

Australian Blueberry Export Trends

Australian 2019/20 Trade Results

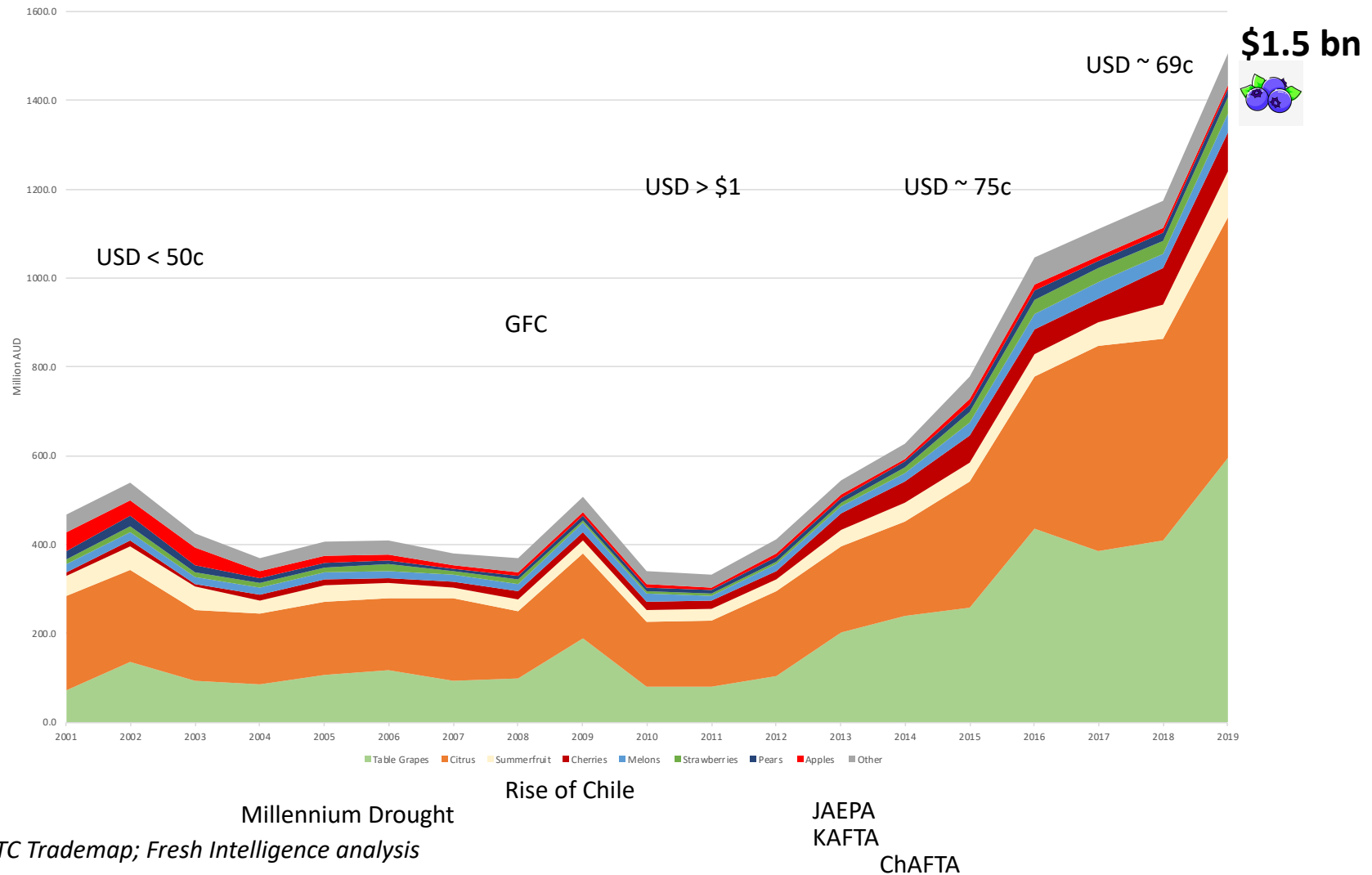
Prepared by
Wayne Prowse
Fresh Intelligence Consulting
16th June 2020





