

# TASMANIAN Cherries

## 2021/22 Export season analysis

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7<sup>th</sup> April 2022



# AUSTRALIAN EXPORTS – BY STATE

Australian cherry exports decreased 16 per cent in 2021/22 to 3,968 tonnes valued at AUD\$75.17 million. Tasmania was unchanged at 2,407 tonnes increasing to 61 per cent of the total cherry export crop retaining the No.1 export state position.

Victoria decreased 33 per cent and New South Wales declined 49 per cent influenced by adverse weather during the harvest season.

## CHERRIES

### Exports by State

Volume KG

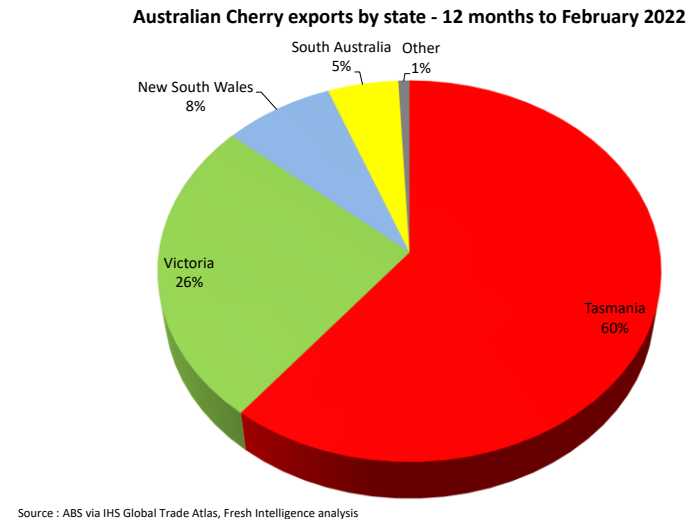
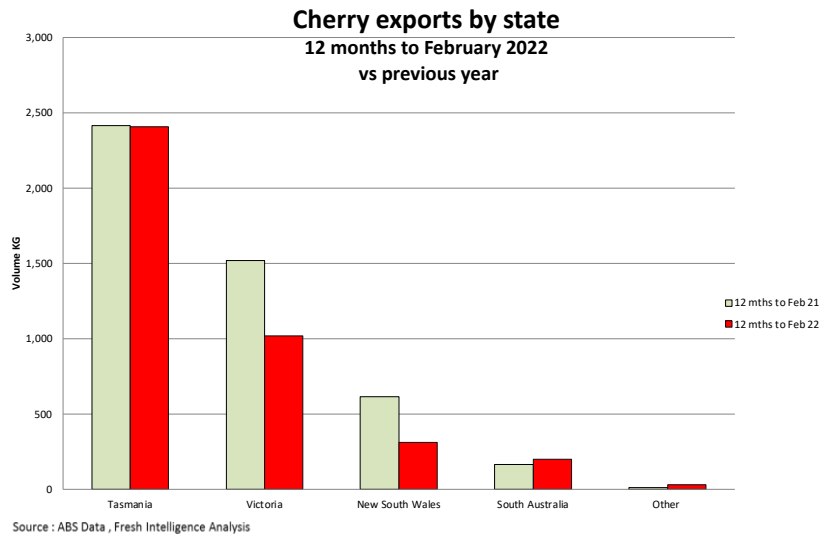
State	Volume Tonnes (season to date)				Value \$ Million AUD (season to date)					
	Mar to Feb-21	Mar to Feb-22	Change to 21	Share %	Mar to Feb-21	Mar to Feb-22	Change to 21	Share %	Mar to Feb-21	Mar to Feb-22
Tasmania	2,415	2,407	0%	61%	43.42	45.80	5%	61%	17.98	19.03
Victoria	1,517	1,020	-33%	26%	26.38	19.76	-25%	26%	17.39	19.36
New South Wales	615	311	-49%	8%	9.70	5.79	-40%	8%	15.77	18.63
South Australia	163	198	22%	5%	2.65	3.22	22%	4%	16.26	16.25
Other	12	31		1%	0.25	0.60		1%		19.18
<b>TOTAL Cherries</b>	<b>4,721</b>	<b>3,968</b>	<b>-16.0%</b>	<b>100%</b>	<b>82.40</b>	<b>75.17</b>	<b>-8.8%</b>	<b>100%</b>	<b>17.45</b>	<b>18.94</b>

