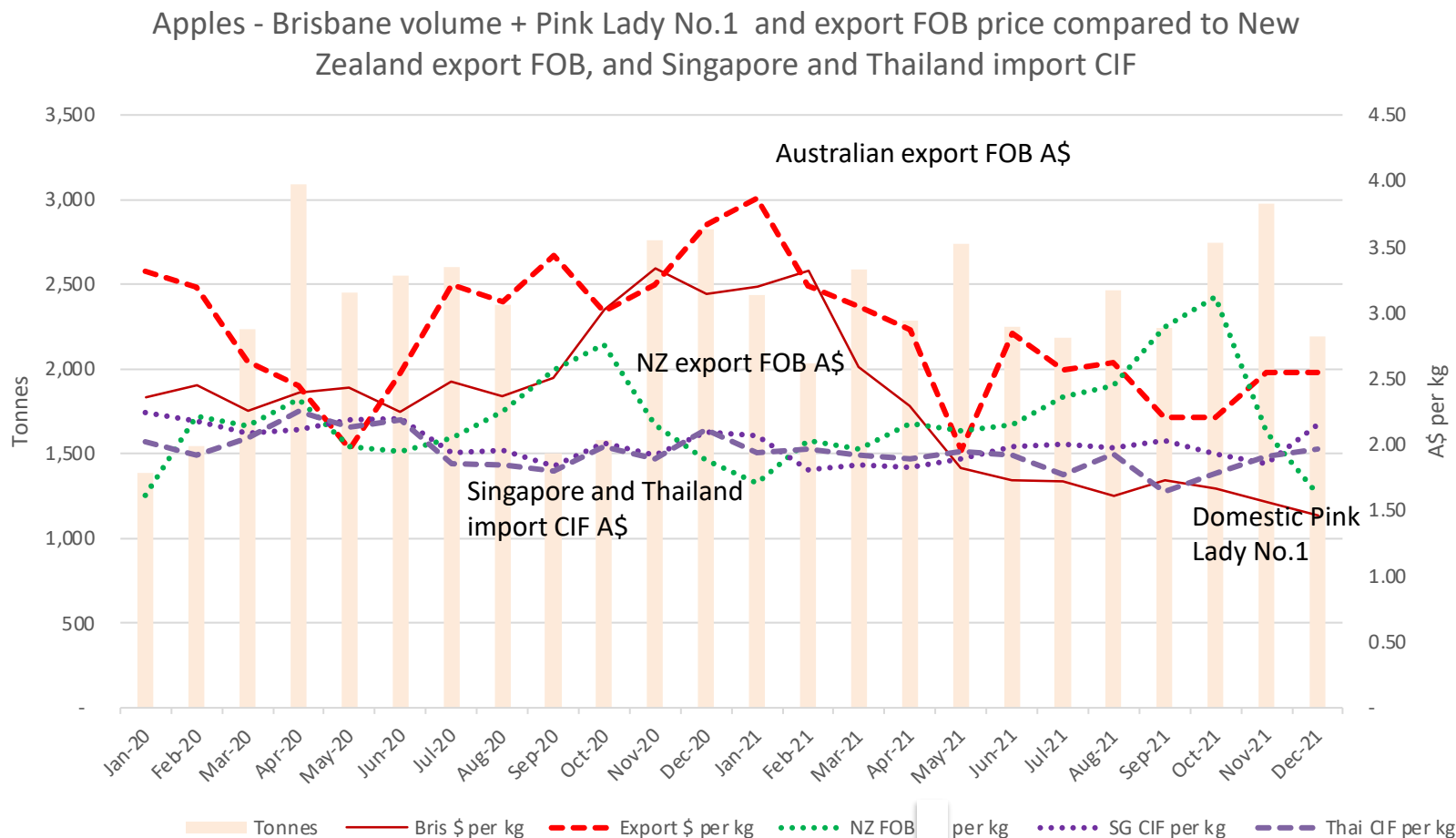
| | 2021 | 1 yr chg | 5 yr CAGR | share |
|-----------------------------------|----------------|----------|-----------|-------|
| | Tonnes | % | & CAGR | % |
| China | 39,806 | -6.5% | 21.4% | 9.9% |
| Vietnam | 37,138 | 5.2% | 26.2% | 9.2% |
| Taiwan | 32,664 | 9.1% | 5.9% | 8.1% |
| India | 31,891 | 31.1% | 31.7% | 7.9% |
| Thailand | 23,205 | -9.8% | -2.5% | 5.8% |
| Hong Kong | 14,953 | -16.3% | 0.4% | 3.7% |
| Japan | 11,270 | 40.0% | 28.6% | 2.8% |
| Singapore | 8,109 | -17.2% | 0.0% | 2.0% |
| Malaysia | 6,528 | -15.6% | 5.7% | 1.6% |
| Indonesia | 5,621 | 19.6% | -4.8% | 1.4% |
| Philippines | 878 | -30.3% | -2.5% | 0.2% |
| Bangladesh | 297 | -82.4% | -50.0% | 0.1% |
| Sub Total Asia | 212,360 | 1.6% | 11.0% | 52.7% |
| United States & Canada | 35,695 | -9.7% | -7.1% | 8.9% |
| EUROPE | 105,200 | -20.2% | -7.5% | 26.1% |
| MIDDLE EAST | 22,068 | -24.1% | -2.1% | 5.5% |
| all other | 27,984 | | | 6.9% |
| Total Exports - Tonnes | 403,307 | -9.1% | 1.4% | 100% |

Source: NZ Customs via ITC Trademap; Fresh Intelligence analysis

Comparison of domestic and export prices trend against other export and import prices per month
 Export prices (Red dash) are above domestic prices and rise and fall in sync at mostly higher levels.

New Zealand export prices rise a bit at end of supply season / October

Singapore and Thailand as examples have consistent year round import prices at around A\$2.00 per kg.



Source: Ausmarket Consultants, IHS Global Trade Atlas; Fresh Intelligence analysis

REFERENCES

- International Trade Centre, TRADE MAP 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.

CONTACT

- Wayne Prowse
- Principal and Senior Analyst
- Fresh Intelligence Consulting
- M: +61 (0)408 164 966
- Email: wayne.prowse@bigpond.com

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