



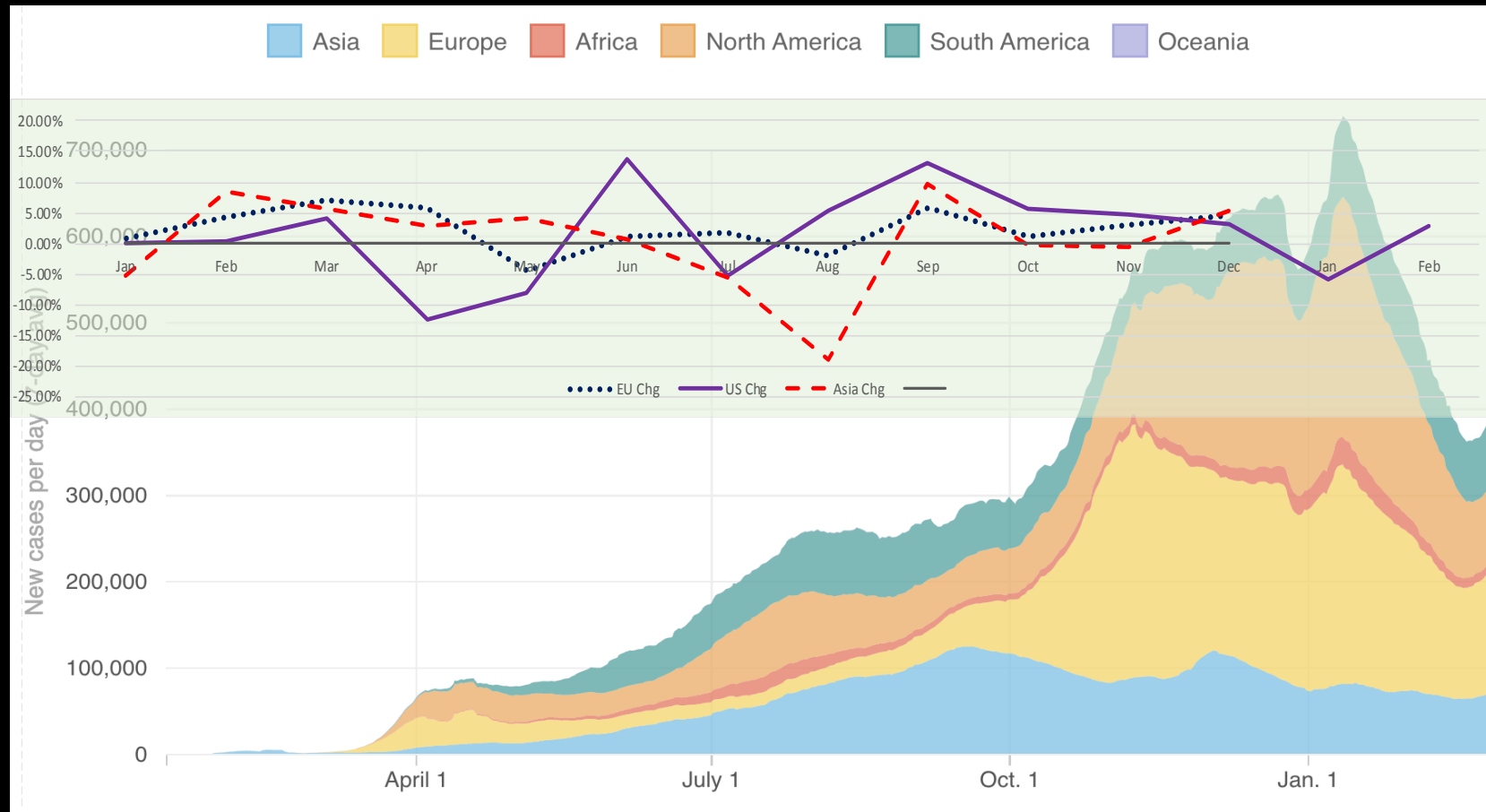
Fruit Growers
Tasmania

Fresh Fruit & Vegetable Trade Overview and Market Trends

Wayne Prowse
Fresh Intelligence

Correlating monthly change in Fresh Fruit Imports with COVID 19 Infections

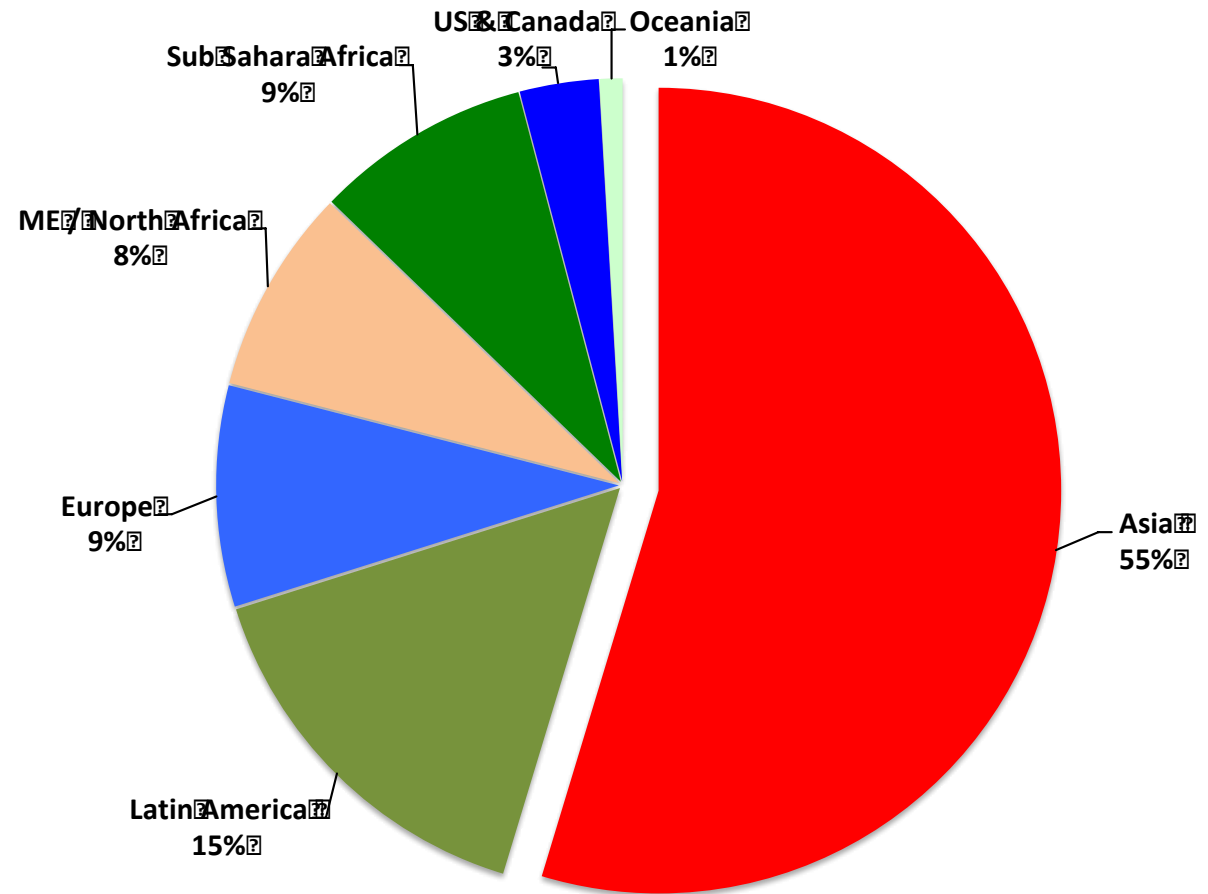
Change in Tonnes Imported by month in 2020 vs average 2018 & 2019



Global Fruit Production and Trade

- ✓ **883** million tonnes produced in 2019
- ✓ **55 %** produced in Asia
- ✓ **15 %** in Latin America
- ✓ **0.5%** in Australia

Source: FAOSTAT 2020, ITC Trademap, World Bank, Fresh Intelligence analysis



Global Fruit Production and Trade

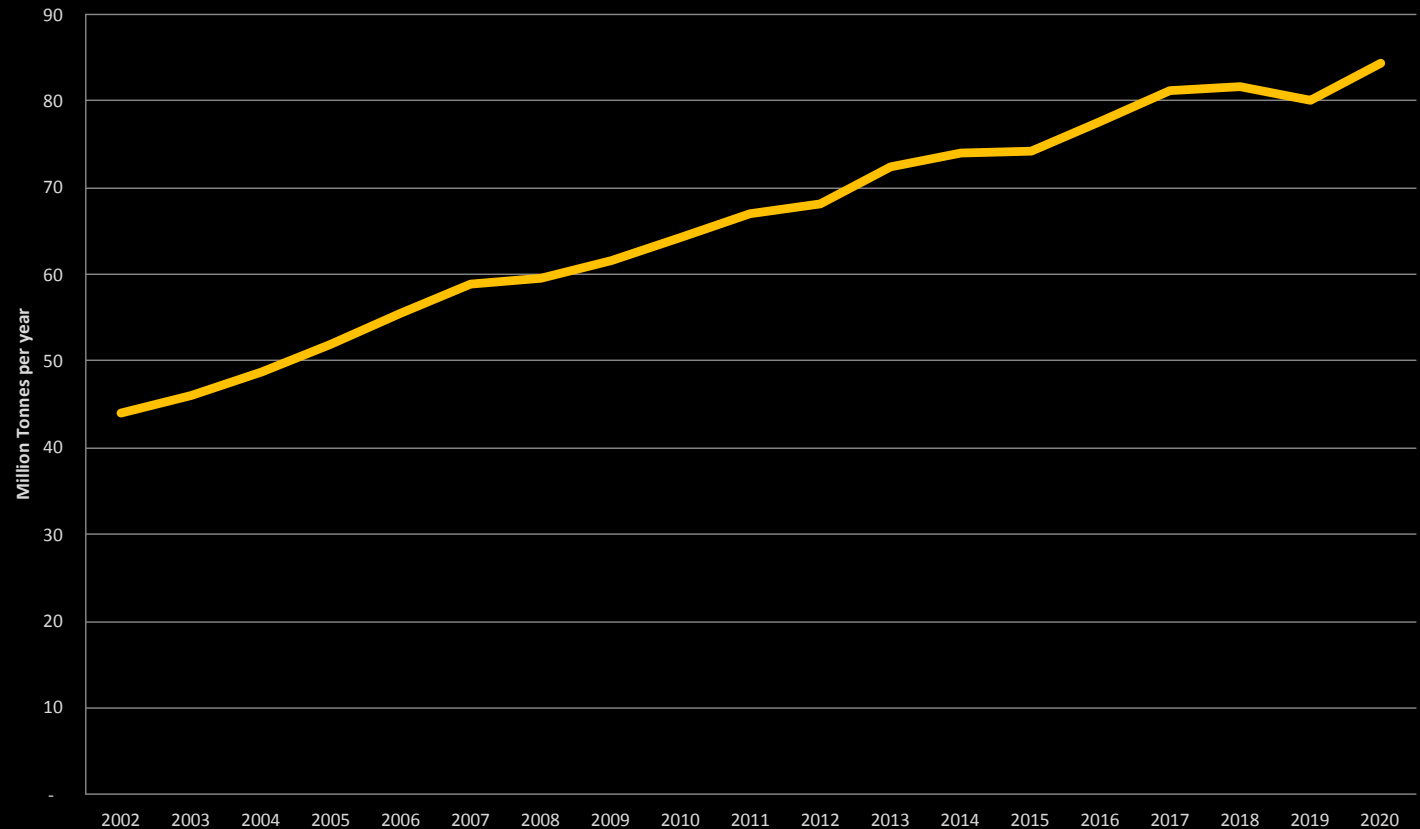
- ✓ 84 million tonnes traded in 2020
- ✓ 9.6 % of fresh fruit is traded internationally
- ✓ 90 % of fresh fruit is consumed or processed in domestic markets

Source: FAOSTAT 2020, ITC Trademap, World Bank, Fresh Intelligence analysis



Global Trade in Fresh Fruit 2002 - 2020

- +5.2%
- 84 Million tonnes
- Despite COVID !