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

Note: Value based on FOB AUD\$

# AUSTRALIAN EXPORTS – BY STATE

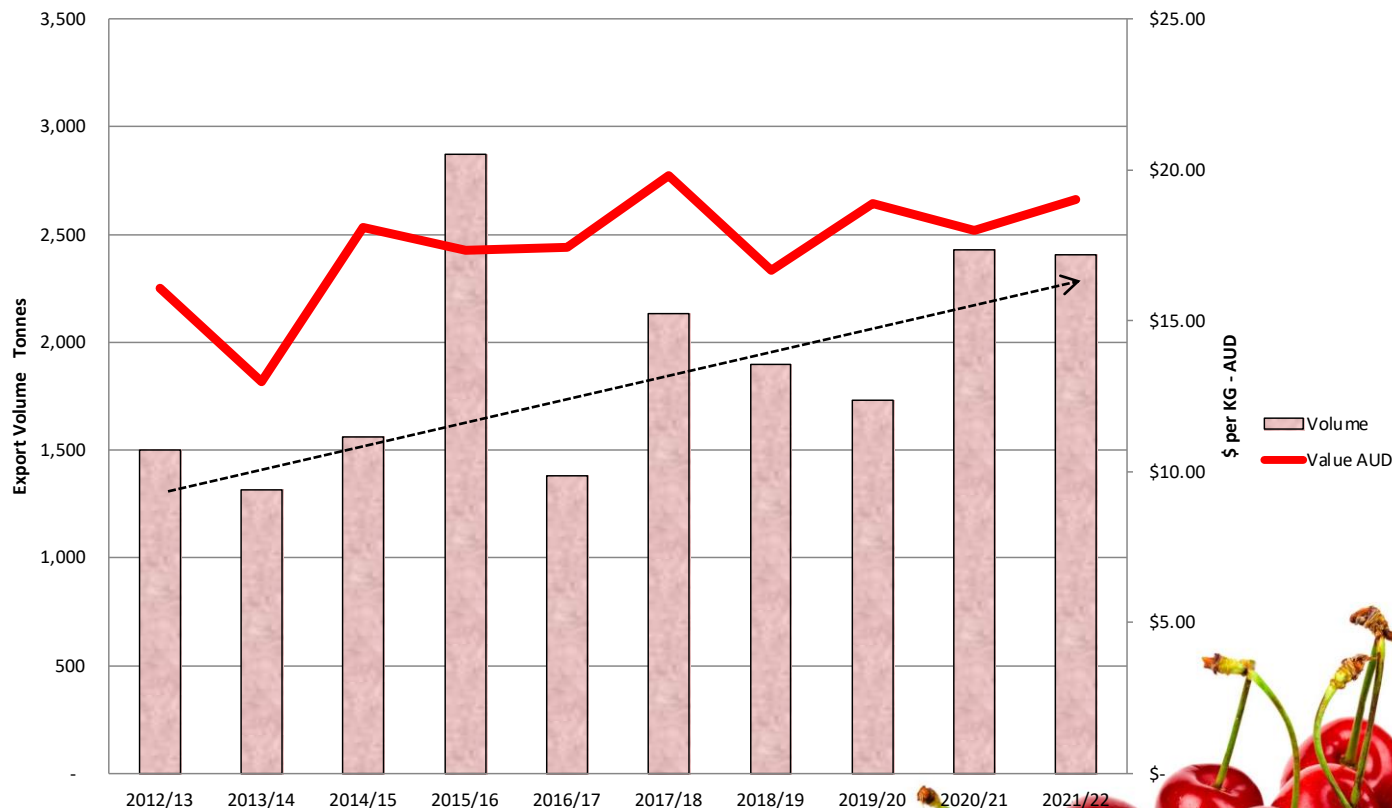
For the 2021/22 season Tasmania exported 61 per cent of the total cherry export crop while Victoria slipped to 26 per cent share and New South Wales had 8 per cent share. South Australia increased to 5 per cent.



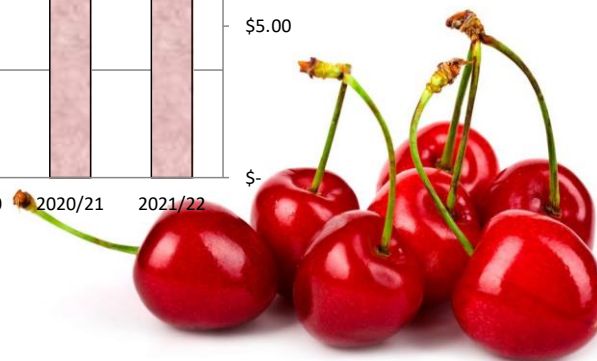
# TASMANIAN EXPORTS – LONG TERM TREND

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.