Australian Fresh Fruit Exports

Exchange Rates, drought, GFC, domestic market prices, FTA's, market access, competitors, DEMAND

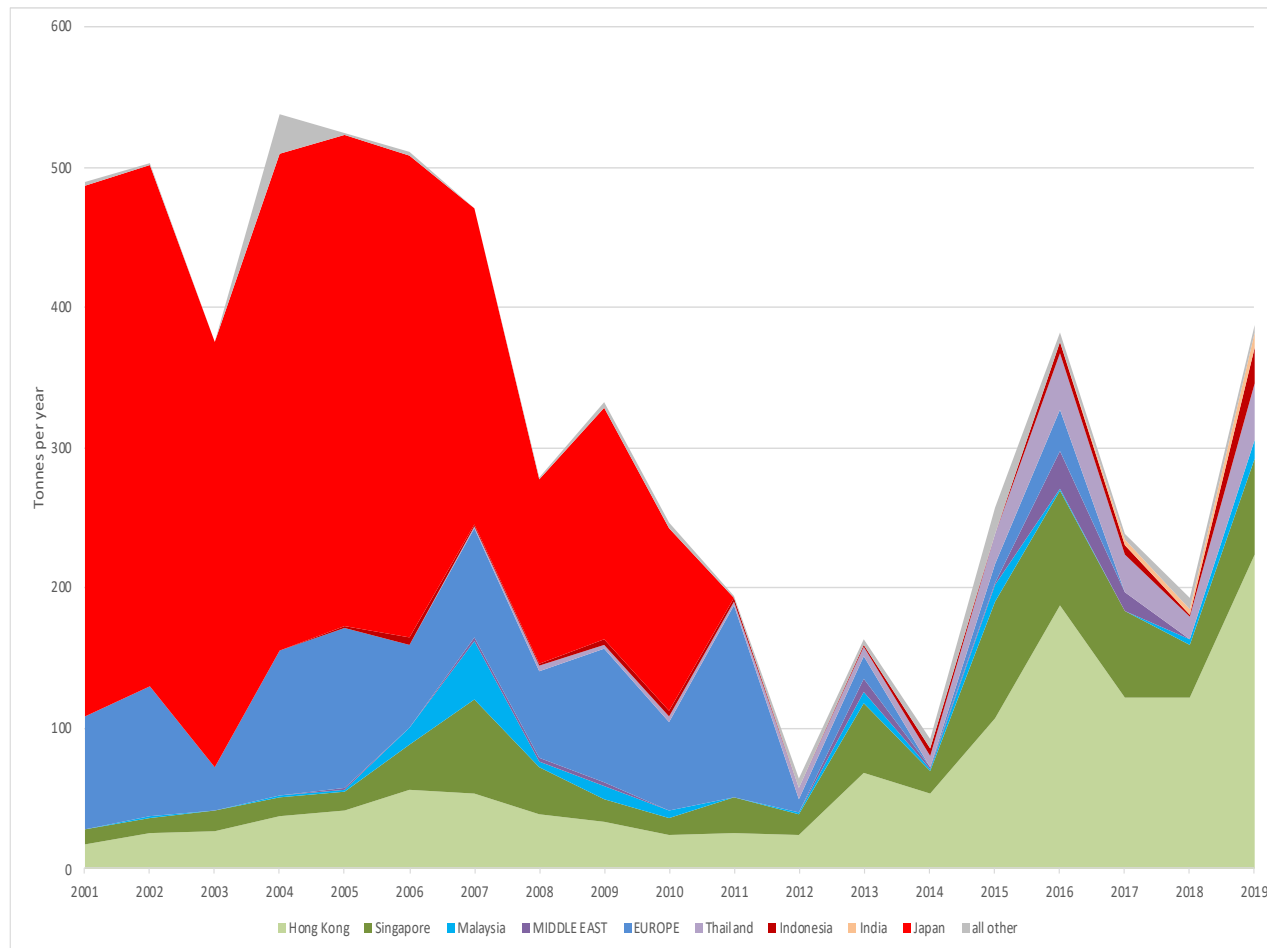


Source: ITC Trademap; Fresh Intelligence analysis



Blueberry Market Access Influences

Non-Protocol, changing protocols to lost access over 2 decades - most blueberries now to non protocol markets