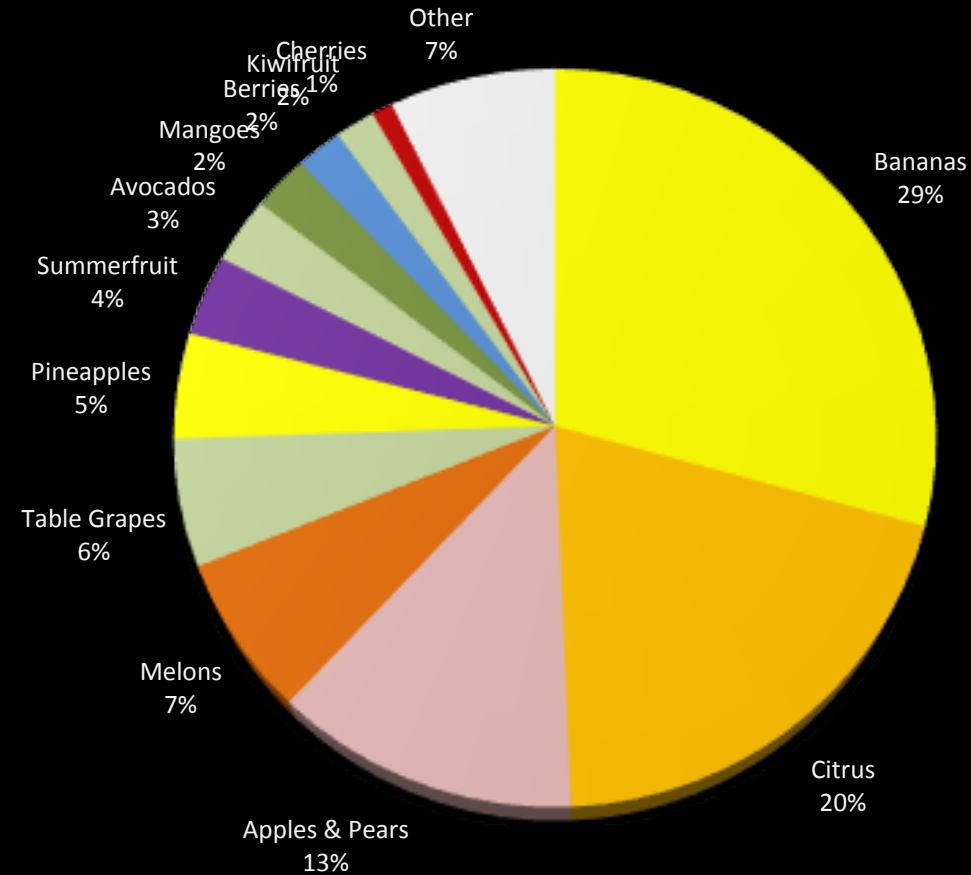


Source : ITC Trademap based on import data; Fresh Intelligence analysis

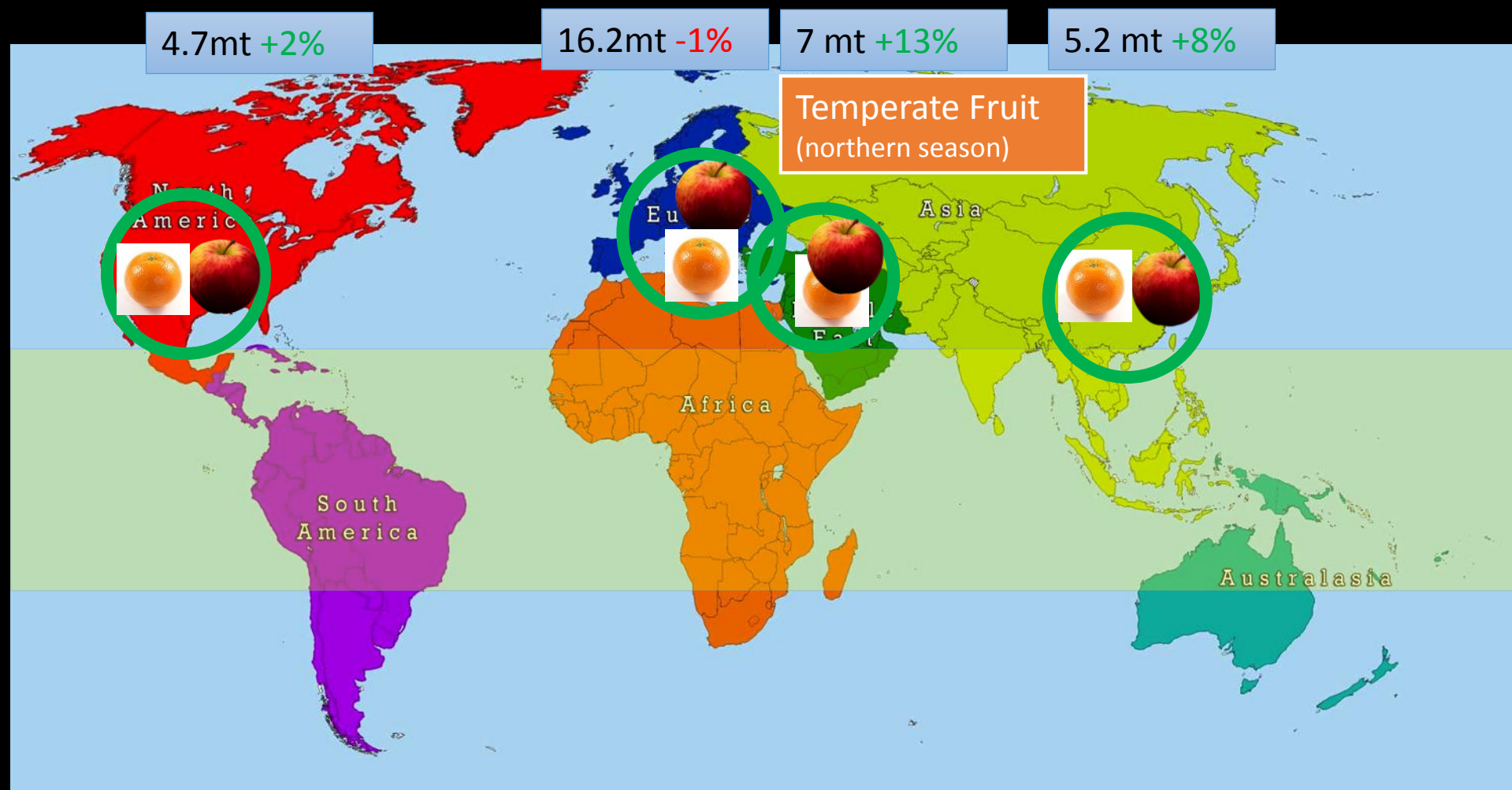
2020 Global Fresh Fruit Trade

84 Million Tonnes

- 30% Bananas
- 20 % Citrus
- 13% Apples & Pears
- 2% Berries
- 1% Cherries



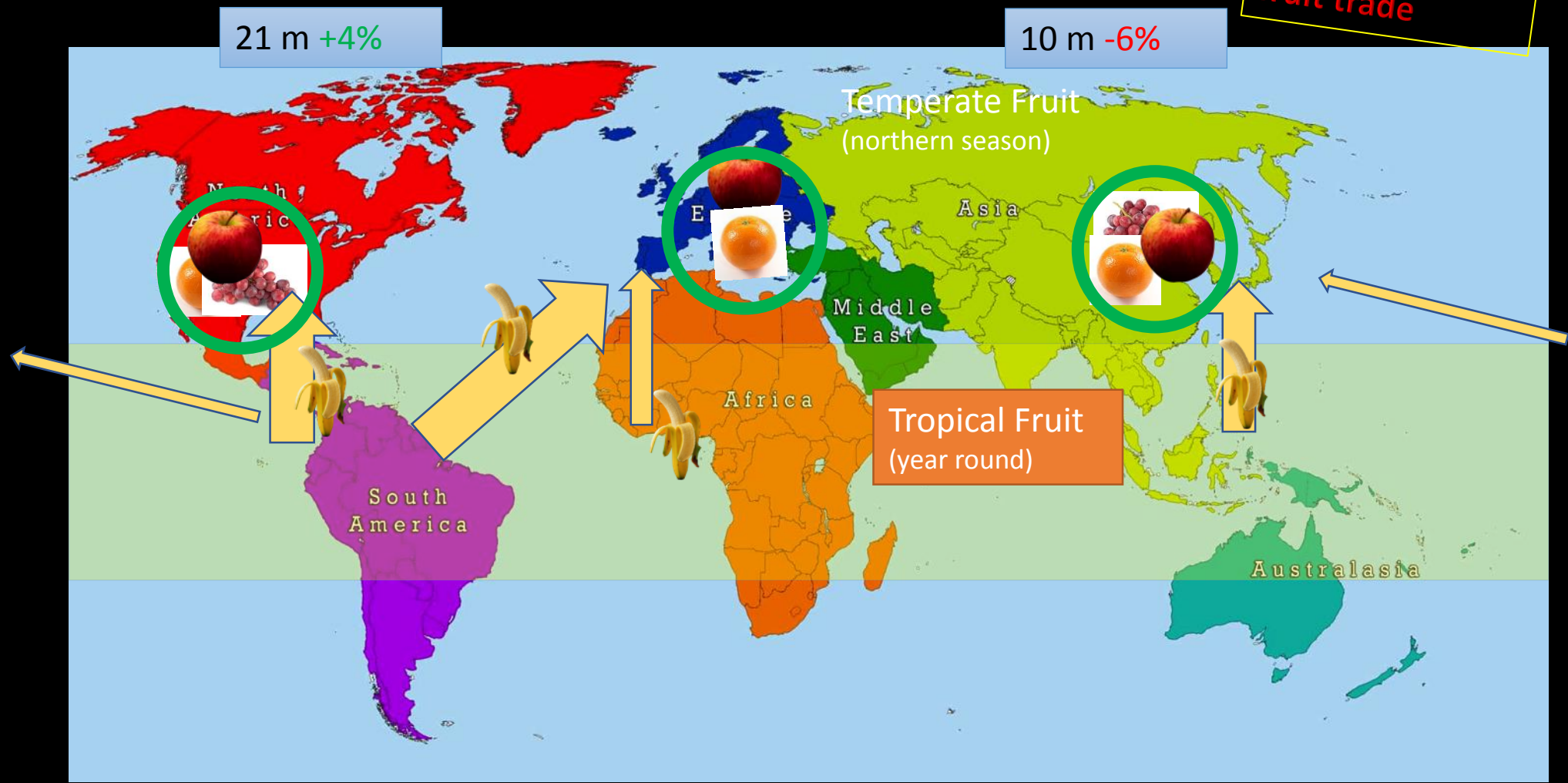
Northern Season temperate fruit circulates in large lucrative northern markets



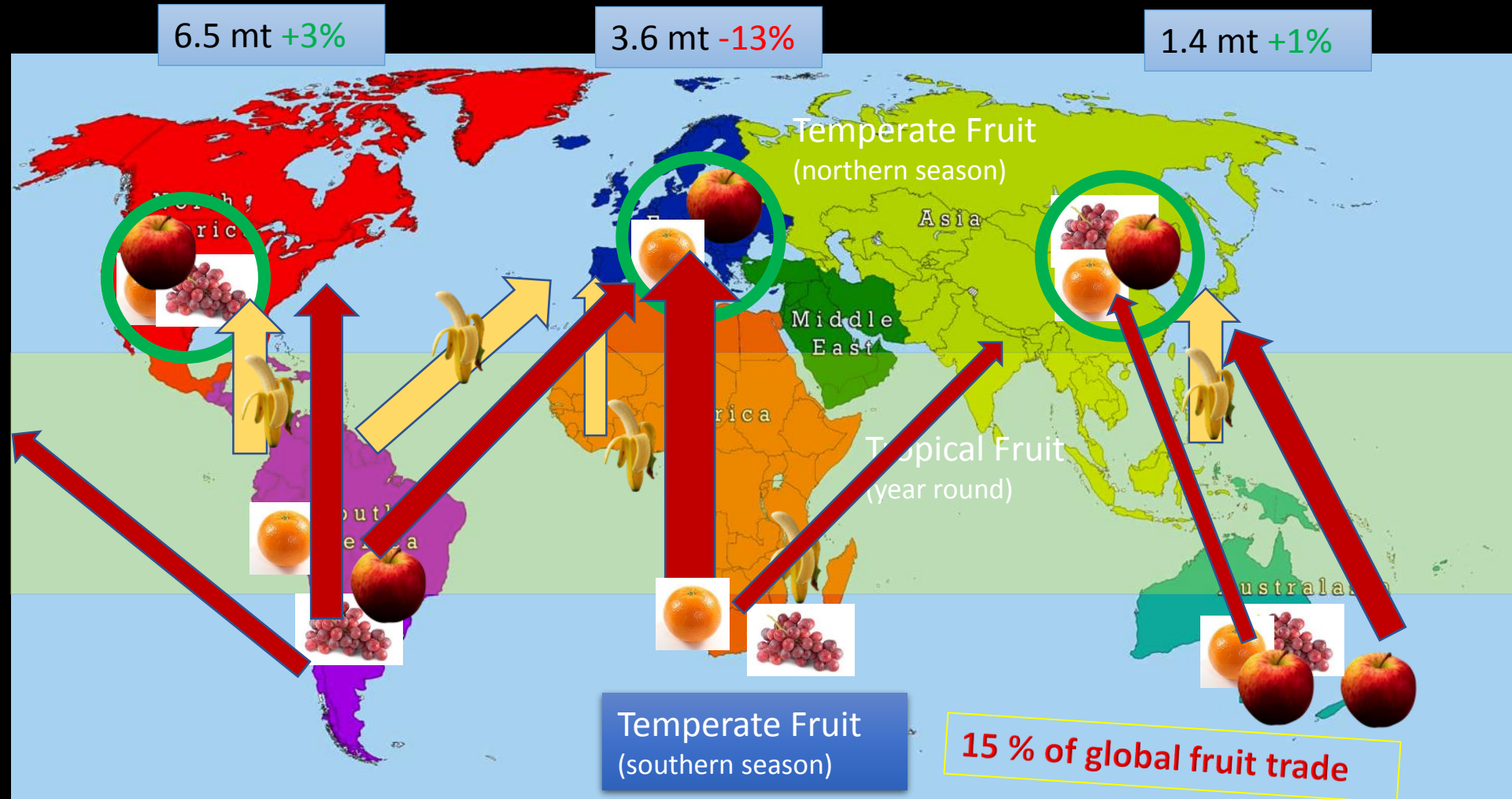
Source: Fresh Intelligence analysis

Tropical fruits are supplied to large northern markets where they are not grown

37 % of global fruit trade

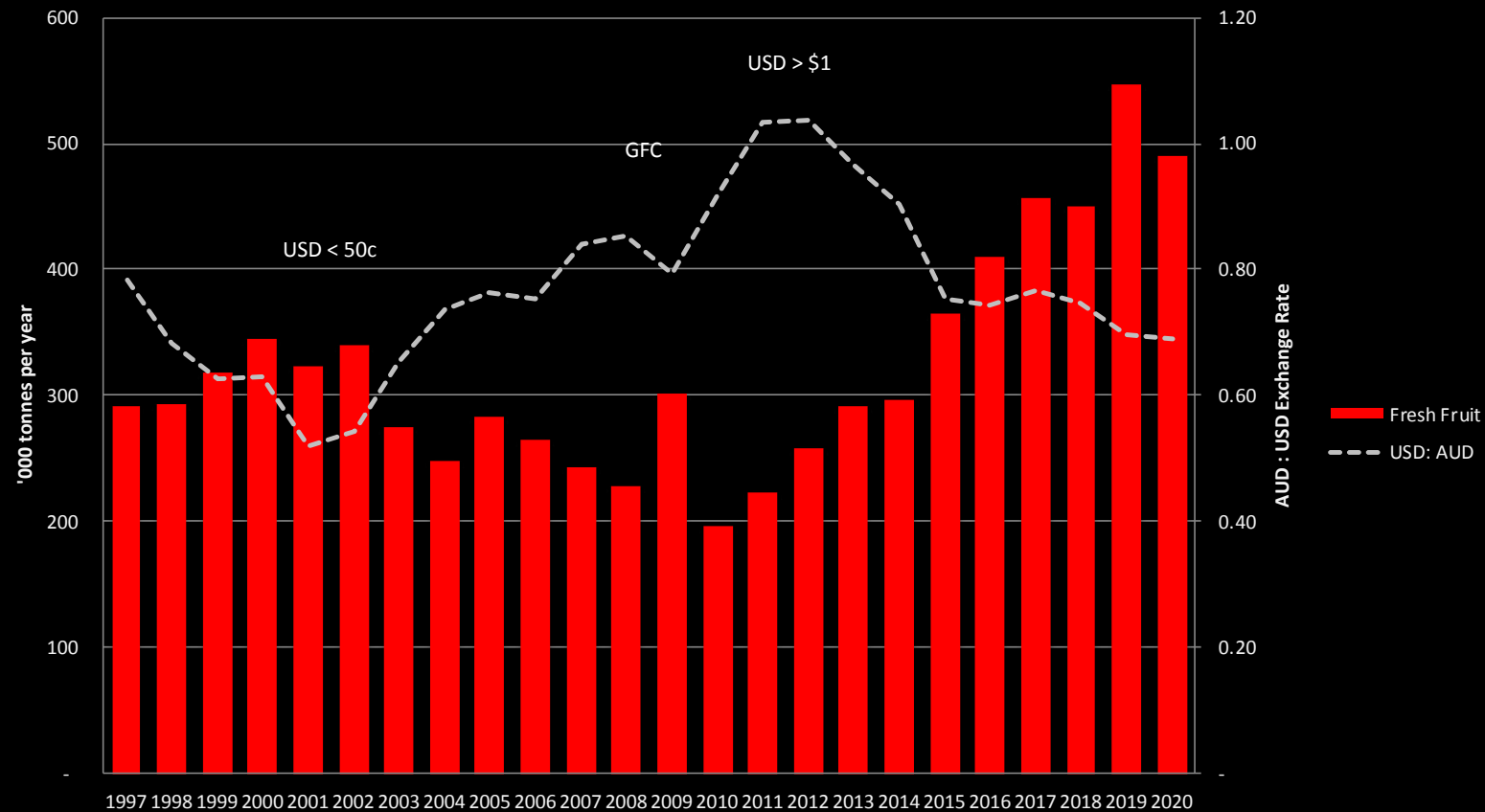


Southern temperate fruit supplied to meet counter season demand in northern markets