**Tasmanian Cherry Exports 10 years - volume and \$ per KG**

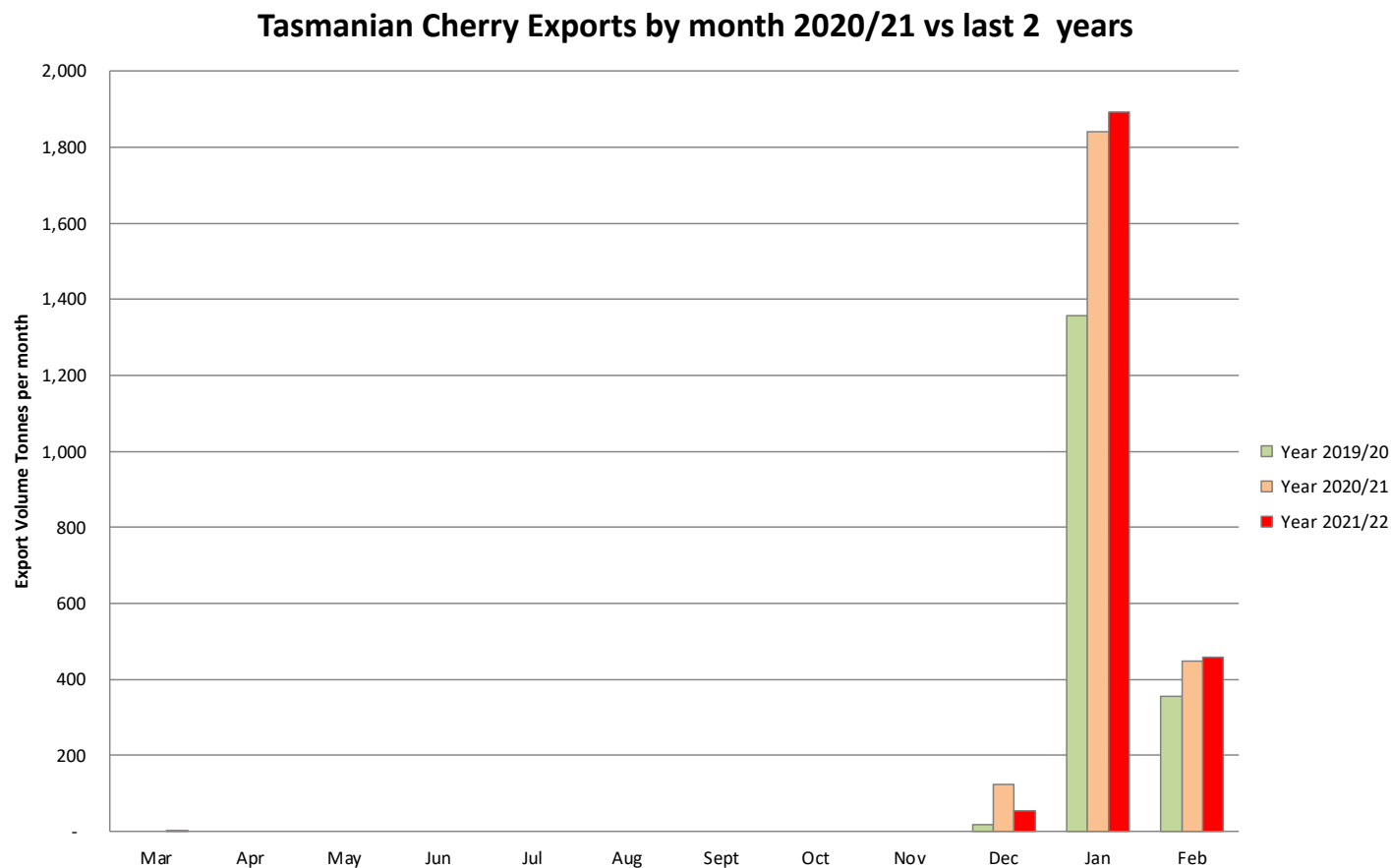


Source : ABS Data via IHS Global Trade Atlas, Fresh Intelligence analysis



# TASMANIAN EXPORTS – BY MONTH

The 2021/22 exports exceeded the previous year in January and February though had a later start to reach 2407 tonnes – unchanged from the previous year.