Japan lost access in 2011
China still to negotiate access
India gained ~2015

Protocol markets..
Thailand and Indonesia

Non Protocol Markets – (e.g. Hong Kong & Singapore + Middle East and Europe)



Australian Blueberry Results

Export by state

Australian blueberry exports increased 93 per cent in 2019/20 to 384 tonnes valued at AU\$8.08 million.

New South Wales and Queensland accounted for over 95 per cent of the national exports

Tasmania had no recorded exports

Victoria lifted 124 per cent off a low base, and arguably may have exported some Tasmanian sourced fruit with a higher price point.

Country -	Volume Tonnes (season to date)				Value \$ Million AUD (season to date)					
	May to Apr-19	May to Apr-20	Change to 19	Share %	May to Apr-19	May to Apr-20	Change to 19	Share %	May to Apr-19	May to Apr-20
TOTAL BLUEBERRIES	199	384	93%	100%	4.76	8.08	70%	100%	23.87	21.04
New South Wales	125	230	84%	60%	3.07	4.84	58%	60%	24.52	21.02
Queensland	63	134	114%	35%	1.44	2.59	80%	32%	22.99	19.38
Victoria	8.6	19	124%	5%	0.22	0.63	181%	8%	26.10	32.78
Western Australia	0.15	0.93	516%	0%	0.004	0.020	401%	0%	26.62	21.67
Tasmania	0.29	0	-100%	0%	0.006	-	-100%	0%	21.66	
Other	3	0	-100%	0%	0.02	-	-100%	0%		-
TOTAL Blueberries	199	384	92.7%	100%	4.76	8.08	70%	100%	23.87	21.04

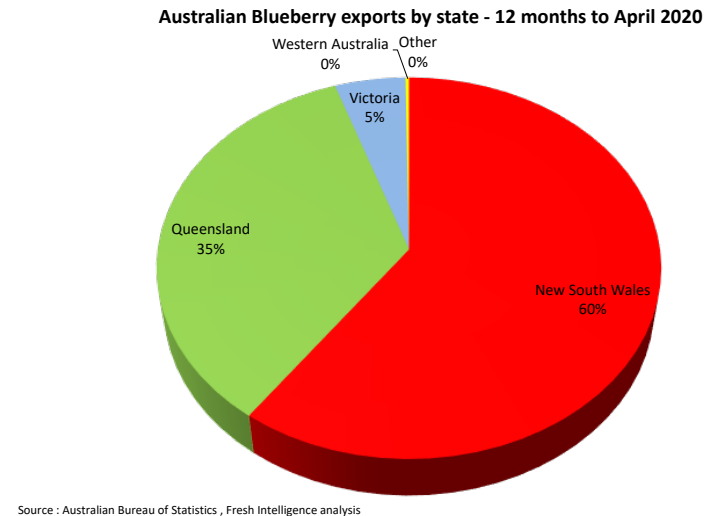
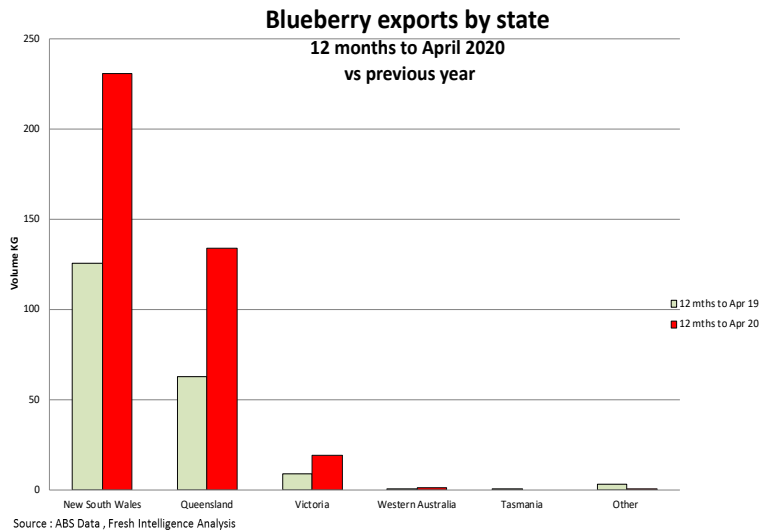
source : ABS data via IHS Global Trade Atlas, Fresh Intelligence analysis