Source: Fresh Intelligence analysis

Australian Fruit Export growth shaped by events



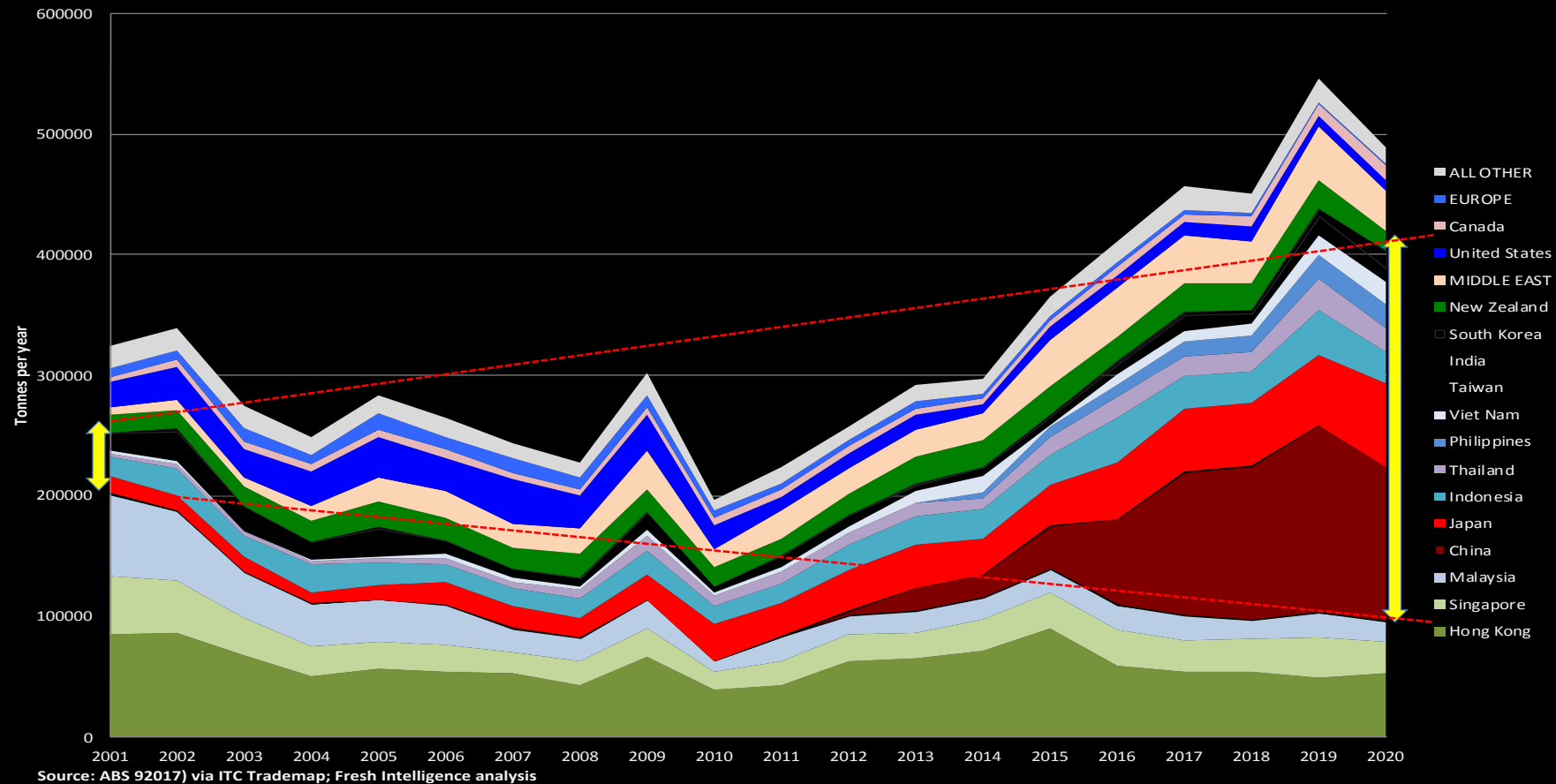
Source : ABS via ITC Trademap; Fresh Intelligence analysis

China in WTO
Millennium Drought
Rise of Chile
China access
Tri State
Floods
JAPEA
KAFTA
ChAFTA

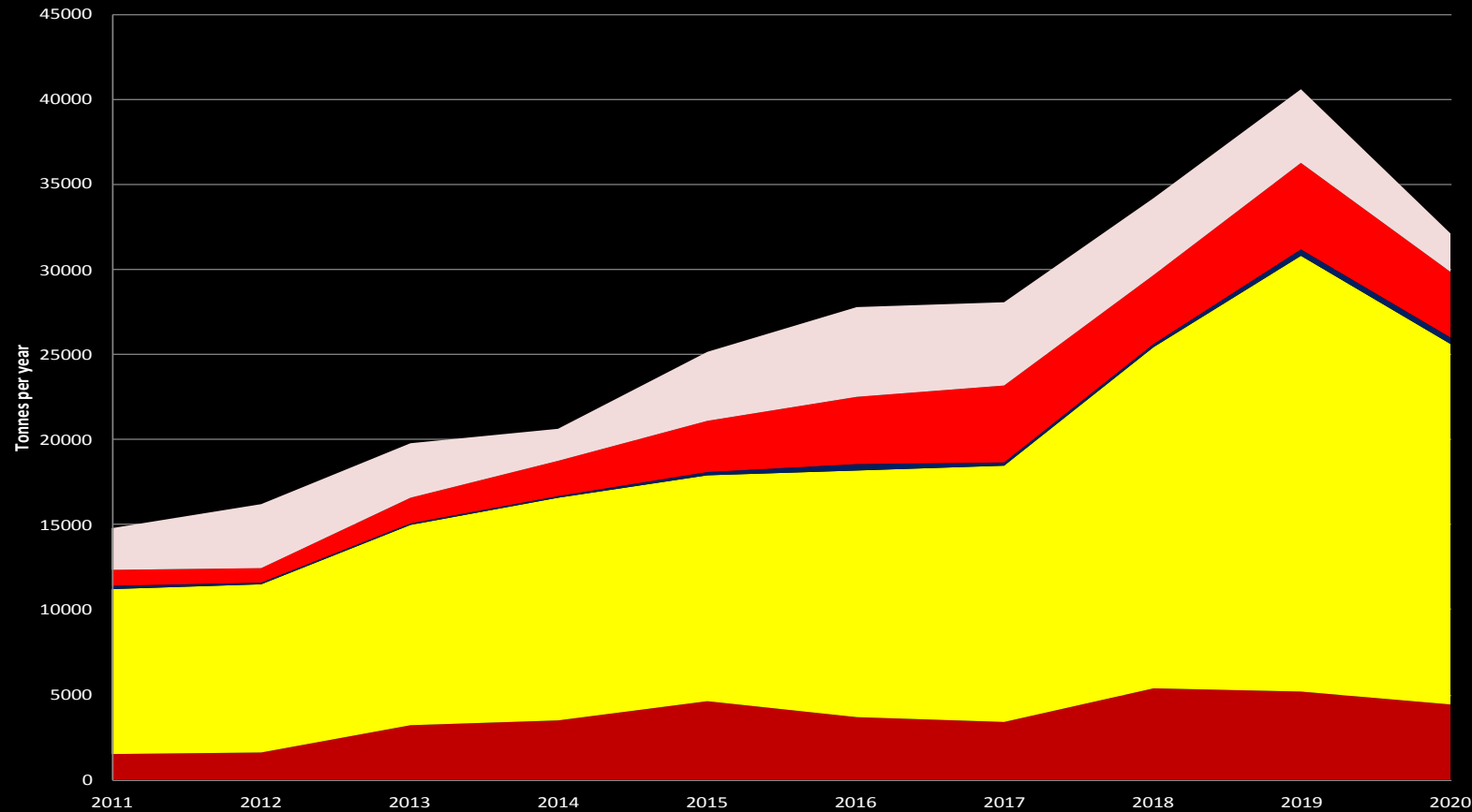
COVID

Australian Exports of Fresh Fruit by market 2001 – 2020

Trade to Protocol markets in Asia has increased from 50,000 to 310,000 tonnes since 2001



Australian Fresh Fruit Exports by selected product 2001 – 2020 (cherries, berries, summerfruit, apples)



8% of total
exports tonnes

15% of total
value

Source: ABS (2020) via ITC Trademap; Fresh Intelligence analysis

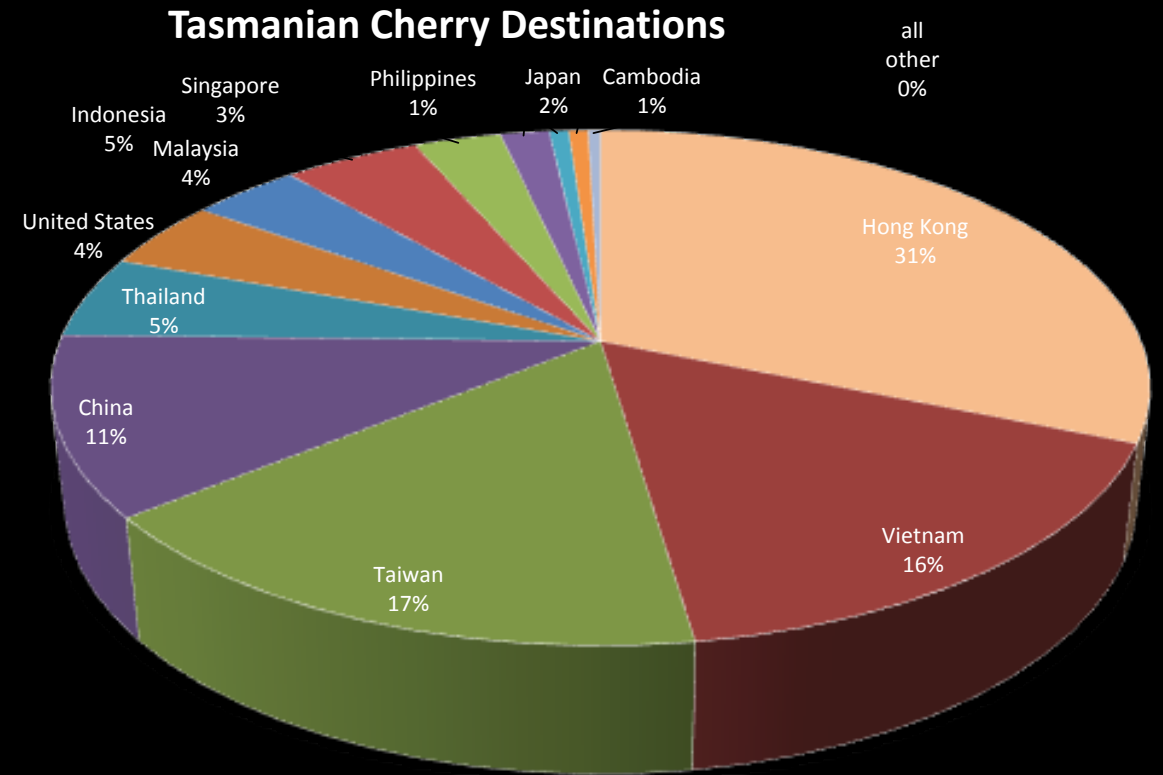
Cherries



2020 Tasmanian Cherry Exports

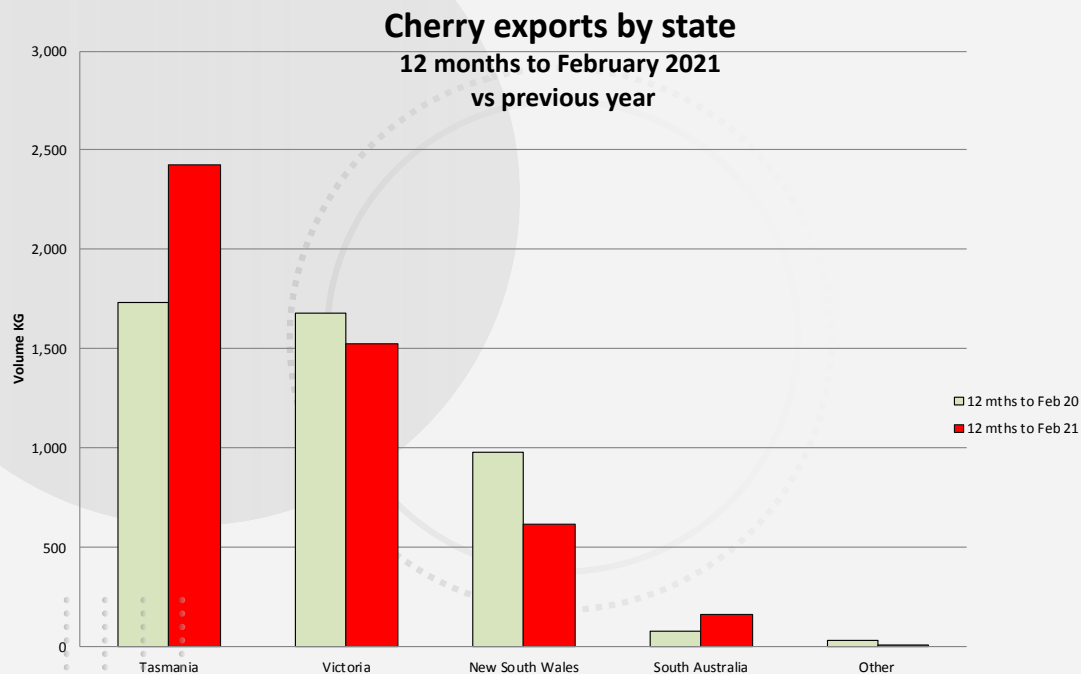
2,429 Tonnes + 40%

- \$43.6 million + 16.5%
- \$17.95 per kg -17%
- 51% of national volume
- 4,741 tonnes + 5.5%



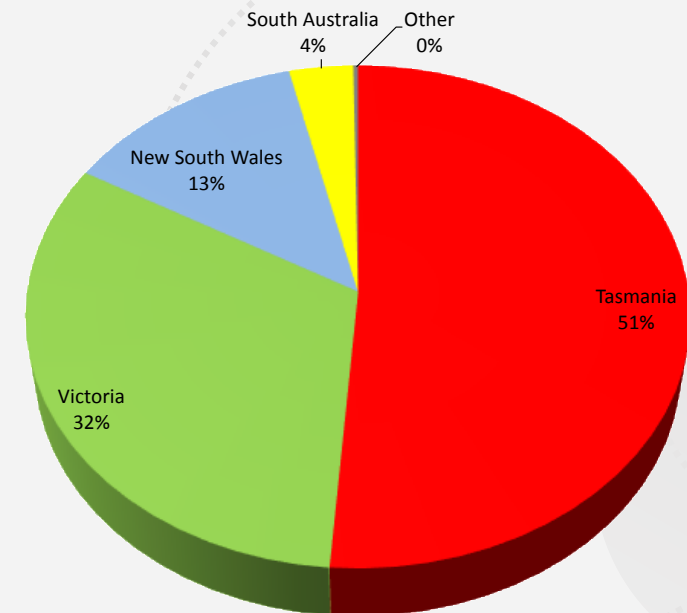
• AUSTRALIAN CHERRY EXPORTS – BY STATE

- Tasmania exported 51 per cent of the national cherry export crop while Victoria slipped to 32 per cent share and New South Wales had 13 per cent share. South Australia increased to 4 per cent share.



