

# **TASMANIAN Apples**

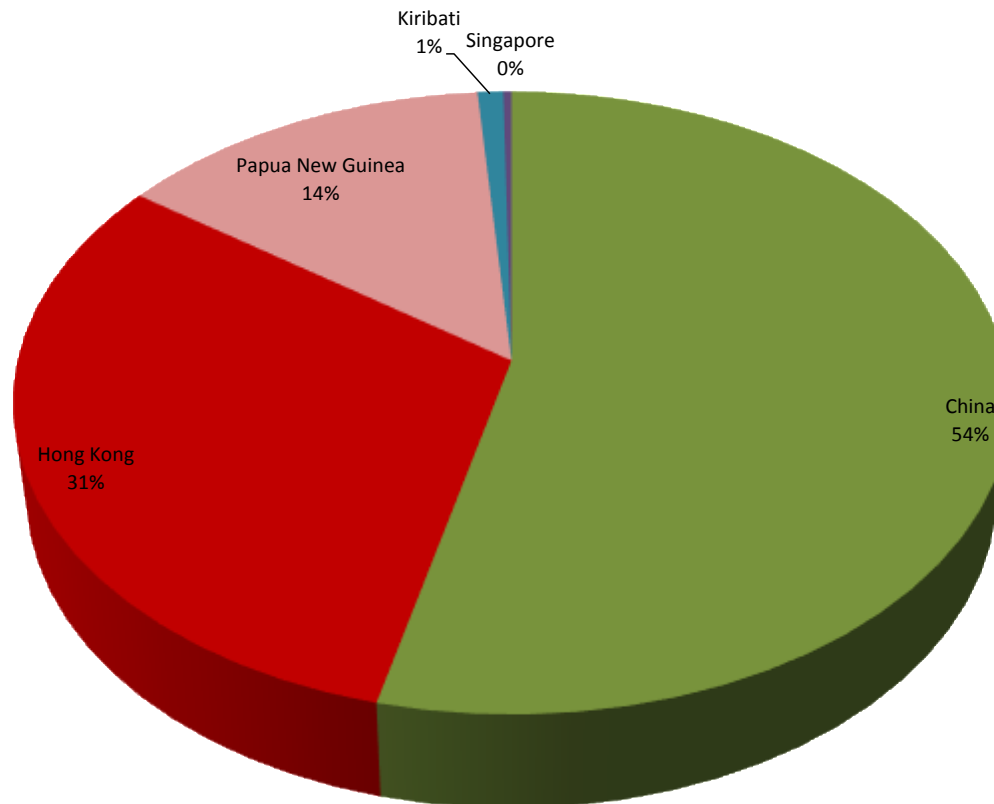
## **2020/21 Export season analysis**

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Tasmania exported 177 tonnes of apples in 12 months to 31<sup>st</sup> March 2021. The leading markets for Tasmanian apples were China, Hong Kong, and Papua New Guinea, accounting for 99% of the season's apple exports.

**Tasmanian Apple Exports by market 177 tonnes - 12 mths to March 2021**



Source : ABS Data , Fresh Intelligence Analysis

Tasmanian Apple exports decreased 66 per cent in 2020/21 to 177 tonnes valued at A\$0.53 million. Unit values increased 20 per cent or 50c per kg

China decreased 75 per cent to 95 tonnes or 54 per cent of the total Tasmanian exports, which were the only Australian apples exported to China