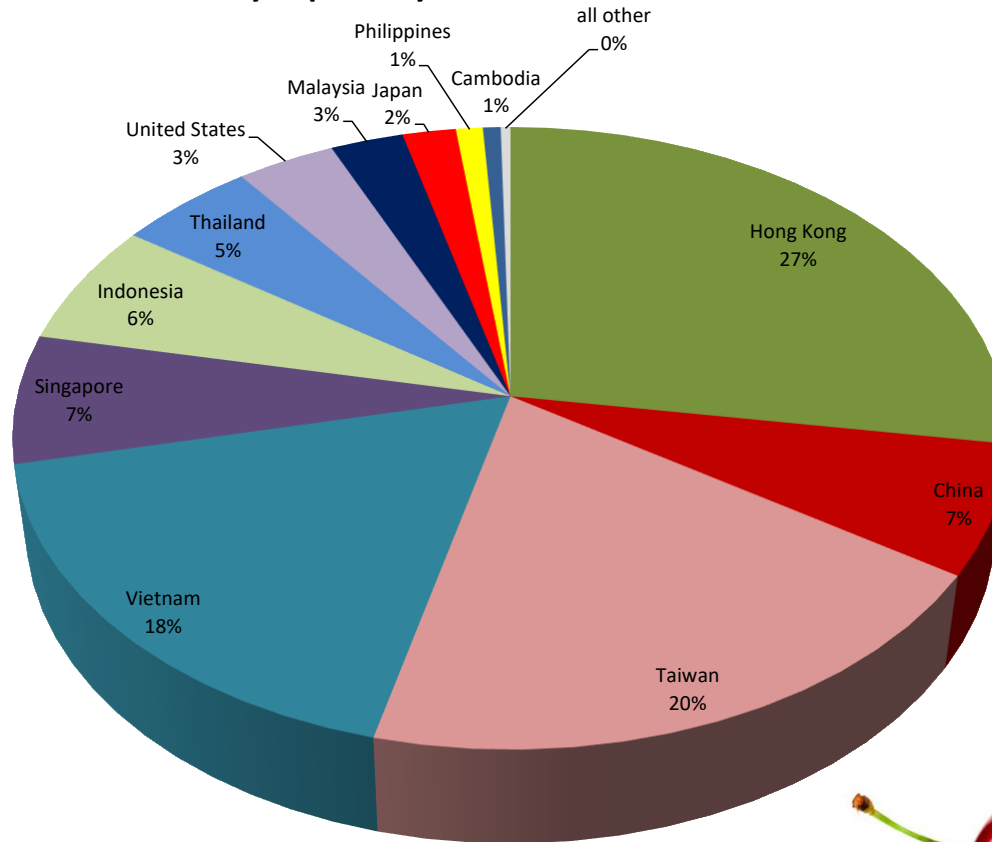


Source : ABS Data , Fresh Intelligence Analysis

# TASMANIAN EXPORTS – ANNUAL MARKET SNAPSHOT

Over last 12 months the leading 5 markets for Tasmanian Cherries were Hong Kong, Taiwan, Vietnam, China and Singapore accounting for 77 per cent of the season's cherry exports.