Source : ABS Data , Fresh Intelligence Analysis

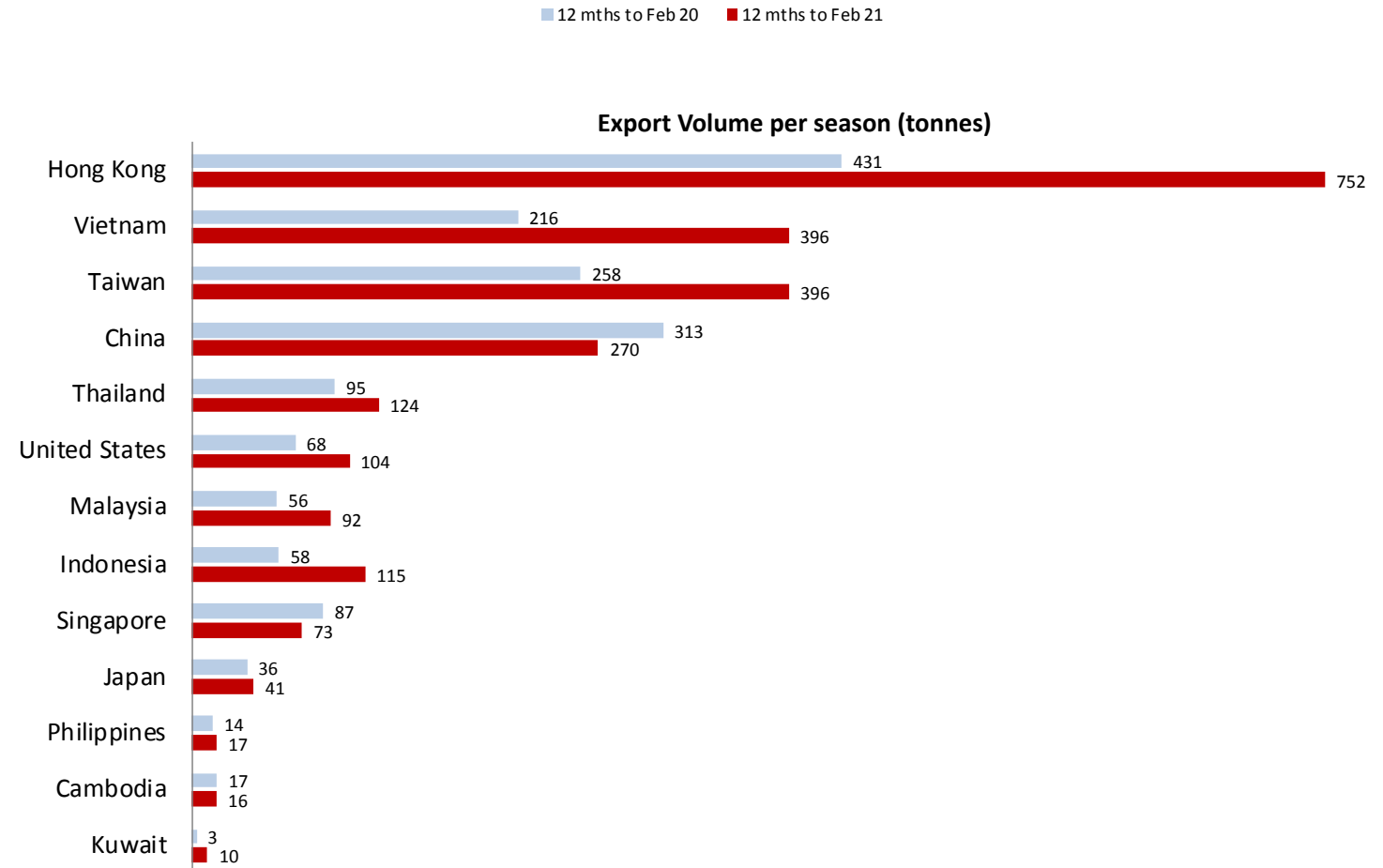
Australian Cherry exports by state - 12 months to February 2021



Source : ABS via IHS Global Trade Atlas, Fresh Intelligence analysis

TASMANIAN EXPORTS – VOLUME BY MARKET

Hong Kong led
by volume and
value this year



Source : ABS Data via IHS Global Trade Atlas, Fresh Intelligence analysis

TASMANIAN EXPORTS – VOLUME and VALUE BY MARKET

Cherry exports lifted by volume and value. Unit values decreased 17 per cent.

March to February

Volume **2,429 tonnes** **40.4%**
Value **43.61 million** **16.5%**
A\$ per kg **\$17.95** **-17%** **-\$3.68**

Market	Volume Tonnes				Value \$ Million AUD					
	Mar to Feb-20	Mar to Feb-21	Change to 20	Share %	Mar to Feb-20	Mar to Feb-21	Change to 20	Share %	Mar to Feb-20	Mar to Feb-21
TOTAL CHERRIES	1,731	2,429	40%	100%	37.44	43.61	16%	100%	21.63	17.95
Hong Kong	431	752	74%	31%	11.23	15.88	41%	36%	26.04	21.11
Vietnam	216	396	83%	16%	4.25	6.37	50%	15%	19.67	16.08
Taiwan	258	396	54%	16%	5.19	6.33	22%	15%	20.11	15.97
China	313	270	-14%	11%	6.68	4.81	-28%	11%	21.36	17.80
Thailand	95	124	30%	5%	2.11	2.88	37%	7%	22.24	23.32
United States	68	104	52%	4%	1.31	1.73	32%	4%	19.10	16.54
Malaysia	56	92	63%	4%	1.15	1.47	28%	3%	20.36	15.96
Indonesia	58	115	99%	5%	1.43	1.26	-12%	3%	24.80	10.97
Singapore	87	73	-16%	3%	1.53	1.11	-28%	3%	17.64	15.12
Japan	36	41	13%	2%	0.58	0.65	12%	1%	15.91	15.85
Philippines	14	17	20%	1%	0.21	0.40	92%	1%	15.22	24.29
Cambodia	17	16	-2%	1%	0.32	0.25	-21%	1%	19.23	15.45
Kuwait	3	10	257%	0%	0.03	0.15	410%	0%	9.86	14.10
Netherlands	14	5	-67%	0%	0.37	0.11	-69%	0%	26.79	24.58
all other	65	18	-72%	1%	-	0.22		1%	-	
TOTAL Cherries	1,731	2,429	40.4%	100%	37.44	43.61	16%	100%	21.63	17.95

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

AUSTRALIAN CHERRY EXPORTS – BY STATE

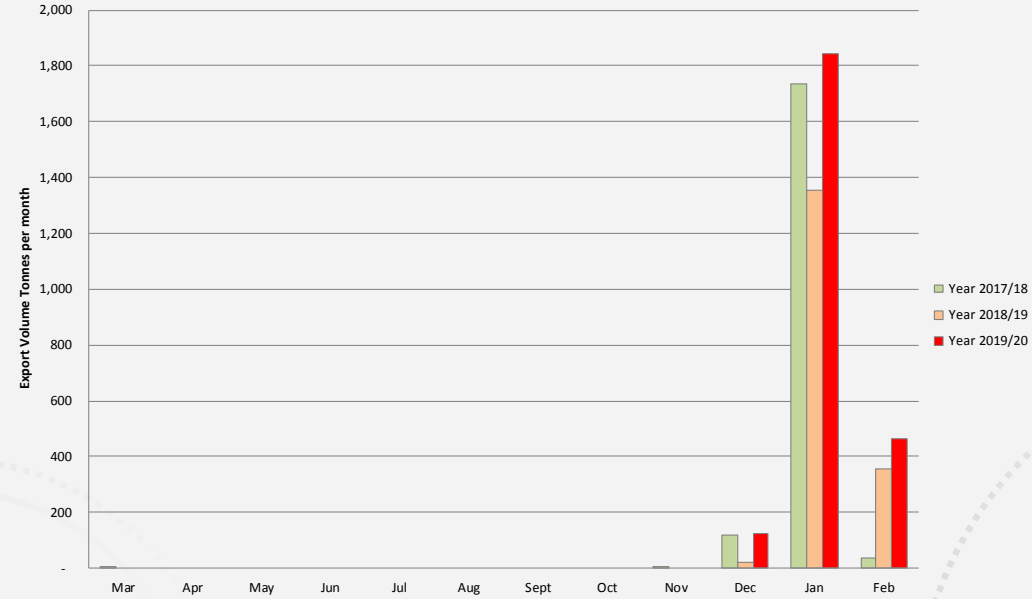
Australian cherry exports increased 5.5 per cent in 2020/21 to 4,741 tonnes valued at AU\$82.69 million. Tasmania increased 40 per cent to 2,429 tonnes or 51 per cent of the total cherry export crop regaining the No.1 export state position

Victoria decreased 9 per cent and New South Wales declined 37 per cent influenced by geopolitical tensions with China.

Country -	Volume Tonnes (season to date)				Value \$ Million AUD (season to date)					
	Mar to Feb-20	Mar to Feb-21	Change to 20	Share %	Mar to Feb-20	Mar to Feb-21	Change to 20	Share %	Mar to Feb-20	Mar to Feb-21
TOTAL CHERRIES	4,496	4,741	5%	100%	81.94	82.69	1%	100%	18.23	17.44
Tasmania	1,731	2,429	40%	51%	37.44	43.61	16%	53%	21.63	17.95
Victoria	1,678	1,522	-9%	32%	28.78	26.48	-8%	32%	17.15	17.40
New South Wales	977	615	-37%	13%	13.60	9.70	-29%	12%	13.92	15.78
South Australia	77	163	110%	3%	1.82	2.65	45%	3%	23.49	16.26
Other	33	12	-64%	0%	0.31	0.25	-19%	0%		21.12
TOTAL Cherries	4,496	4,741	5.5%	100%	81.94	82.69	1%	100%	18.23	17.44

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

Tasmanian Cherry Exports by month 2020/21 vs last 2 years



Source : ABS Data , Fresh Intelligence Analysis

TASMANIAN EXPORTS – BY MONTH

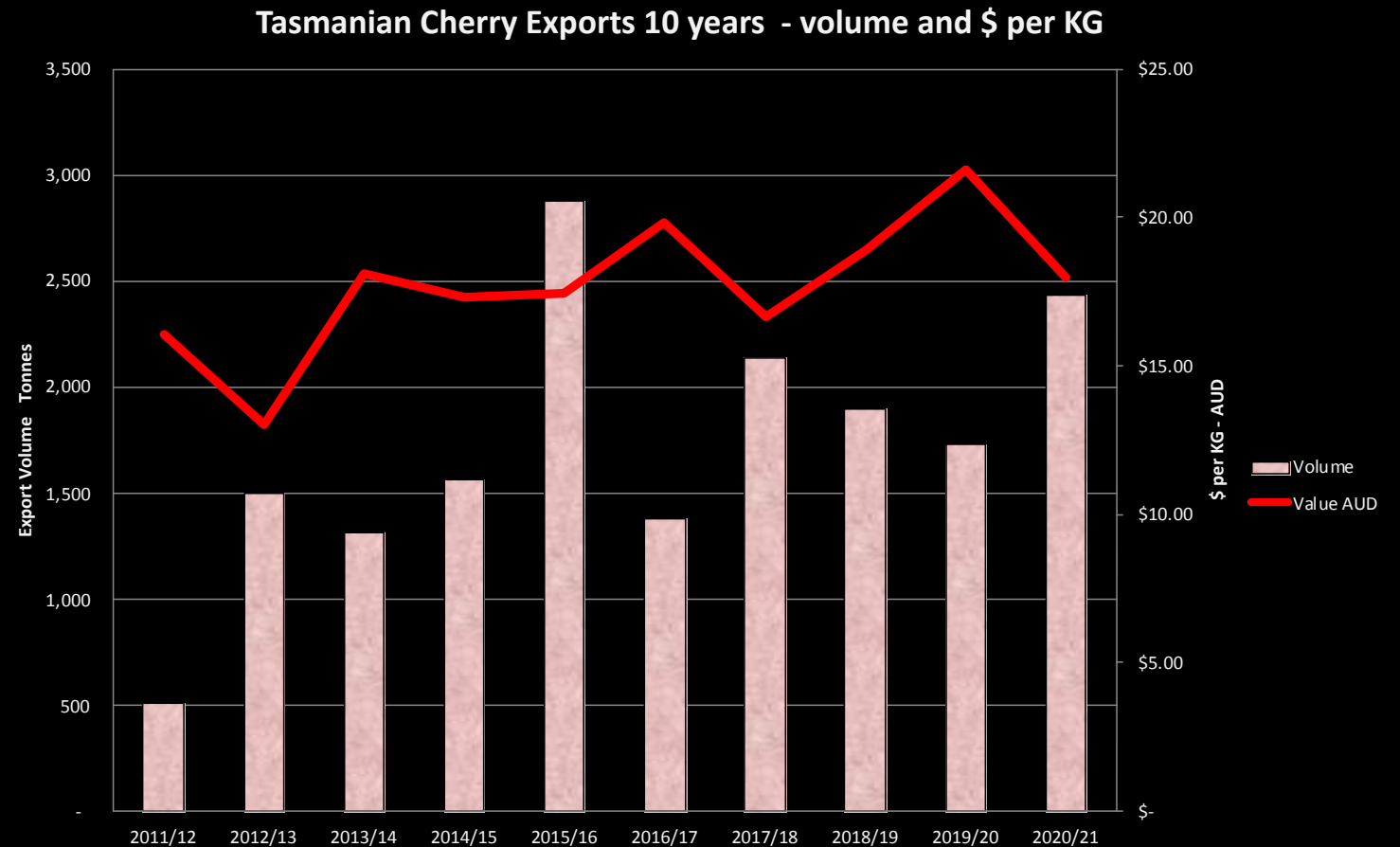
The 2020/21 exports exceeded the previous year in each month.

2nd highest January (2016 2,297 tonnes)

TASMANIAN EXPORTS – VOLUME and VALUE by YEAR

The 10-year moving annual total trend for cherries with recorded price points highlights the anomaly of the 2015/16 and 2016/17 seasons with the 2020/21 season back on trend.

Unit values were lower though closer to average over the longer term.