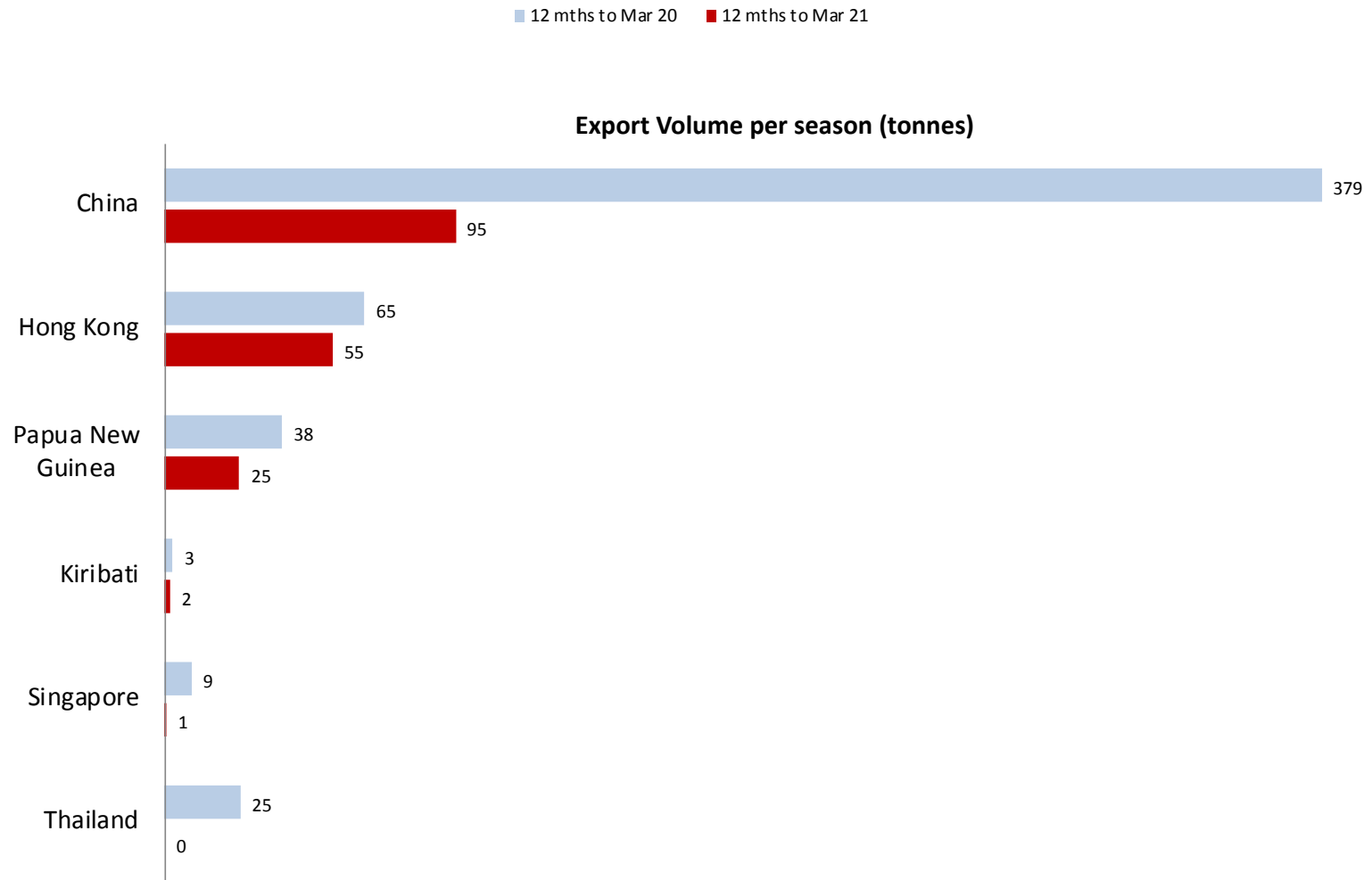
### April to March

**Volume** 177 tonnes ..... -65.9%  
**Value** 0.53 million ..... -59.1%  
**A\$ per kg** \$2.97 ..... 20% \$0.50

	Volume Tonnes				Value \$ Million AUD					
Market	Apr to Mar-20	Apr to Mar-21	Change to 20	Share %	Apr to Mar-20	Apr to Mar-21	Change to 20	Share %	Apr to Mar-20	Apr to Mar-21
TOTAL APPLES	520	177	-66%	100%	1.29	0.53	-59%	100%	2.47	<b>2.97</b>
China	379	95	-75%	54%	0.82	0.24	-71%	45%	2.15	<b>2.48</b>
Hong Kong	65	55	-16%	31%	0.21	0.20	-5%	38%	3.20	<b>3.62</b>
Papua New Guinea	38	25	-36%	14%	0.14	0.08	-42%	15%	3.63	<b>3.31</b>
Kiribati	3	2	-38%	1%	0.01	0.00	-33%	1%	2.67	<b>2.87</b>
Singapore	9	1	-94%	0%	0.02	0.00	-83%	1%	2.72	<b>7.60</b>
Thailand	25	0			0.09	-			3.56	
all other	0	0		0%	-	-		0%		
<b>TOTAL Apples</b>	<b>520</b>	<b>177</b>	<b>-65.9%</b>	<b>100%</b>	<b>1.29</b>	<b>0.53</b>	<b>-59%</b>	<b>100%</b>	<b>2.47</b>	<b>2.97</b>

