FRESH Intelligence
bringing data to life

Fruit Growers Tasmania

Economic drivers & barriers to export

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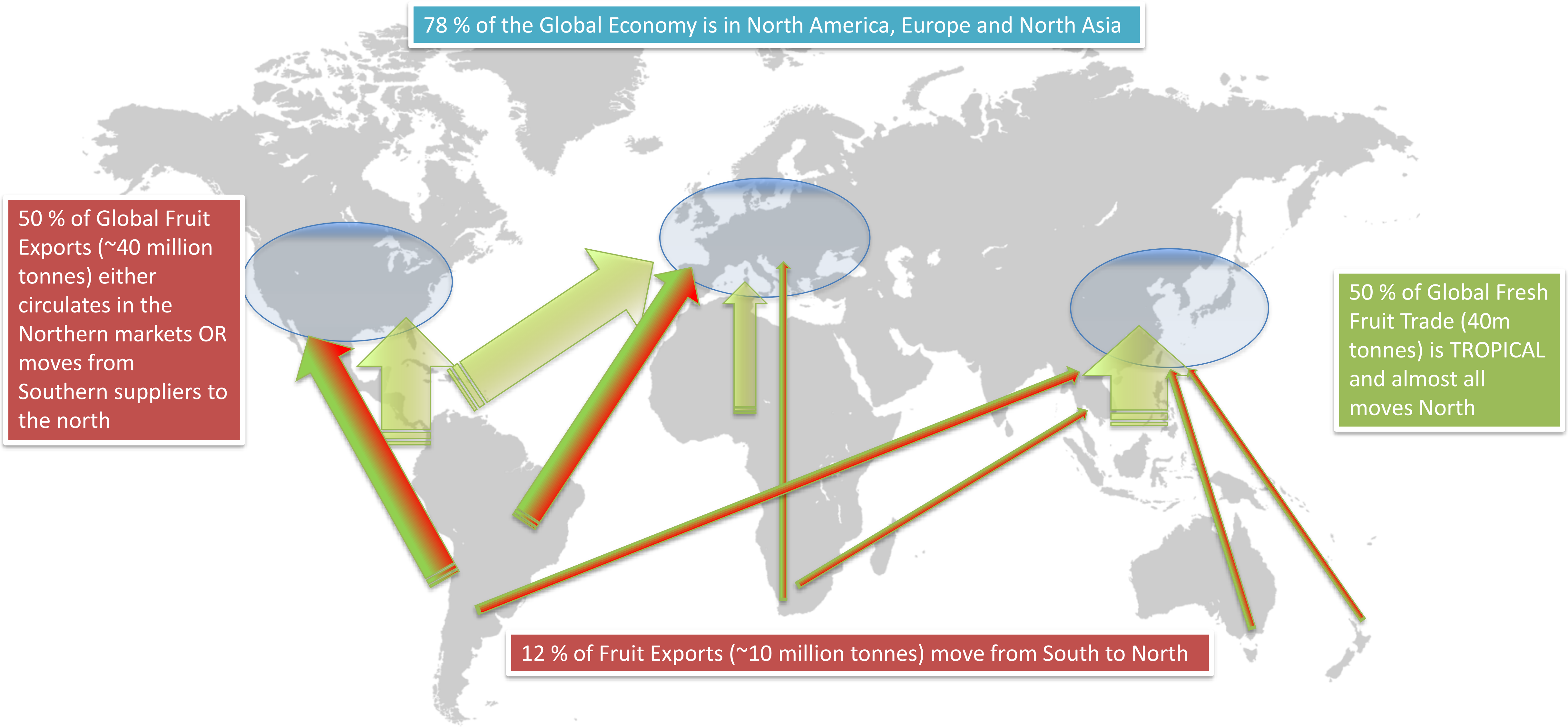
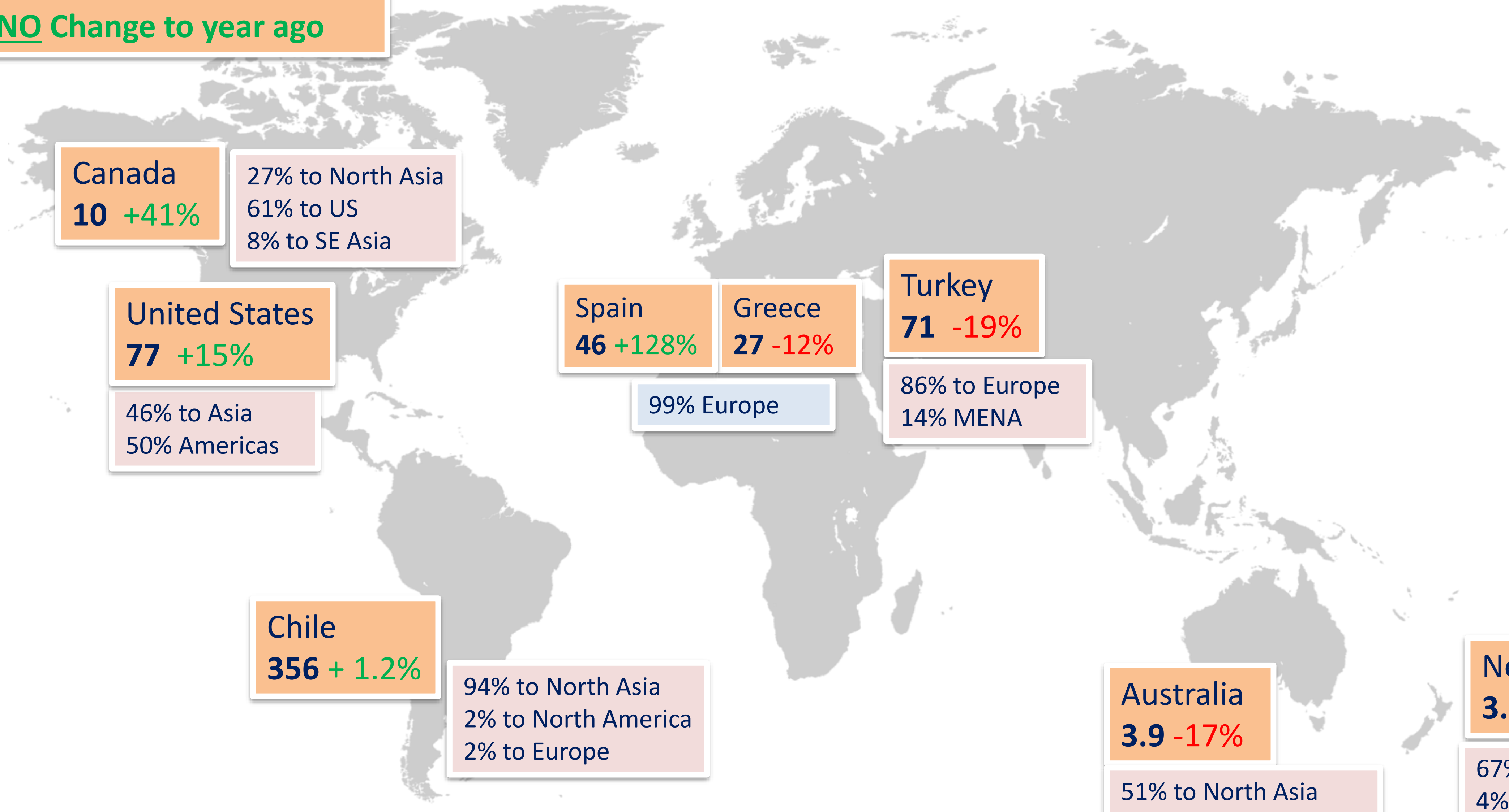

78 % of the Global Economy is in North America, Europe and North Asia
50 % of Global Fruit Exports (~40 million tonnes) either circulates in the Northern markets OR moves from Southern suppliers to the north
50 % of Global Fresh Fruit Trade (40m tonnes) is TROPICAL and almost all moves North
12 % of Fruit Exports (~10 million tonnes) move from South to North

Cherries

Cherry Exports by supplier

818 Thousand Tonnes

NO Change to year ago



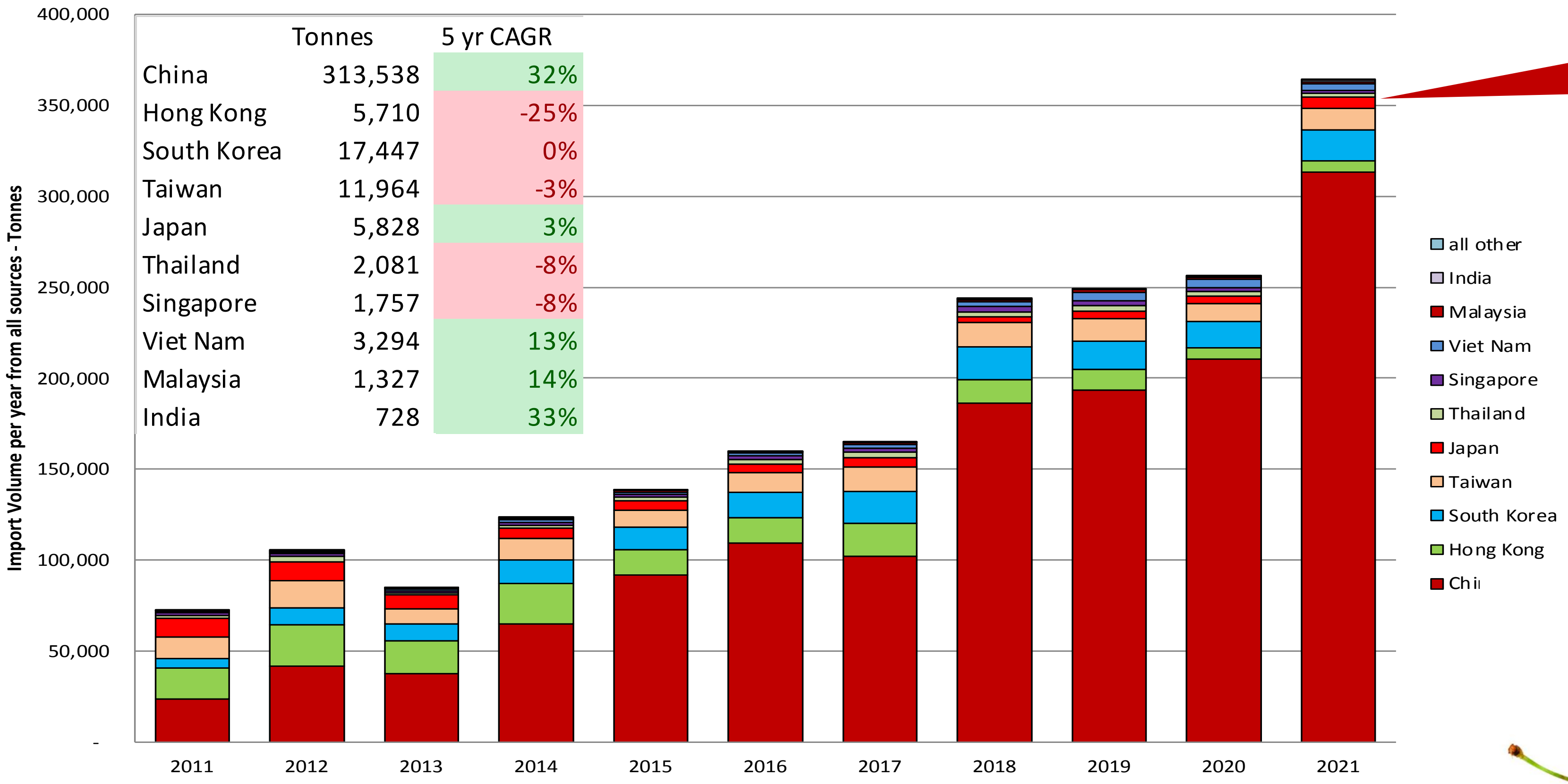
Volumes : Thousand Tonnes

Source: ITC Trademap; Fresh Intelligence analysis

ASIAN MARKET IMPORTS OF CHERRIES – LONG TERM TREND

China dominated with over 300,000 tonnes mostly from Chile and is expanding 32 per cent per year
Hong Kong is influenced by re exports to China, which have been removed.
Korea, Taiwan and Japan all fairly steady
Large growth trends from small markets in Vietnam, Malaysia and India