Australian Blueberry Results

Export by state

Ninety-five per cent of exports were from New South Wales and Queensland, and most of the balance from Victoria. There were no recorded exports from Tasmania.

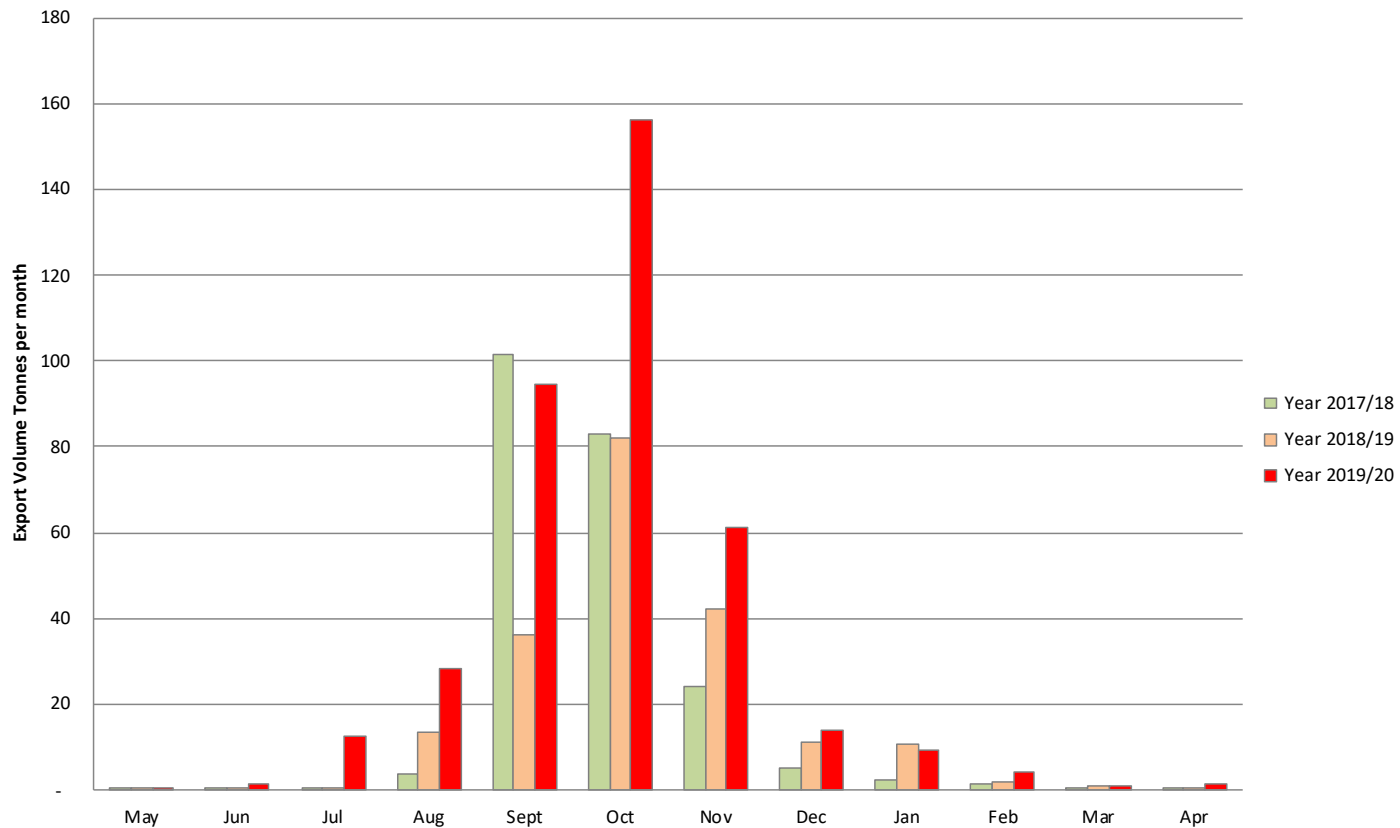




Australian Blueberry Results

Export by month

Australian Blueberry Exports by month 2019/20 vs last 2 years



