



TASMANIAN Cherries 2020/21 Export season analysis

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AUSTRALIAN 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

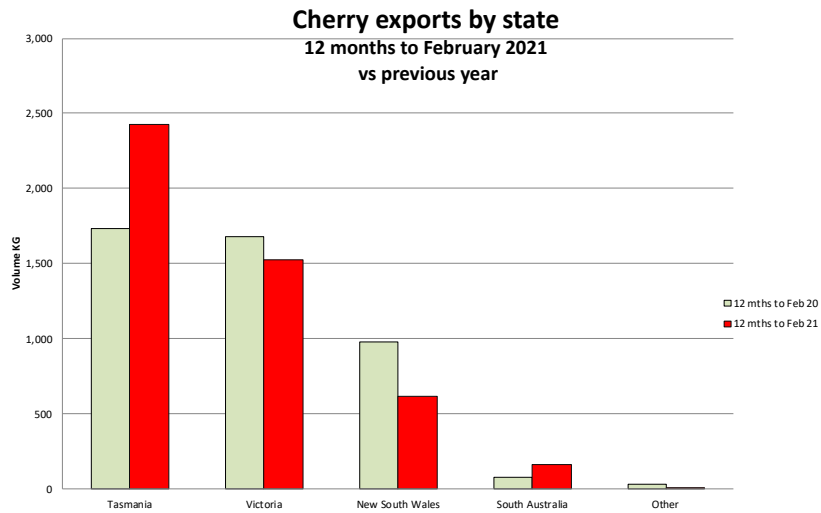
Victoria decreased 9 per cent and New South Wales declined 37 per cent influenced by geopolitical tensions with China.

Country	Volume Tonnes (season to date)				Value \$ Million AUD (season to date)				Mar to Feb-20	Mar to Feb-21
	Mar to Feb-20	Mar to Feb-21	Change to 20	Share %	Mar to Feb-20	Mar to Feb-21	Change to 20	Share %		
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

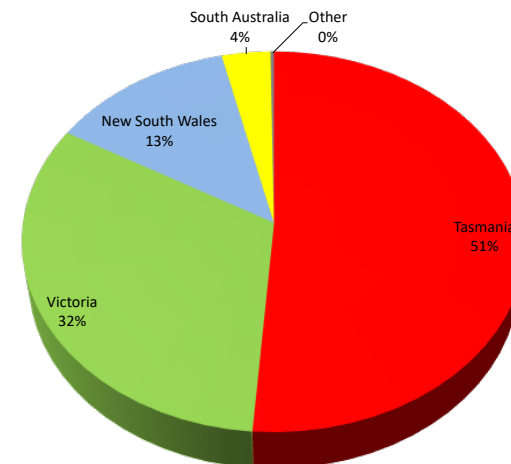
AUSTRALIAN EXPORTS – BY STATE

For the 2020/21 season Tasmania exported 51 per cent of the total 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.