Asian import growth for Cherries from all sources 2011 - 2021



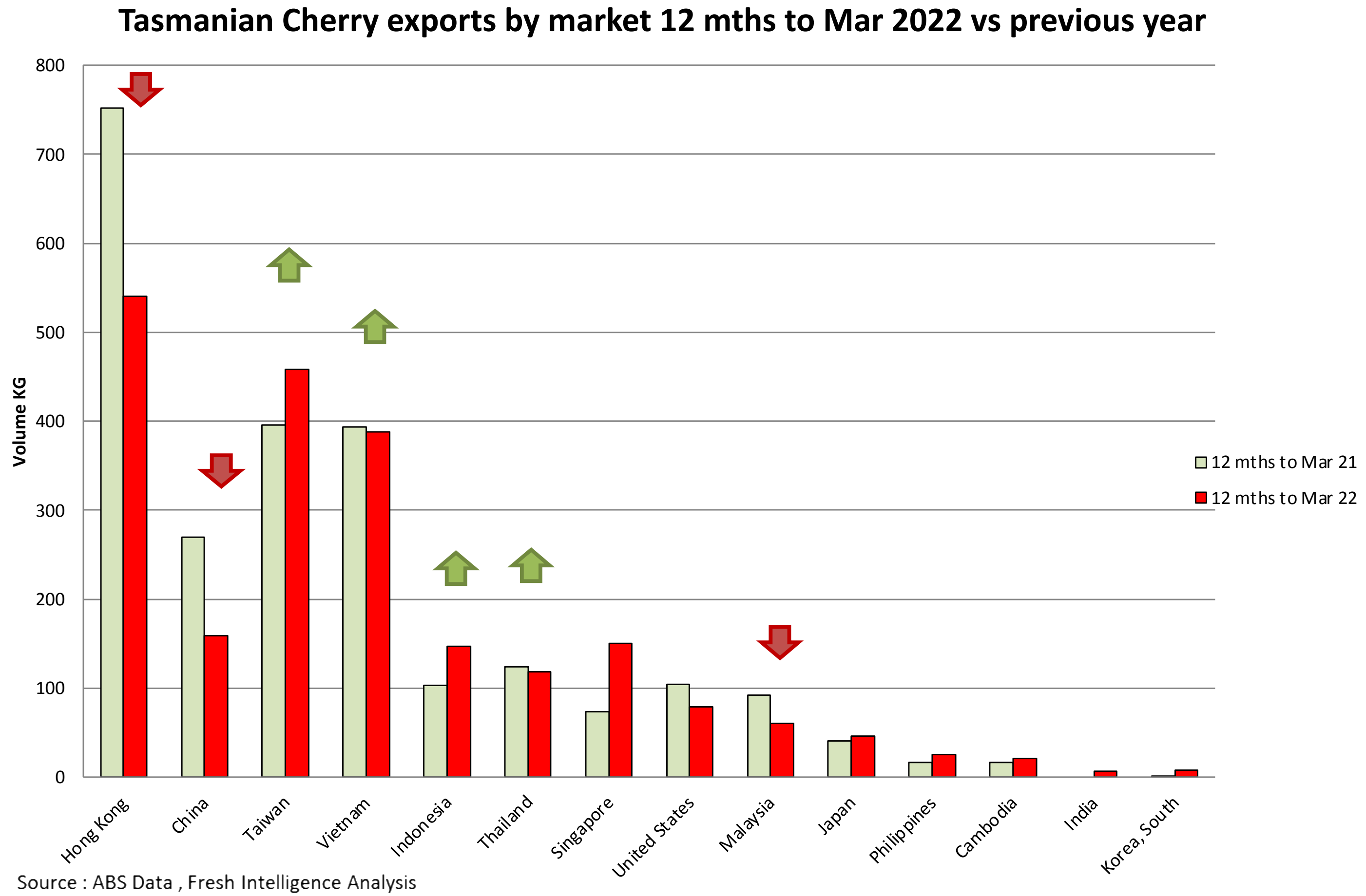
	Tonnes	5 yr CAGR
China	313,538	32%
Hong Kong	5,710	-25%
South Korea	17,447	0%
Taiwan	11,964	-3%
Japan	5,828	3%
Thailand	2,081	-8%
Singapore	1,757	-8%
Viet Nam	3,294	13%
Malaysia	1,327	14%
India	728	33%

Source : ITC Trademap; Fresh Intelligence analysis

North Asian markets are the 5 leading importers

TASMANIAN CHERRY EXPORTS – BY MARKET

2,224 tonnes - 7.9%
$42.9 million - 1.2%
$19.29 per kg +7 %



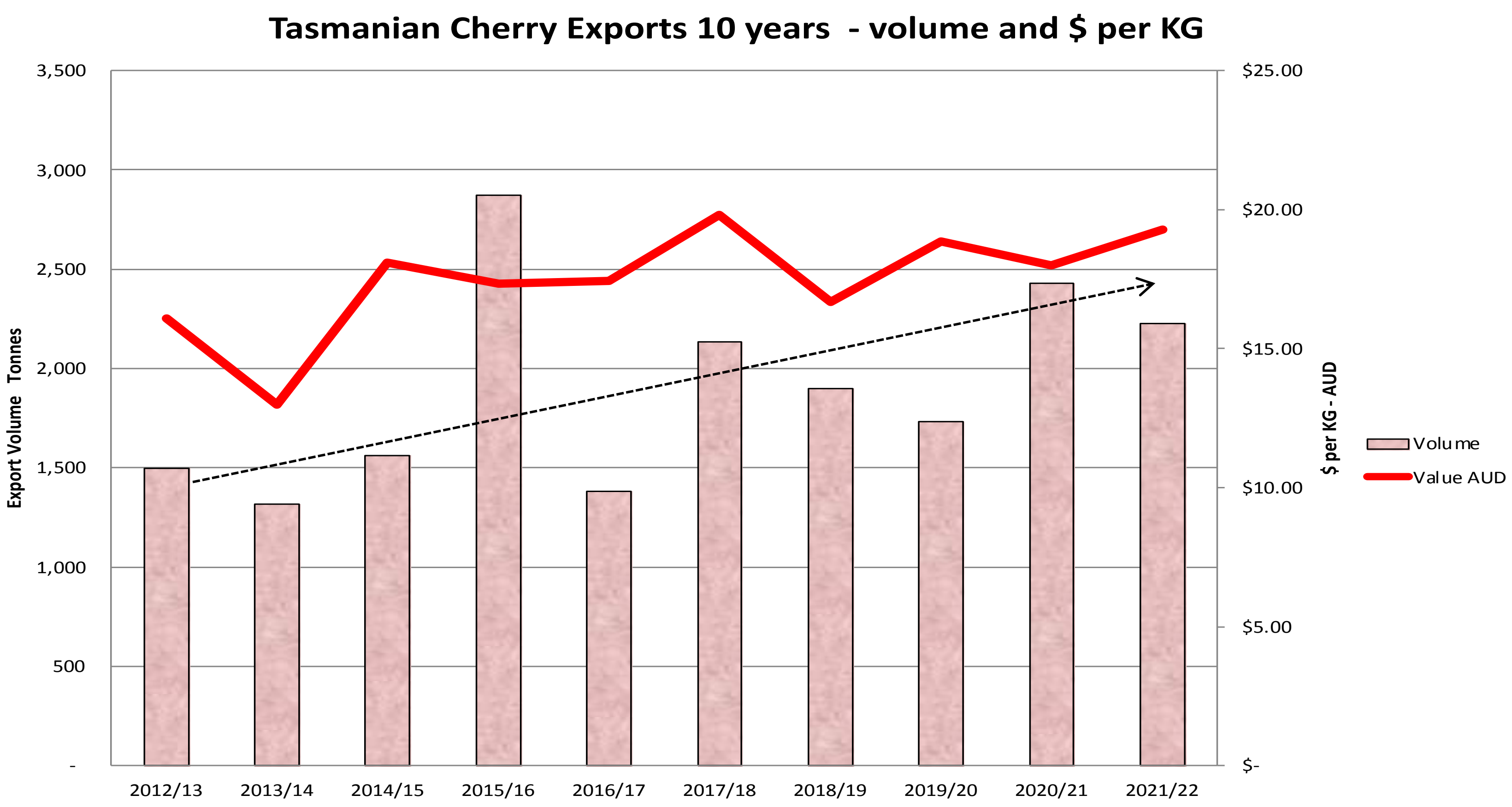
Source : ABS Data , Fresh Intelligence Analysis

	Volume Tonnes Tasmania			National Tonnes	
Market	Apr to Mar-22	Change to 21	Tas share of National	Apr to Mar-22	Change to 21
Hong Kong	541	-28%	52%	1049	-10%
China	160	-41%	57%	278	-68%
Taiwan	458	16%	100%	459	14%
Vietnam	388	-1%	48%	802	6%
Indonesia	148	43%	77%	191	2%
Thailand	119	-4%	99%	120	-3%
Singapore	151	106%	30%	498	-7%
United States	79	-24%	100%	79	-24%
Malaysia	60	-35%	29%	205	-4%
Japan	46	13%	100%	46	11%
Philippines	26	56%	66%	39	135%
Cambodia	21	26%	66%	31	55%
India	7	0%	53%	13	36%
Korea, South	8	553%	106%	8	
all other	14	-54%	16%	86	0%
TOTAL Cherries	**2,224**	-7.9%	57%	**3905**	-17.3%

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

TASMANIAN EXPORTS – LONG TERM TREND

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 2021/22 season on trend.   Unit values were higher though nudging the levels of 2017/18