Source : ABS Data , Fresh Intelligence Analysis

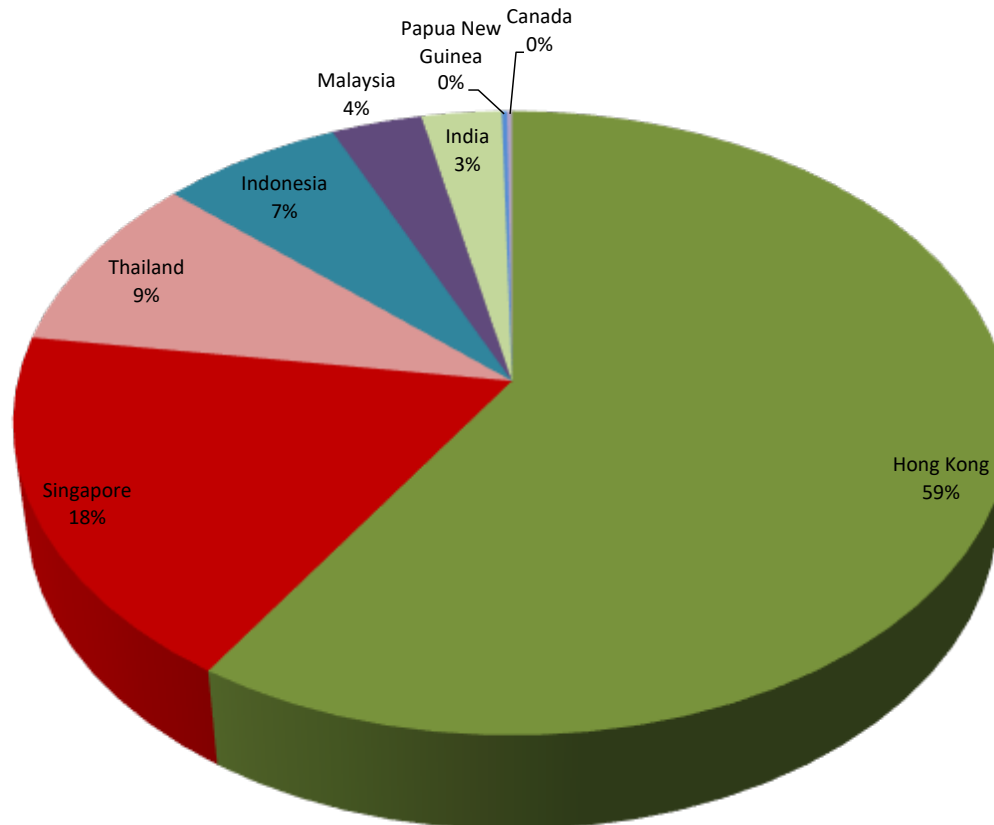


Australian Blueberry Results

Export market destinations

Over last 12 months the leading 5 markets for Australian blueberries were Hong Kong, Singapore, Thailand, Indonesia and Malaysia, accounting for 96% of all annual blueberry exports by volume.