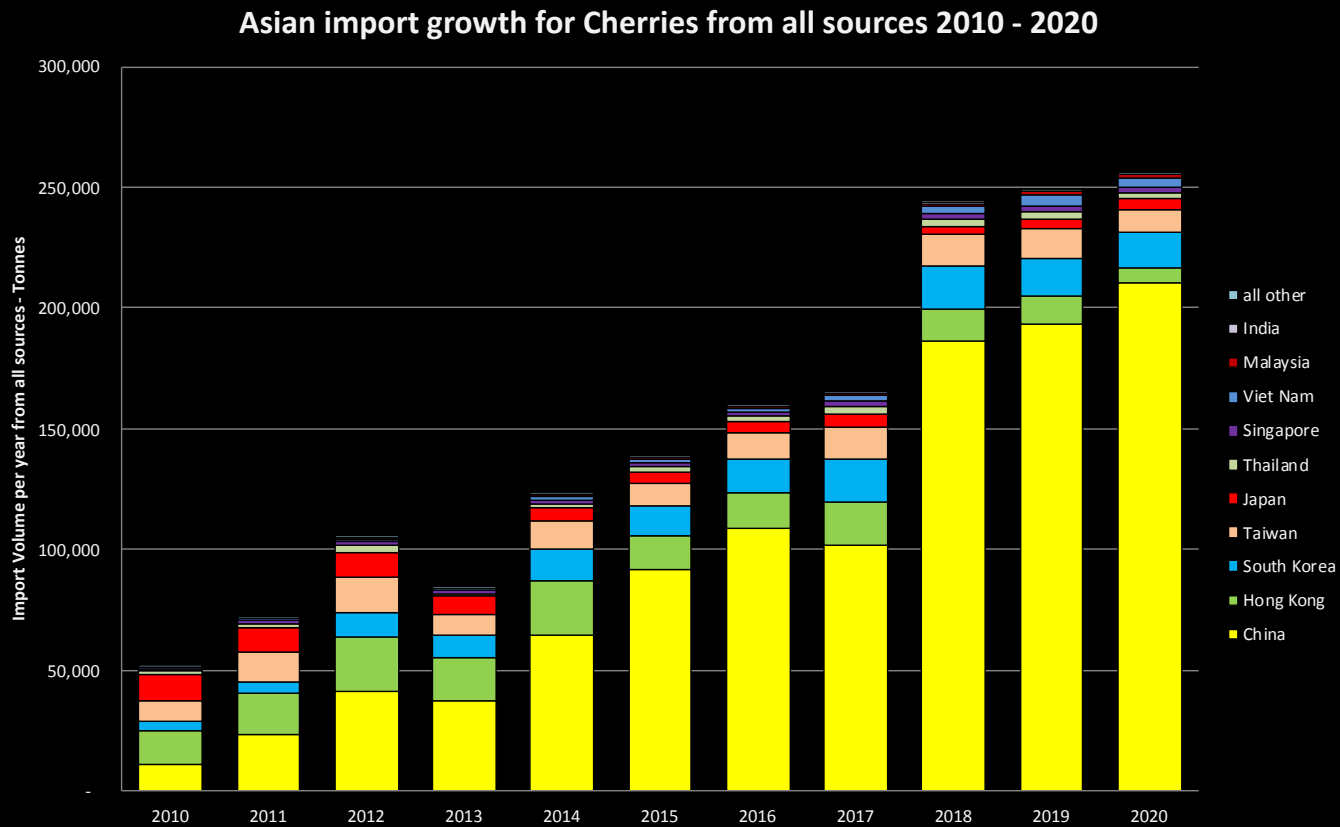


- CHERRY IMPORTS BY ASIA

Growth rates eased though still higher despite COVID.

Chile exceeded 320,000 tonnes in 2021

China dominates due to Chile



Source: ITC Trademap, Fresh Intelligence analysis

Blueberries

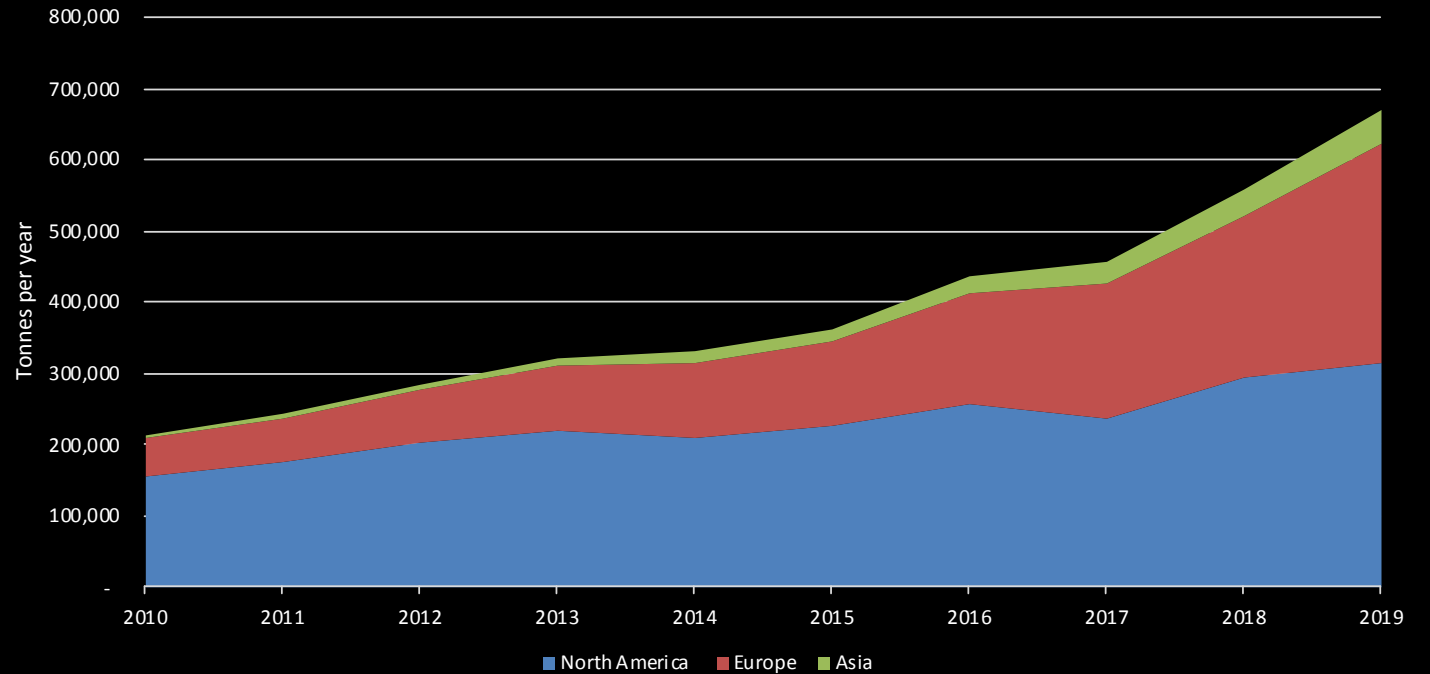


- GLOBAL BLUEBERRY IMPORTS

700,000 tonnes

Mostly to Europe and
North America

Asia is slowly
increasing



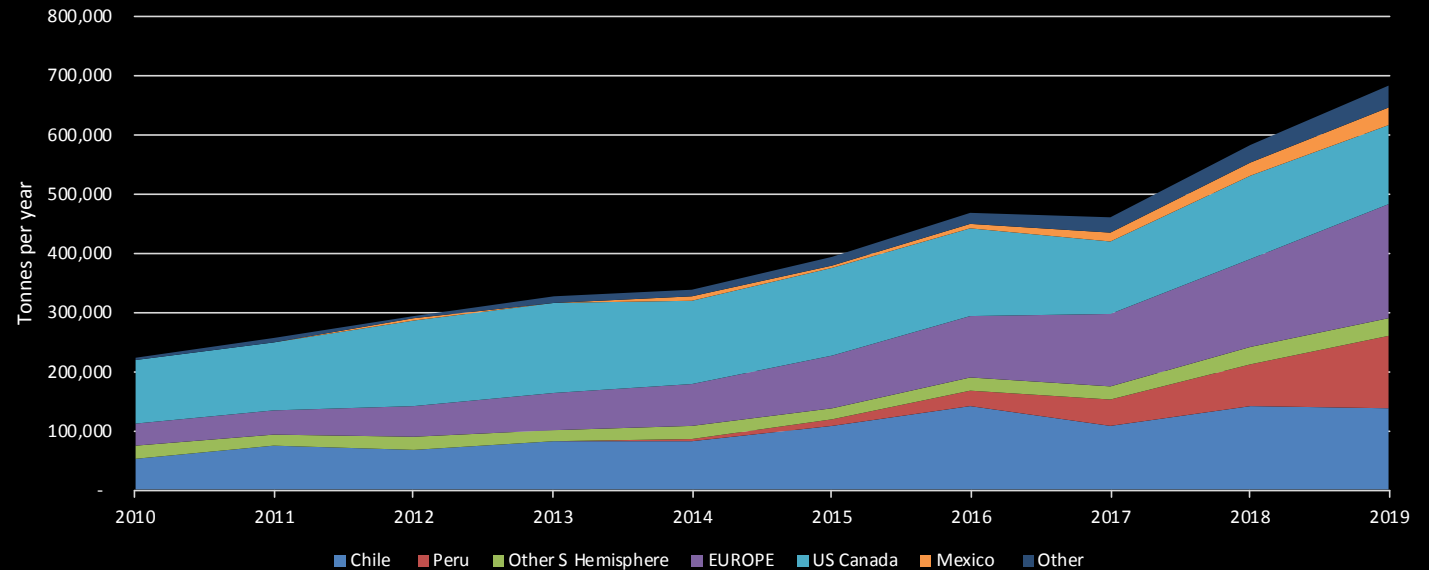
- GLOBAL BLUEBERRY EXPORTS

700,000 tonnes

Chile and Peru drive volume to northern markets

Mostly to Europe and North America

Australia = 335 tonnes



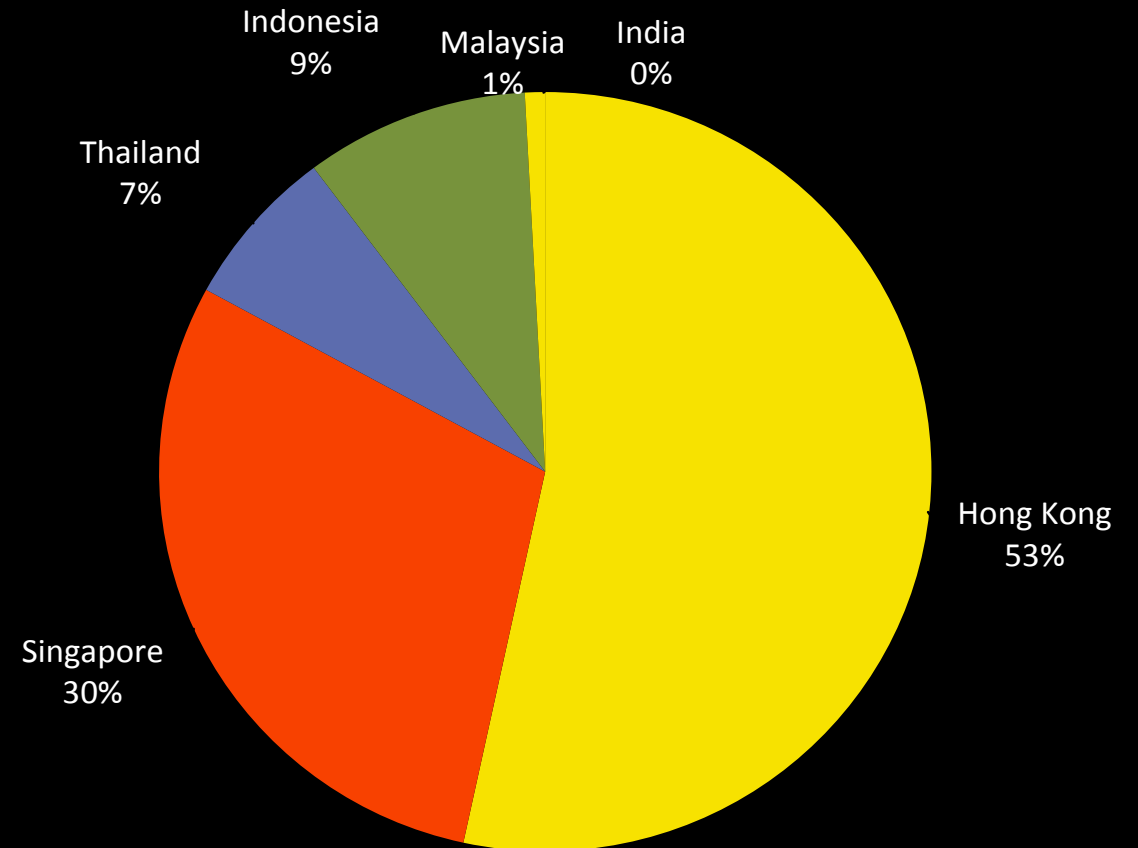
Source: ITC Trademap, Fresh Intelligence analysis

- AUSTRALIAN BLUEBERRY EXPORTS

335 tonnes

Hong Kong and
Singapore (non
protocol)

No recorded trade
from Tasmania

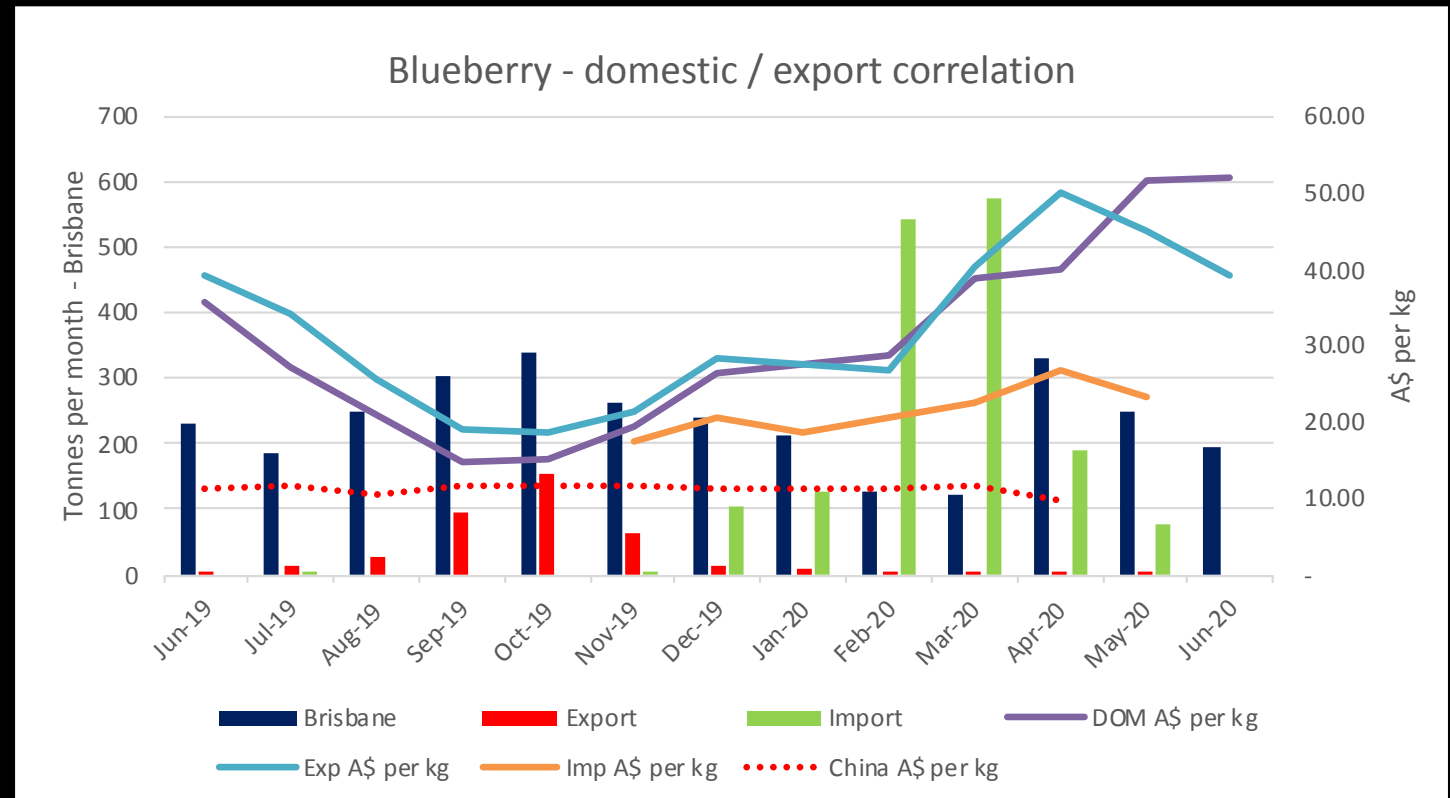


- AUSTRALIAN BLUEBERRY EXPORTS

335 tonnes

Prices track the domestic market

Mostly not competitive with international trade





Vegetables



Global Vegetable Production and Trade

- ✓ **1,989** million tonnes produced in 2019
- ✓ **56** million tonnes traded in 2020
- ✓ **2.8 %** of fresh vegetables is traded globally