**Tasmanian Cherry Exports by market 2,407 tonnes - 12 mths to Feb 2022**

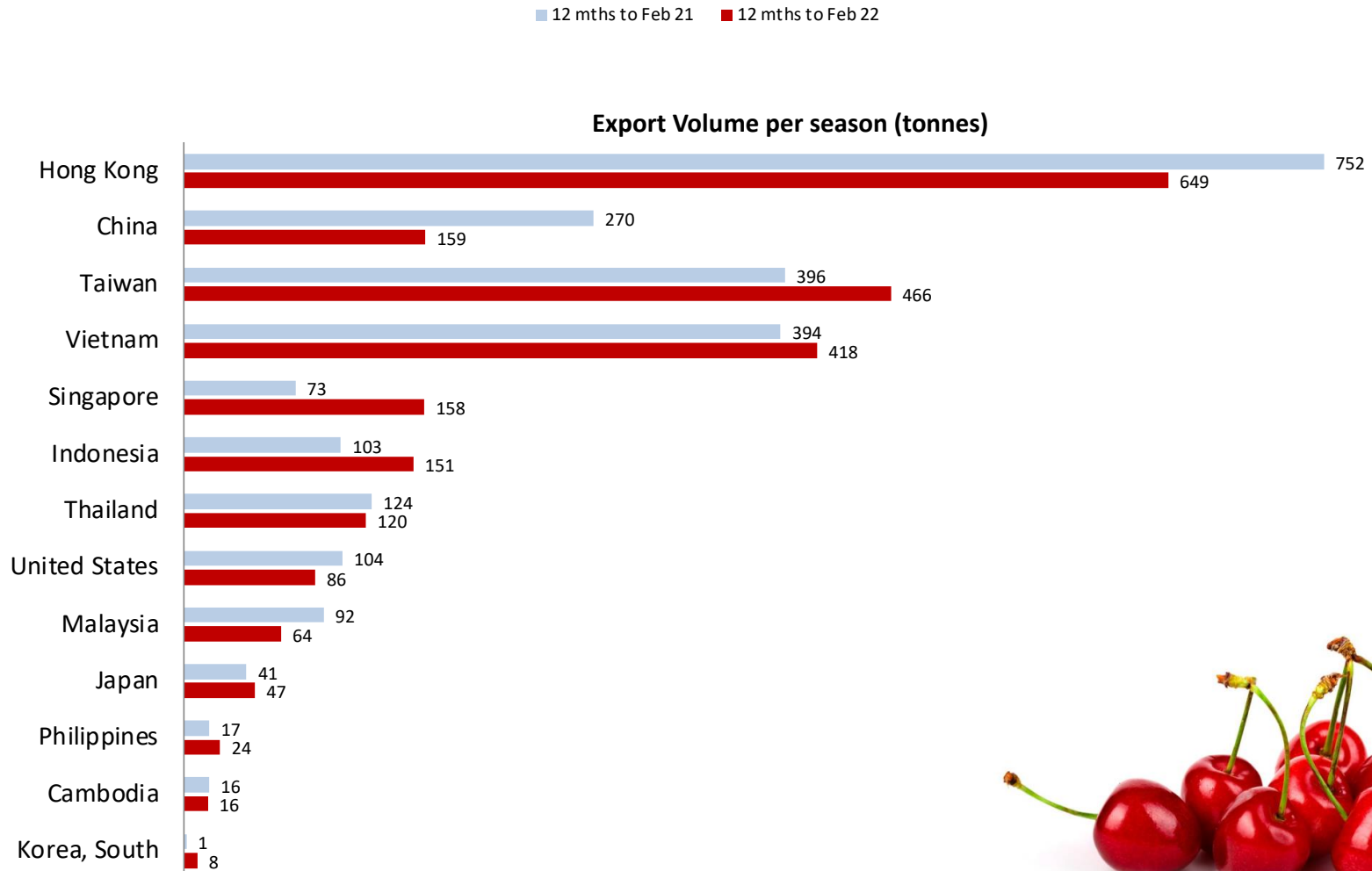


Source : ABS Data , Fresh Intelligence Analysis



# TASMANIAN EXPORTS – BY MARKET

Taiwan, Vietnam and Singapore offset the decline in trade to Hong Kong and China



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

# TASMANIAN EXPORTS – BY MARKET

Cherry exports almost unchanged by volume and lifted 5.5 per cent by value with higher unit values. Unit values increased 6 per cent.

## March to February

**Volume**                      **2,407 tonnes**                      ..... **-0.3%**  
**Value**                        **45.80 million**                      ..... **5.5%**  
**A\$ per kg**                      **\$19.03**                      ..... **6%**                      **\$1.04**

	Volume Tonnes				Value \$ Million AUD					
Market	Mar to Feb-21	Mar to Feb-22	Change to 21	Share %	Mar to Feb-21	Mar to Feb-22	Change to 21	Share %	Mar to Feb-21	Mar to Feb-22
Hong Kong	752	649	-14%	27%	15.88	11.82	-26%	26%	21.11	18.20
China	270	159	-41%	7%	4.81	3.44	-28%	8%	17.80	21.62
Taiwan	396	466	18%	19%	6.33	9.09	44%	20%	15.97	19.50
Vietnam	394	418	6%	17%	6.31	7.98	26%	17%	16.03	19.11
Singapore	73	158	116%	7%	1.11	2.21	100%	5%	15.12	13.98
Indonesia	103	151	46%	6%	1.13	3.39	201%	7%	10.92	22.44
Thailand	124	120	-3%	5%	2.88	2.45	-15%	5%	23.32	20.46
United States	104	86	-17%	4%	1.73	1.76	2%	4%	16.54	20.45
Malaysia	92	64	-31%	3%	1.50	1.21	-19%	3%	16.27	19.02
Japan	41	47	14%	2%	0.65	0.76	16%	2%	15.85	16.23
Philippines	17	24	43%	1%	0.40	0.37	-7%	1%	24.29	15.82
Cambodia	16	16	-5%	1%	0.25	0.24	-7%	1%	15.45	15.23
Korea, South	1	8	553%	0%	0.02	0.09	370%	0%	15.38	11.08
United Arab Emirates	0	4	3044%	0%	0.00	0.05	2298%	0%	18.30	13.96
all other	30	37	23%	2%	-	0.93		2%	-	
<b>TOTAL Cherries</b>	<b>2,415</b>	<b>2,407</b>	<b>-0.3%</b>	<b>100%</b>	<b>43.42</b>	<b>45.80</b>	<b>5.5%</b>	<b>100%</b>	<b>17.98</b>	<b>19.03</b>