Source : ABS Data , Fresh Intelligence Analysis

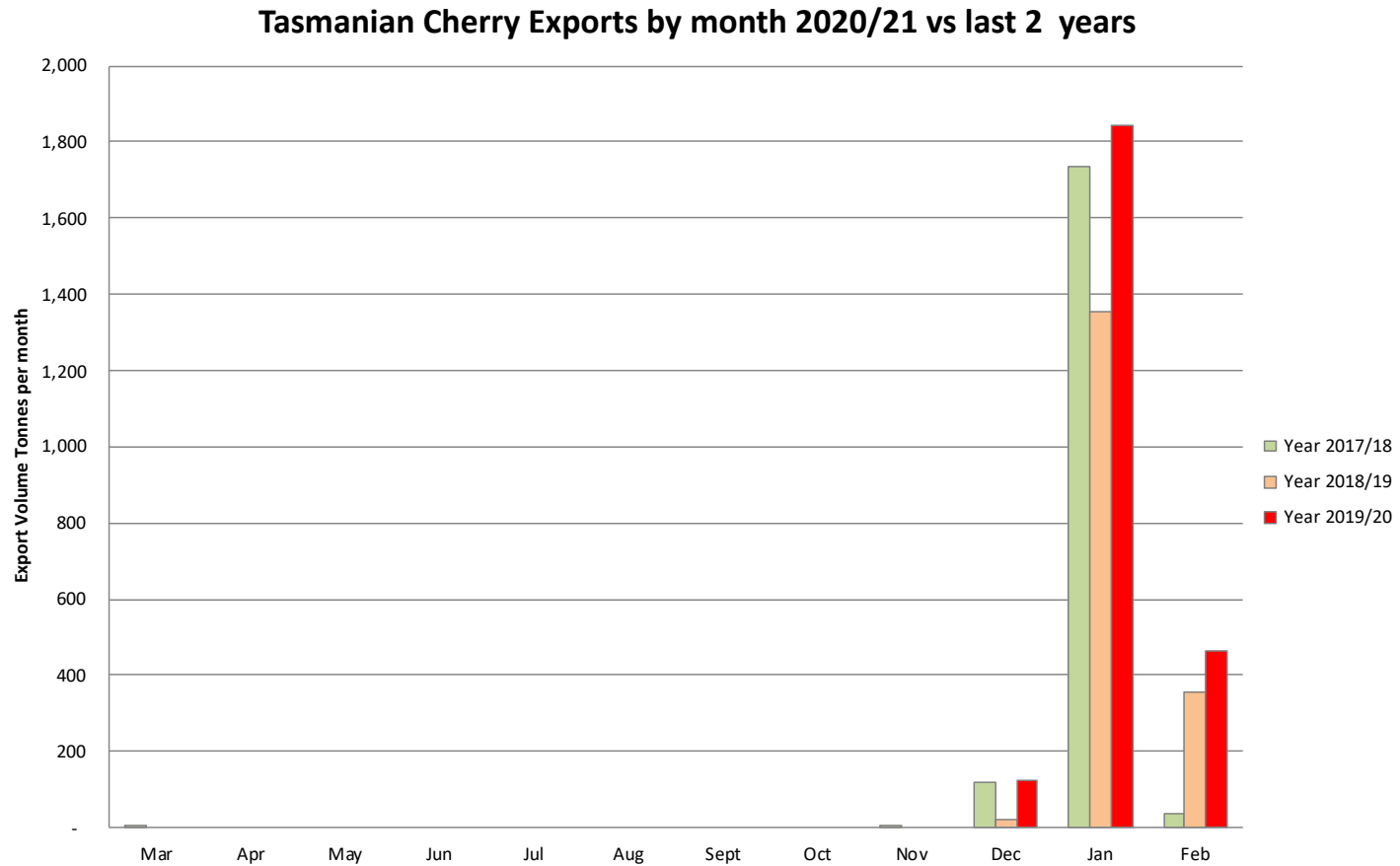
Australian Cherry exports by state - 12 months to February 2021