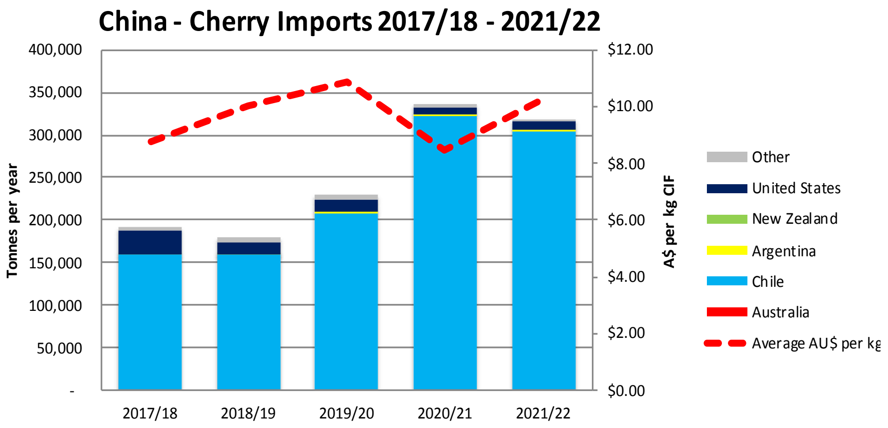
Source : ABS Data via IHS Global Trade Atlas, Fresh Intelligence analysis

China

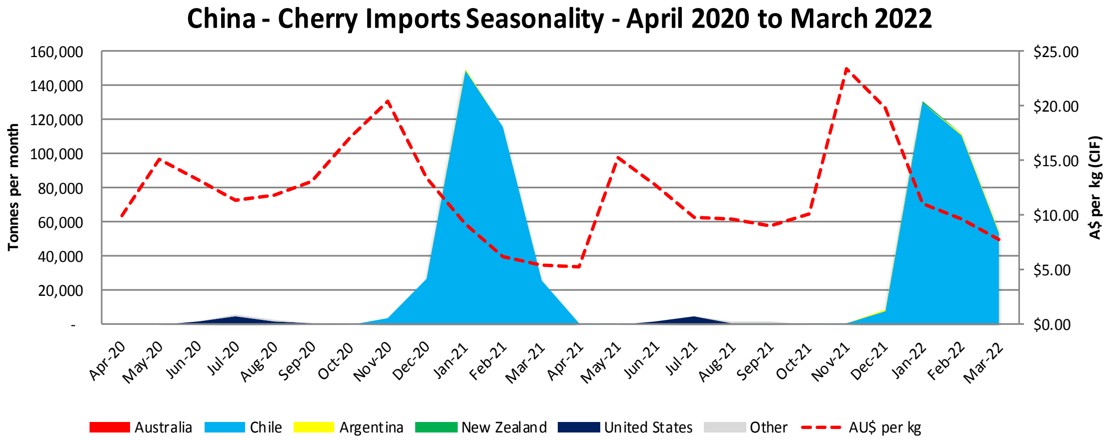
Population	1402.1	million
Urban share	61%	
Per capita GDP (USD PPP)	$17,211	USD (PPP)
GDP growth (5 yr trend, CAGR)	7.4%	USD

Chile dominates the cherry supply to China while Australia is a niche supplier

Cherry Production	35,195	tonnes
Cherry Imports	317,746	tonnes
Cherry Imports growth trend	13.5%	per yr CAGR
Reliance on Imports	100%	
Cherry competitors	Chile	Argentina
Cherry month volatility	175%	st deviation
Cherry Consumption per capita	0.25	kg p.p.



Source: IHS Global Trade Atlas ; Fresh Intelligence analysis



Source: IHS Global Trade Atlas; Fresh Intelligence analysis

Seasonality	**share of imports**
Northern Season	**3.9%**
Southern Season	**96.1%**

Supplier	Volume imported 2021	Unit Value A$ per kg	5 yr trend p.a CAGR	Market share %
Australia	277	$26.93	-19.4%	0.1%
Chile	304,516	$10.19	17.8%	95.8%
Argentina	1,565	$12.92		0.5%
New Zealand	585	$27.36	-19.2%	0.2%
United States	8,644	$10.20	-24.8%	2.7%
Other	*2,160*			*0.7%*
Total	**317,746**	**$10.25**	**13.5%**	**100.0%**

Source: IHS Global Trade Atlas; Fresh Intelligence analysis

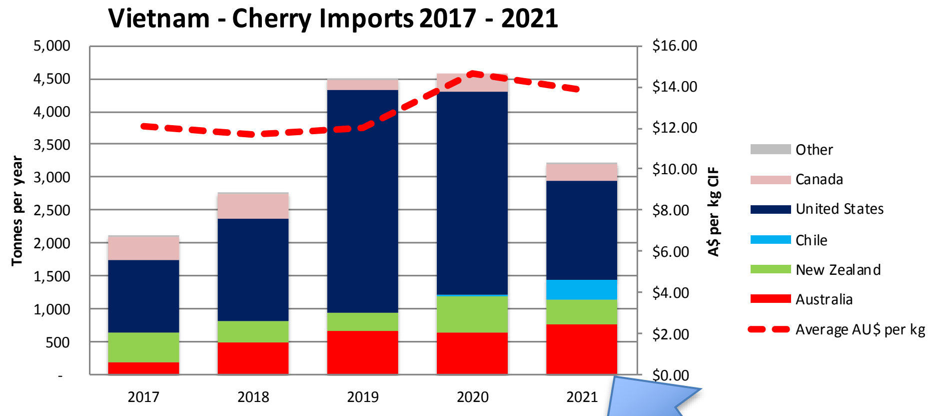
High per capita consumption in 2 months
growth difficult as Chile is struggling to increase trade
Geo political tensions inhibit Australian trade
Australian trade rapidly declining

Vietnam

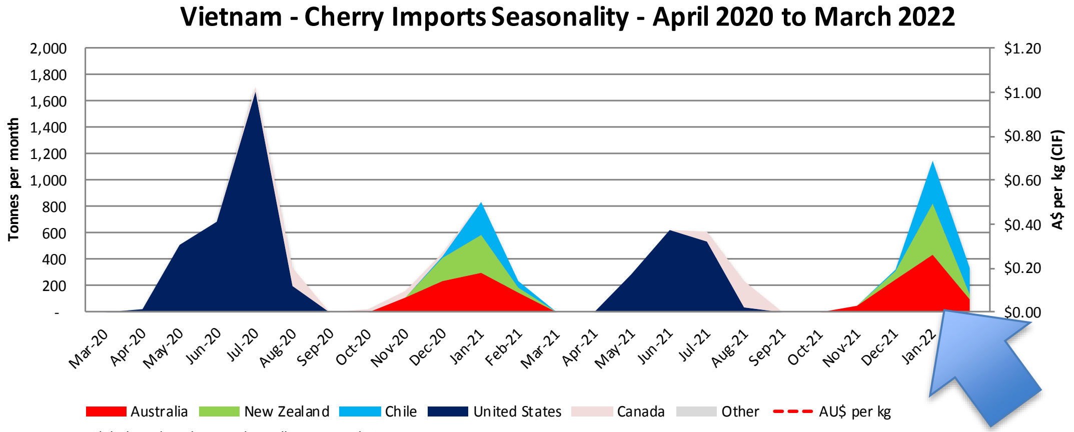
Australia increasing share in southern season with access since 2017

Population	97.3	million
Urban share	37%	
Per capita GDP (USD PPP)	$8,650	USD (PPP)
GDP growth (5 yr trend, CAGR)	8.8%	USD

Cherry Production	0	tonnes
Cherry Imports	3,211	tonnes
Cherry Imports growth trend	11.3%	per yr CAGR
Reliance on Imports	100%	
Cherry competitors	New Zealan	Chile
Cherry month volatility	118%	st deviation
Cherry Consumption per capita	0.03	kg p.p.



Source: ITC Trademap; Fresh Intelligence analysis



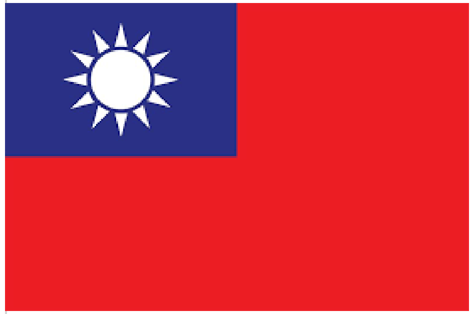
Source: IHS Global Trade Atlas; Fresh Intelligence analysis

Seasonality	**share of imports**
Northern Season	**54.8%**
Southern Season	**45.2%**

Supplier	Volume imported 2021	Unit Value A$ per kg	5 yr trend p.a CAGR	Market share %
Australia	**754**	$19.65	40.8%	23.5%
New Zealand	**385**	$15.91	-4.2%	12.0%
Chile	**312**	$8.01		9.7%
United States	**1,485**	$12.16	8.2%	46.2%
Canada	**274**	$11.15	-6.5%	8.5%
Other	*1*			*0.0%*
Total	**3,211**	**$13.87**	**11.3%**	**100.0%**

Source: IHS Global Trade Atlas; Fresh Intelligence analysis

Low per capita consumption = growth potential
Southern supply season increasing
Australia is the leading southern supplier
Chile has access with a low price = threat



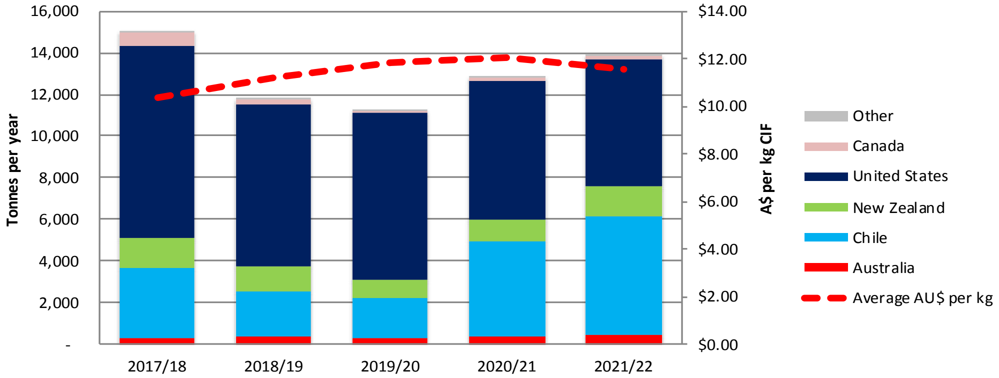
Taiwan

US and Chile dominate the cherry supply to Taiwan while Australia is a niche supplier

Population	23.6	million
Urban share	79%	
Per capita GDP (USD PPP)	$59,398	USD (PPP)
GDP growth (5 yr trend, CAGR)	5.7%	USD

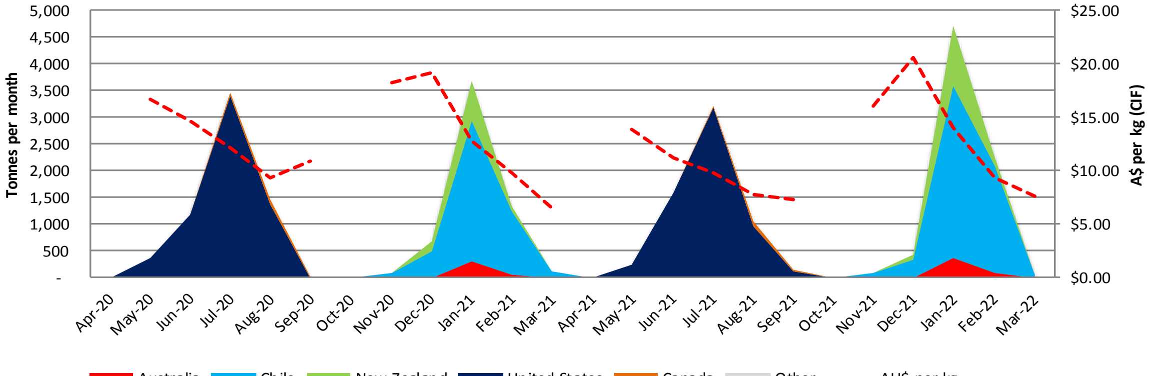
Cherry Production	0	tonnes
Cherry Imports	13,851	tonnes
Cherry Imports growth trend	-1.9%	per yr CAGR
Reliance on Imports	100%	
Cherry competitors	Chile	New Zealand
Cherry month volatility	127%	st deviation
Cherry Consumption per capita	0.59	kg p.p.