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

## Despite being lower, China led by volume and value this year

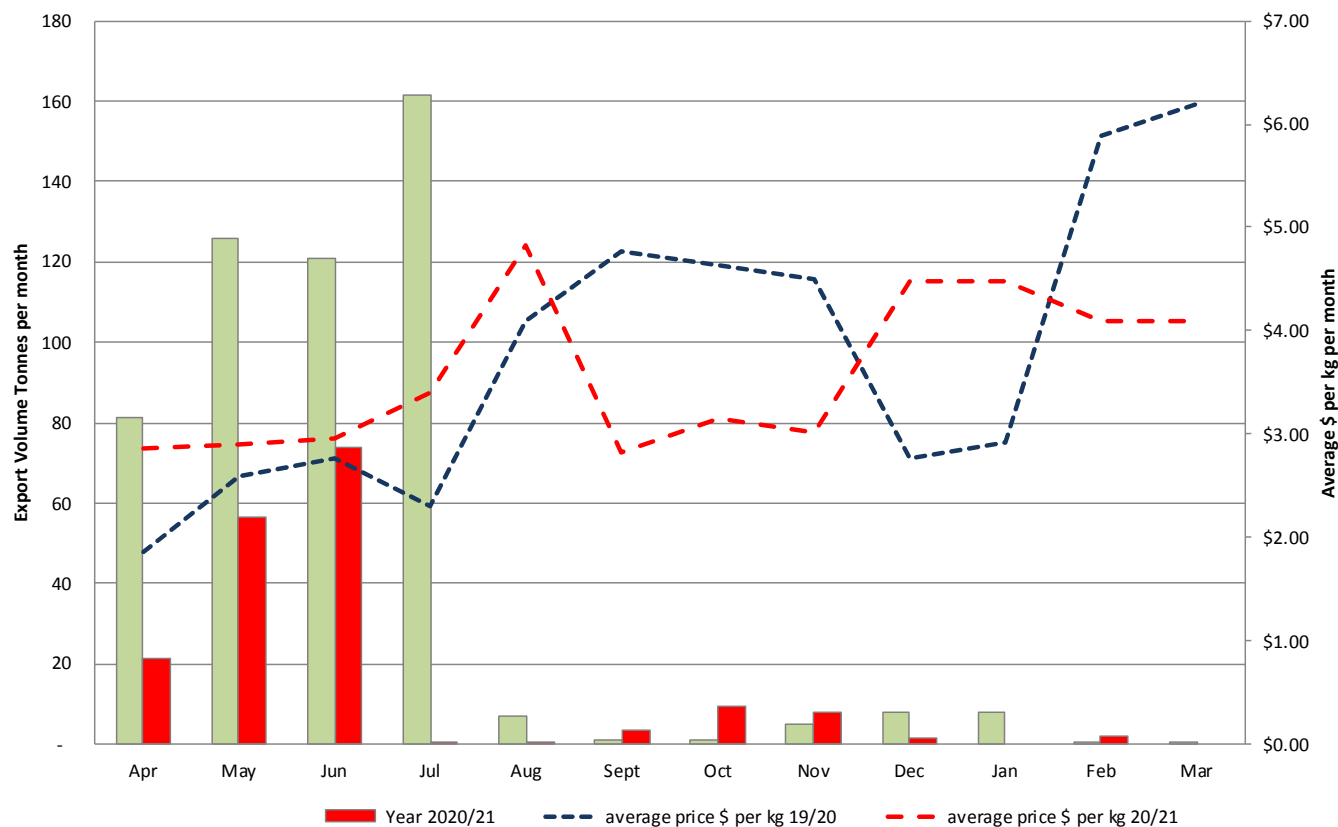


Source : ABS Data via IHS Global Trade Atlas, Fresh Intelligence analysis

Almost all Tasmania's exports occurred in the April to June period. Despite July being the largest month of the 2019/20 season, there were no measurable exports in July 2020.