Australian Blueberry Exports by market 384 tonnes - 12 mths to April 2020





Australian Blueberry Results

Export market destinations

May to April

Volume **384 tonnes** **92.7%**
Value **8.08 million** **69.8%**
A\$ per kg **\$21.04** **-12%** **-\$2.84**

	Volume Tonnes				Value \$ Million AUD					
Market	May to Apr-19	May to Apr-20	Change to 19	Share %	May to Apr-19	May to Apr-20	Change to 19	Share %	May to Apr-19	May to Apr-20
TOTAL BLUEBERRIES	199	384	93%	100%	4.76	8.08	70%	100%	23.87	21.04
Hong Kong	124	226	83%	59%	3.10	5.06	63%	63%	25.03	22.37
Singapore	39	69	80%	18%	0.80	1.25	57%	15%	20.60	17.98
Thailand	18	36	93%	9%	0.45	0.72	62%	9%	24.21	20.39
Indonesia	4	26	586%	7%	0.09	0.52	489%	6%	23.78	20.42
Malaysia	4	13	222%	3%	0.09	0.24	169%	3%	22.05	18.43
India	4	11	201%	3%	0.13	0.22	75%	3%	33.91	19.69
Papua New Guinea	0	1	78%	0%	0.01	0.02	76%	0%	23.41	23.13
Canada	3	1	-73%	0%	0.07	0.01	-81%	0%	26.17	18.67
all other	4	1	-65%	0%	0.04	0.03		0%	8.98	
TOTAL Blueberries	199	384	92.7%	100%	4.76	8.08	70%	100%	23.87	21.04

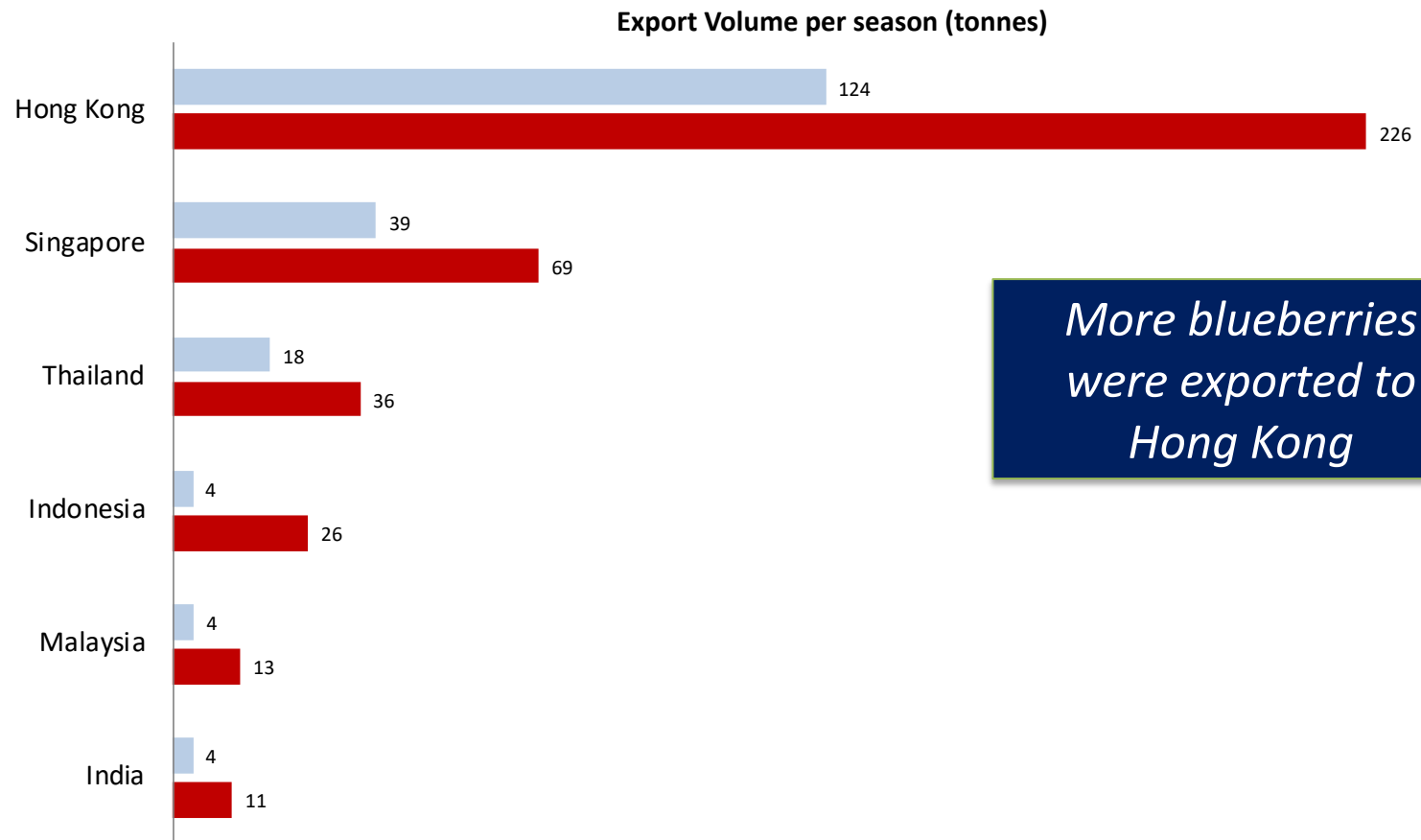
source : ABS data via IHS Global Trade Atlas, Fresh Intelligence analysis