Taiwan - Cherry Imports 2017/18 - 2021/22



Source: IHS Global Trade Atlas ; Fresh Intelligence analysis

Taiwan - Cherry Imports Seasonality - April 2020 to March 2022



Source: IHS Global Trade Atlas; Fresh Intelligence analysis

Seasonality	**share of imports**
Northern Season	**45.4%**
Southern Season	**54.6%**

Supplier	Volume imported 2021/22	Unit Value A$ per kg	5 yr trend p.a CAGR	Market share %
Australia	**458**	$21.16	14.1%	3.3%
Chile	**5,716**	$8.62	13.7%	41.3%
New Zealand	**1,387**	$28.08	-0.6%	10.0%
United States	**6,148**	$9.93	-9.7%	44.4%
Canada	**140**	$10.48	-30.9%	1.0%
Other	*0*			*0.0%*
Total	**13,851**	**$11.59**	**-1.9%**	**100.0%**

Source: IHS Global Trade Atlas; Fresh Intelligence analysis

Strong per capita consumption, increasing over 3 years
Chile is building trade to break reliance on China
Australian trade is increasing

TAIWAN PROMOTION

Digital and Social Media

TAIWAN PROMOTION

Digital and Social Media

TAIWAN PROMOTION

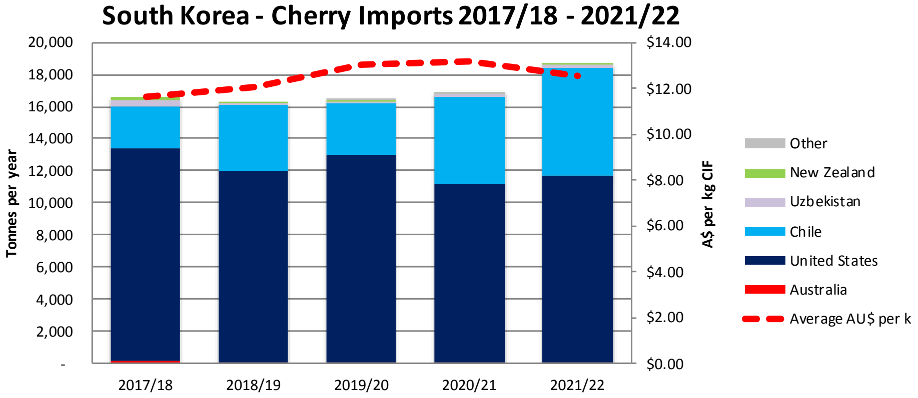
Digital and Social Media

South Korea

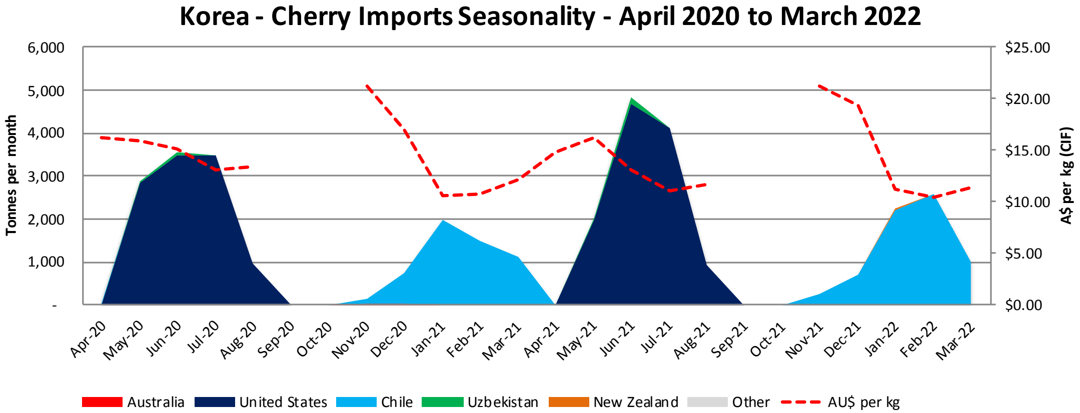
Market dominated by US and Chile.

Population	51.8	million
Urban share	81%	
Per capita GDP (USD PPP)	$45,274	USD (PPP)
GDP growth (5 yr trend, CAGR)	2.8%	USD

Cherry Production	0	tonnes
Cherry Imports	18,655	tonnes
Cherry Imports growth trend	3.0%	per yr CAGR
Reliance on Imports	100%	
Cherry competitors	United States Chile	
Cherry month volatility	100%	st deviation
Cherry Consumption per capita	0.36	kg p.p.



Source: IHS Global Trade Atlas; Fresh Intelligence analysis



Source: IHS Global Trade Atlas; Fresh Intelligence analysis

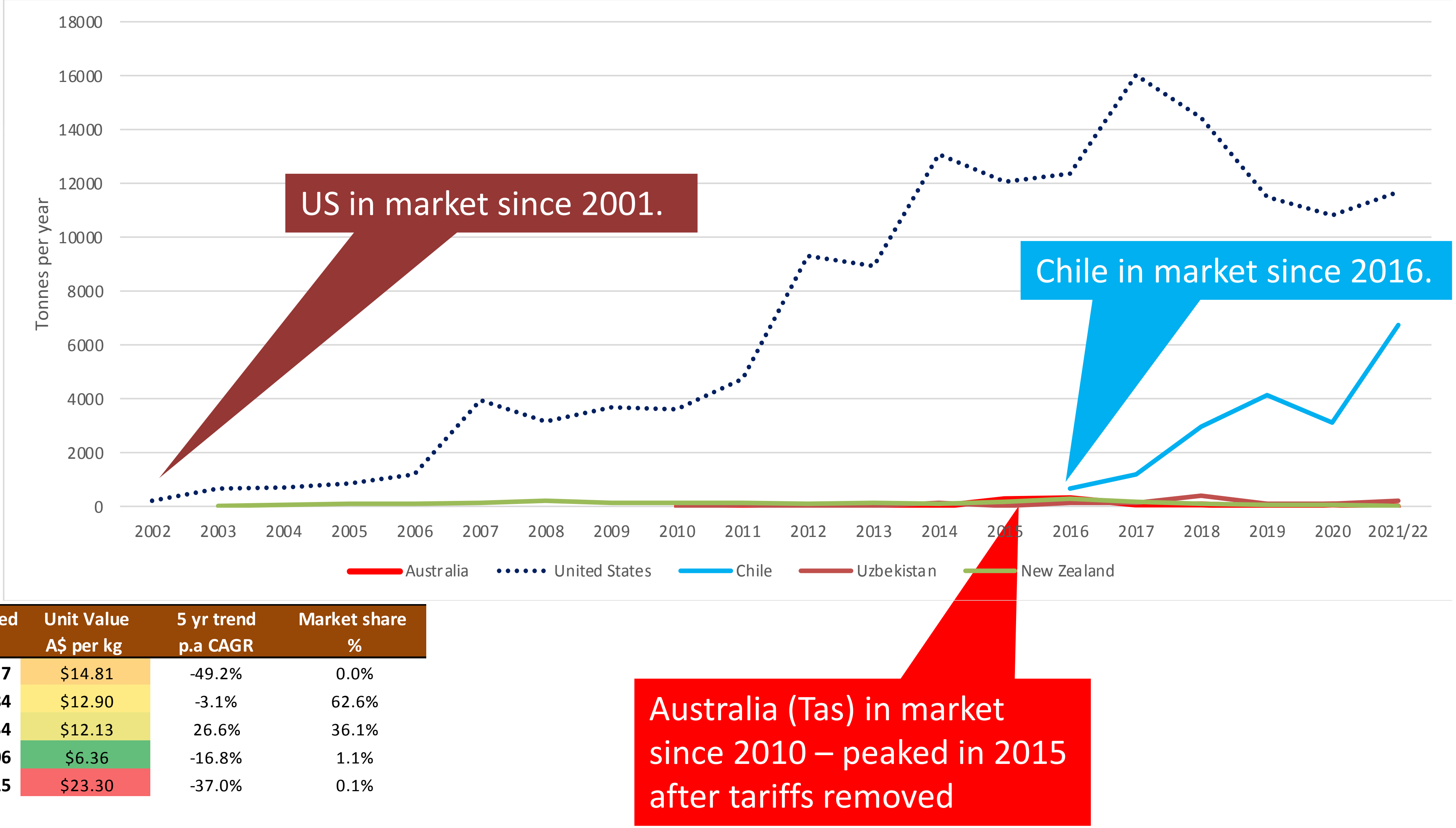
Seasonality	share of imports
Northern Season	**63.7%**
Southern Season	**36.3%**

Supplier	Volume imported 2021	Unit Value A$ per kg	5 yr trend p.a CAGR	Market share %
Australia	**7**	$14.81	-49.2%	0.0%
United States	**11,684**	$12.90	-3.1%	62.6%
Chile	**6,734**	$12.13	26.6%	36.1%
Uzbekistan	**206**	$6.36	-16.8%	1.1%
New Zealand	**25**	$23.30	-37.0%	0.1%
Other	*0*			*0.0%*
Total	**18,655**	**$12.56**	**3.0%**	**100.0%**

Source: IHS Global Trade Atlas; Fresh Intelligence analysis

High per capita consumption = growth difficult
Southern supply season increasing from Chile
Australia has not gained traction since a short burst after the FTA in 2015 (Tas only)

South Korea market for cherries is growing



Supplier	Volume imported 2021	Unit Value A$ per kg	5 yr trend p.a CAGR	Market share %
Australia	**7**	$14.81	-49.2%	0.0%
United States	**11,684**	$12.90	-3.1%	62.6%
Chile	**6,734**	$12.13	26.6%	36.1%
Uzbekistan	**206**	$6.36	-16.8%	1.1%
New Zealand	**25**	$23.30	-37.0%	0.1%
Other	*0*			*0.0%*
Total	**18,655**	**$12.56**	**3.0%**	**100.0%**