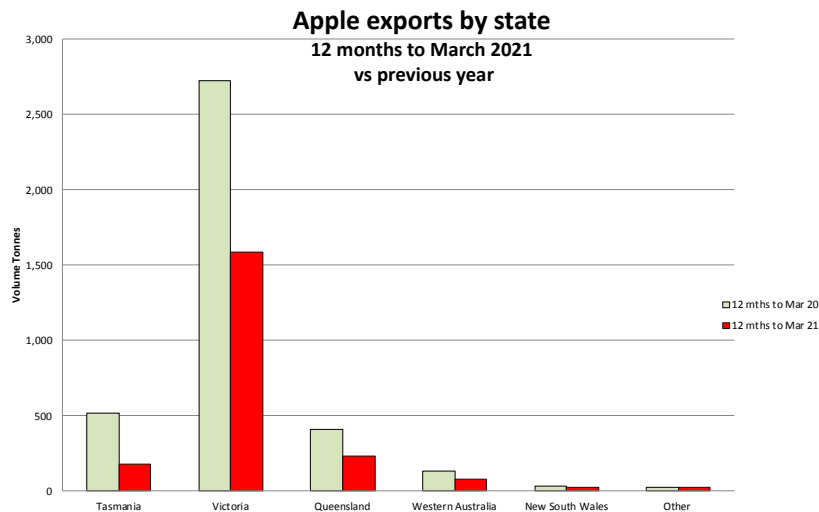
Unit values were higher through the main export season although more erratic in the months of low export volume

**Tasmanian Apple Exports by month 2020/21 vs last years**

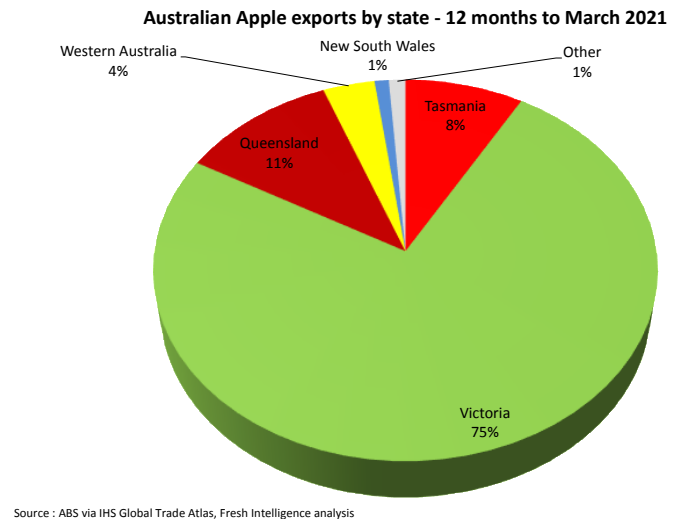


Source : ABS Data , Fresh Intelligence Analysis

For the 2020/21 season Tasmania exported 8 per cent of the total national apple export volumes.



Source : ABS Data , Fresh Intelligence Analysis



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

Australian apple exports decreased 44.8 per cent in 2020/21 to 2,117 tonnes valued at A\$5.78 million. Tasmania accounted for 8 per cent of the national apple exports

Victoria was the largest export state accounting for 75 per cent of the exports followed by Queensland, although Queensland exports were mostly to Papua New Guinea from fruit sourced most likely from Victoria