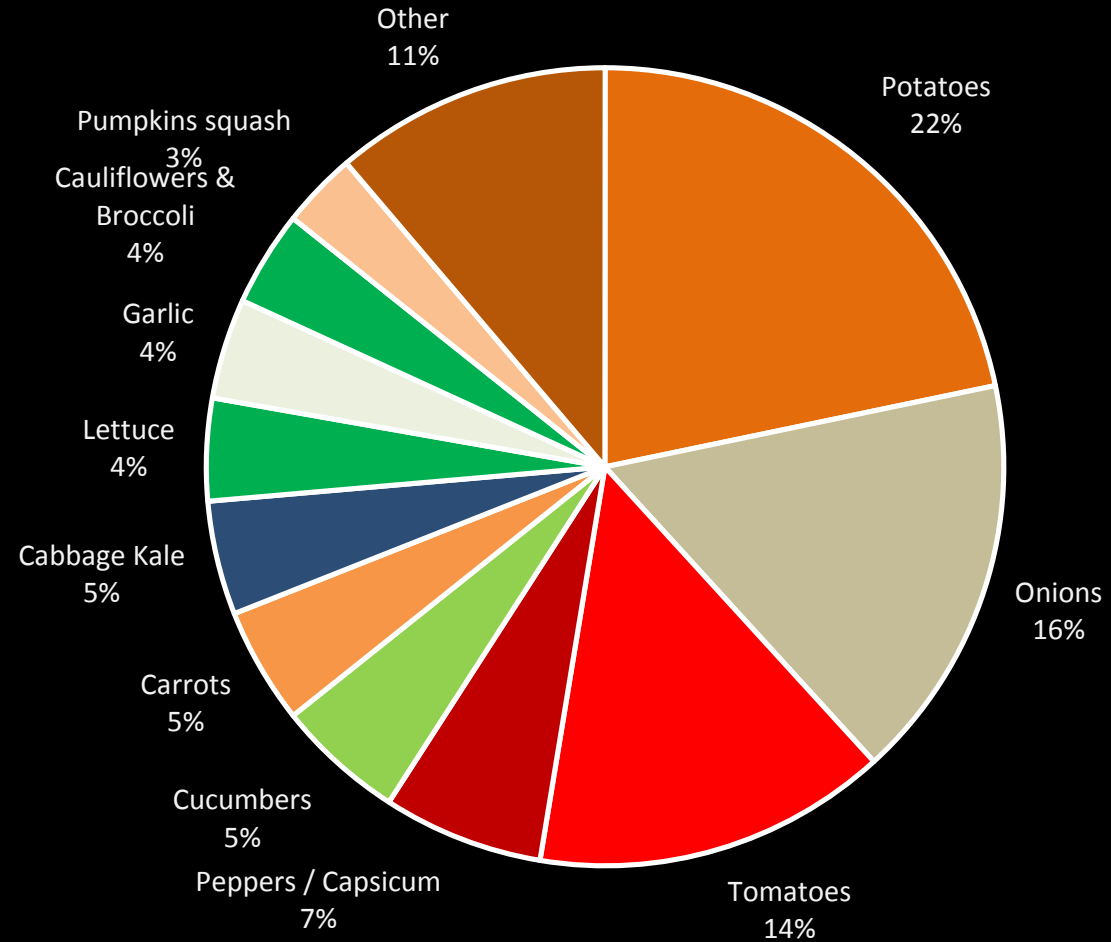
Source: FAOSTAT 2020, ITC Trademap, World Bank, Fresh Intelligence analysis



2020 Global Fresh Vegetable Trade

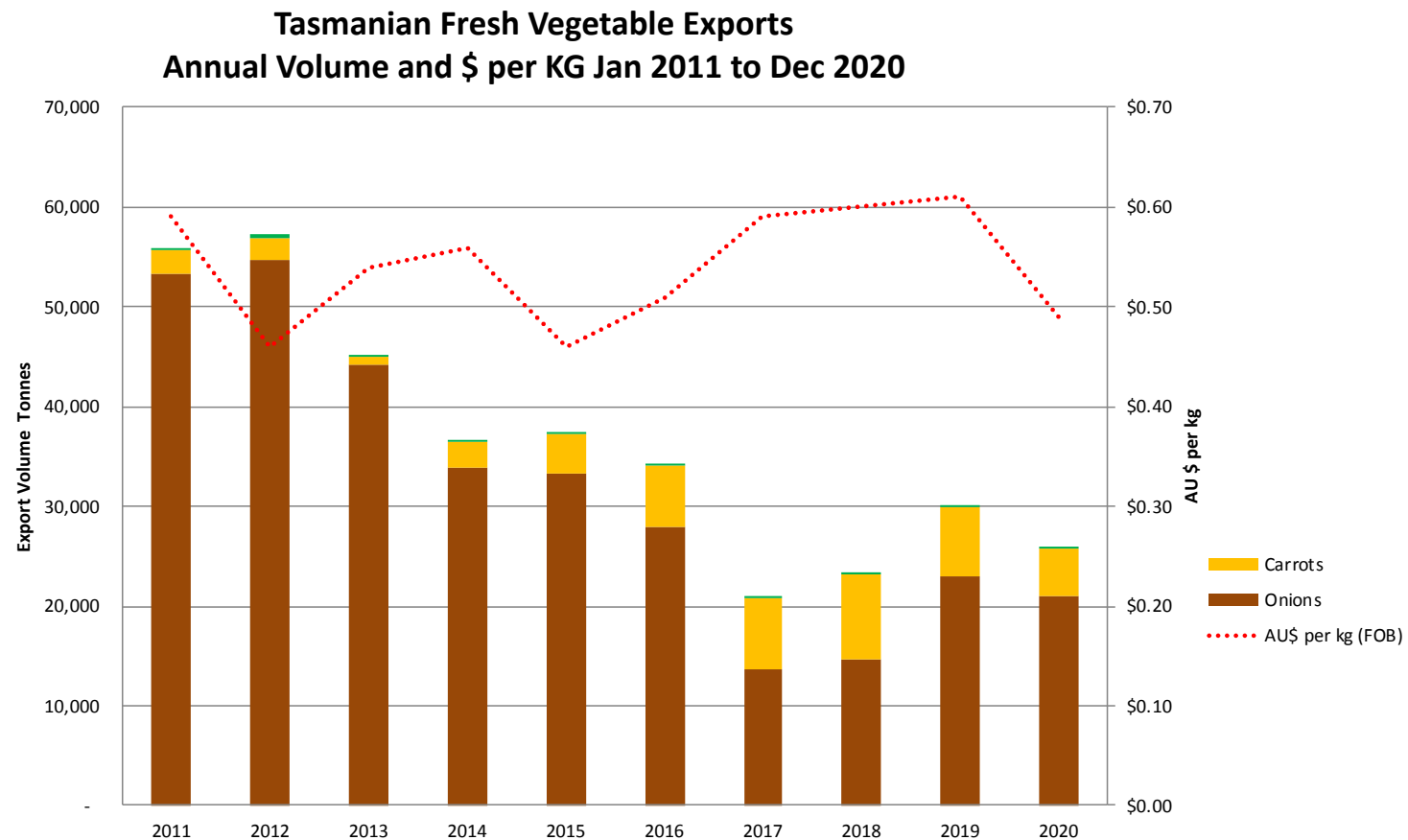
56 Million Tonnes

- 2.8 % of global production



TASMANIAN VEGETABLE EXPORTS – VOLUME and VALUE by YEAR

Dominated by
onions,
flavoured by
carrots with a
hint of greens



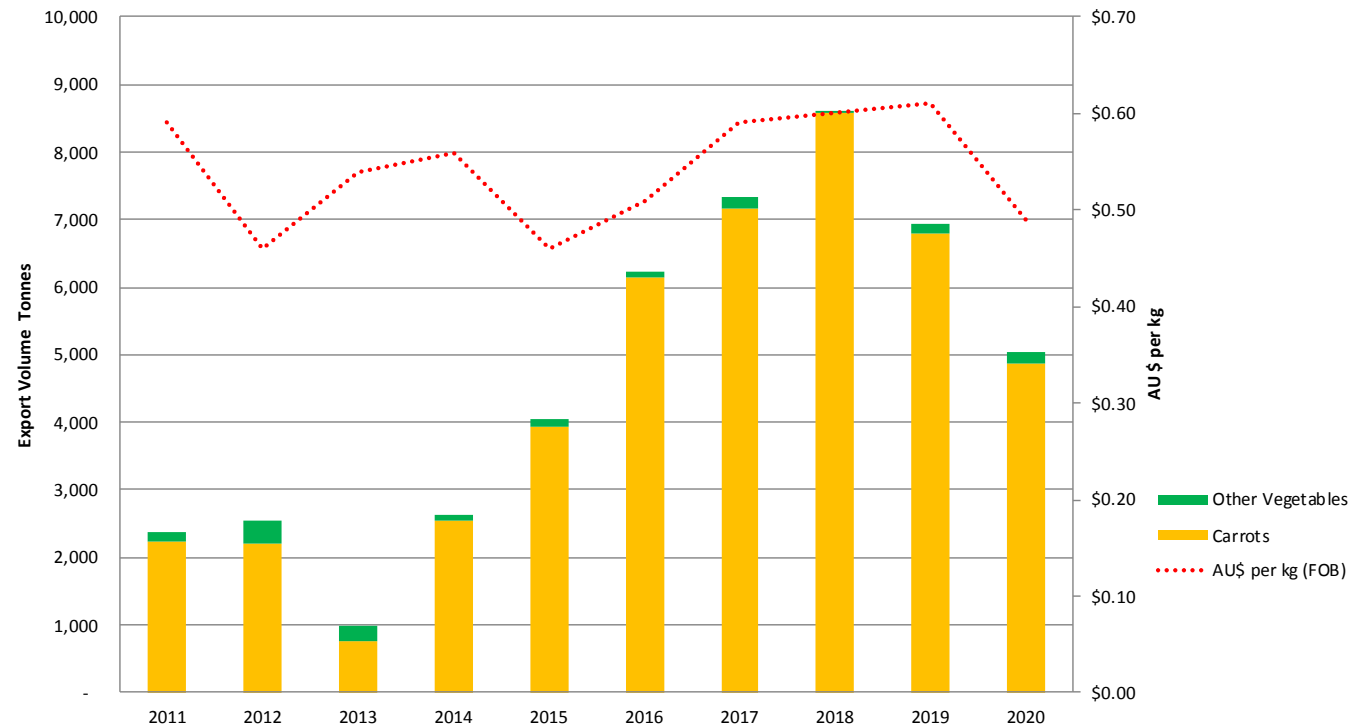
Source : ABS Data via IHS Global Trade Atlas, Fresh Intelligence Analysis

TASMANIAN VEGETABLE EXPORTS – VOLUME and VALUE by YEAR

Excluding Onions

Dominated by
onions,
flavoured by
carrots with a
hint of greens

**Tasmanian Fresh Vegetable Exports
Annual Volume and \$ per KG Jan 2011 to Dec 2020**



Source : ABS Data via IHS Global Trade Atlas, Fresh Intelligence Analysis



- TASMANIAN CARROT EXPORTS
- VOLUME and VALUE
- 5,285 tonnes \$4.84 m
- 5% of National (109,360 tonnes)

Carrot Exports from Tasmania

12 months to March 2021	Tasmania					
	Tonnes	Value M AUD	\$ per kg	1 yr chg	National	Tas share
World	5,285	4.84	\$0.92	0.0%	109,360	5%
United Arab Emirates	1,248	1.18	\$0.95	-15.2%	30,160	4%
Hong Kong	1,178	1.04	\$0.88	33.4%	4,507	26%
Singapore	845	0.71	\$0.84	81.7%	13,377	6%
Japan	536	0.62	\$1.15	-0.2%	1,640	33%
Malaysia	581	0.49	\$0.85	-8.2%	15,510	4%
New Caledonia	218	0.25	\$1.15	15.9%	271	81%
Thailand	136	0.12	\$0.89	-16.8%	2,433	6%
Taiwan	138	0.10	\$0.75	-12.1%	978	14%
Fiji	100	0.08	\$0.76	-19.3%	666	15%
Saudi Arabia	101	0.07	\$0.70	-77.7%	20,173	0%
Korea, South	69	0.05	\$0.73		69	100% Tas only
French Polynesia	40	0.04	\$0.91		289	14%
Kuwait	49	0.03	\$0.63	-31.9%	4,733	1%
All Other	45			9.8%	14,554	0%
Total	5,285	4.84	\$0.92	0.0%	109,360	5%

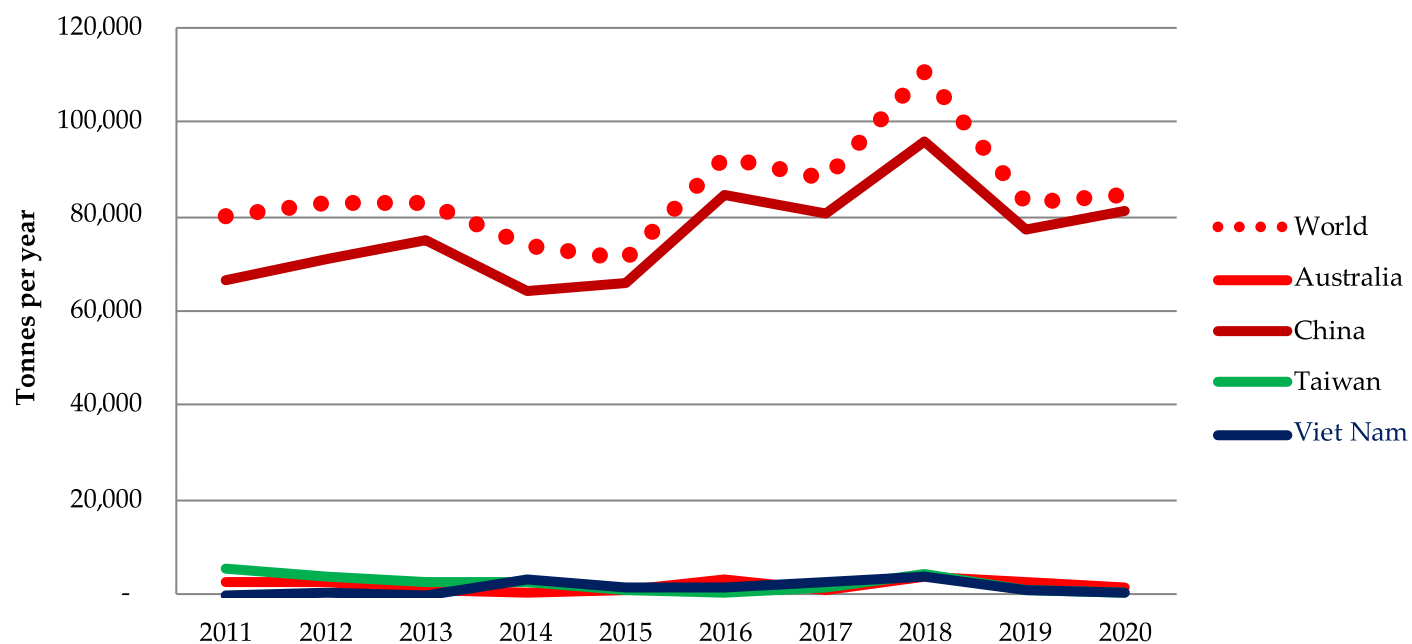
Source: IHS Global Trade Atlas; Fresh Intelligence analysis