Australian Blueberry Results

Export market destinations

■ 12 mths to Apr 19 ■ 12 mths to Apr 20



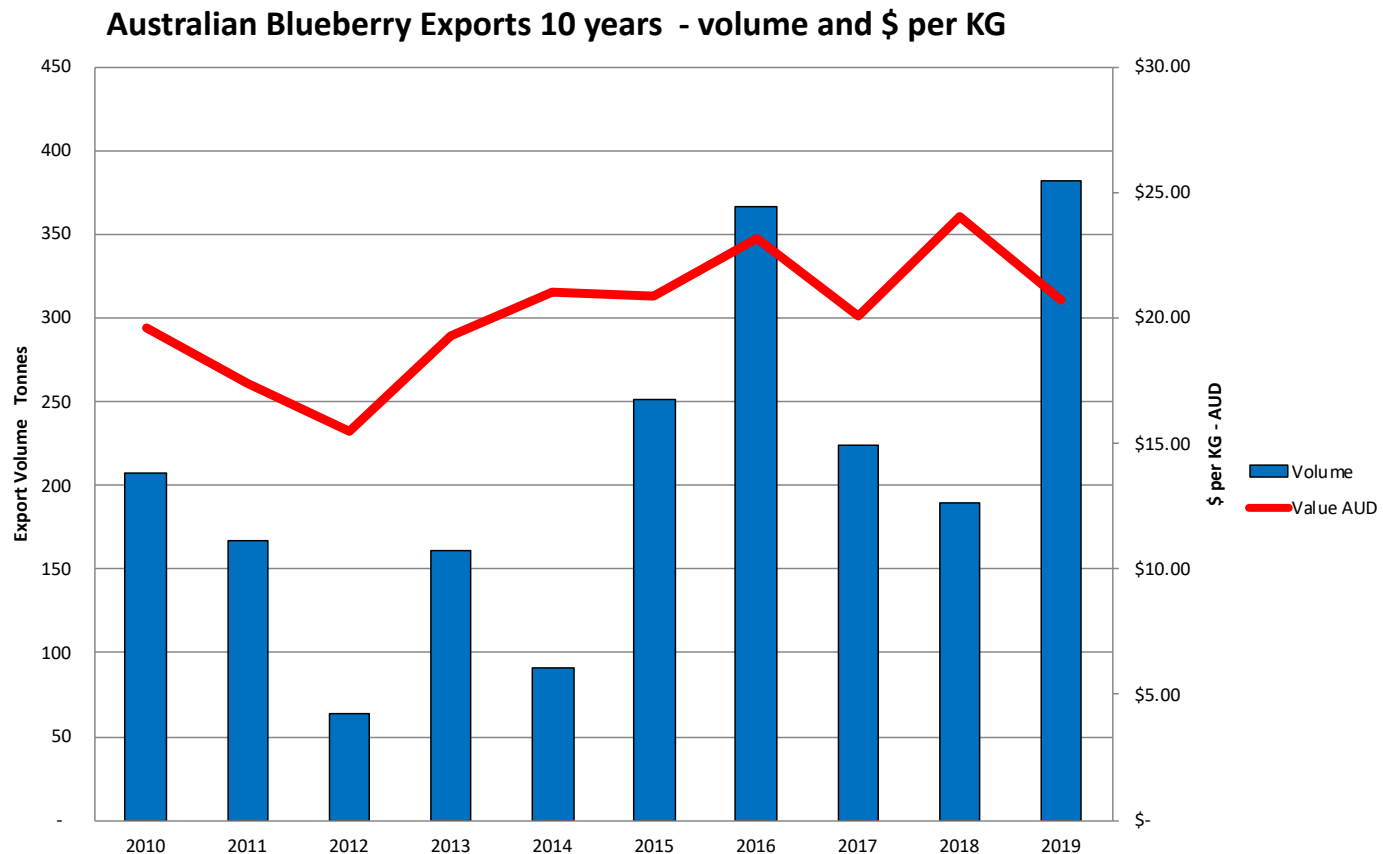
*More blueberries
were exported to
Hong Kong*