## APPLES

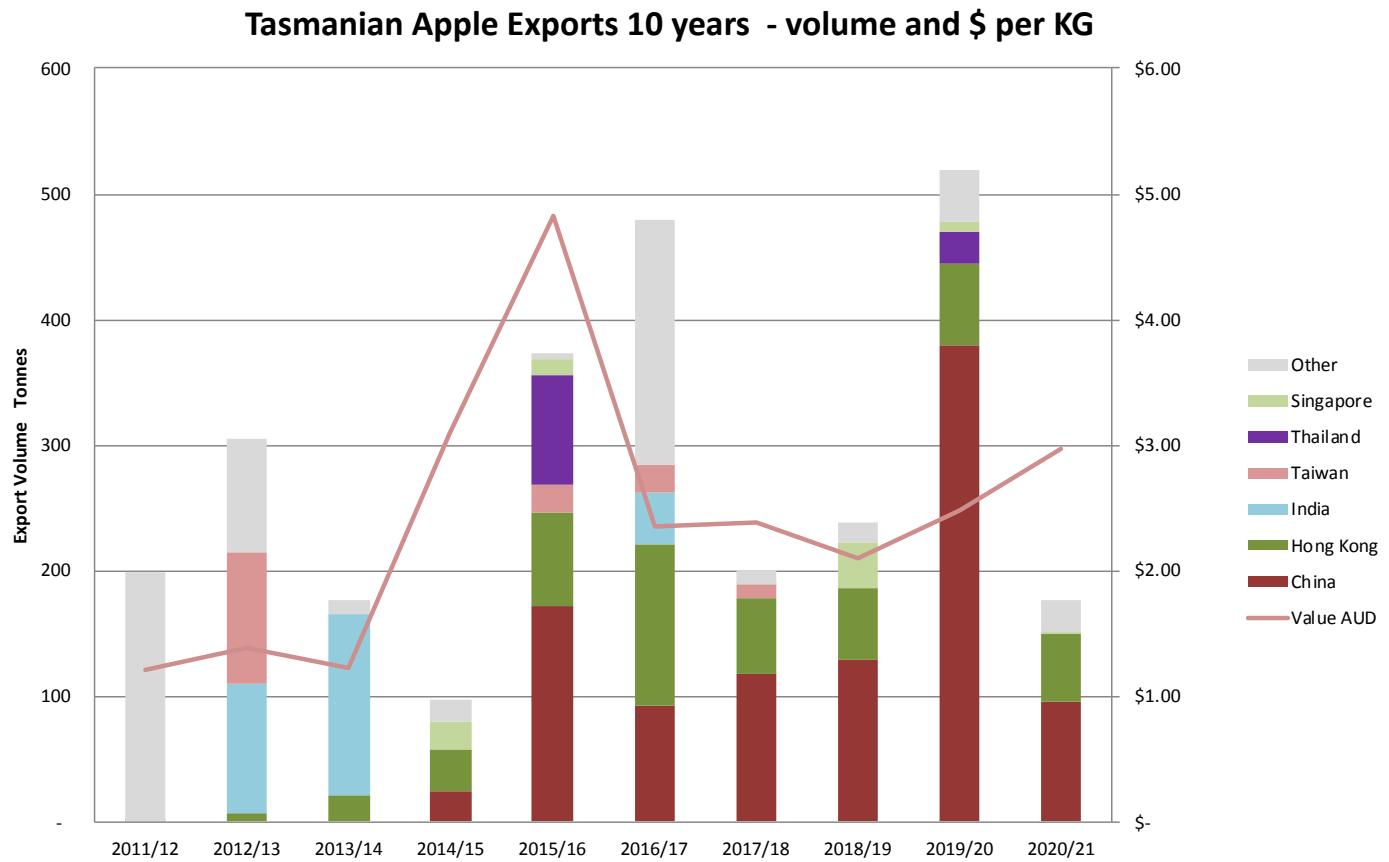
### Exports by State

Volume KG

Country -	Volume Tonnes (season to date)				Value \$ Million AUD (season to date)					
	Apr to Mar-20	Apr to Mar-21	Change to 20	Share %	Apr to Mar-20	Apr to Mar-21	Change to 20	Share %	Apr to Mar-20	Apr to Mar-21
TOTAL APPLES	3,836	2,117	-45%	100%	8.96	5.78	-36%	100%	2.34	<b>2.73</b>
Tasmania	520	177	-66%	8%	1.29	0.53	-59%	9%	2.47	<b>2.97</b>
Victoria	2,727	1,583	-42%	75%	5.89	3.95	-33%	68%	2.16	<b>2.50</b>
Queensland	405	233	-42%	11%	1.11	0.65	-41%	11%	2.73	<b>2.80</b>
Western Australia	127	77	-39%	4%	0.44	0.41	-8%	7%	3.48	<b>5.24</b>
New South Wales	34	21	-38%	1%	0.16	0.10	-34%	2%	4.58	<b>4.82</b>
Other	24	25	4%	1%	0.08	0.14	79%	2%		<b>5.55</b>
<b>TOTAL Apples</b>	<b>3,836</b>	<b>2,117</b>	<b>-44.8%</b>	<b>100%</b>	<b>8.96</b>	<b>5.78</b>	<b>-36%</b>	<b>100%</b>	2.34	<b>2.73</b>

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

The 10 year moving annual total (MAT) trend for apples with recorded price points highlights the influence of China since 2015. China and Thailand appeared to generate abnormally high prices in 2015/16 and Australia mostly exited the India market with its low prices at this time.



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

The Compound average annual trend (CAGR) is tracking 22 per cent lower per year and 66 per cent decrease for one year. Most trade appears to be opportunistic. For example the UAE was the largest market in 2017 and has not been supplied since. China peaked at 379 tonnes in 2019/20.