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

TASMANIAN EXPORTS – BY MONTH

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

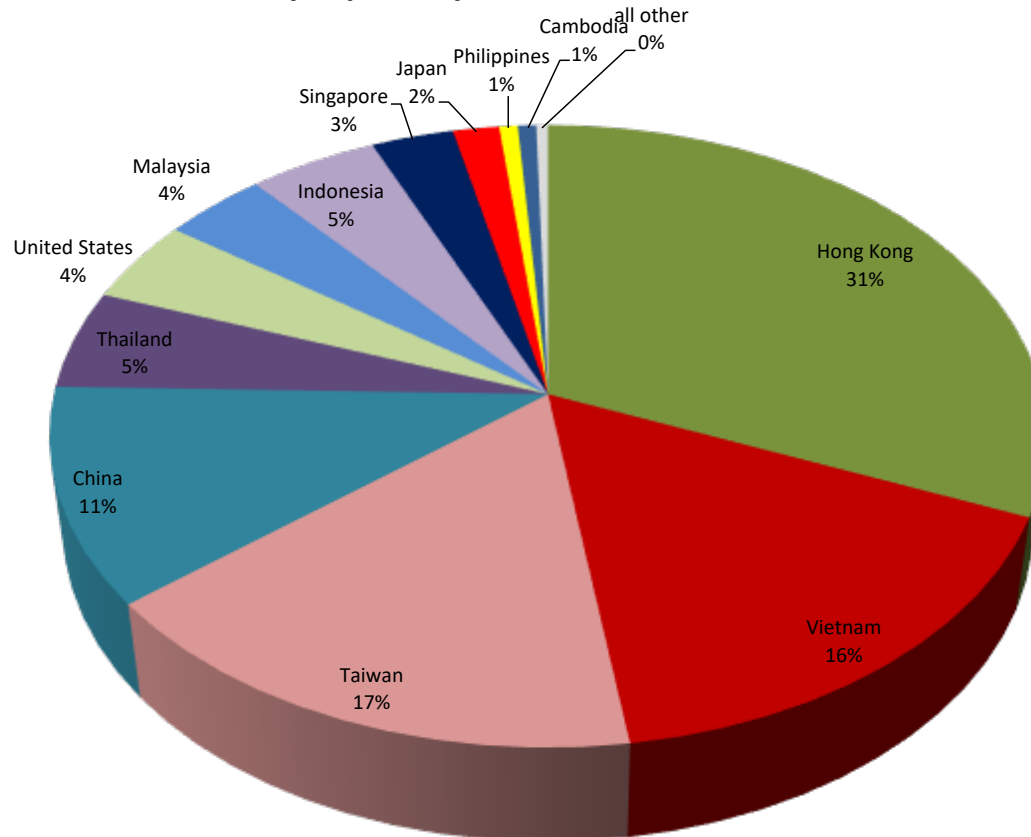


Source : ABS Data , Fresh Intelligence Analysis

TASMANIAN EXPORTS – ANNUAL MARKET SNAPSHOT

Over last 12 months the leading 5 markets for Tasmanian Cherries were Hong Kong, Vietnam, Taiwan, China and Thailand, accounting for 80% of the season's cherry exports.

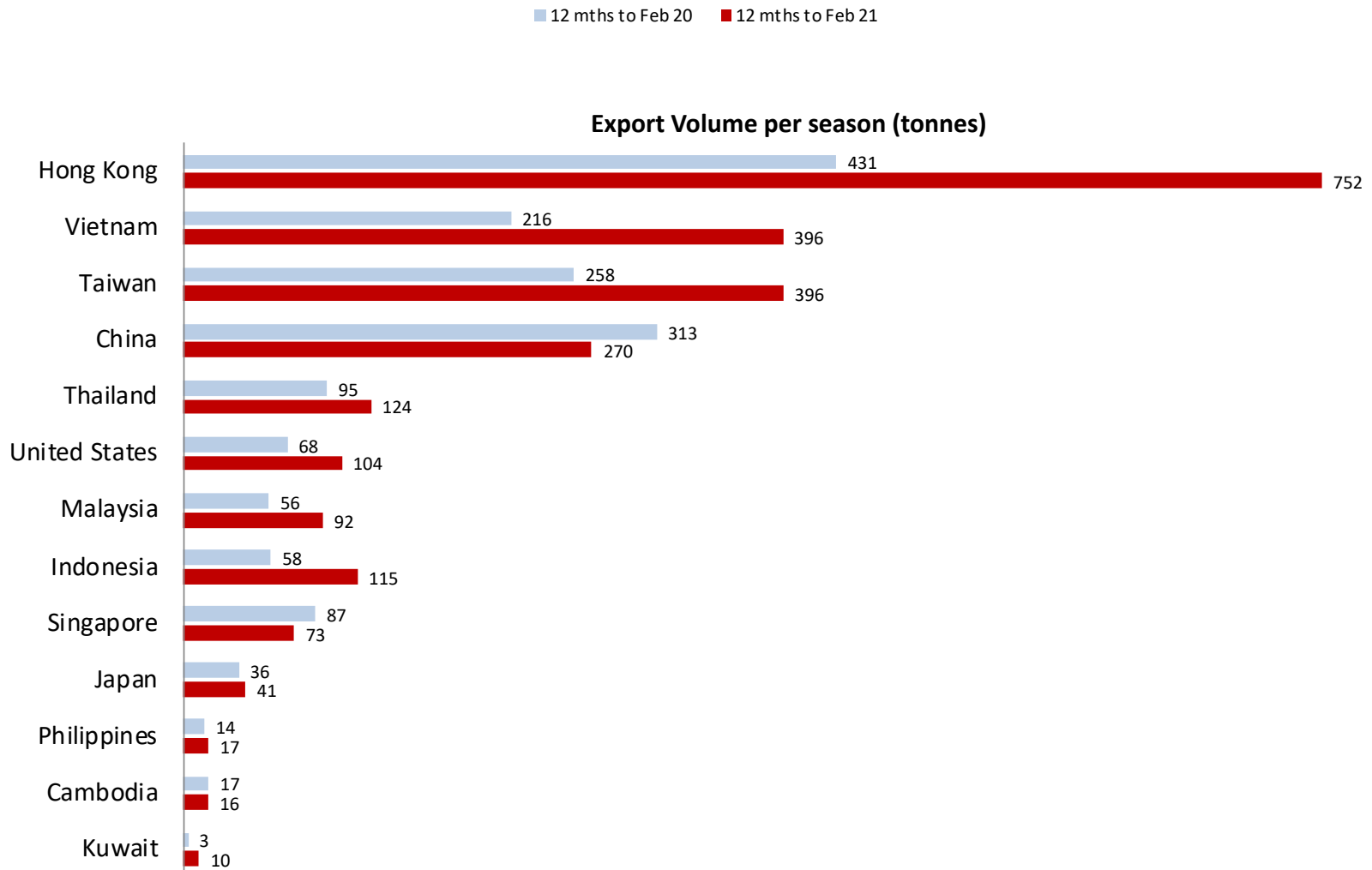
Tasmanian Cherry Exports by market 2,429 tonnes - 12 mths to Feb 2021