Australian Blueberry Results

10-year trend

The 10 year moving annual total trend for blueberries with recorded price points highlights the variable growth with the 2019/20 season the highest in the decade edging ahead of 2016 record. Unit values increase likely a reflection of the exchange rate though softer pricing in 2019.





Australian Blueberry Results

10-year trend by market

102 per cent growth in 1 year and 11 per cent growth over 5 years with growth in most markets

Hong Kong, Singapore and Thailand appear to have steady gains over time

Trade to Europe seems to have ground to a halt – influenced by Peru

No major market access agreements to assist new market growth

Country	-	2011	2012	2013	2014	2015	2016	2017	2018	2019	Chg LY	5 yr CAGR*	share 2019
		Tonnes	Tonnes	Tonnes	Tonnes	Tonnes	Tonnes	Tonnes	Tonnes	Tonnes			
Hong Kong		21	24	66	54	105	178	114	120	221	85%	21%	58.1%
Singapore		20	15	50	15	83	80	59	37	68	82%	-5%	17.8%
Thailand		2	7	6	8	20	37	25	16	39	139%	18%	10.2%
Indonesia		2	1	2	5	0	8	6	2	25	1133%	239%	6.5%
Malaysia		0	1	8	2	13	2	0	3	13	320%	0%	3.5%
India		-	-	-	-	-	-	4	4	11	222%		3.0%
Canada		-	-	-	-	7	5	1	3	1	-51%	-32%	0.4%
United Arab Emirates		0	0	10	1	1	16	8	-	0		-22%	0.1%
EUROPE		108	-	2	-	11	29	-	-	-			0.0%
all other		12	16	17	6	11	11	5	4	2	-63%	-38%	0.4%
Total Exports (Tonnes)		166	64	161	91	251	366	224	189	382	102%	11%	100%

Source: Australian Bureau of Statistics; Fresh Intelligence analysis

CAGR = compound annual growth rate



Comments

REFERENCES

- International Trade Centre, TRADE MAP www.trademap.org/
- Food & Agriculture Organisation, FAOSTAT, www.fao.org/faostat/

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
- Ph: +61 (0)408 164 966
- Email: wayne.prowse@bigpond.com

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