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



# TASMANIAN EXPORTS – LONG TERM TREND

Compound average annual growth trend overall of 3 per cent per year and no change.

China dropped 41 per cent in a year and now 30 per cent lower over 5 years CAGR.

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

## Tasmanian Cherry Exports by year

Tasmanian Cherry Exports by year								5 Year Trend				
Rank	Country	-	Mar - Feb 2017	Mar - Feb 2018	Mar - Feb 2019	Mar - Feb 2020	Mar - Feb 2021	Mar - Feb 2022	Chg LY	5 yr CAGR*	share 2018	share 2022
			Tonnes	Tonnes	Tonnes	Tonnes	Tonnes	Tonnes				
1	Hong Kong		404	445	457	431	752	649	-14%	10%	20.9%	27.0%
2	China		313	670	478	313	270	159	-41%	-30%	31.4%	6.6%
3	Taiwan		163	260	313	258	396	466	18%	16%	12.2%	19.4%
4	Vietnam		-	154	220	216	396	418	5%	28%	7.2%	17.3%
5	Singapore		59	51	45	87	73	158	116%	33%	2.4%	6.6%
6	Korea, South		77	106	21	31	1	8	553%	-47%	5.0%	0.4%
7	Indonesia		74	80	83	58	115	151	32%	17%	3.8%	6.3%
8	Thailand		45	109	61	95	124	120	-3%	2%	5.1%	5.0%
9	Malaysia		39	61	61	56	92	64	-31%	1%	2.8%	2.6%
10	United States		124	88	52	68	104	86	-17%	0%	4.1%	3.6%
11	Japan		30	33	28	36	41	47	14%	9%	1.5%	1.9%
12	United Arab Emirates		20	17	1	-	0	4		-31%	0.8%	0.2%
13	India		18	12	8	12	-	-		-100%	0.6%	0.0%
14	EUROPE		1	3	-	16	6	-		-100%	0.1%	0.0%
15	Philippines		3	8	8	14	17	24	43%		0.4%	1.0%
16	Saudi Arabia		3	12	25	11	3	-		-100%	0.6%	0.0%
17	Kuwait		2	8	12	3	10	0	-96%	-51%	0.4%	0.0%
18	Qatar		4	2	9	2	7	1		-21%	0.1%	0.0%
19	Russia		-	-	-	-	-	-			0.0%	0.0%
20	Myanmar		-	4	-	4	4	1			0.2%	0.1%
	all other		3	11	17	19	19	50	172%	46%	0.5%	2.1%
0	Total Exports (Tonnes)		1,381	2,133	1,898	1,731	2,429	2,407	-0.9%	3.1%	100%	100%