### Tasmanian Apple Exports by year

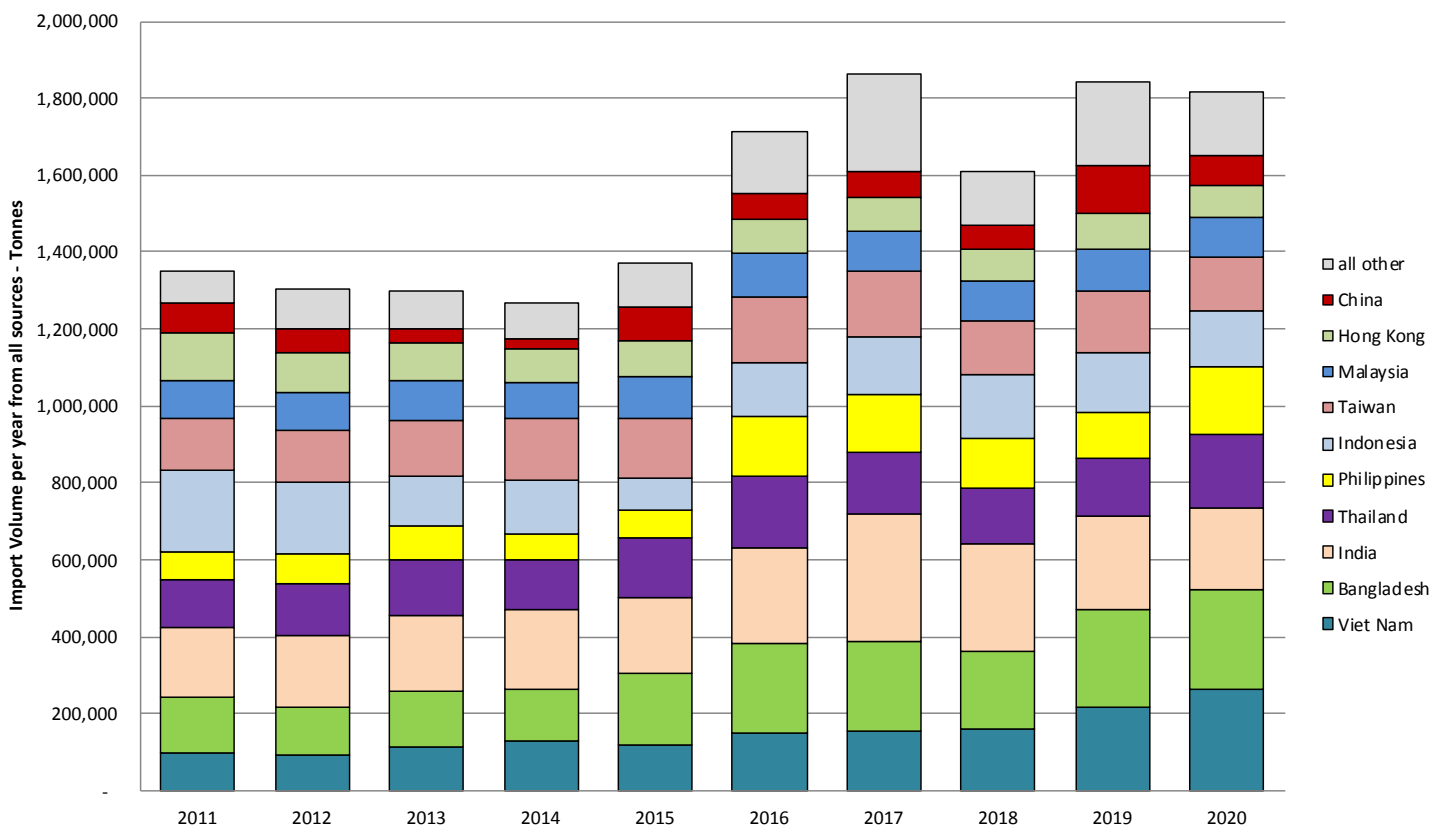
Country	-						5 Year Trend		share 2017	share 2021
		Apr - Mar 2017	Apr - Mar 2018	Apr - Mar 2019	Apr - Mar 2020	Apr - Mar 2021	Chg LY	5 yr CAGR*		
		Tonnes	Tonnes	Tonnes	Tonnes	Tonnes				
China		92	119	129	379	95	-75%	1%	19.3%	53.8%
Hong Kong		128	60	56	65	55	-16%	-19%	26.7%	31.1%
India		41	-	-	-	-		-100%	8.6%	0.0%
Taiwan		22	10	-	-	-			4.6%	0.0%
Thailand		-	-	-	25	-	-100%		0.0%	0.0%
Singapore		-	0	37	9	1	-94%		0.0%	0.3%
Sri Lanka		21	-	-	-	-		-100%	4.4%	0.0%
Papua New Guinea		3	11	16	38	25	-36%	76%	0.5%	13.9%
United Arab Emirates		112	-	-	-	-		-100%	23.4%	0.0%
Malaysia		39	-	-	-	-		-100%	8.1%	0.0%
Vietnam		-	-	-	-	-			0.0%	0.0%
Japan		21	-	-	-	-		-100%	4.4%	0.0%
Indonesia		-	-	-	-	-			0.0%	0.0%
Kiribati		0	-	-	3	2		77%	0.0%	0.9%
all other		-	1	0	-	-			0.0%	0.0%
<b>Total Exports (Tonnes)</b>		<b>480</b>	<b>201</b>	<b>239</b>	<b>520</b>	<b>177</b>	<b>-66%</b>	<b>-22%</b>	<b>100%</b>	<b>100%</b>