Source : ABS Data , Fresh Intelligence Analysis

TASMANIAN EXPORTS – BY MARKET

Hong Kong led by volume and value this year



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

TASMANIAN EXPORTS – BY MARKET

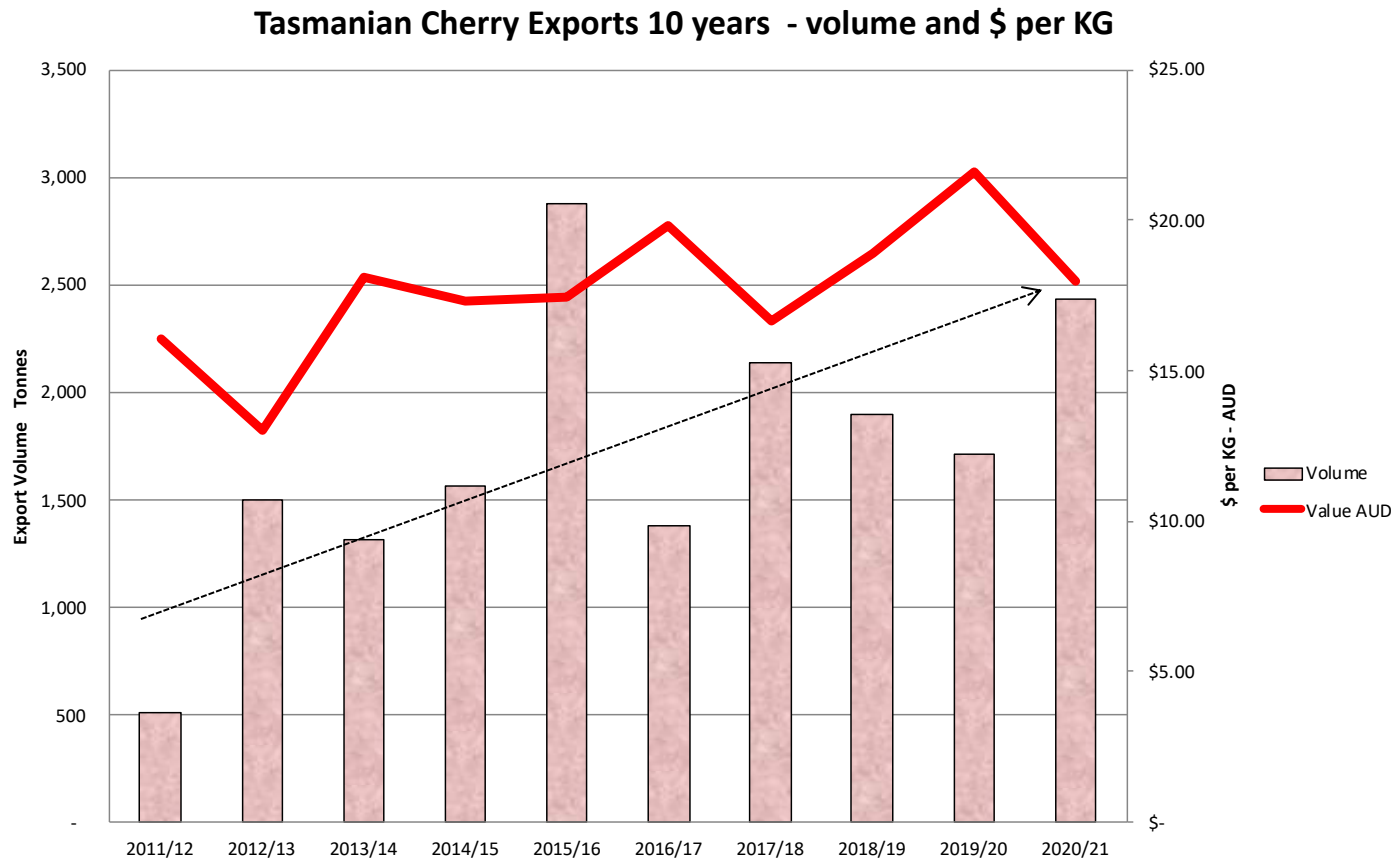
Cherry exports lifted by volume and value. Unit values decreased 17 per cent.