Carrots



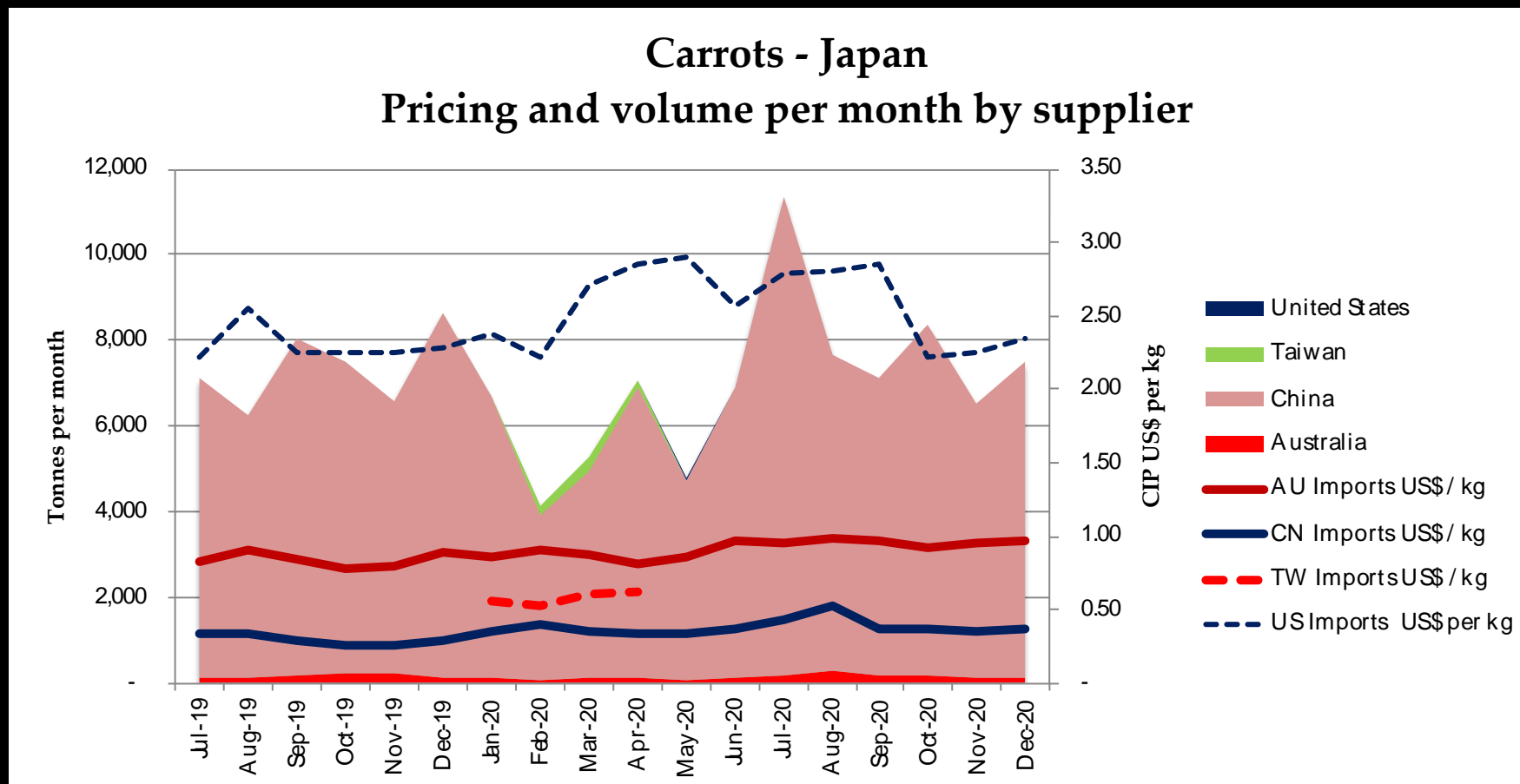
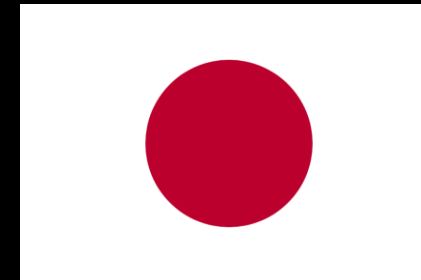
Carrots - Japan
Imports per year



Source: ITC Trademap, Fresh Intelligence analysis



Carrots



Source: ITC Trademap, Fresh Intelligence analysis



Onions

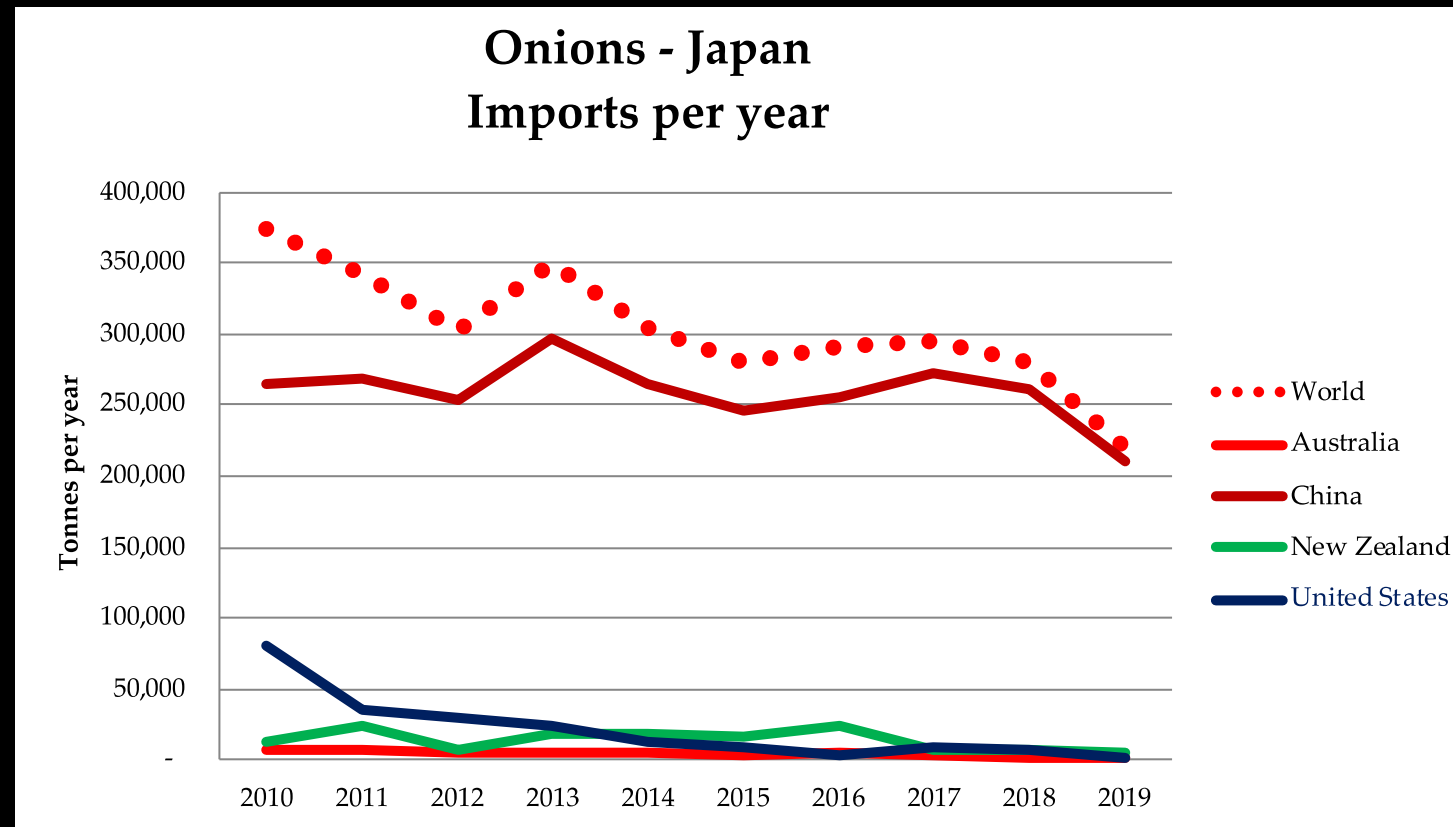
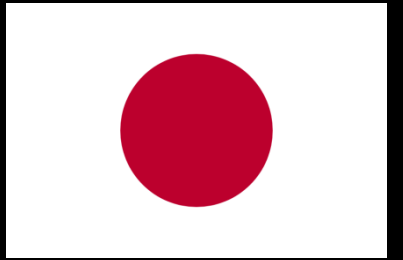
- TASMANIAN ONION EXPORTS
- VOLUME and VALUE
- 20,800 tonnes \$13.56 m
- 52% of National (40,002 tonnes)

Onion Exports from Tasmania

12 months to March 2021	Tasmania					
	Tonnes	Value M AUD	\$ per kg	1 yr chg	National	Tas share
World	20,800	13.56	\$0.65	-2.2%	40,002	52%
Belgium	3,184	2.12	\$0.66	-7.2%	3,184	100%
Thailand	2,561	1.53	\$0.60	57.0%	7,045	36%
Malaysia	2,240	1.05	\$0.47	61.7%	3,458	65%
France	2,149	1.49	\$0.69	-19.3%	2,471	87%
Netherlands	2,142	1.52	\$0.71	6.3%	2,708	79%
Germany	1,584	0.89	\$0.56	-40.5%	1,584	100%
Spain	1,227	0.84	\$0.69	76.8%	1,453	84%
Japan	906	0.88	\$0.98	-36.1%	1,006	90%
Norway	903	0.70	\$0.78	100.2%	903	100%
United Arab Emirates	896	0.56	\$0.62	228.2%	3,172	28%
Indonesia	740	0.53	\$0.71	-3.1%	820	90%
Singapore	685	0.36	\$0.52	-2.0%	1,911	36%
Hong Kong	453	0.30	\$0.66	-64.1%	878	52%
All Other	1,130			-54.2%	9,409	12%
Total	20,800	13.56	\$0.65	-2.2%	40,002	52%

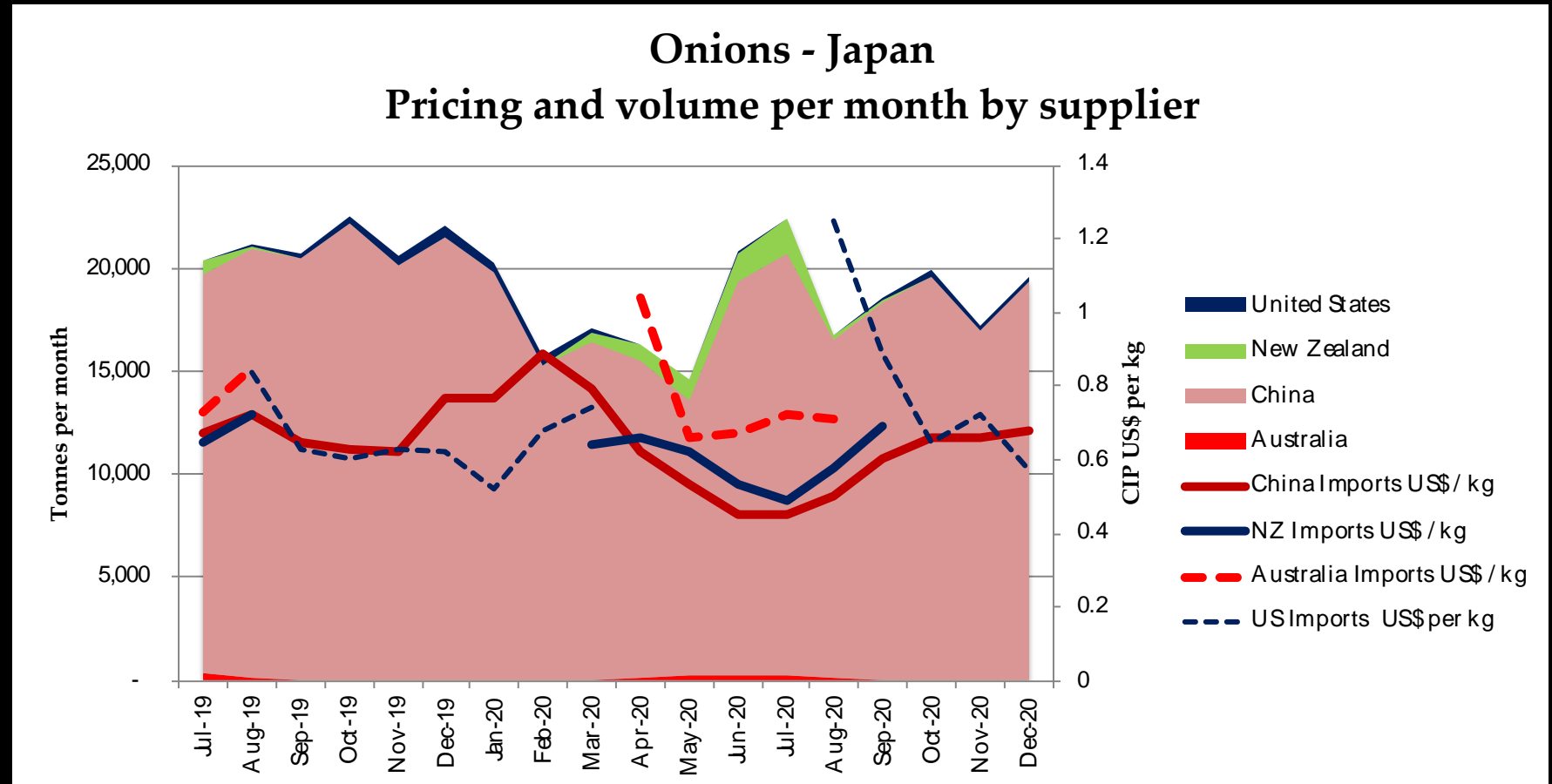
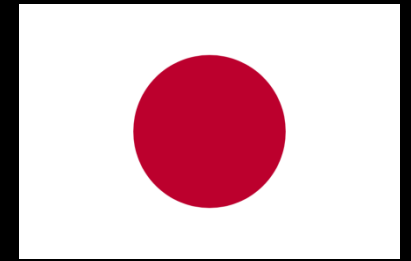
Source: IHS Global Trade Atlas; Fresh Intelligence analysis