Source: Australian Bureau of Statistics; Fresh Intelligence analysis

CAGR = compound annual growth rate

# ASIAN MARKET IMPORTS – LONG TERM TREND

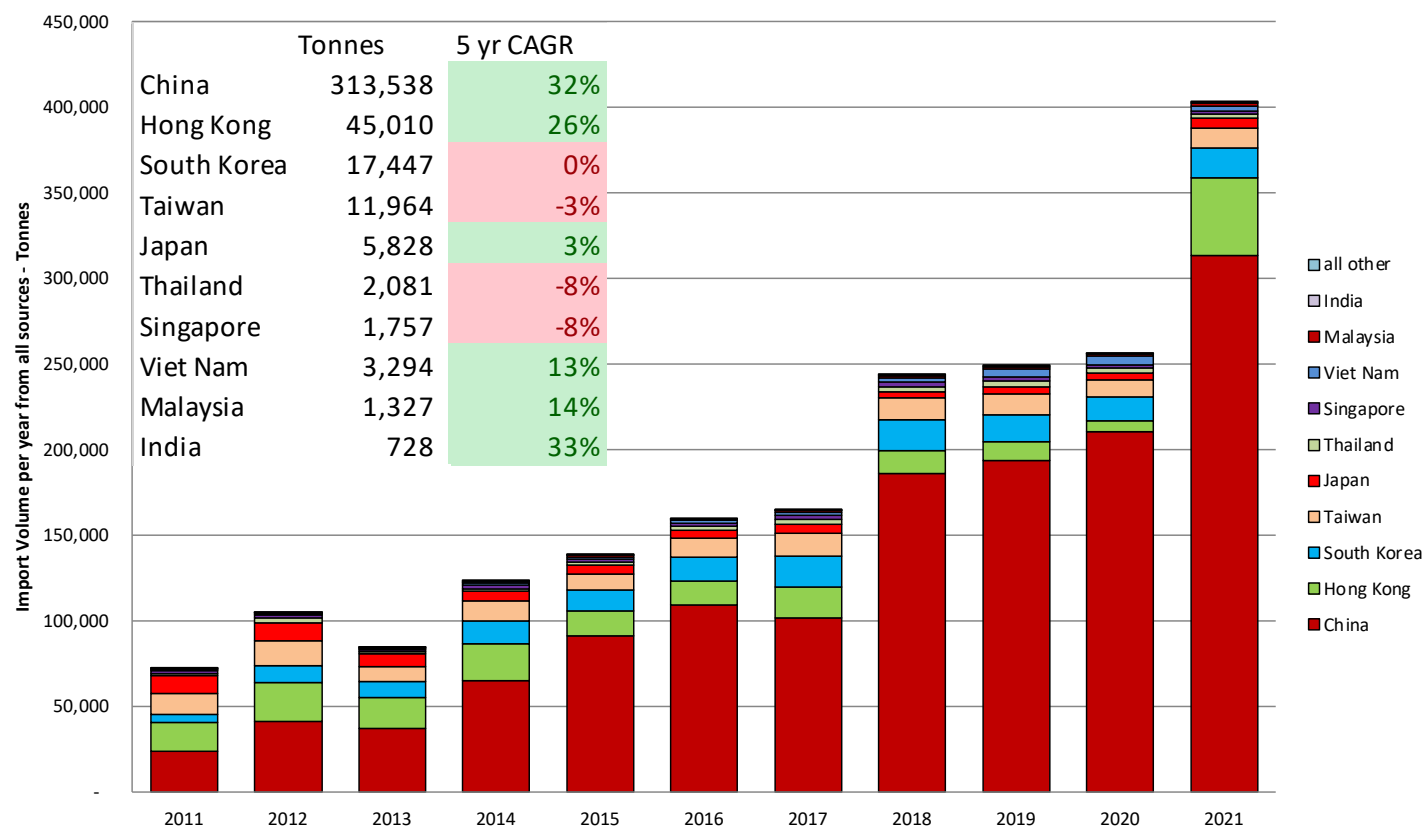
China dominated with over 300,000 tonnes mostly from Chile and expanding 32 per cent per year

The lift in Hong Kong is influenced by re exports to China.

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**



Source : ITC Trademap; Fresh Intelligence analysis

# COMPETITORS

**Chile** dominates exporting 356,000 tonnes in 2021/22 - 92 per cent to Asia – mostly to CHINA

**New Zealand** exported 3,227 tonnes in 2021/22 – 94.5 per cent to Asia - Leading market TAIWAN

## Chile - Exports of Cherries Mar - Feb 2022

	2021/22	1 yr chg	share
	Tonnes	%	%
China	313,275	-2.5%	87.9%
South Korea	6,900	27.6%	1.9%
Taiwan	5,998	31.3%	1.7%
Hong Kong	707	-26.6%	0.2%
Thailand	1,026	3.0%	0.3%
Vietnam	688	165.6%	0.2%
India	411	76.8%	0.1%
Japan	200	2.8%	0.1%
Singapore	92	-16.3%	0.0%
Philippines	103	-45.2%	0.0%
Malaysia	56	32.3%	0.0%
Indonesia	12		0.0%
<b>Sub Total Asia</b>	<b>329,470</b>	<b>-1.4%</b>	<b>92.4%</b>
United States & Canada	13,877	85.3%	3.9%
EUROPE	6,253	30.5%	1.8%
MIDDLE EAST	274	29.4%	0.1%
all other	6,552		1.8%
<b>Total Exports - Tonnes</b>	<b>356,425</b>	<b>1.2%</b>	<b>100%</b>