Source: Australian Bureau of Statistics; Fresh Intelligence analysis

CAGR = compound annual growth rate

Imports of apples by **Asian markets** exceed 1.8 million tonnes, of which over 50 per cent is supplied from China. The largest importers are in South and South East Asia - Vietnam, Bangladesh, India and Thailand, although no single market stands out. 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 2010 - 2020**

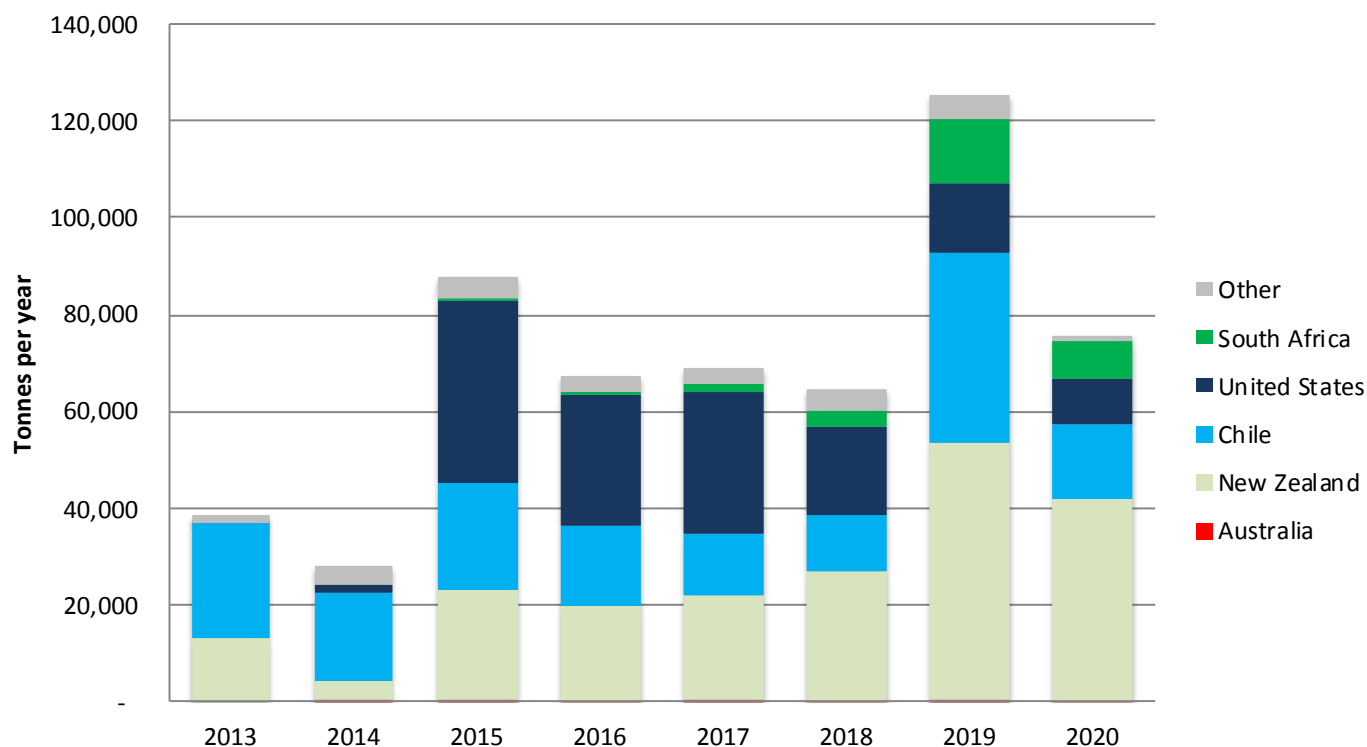


Source : ITC Trademap; Fresh Intelligence analysis

**China** has imported around 60,000 tonnes per year since 2014, 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 42 million tonnes and exported over 1 million tonnes in 2020.