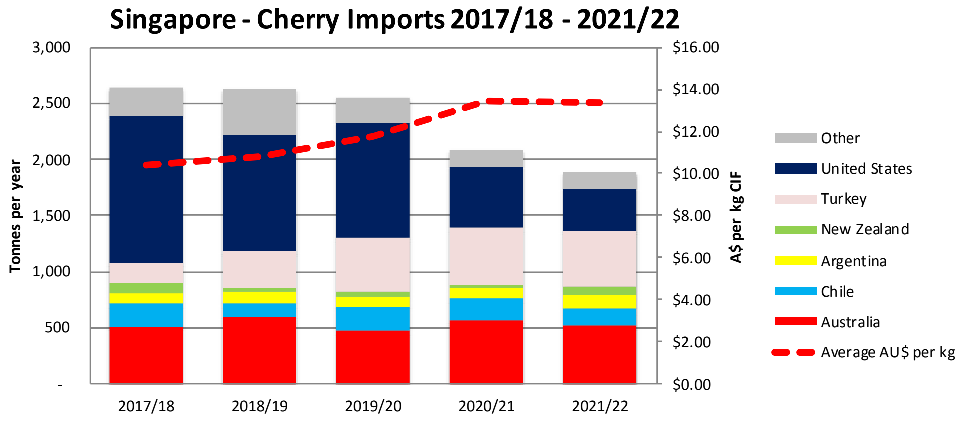
Source: IHS Global Trade Atlas; Fresh Intelligence analysis

Singapore

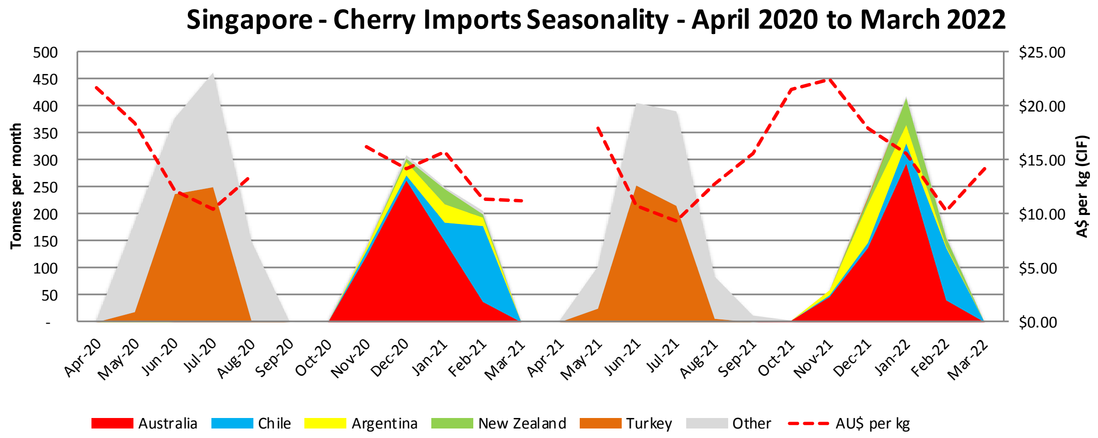
Australia is the lead southern supplier in a steady southern market

Population	5.7	million
Urban share	100%	
Per capita GDP (USD PPP)	$98,520	USD (PPP)
GDP growth (5 yr trend, CAGR)	2.5%	USD

Cherry Production	0	tonnes
Cherry Imports	1,882	tonnes
Cherry Imports growth trend	-8.2%	per yr CAGR
Reliance on Imports	100%	
Cherry competitors	Chile	Argentina
Cherry month volatility	96%	st deviation
Cherry Consumption per capita	0.33	kg p.p.



Source: IHS Global Trade Atlas ; Fresh Intelligence analysis



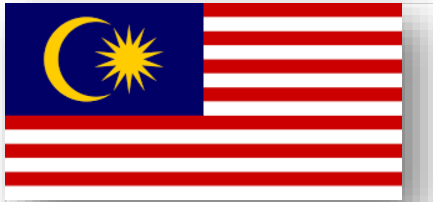
Source: IHS Global Trade Atlas; Fresh Intelligence analysis

Seasonality	**share of imports**
Northern Season	**60.1%**
Southern Season	**39.9%**

Supplier	Volume imported 2021	Unit Value A$ per kg	5 yr trend p.a CAGR	Market share %
Australia	**518**	$16.29	0.7%	27.5%
Chile	**151**	$10.04	-7.8%	8.0%
Argentina	**117**	$16.96	5.3%	6.2%
New Zealand	**73**	$22.05	-3.7%	3.9%
Turkey	**505**	$7.83	28.2%	26.8%
Other	*518*			*27.5%*
Total	**1,882**	**$13.33**	**-8.2%**	**100.0%**

Source: IHS Global Trade Atlas; Fresh Intelligence analysis

High per capita consumption
Long held key market for Australia - needs to be mindful that Chile and Argentina are taking share.
Northern season supply shifting from US to Turkey though has less impact for Australia

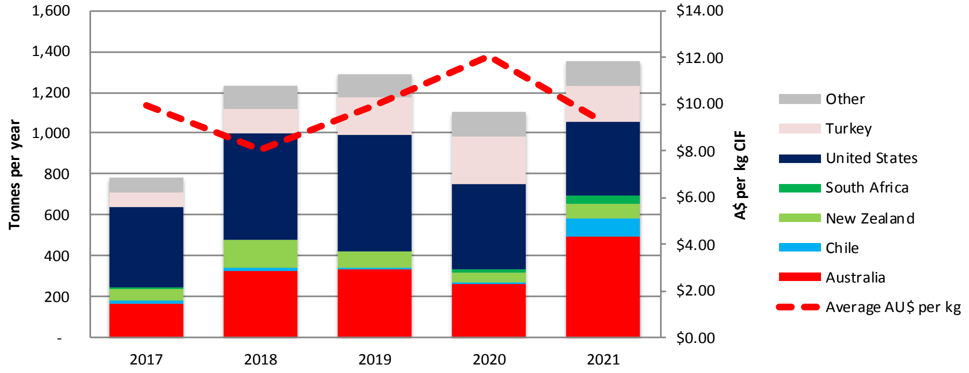


Malaysia

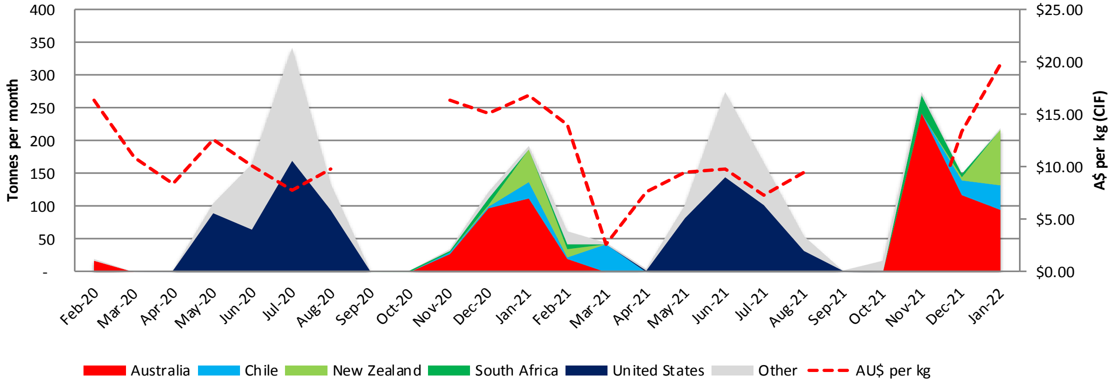
Australia is the leading southern supplier in a growing market

Population	32.4	million
Urban share	77%	
Per capita GDP (USD PPP)	$27,924	USD (PPP)
GDP growth (5 yr trend, CAGR)	2.8%	USD

Cherry Production	0	tonnes
Cherry Imports	1,354	tonnes
Cherry Imports growth trend	14.6%	per yr CAGR
Reliance on Imports	100%	
Cherry competitors	Chile	New Zealand
Cherry month volatility	98%	st deviation
Cherry Consumption per capita	0.03	kg p.p.



Source: IHS Global Trade Atlas; Fresh Intelligence analysis



Source: IHS Global Trade Atlas; Fresh Intelligence analysis

Seasonality	**share of imports**
Northern Season	**49.0%**
Southern Season	**51.0%**

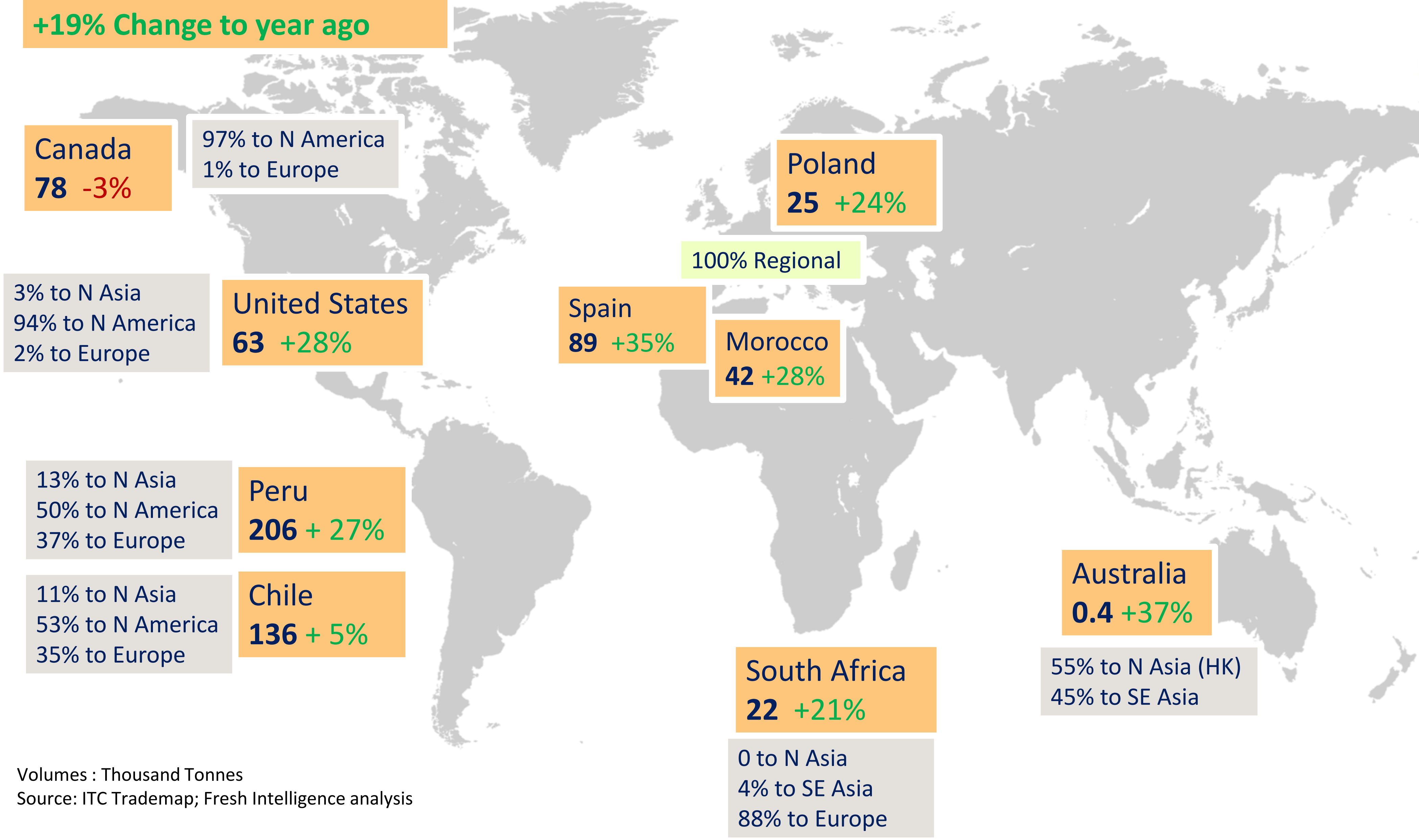
Supplier	Volume imported 2021	Unit Value A$ per kg	5 yr trend p.a CAGR	Market share %
Australia	**493**	$9.37	32.3%	36.4%
Chile	**93**	$7.06	53.5%	6.9%
New Zealand	**68**	$19.89	3.9%	5.0%
South Africa	**37**	$3.29	47.9%	2.7%
United States	**363**	$9.43	-2.0%	26.8%
Other	*300*			*22.1%*
Total	**1,354**	**$9.23**	**14.6%**	**100.0%**

