

Unlocking Export Value

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Intelligence

bringing data to life



Being Export Ready

- * You have a **product** that is in demand by consumers in overseas markets
- * It has a **unique selling proposition** such as flavour, size, brand, packaging, geographic identity or seasonal advantage that sets it apart from others in market
- * Prepare your product **portfolio** – selling attributes
- * Build a **relationship** with potential customers by attending trade events or visiting them in their market.
- * Learn to navigate the **supply chain** to deliver on time
- * Make a **profit**

Identify Markets

- * Assess all markets for **import volume trends** of your product type
- * Assess **import reliance** – as a share of production and consumption
- * Assess import **seasonality**
- * Assess **unit values and** how they compare with your expectation
- * You have found some markets with **potential** propensity to consume
- * Assess the **market demographics** – population, GDP, trade structures etc.
- * Assess the **competition**, other suppliers of your product
- * Search for opportunity gaps
- * Ensure there is an existing export pathway and that you can fulfil the requirements (Micor)

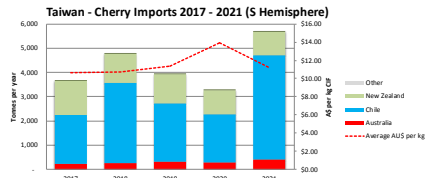
Case Study - Cherries to Taiwan



Taiwan

Population	24.4 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 (Seasonal)	5,675 tonnes
Cherry Imports growth trend	11.6% per yr CAGR
Reliance on Imports	100%
Cherry competitors	Chile New Zealand
Cherry month volatility	129% st deviation
Cherry Consumption per capita	0.23 kg p.p.

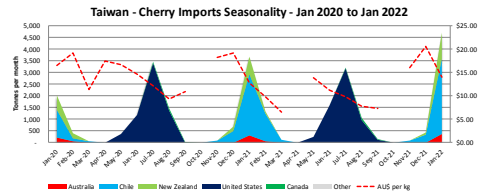


Source: ITC Trademap, Fresh Intelligence analysis

Seasonality	share of imports
Northern Season	52.6%
Southern Season	47.4%

Supplier	Volume imported 2021	Unit Value \$/kg	5 yr trend p/a CAGR	Market share %
Australia	395	\$15.03	-14.2%	8.3%
Chile	4,316	\$9.01	20.0%	36.1%
New Zealand	964	\$25.92	-8.9%	8.1%
United States	6,148	\$9.93	-9.5%	51.4%
Canada	140	\$10.48	-30.6%	1.2%
Other	0		0.0%	0.0%
Total	11,964	\$11.19	-2.8%	100.0%

Source: IHS Global Trade Atlas, Fresh Intelligence analysis



Source: IHS Global Trade Atlas, Fresh Intelligence analysis

- * Long Term Trends
- * Seasonality
- * Price Points
- * Competition
- * Phytosanitary
- * USP

YES

YES

YES

YES

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YES

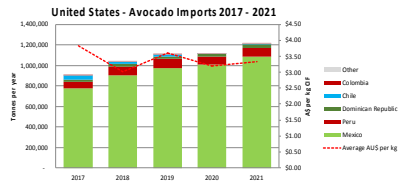
Case Study – Avocados to US



United States

Population	329.5	million
Urban share	83%	
Per capita GDP (USD PPP)	\$63,593	USD (PPP)
GDP growth (5 yr trend, CAGR)	3.5%	USD

Avocado Production	123030	tonnes
Avocado Imports	1,213,412	tonnes
Avocado imports growth trend	7.8%	per yr CAGR
Reliance on imports	100%	
Avocado competitors	Mexico	Peru
Avocado month volatility	14%	st deviation
Avocado Consumption per capita	3.87	kg p.p.

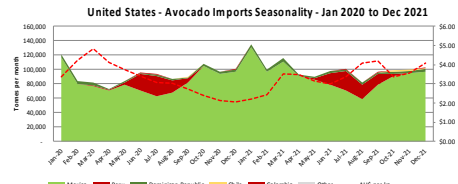


Source: ITC Trademap, Fresh Intelligence analysis

Seasonality	share of imports
Northern Season	92.7%
Southern Season	7.3%

Supplier	Volume imported 2021	Unit Value \$/kg	5 yr trend p.a CAGR	Market share %
Mexico	1,085,353	\$3.41	8.8%	89.4%
Peru	84,528	\$2.92	7.0%	7.0%
Dominican Republic	36,219	\$1.89	-10.7%	3.0%
Chile	4,075	\$3.74	-42.4%	0.3%
Colombia	3,236	\$3.23	224.2%	0.3%
Other	0		0.0%	0.0%
Total	1,213,412	\$3.33	7.8%	100.0%

Source: IHS Global Trade Atlas, Fresh Intelligence analysis



Source: IHS Global Trade Atlas, Fresh Intelligence analysis

Situation

The US is the world's largest importer of avocados, over 1 million tonnes per year mostly from Mexico and offset by Peru in the Mexican off season.

Prices – under \$3.50 per kg influenced by Peru

Market access – **prohibited** no access – tariff free (AUSFTA)

Brand awareness – Australia fruit is best known for citrus

Strategy – TBA – not considered viable

EXAMPLE By 2026 export 0 tonnes by attaining 0% market share and 0% market growth with price points no higher than A\$4.00 per kg CIF

- * Long Term Trends
- * Seasonality
- * Price Points
- * Competition
- * Phytosanitary
- * USP

YES

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NO

NO

NO

NO

Supply Chain

- * Air or Sea ?
- * Freight Forwarder
- * Phytosanitary Certificates
- * Bill of Lading
- * Terms of Trade
- * Import Documentation
- * Delivery to Customer
- * Marketing support for your customer



Commitment to Supply

- * Commitment
 - * Deliver what you promise
 - * Include marketing support
 - * **Ignore domestic market signals**
- * Communication
 - * Keep customers informed
- * Control
 - * Have a good monitoring systems in place and act if necessary



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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