### China Imports of Apples 2013 - 2020



Source: China Customs via ITC Trademap, Decofruit; Fresh Intelligence analysis

# New Zealand Apple Exports

New Zealand - Exports of Apples Year End March					
	2019	2020	2021	2021	2021
	Tonnes	Tonnes	Tonnes	chg % to 2020	% share
China	25,868	45,557	39,639	-13.0%	10.0%
Vietnam	18,529	27,199	32,380	19.1%	8.2%
Taiwan	20,864	20,514	26,787	30.6%	6.8%
Thailand	19,445	32,058	23,168	-27.7%	5.8%
India	26,189	16,625	22,783	37.0%	5.7%
Hong Kong	14,306	19,119	15,769	-17.5%	4.0%
Singapore	7,214	7,626	8,678	13.8%	2.2%
Japan	3,379	4,949	7,192	45.3%	1.8%
Malaysia	4,345	6,274	6,747	7.5%	1.7%
Indonesia	4,214	6,236	5,077	-18.6%	1.3%
Bangladesh	849	4,882	1,551	-68.2%	0.4%
Cambodia	501	893	1,179	32.0%	0.3%
Philippines	1,240	4,050	1,034	-74.5%	0.3%
Sri Lanka	1,019	853	432	-49.4%	0.1%
Sub Total Asia	147,962	196,837	192,417	-2.2%	48.5%
EUROPE	146,862	126,972	138,219	8.9%	34.8%
United States & Canada	46,128	39,761	34,606	-13.0%	8.7%
MIDDLE EAST	20,322	19,434	22,859	17.6%	5.8%
Australia	189	7	0	-99.8%	0.0%
all other	8,604	8,522	8,592		2.2%
Total Exports - Tonnes	370,066	391,532	396,693	1.3%	100%

Source of Data: Statistics New Zealand via ITC Trademap; Fresh Intelligence analysis

New Zealand apple exports were up 1.3 per cent to 396,693 tonnes

Almost 50 per cent exported to Asia and 35 per cent to Europe

Smaller, though not insignificant volumes were exported to the US and Middle East markets

There were no exports to Australia in 2020/21

# Chilean Apple Exports

Chile - Exports of Apples			Year End March		
	2019	2020	2021	2021	2021 share
	Tonnes	Tonnes	Tonnes	chg % to 2020	% share
Taiwan	50,323	42,026	39,011	-7.2%	6.0%
India	57,836	39,720	23,783	-40.1%	3.6%
China	11,526	40,691	13,212	-67.5%	2.0%
Bangladesh	3,662	2,244	1,293	-42.4%	0.2%
Thailand	793	1,070	364	-66.0%	0.1%
Hong Kong	656	106	353	233.0%	0.1%
Vietnam	-	-	42		0.0%
Singapore	-	63	-		0.0%
Japan	-	18	-		0.0%
Malaysia	104	82	-		0.0%
Indonesia	-	42	-		0.0%
Philippines	-	322	-		0.0%
Sub Total Asia	124,900	126,385	78,059	-38.2%	11.9%
United States & Canada	83,801	94,784	60,991	-35.7%	9.3%
EUROPE	215,958	146,637	171,008	16.6%	26.1%
MIDDLE EAST	62,018	55,201	65,947	19.5%	10.1%
all other	290,224	248,123	278,213	12.1%	42.5%
Total Exports - Tonnes	776,903	671,130	654,219	-2.5%	100%

Source of Data: Chile Customs via ITC Trademap - Fresh Intelligence analysis

Chilean apple exports were down 2.5 per cent to 654,219 tonnes

Around 12 per cent were exported to Asia, down 38 per cent, and 26 per cent to Europe

The US and Canada are taking less than 10 per cent of Chile's apple exports and similar to Middle East

Latin America, most of "all other" accounts for 42 per cent of Chilean exports.

## REFERENCES

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

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