Source: IHS Global Trade Atlas; Fresh Intelligence analysis

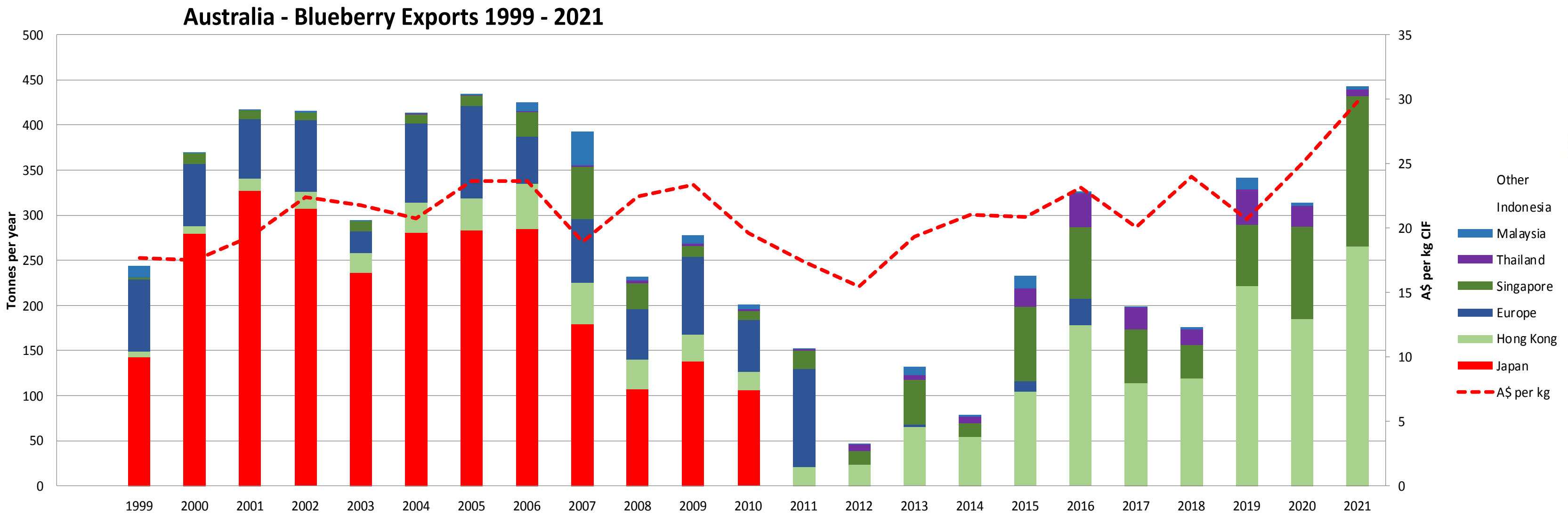
Low per capita consumption = growth potential
Long held key market for Australia - needs to be mindful that Chile and South Africa are taking share.
Northern season supply shifting from US to Turkey though has less impact for Australia

Blueberries

Blueberry Exports by supplier
872 Thousand Tonnes
+19% Change to year ago



Volumes : Thousand Tonnes
Source: ITC Trademap; Fresh Intelligence analysis



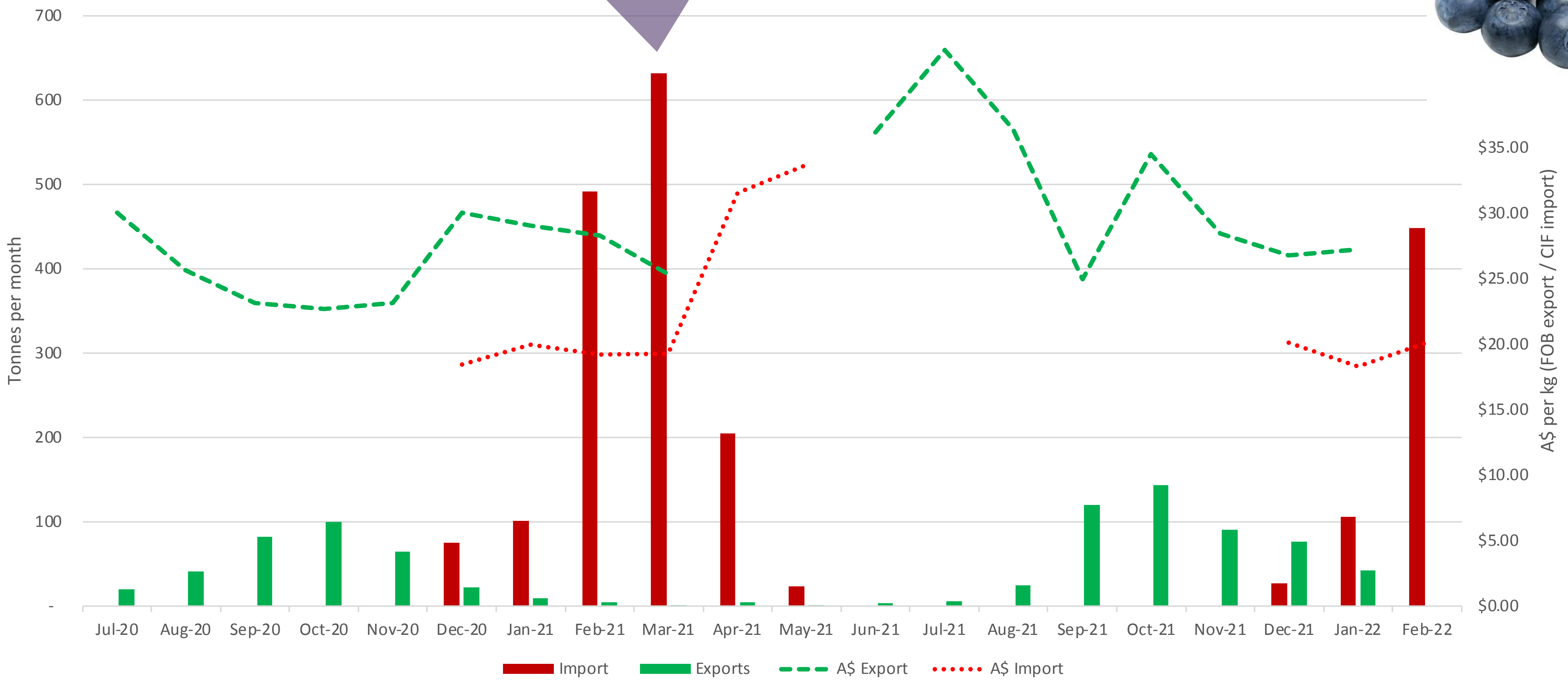
Source: ITC Trademap; Fresh Intelligence analysis

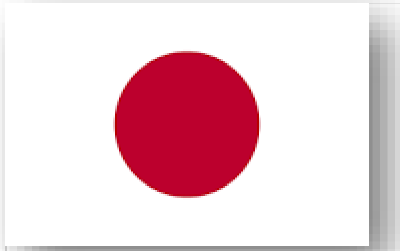
Australian Exports of Blueberries

	2020	2021	1 yr chg	5 yr CAGR
Tonnes	**348**	**476**	**36.8%**	**12.0%**
Value	8.7	14.2	62.7%	33.3%
Unit Value A$ p	25.04	29.76	18.9%	10.3%
Key Markets	*Tonnes*	*Tonnes*		
Hong Kong	185	265	43.2%	23.5%
Singapore	102	167	64.4%	29.7%
Thailand	24	7	-68.4%	-25.8%
Indonesia	32	30	-6.6%	48.4%
Malaysia	3	3	-10.8%	80.2%
India	0	0		
Other	2	3		

Source: IHS Global Trade Atlas; Fresh Intelligence analysis

Australia imports more blueberries from New Zealand than it exports



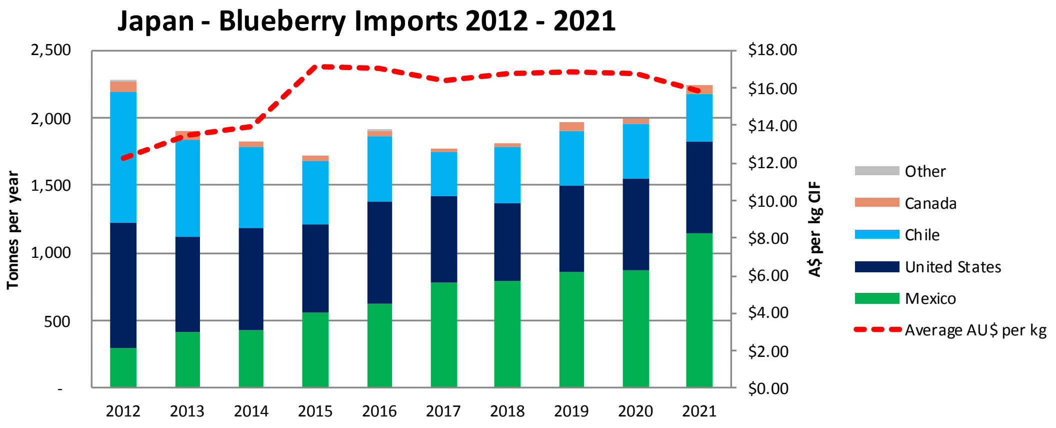


Japan

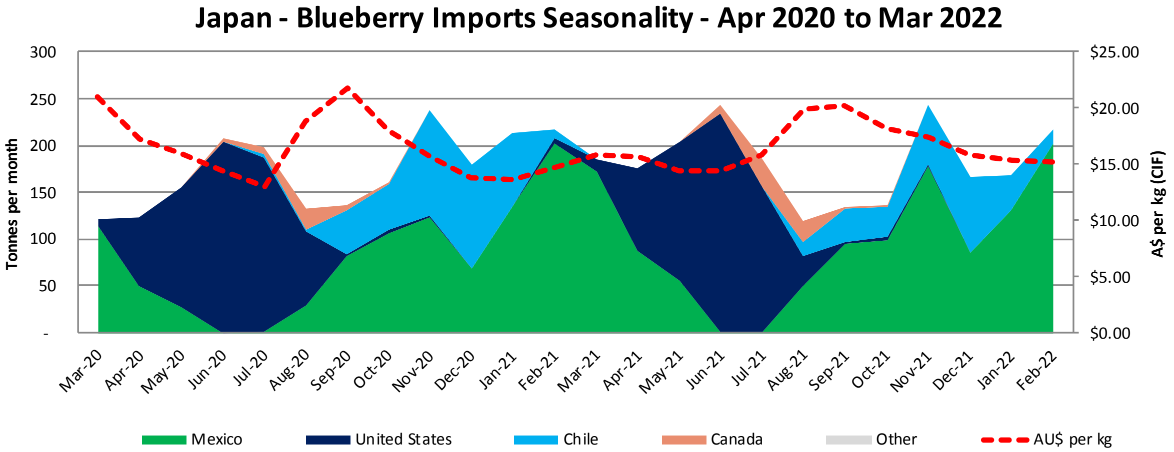
Australia lost blueberry access in 2012 and is a market access priority

Population	125.8	million
Urban share	92%	
Per capita GDP (USD PPP)	$42,390	USD (PPP)
GDP growth (5 yr trend, CAGR)	3.3%	USD

Blueberry Production	23,452	Tonnes
Blueberry Imports	2,238	Tonnes
Blueberry Exports growth trend	5.7%	5 yr CAGR
Reliance on Imports	10%	
Blueberry competitors	United States	Chile
Blueberry Consumption per capi	0.18	kg p.p.