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
	Mar to Feb-20	Mar to Feb-21	Change to 20	Share %	Mar to Feb-20	Mar to Feb-21	Change to 20	Share %		
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

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 2020/21 season back on trend. Unit values were lower though closer to average over the longer term.



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

TASMANIAN EXPORTS – LONG TERM TREND

Compound average annual growth trend overall of 15 per cent per year and 40 per cent increase for one year

China for slipped 14 per cent in a year although and 4 per cent on the 5 year CAGR.

Results compare for 5 years though 2015/16 added for comparison – the highest year on record with strong Korea and China trade

Tasmanian Cherry Exports by year										5 Year Trend	
Rank	Country	Mar - Feb 2016	Mar - Feb 2017	Mar - Feb 2018	Mar - Feb 2019	Mar - Feb 2020	Mar - Feb 2021	Chg LY	5 yr CAGR*	share 2017	share 2021
		Tonnes	Tonnes	Tonnes	Tonnes	Tonnes	Tonnes				
1	Hong Kong	673	404	445	457	431	752	74%	17%	29.2%	31.0%
2	China	732	313	670	478	313	270	-14%	-4%	22.7%	11.1%
3	Taiwan	502	163	260	313	258	396	54%	25%	11.8%	16.3%
4	Vietnam	-	-	154	220	216	396	83%		0.0%	16.3%
5	Korea, South	365	77	106	21	31	1	-96%	-64%	5.6%	0.1%
6	Singapore	122	59	51	45	87	73	-16%	5%	4.3%	3.0%
7	Indonesia	73	74	80	83	58	115	99%	12%	5.4%	4.7%
8	Thailand	129	45	109	61	95	124	30%	29%	3.3%	5.1%
9	Malaysia	82	39	61	61	56	92	63%	24%	2.8%	3.8%
10	United States	64	124	88	52	68	104	52%	-4%	9.0%	4.3%
11	Japan	36	30	33	28	36	41	13%	8%	2.2%	1.7%
12	United Arab Emirates	52	20	17	1	-	0		-72%	1.4%	0.0%
13	EUROPE	2	1	3	-	16	6	-63%	45%	0.1%	0.2%
14	India	21	18	12	8	12	-		-100%	1.3%	0.0%
15	Russia	-	-	-	-	-	-			0.0%	0.0%
16	Philippines	9	3	8	8	14	17		60%	0.2%	0.7%
17	Saudi Arabia	-	3	12	25	11	3	-76%	-7%	0.2%	0.1%
18	Kuwait	1	2	8	12	3	10		51%	0.1%	0.4%
19	Qatar	1	4	2	9	2	7	226%	18%	0.3%	0.3%
20	Myanmar	4	-	4	-	4	4			0.0%	0.1%
	all other	6	3	11	17	19	19	-3%	56%	0.2%	0.8%
0	Total Exports (Tonnes)	2,872	1,381	2,133	1,898	1,731	2,429	40%	15%	100%	100%

Source: Australian Bureau of Statistics; Fresh Intelligence analysis

CAGR = compound annual growth rate

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.

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