Onions Japan



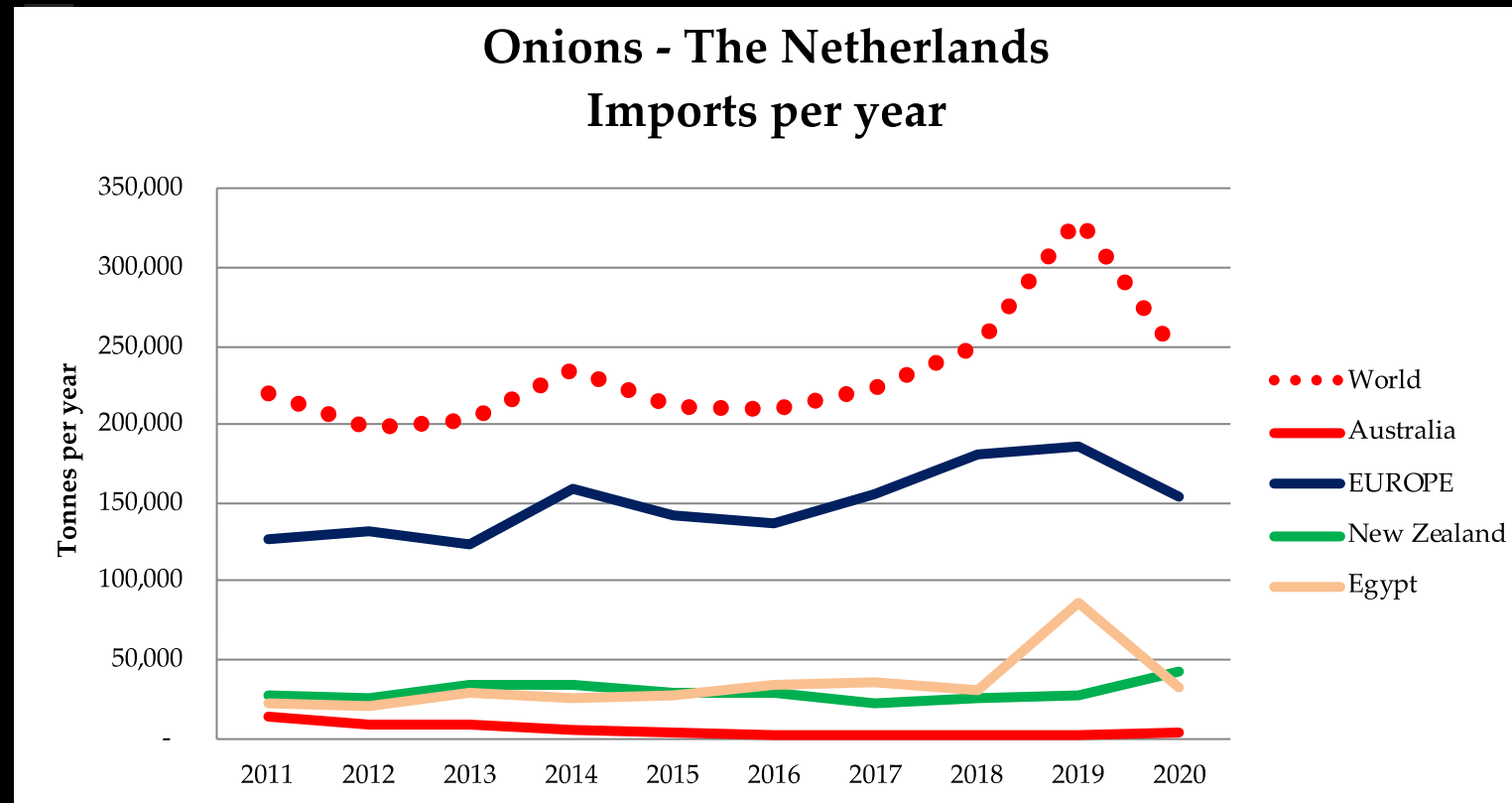
Source: ITC Trademap, Fresh Intelligence analysis

Onions Japan



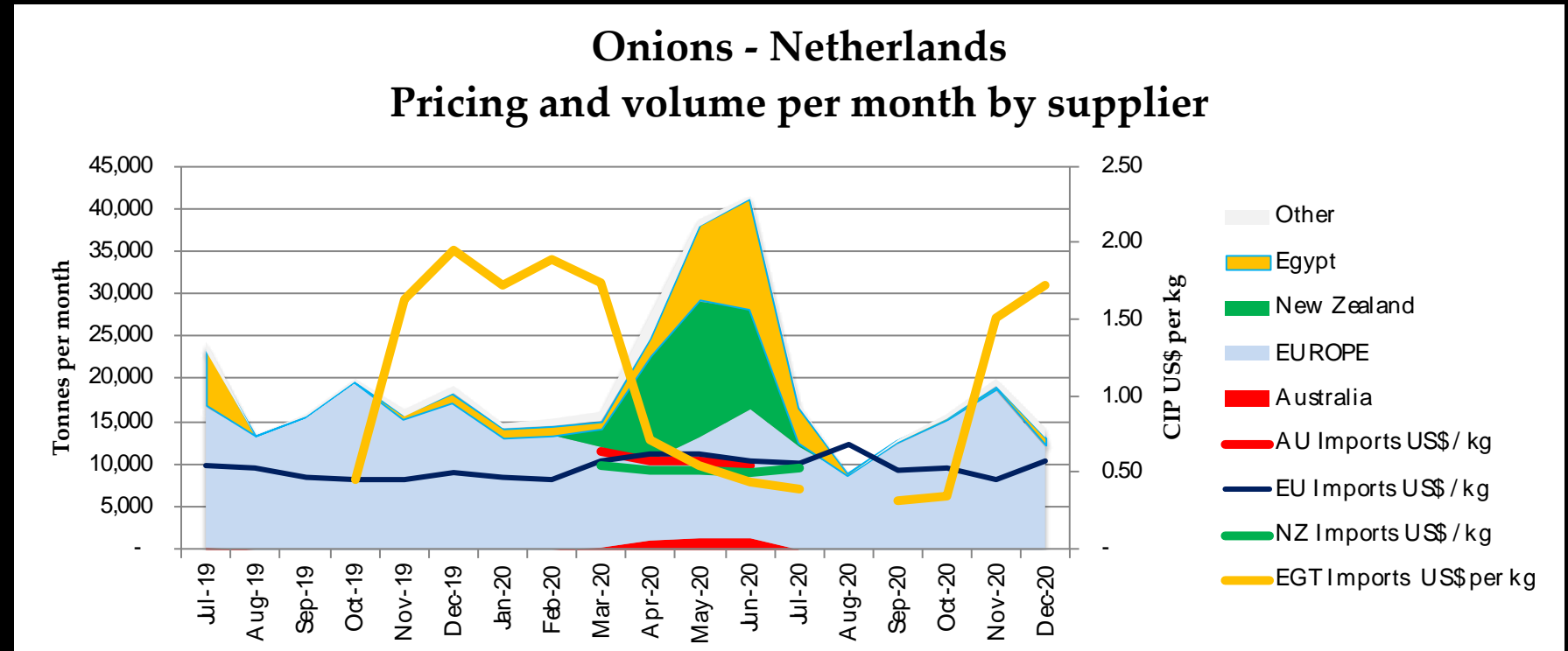
Source: ITC Trademap, Fresh Intelligence analysis

Onions Netherlands



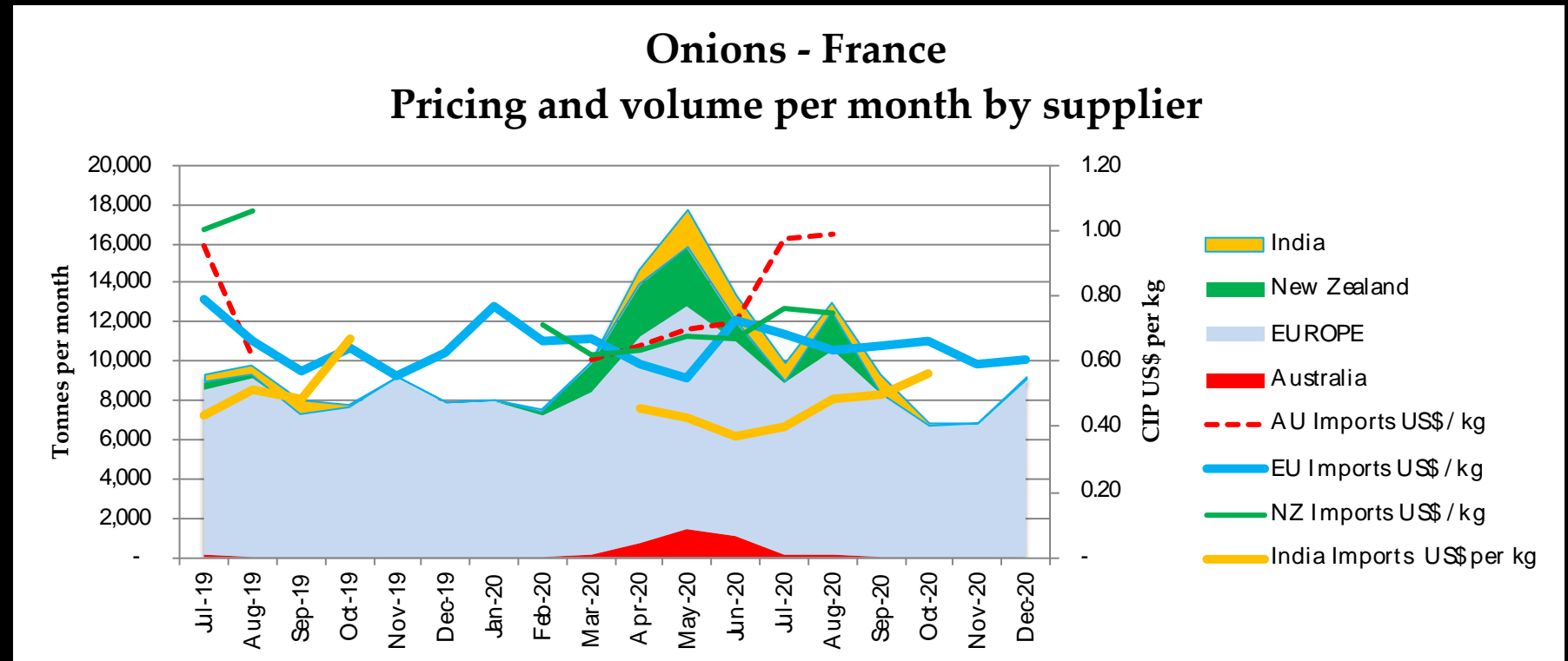
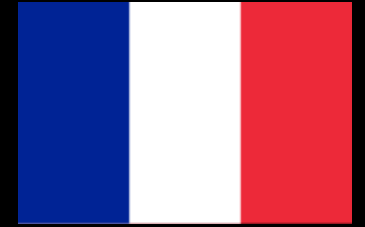
Source: ITC Trademap, Fresh Intelligence analysis

Onions Netherlands



Source: ITC Trademap, Fresh Intelligence analysis

Onions France



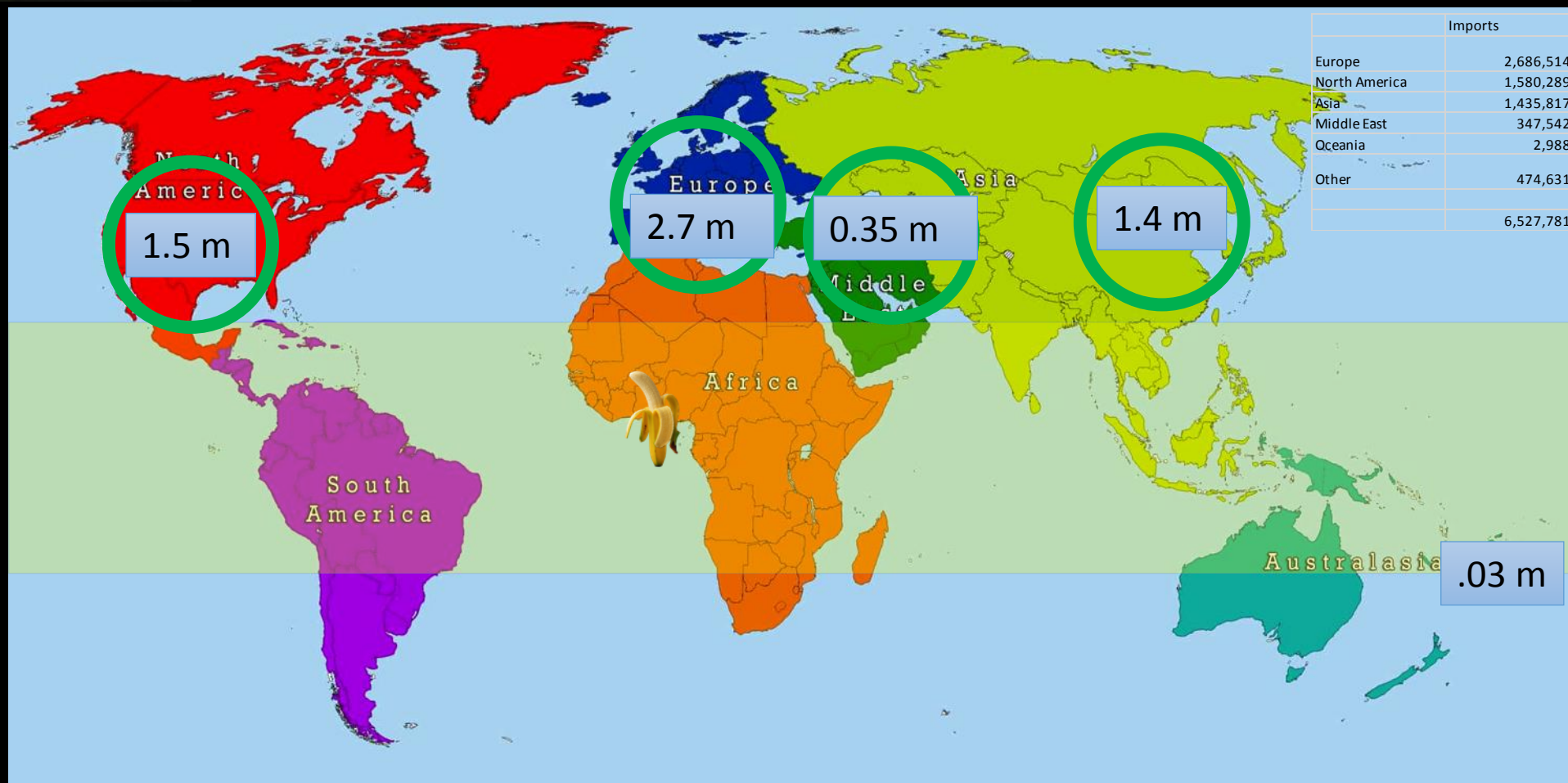
Source: ITC Trademap, Fresh Intelligence analysis



Green Vegetables

6.5 Million Tonnes Imported

11 % of global
vegetable trade



Source: Fresh Intelligence analysis



Green Vegetables Distribution

6.5 Million Tonnes Imported

11 % of global vegetable trade

	Tonnes	share	Europe	Russia / CIS	Middle East	North America	Asia	Oceania
Spain	1,325,512	20%	98.0%	0.0%	1.7%	0.0%	0.0%	0.0%
Netherlands	388,333	6%	97.8%	0.0%	1.5%	0.3%	0.2%	0.0%
China	1,182,266	18%	0.0%	3.7%	0.3%	0.4%	93.4%	0.0%
United States	654,770	10%	0.0%	0.0%	0.1%	90.4%	7.7%	0.0%
Mexico	929,568	14%	0.0%	0.0%	0.0%	99.8%	0.0%	0.0%
Iran	292,781	4%	0.0%	13.2%	86.6%	0.0%	0.0%	0.0%
Australia	7,581	0.12%	0.0%	0.0%	2.0%	0.0%	93.1%	4.4%
New Zealand	2,171	0.03%	0.0%	0.0%	0.0%	0.0%	1.3%	98.1%
Other	1,744,799							
Total	6,527,781	100%						
Source: ITC Trademap; Fresh Intelligence analysis								

REFERENCES

- International Trade Centre, TRADE MAP www.trademap.org/

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

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