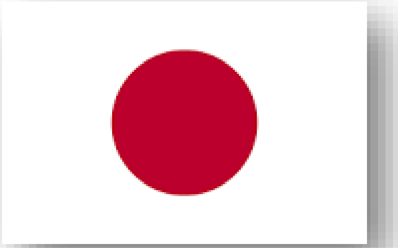
Source: ITC Trademap; Fresh Intelligence analysis



Source: IHS Global Trade Atlas; Fresh Intelligence analysis

Supplier	2021 Imported Tonnes	Value A$ million	Unit Value A$ per kg	1 yr vol change p.a	5 yr vol trend p.a CAGR	Market share % vol
Mexico	**1,142**	**18.5**	**$16.19**	**31.6%**	**10.1%**	**51.1%**
United States	**681**	**10.3**	$15.16	-0.4%	1.5%	30.4%
Chile	**349**	**5.5**	$15.74	-13.9%	1.5%	15.6%
Canada	**65**	**1.1**	$17.05	68.7%	21.6%	2.9%
Other	-					
Total	**2,238**	**35.4**	**$15.83**	**12.1%**	**5.7%**	**100.0%**

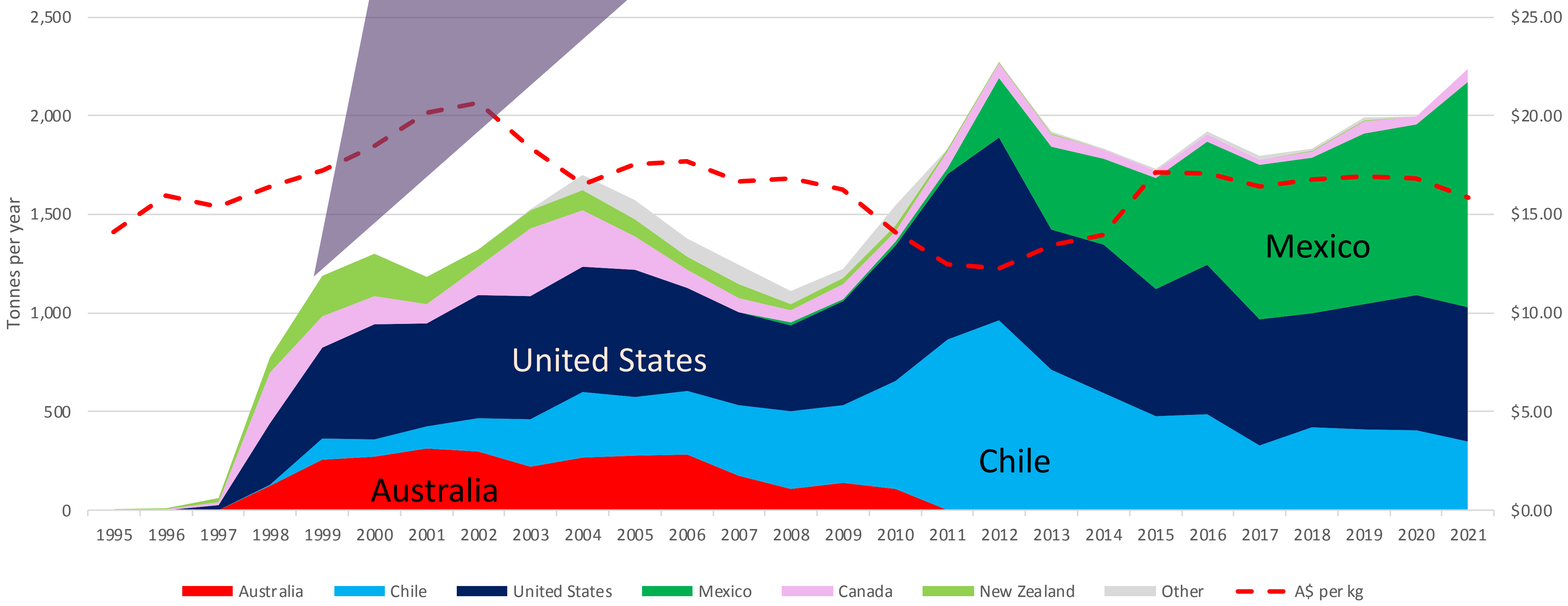
Imports peaked in 2012 and fell though rising again since 2015 driven by Mexico. US and Chile have lower volume than in 2012.



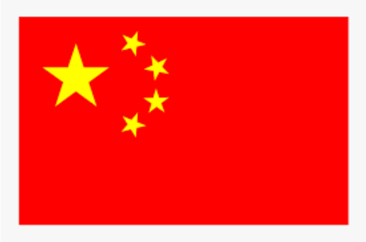
Japan

25 years of blueberry imports

The big seller for the Japanese have been claims that blueberries improve vision, and the berry is known as "vision fruit".
According to the Tokyo Customs Office, imports reached 772 tonnes in 1998, 12.4 times 1997's figure, and in the nine months to September 1999 they have already hit 898 tonnes. (Financial Review Dec 6 1999)



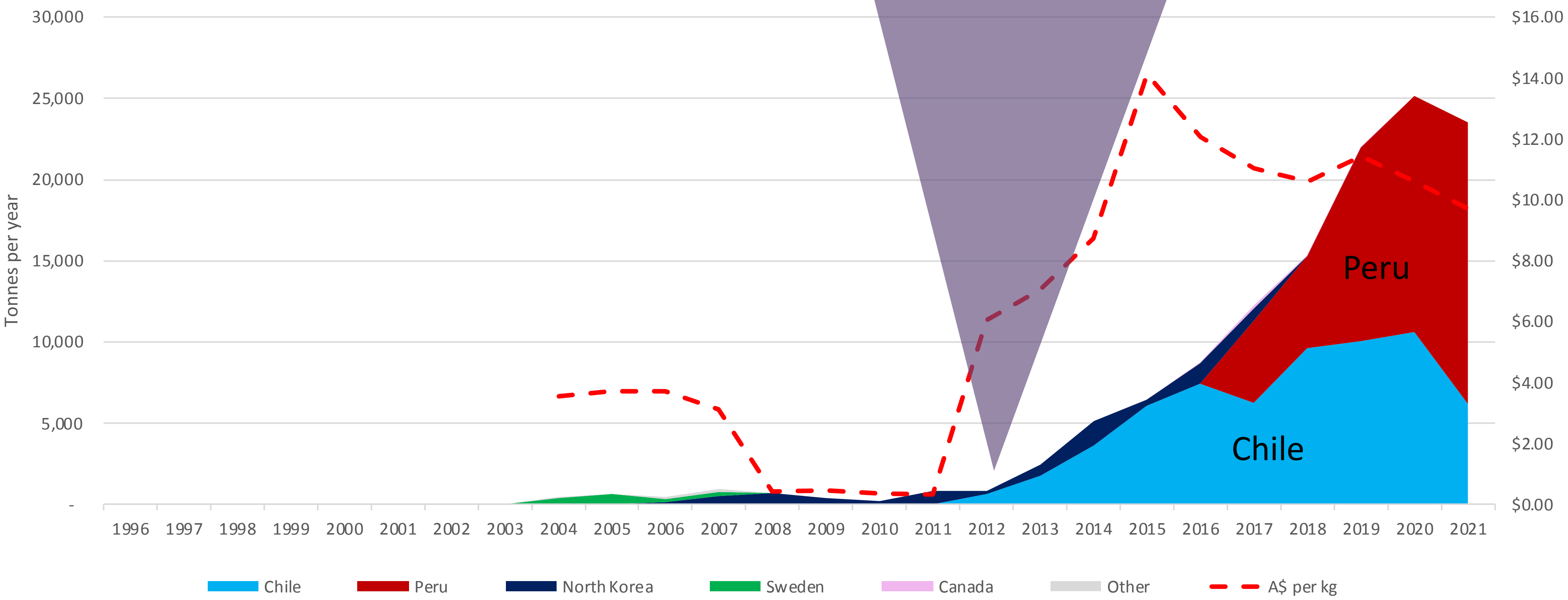
Source: IHS Global Trade Atlas; Fresh Intelligence analysis



China

Chile, and then Peru have driven the imports of blueberries in volume since 2013 though small volumes have been recorded from Sweden and North Korea since 2003.

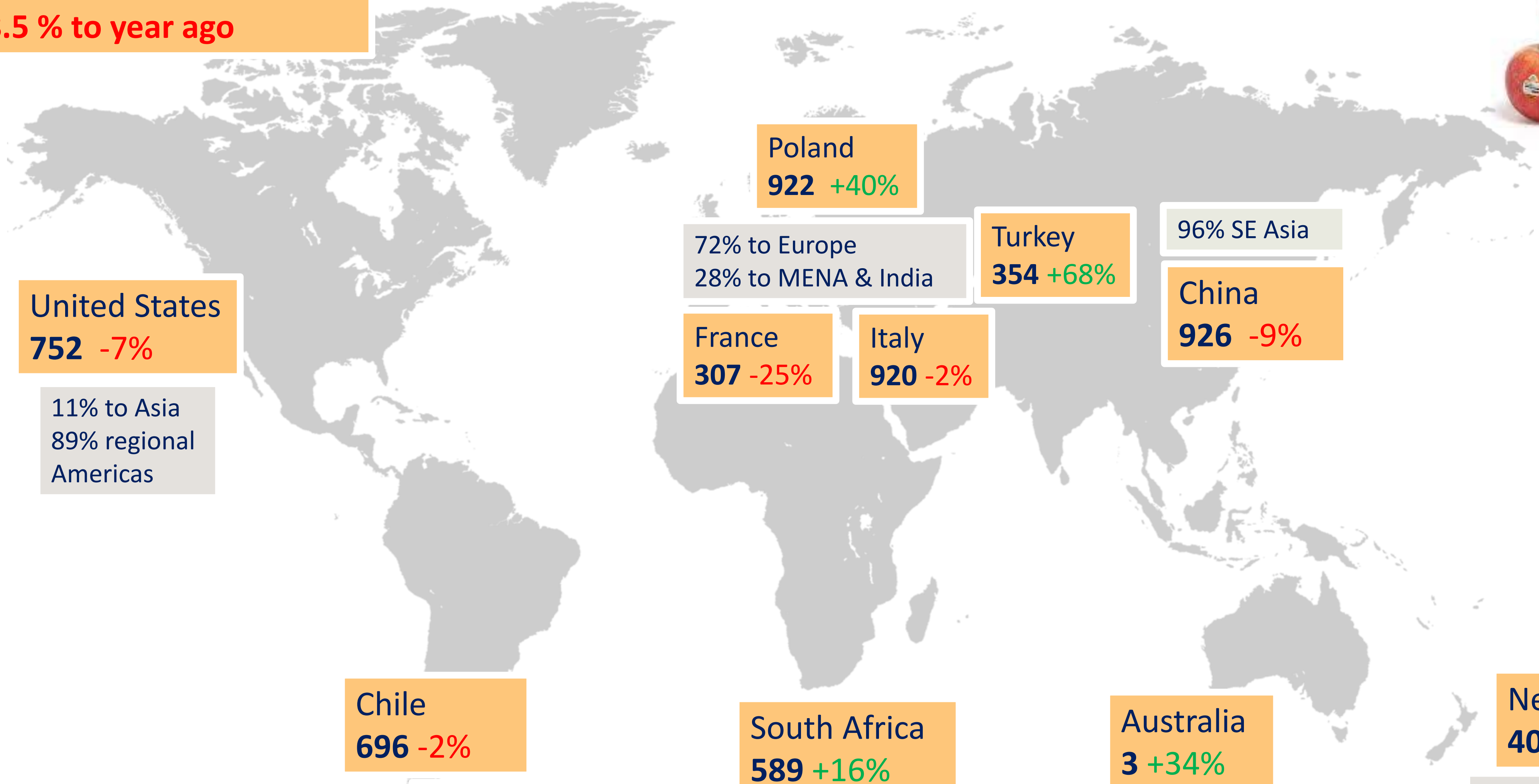
China now produces over 200,000 tonnes of blueberries reducing import reliance