Source: IHS Global Trade Atlas; Fresh Intelligence analysis

## NZ - Exports of Cherries Mar - Feb 2022

	2021/22	1 yr chg	share
	Tonnes	%	%
Taiwan	1,400	34.9%	43.4%
China	580	5.8%	18.0%
Vietnam	473	7.2%	14.7%
Thailand	210	21.7%	6.5%
Malaysia	90	45.3%	2.8%
Japan	88	87.8%	2.7%
Singapore	73	83.9%	2.3%
Philippines	65	412.8%	2.0%
Hong Kong	43	172.6%	1.3%
South Korea	25	-45.4%	0.8%
India	1		0.0%
Indonesia	1		0.0%
<b>Sub Total Asia</b>	<b>3,050</b>	<b>25.8%</b>	<b>94.5%</b>
United States & Canada	154	55.0%	4.8%
EUROPE	-		0.0%
MIDDLE EAST	3		0.1%
all other	20		0.6%
<b>Total Exports - Tonnes</b>	<b>3,227</b>	<b>26.8%</b>	<b>100%</b>

Source: IHS Global Trade Atlas; Fresh Intelligence analysis

**TAIWAN PROMOTION**



## **Digital and Social Media**



## TAIWAN PROMOTION



## Digital and Social Media

- The campaign was anchored with a 4 week **digital and social media program** from 3 January to 3 February 2022 targeting young professionals in the Taipei region.
  - focussed on premium quality cherries flown from Tasmanian orchards
    - a gift to delight for Chinese New Year.
  - Channels YOUTUBE, Facebook / Instagram
  - Launched the campaign using YOUTUBE video selling the fresh experience of Tasmanian cherries.
  - Promoted the video assets via Facebook and Instagram, targeted towards relevant audiences and interest categories related to Gifts & Food & Health.

## TAIWAN PROMOTION



# Facebook Creatives



Did Someone Say Tasmanian Cherries? – 15s  
Preview Link: <https://fb.me/201oUvN7iIT9j6X>



Everyone Loves Tasmanian Cherries – 15s  
Preview Link: <https://fb.me/21HOFQTAq9Oe7cy>



Tasmanian Cherries – 30s  
Preview Link: <https://fb.me/qwSi3pckEjC69Y>



## TAIWAN PROMOTION - 15 sec Video (English version)



# TAIWAN PROMOTION

## Digital and Social Media highlights



Publisher	Media Spend (\$AUD)	Impressions	Reach	Views	Cost-Per-View (CPV)	Clicks	Click-Through-Rate (CTR)	Engagements (Likes, Comments, Shares)
YouTube	\$21,246.70	3,204,630	1,602,315	1,498,642	\$0.01	4,858	0.15%	N/A
Facebook/Instagram	\$21,249.34	3,034,186	1,477,707	690,511	\$0.03	3,737	0.12%	220
<b>TOTAL</b>	<b>\$42,496.04</b>	<b>6,238,816</b>	<b>3,080,022</b>	<b>2,189,153</b>	<b>\$0.02</b>	<b>8,595</b>	<b>0.14%</b>	<b>220</b>

### Key Highlights

Strong results overall

- 2.2 million Video Views from the 6.2M impressions (exposures) delivered – reaching slightly over 3M people
- Both YouTube & FB reached similar number of people however in terms of Video Views, YouTube performed better with over twice the amount of views that Facebook had, driving a low Cost-Per-View of \$0.01 (exceeding the KPI of \$0.04).
- Facebook also performed well with a CPV of \$0.03 which is lower than the KPI of \$0.05
- The activity managed to receive 8,600 clicks to the website which is a good result - the activity was not optimizing towards clicks.



# TAIWAN PROMOTION

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### Trade result for 2021-22 season

- Sales for Taiwan increased 18 percent to 466 tonnes on previous season and an increase in value of 22 percent to A\$19.50/kg.
- Of our top 4 markets (HK, China, Taiwan and Vietnam), Taiwan performed the best in terms of volume and price.
- For Taiwan exports there was a 22 percent increase in A\$/kg compared to 6 percent increase in A\$/kg for Tasmanian cherry exports overall.

## TAIWAN PROMOTION - 30 sec Video



## REFERENCES

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