Source: ITC TradeMap; Fresh Intelligence analysis

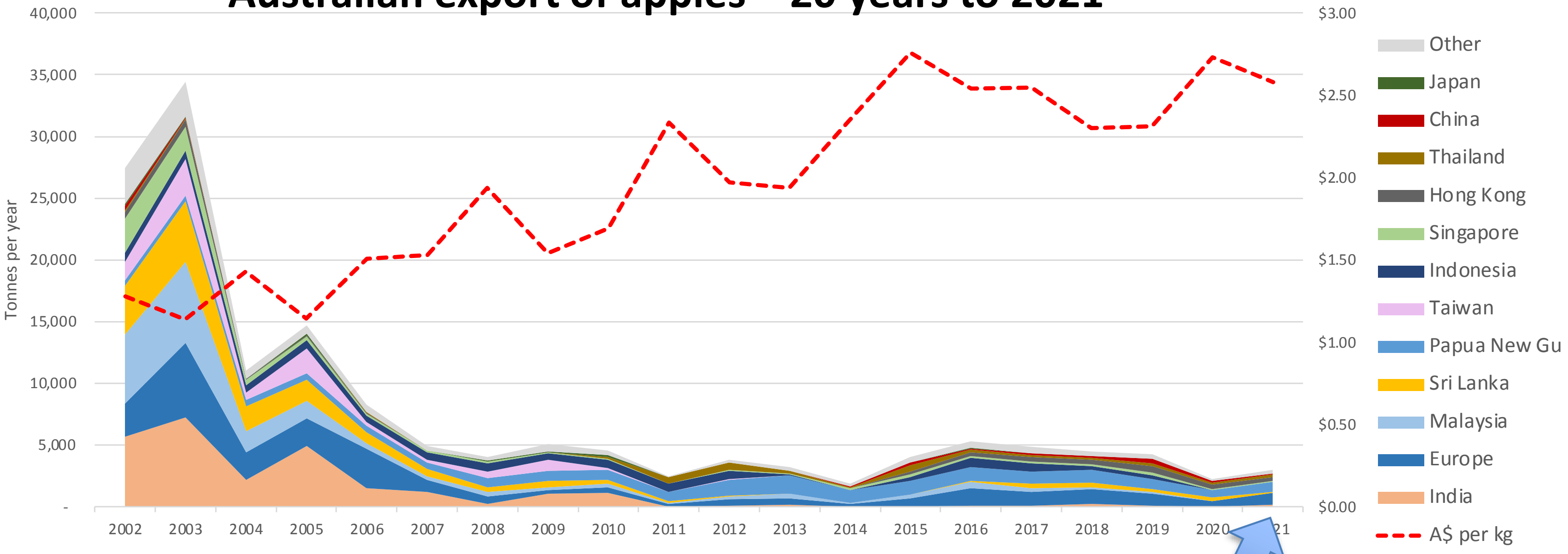
Apples

Apple Exports by supplier
8.1 Million Tonnes
-8.5 % to year ago



Volumes : Thousand Tonnes
Source: ITC Trademap; Fresh Intelligence analysis

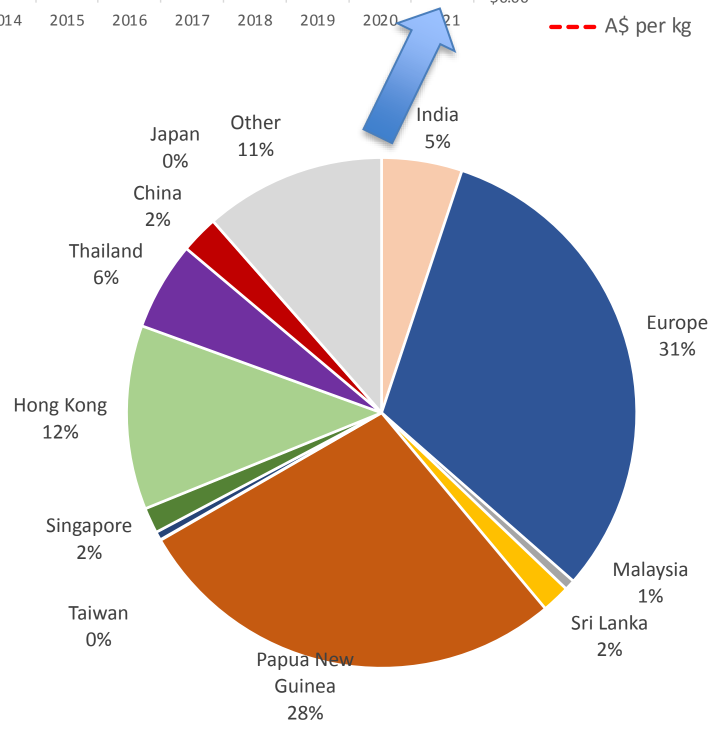
Australian export of apples – 20 years to 2021



Source: ITC TradeMap; Fresh Intelligence analysis

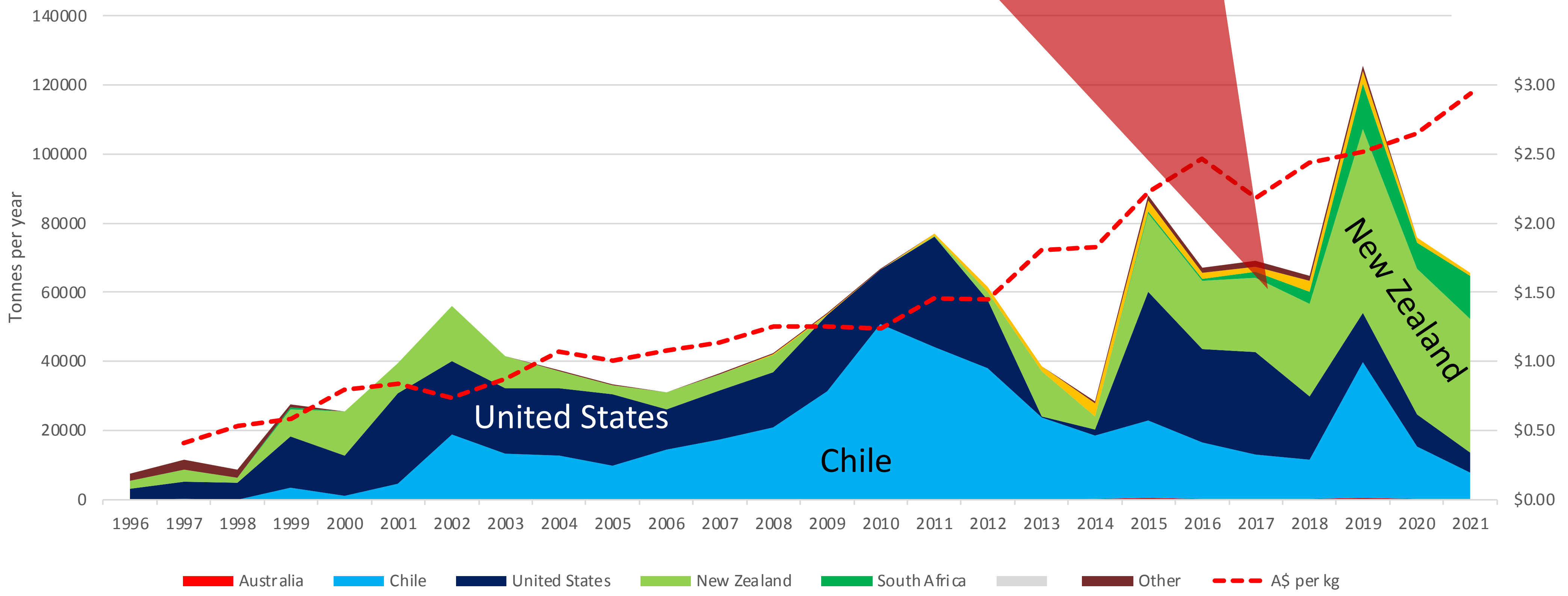
Australian Exports of	Apples			
	2020	2021	1 yr chg	5 yr CAGR
Tonnes	**2,256**	**3,020**	**33.9%**	**-11.1%**
Value (Million AUD)	6.2	7.8	26.3%	-10.8%
Unit Value A$ per kg	$2.73	$2.58	-5.6%	0.3%
Key Markets	*Tonnes*	*Tonnes*		
Europe	465	947	103.7%	-4.4%
Papua New Guinea	635	839	32.1%	-2.6%
Hong Kong	377	352	-6.6%	-1.5%
Thailand	176	169	-4.0%	-0.4%
India	0	154		27.1%
China	103	72	-30.1%	-15.3%
Other	500	487		

Source: ITC TradeMap; Fresh Intelligence analysis



China

China produces 40 million tonnes, exports almost 1 million tonnes and imports around 60,000 tonnes – import reliance of 0.2%   New Zealand is driving trade with club varieties



Source: ITC TradeMap; Fresh Intelligence analysis

Economic drivers & barriers to export

1. Affluent northern economies drive international trade
2. Right Product, Right Price, Right Place at the Right Time
3. Capability of supply (product, cost, logistics) to match demand
4. Market access is necessary, however refer points 1, 2 & 3

Thank you

Wayne Prowse
Fresh Intelligence Consulting
27th May 2022

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REFERENCES

- International Trade Centre, TRADE MAP www.trademap.org/
- IHS Global Trade Atlas
- FAOSTAT, Production Statistics www.faostat3.fao.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.
- Views expressed are personal and may not reflect the same views of Fruit Growers Tasmania.

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