

Fresh Fruit & Vegetable Export / Import Statistics 2017/18



A statistics resource for fresh produce exporters and importers prepared for the Australian Horticultural Exporters & Importers Association by Fresh Intelligence Consulting

Introduction

This extensive statistics update covers fresh fruit and vegetable exports and imports to and from Australia's major trading partners with volume and value by product by country.

With the dual focus on exports and imports this analysis is compiled by country with combined two-way trade for exports and imports, where applicable, on each page. The tables are colour coded green for exports and red for imports.

As in previous issues all the country tables have been prepared in the same format for ease of comparison across markets. They include 3 years of volume figures, growth and share analytics with the latest annual A\$ value on the far right column. The data has been sorted by value.

The key market measures for total volume, value and unit values over three years are summarised in the top 3 lines of each table. All export value measures are FOB and import value measures are CIF.

The total fresh fruit and vegetables exclude dried fruits and vegetables except in some cases where there is no distinction by the codes. Such volumes would make no material impact on the overall results.

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Disclaimer

The data for the AHEIA export import statistics was collated by Fresh Intelligence Consulting from data provided through the International Trade Centre and Global Trade Atlas based on data provided by the Australian Bureau of Statistics. This data is collated from export and import documents. 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

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Fresh Fruit and Vegetable Summary

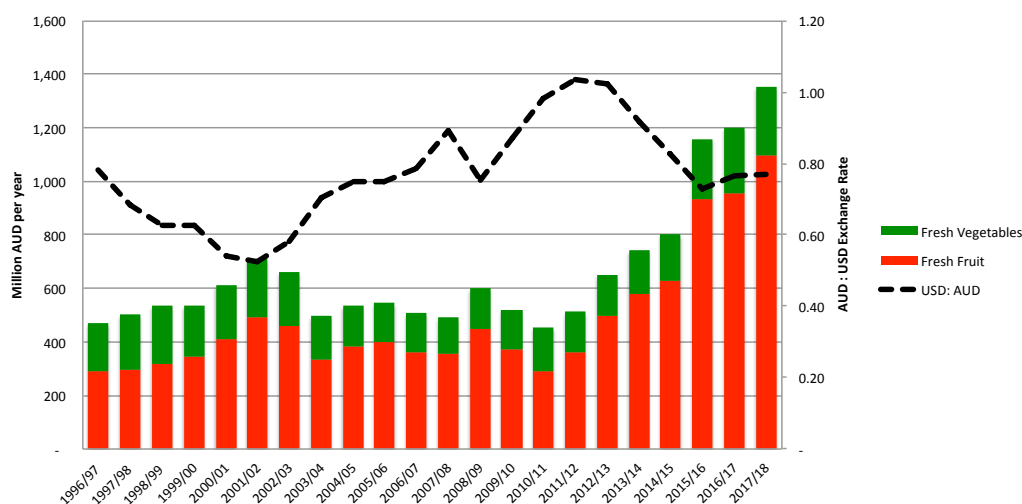
Australian fresh fruit and vegetable exports combined increased 15.9 per cent to 675,051 tonnes worth **AU\$1.40 billion** for the year ending June 2018. Of this fresh fruit increased 19 per cent to 466,546 tonnes and fresh vegetables increased 8.8 per cent to 208,505 tonnes. Fresh fruit exceeded AU\$1 billion for the first time in a financial year.

Horticulture Exports

	2015/16	2016/17	2017/18	2017/18 change to LY	2017/18 vol share	2017/18 Value
Value \$A Million	1,158.8	1,195.3	1,404.2	17.5%		
Volume Tonnes	602,205	582,692	675,051	15.9%		
A\$ per kg	\$1.92	\$2.05	\$2.08	1.4%		
	Tonnes	Tonnes	Tonnes			A\$ million
Fresh Fruit	393,968	391,040	466,546	19.3%	69.1%	1,141.8
Fresh Vegetables	208,237	191,652	208,505	8.8%	30.9%	262.4
Total	602,205	582,692	675,051	15.9%	100%	1,404.2

Source: Australian Bureau of Statistics; Fresh Intelligence analysis

Fruit & Vegetable Export Values over 20 years



The 2017/18 export result was again a record breaker for the fifth consecutive year. The above chart demonstrates the impact of the AUD:USD exchange rate over 2 decades although other influences positive and negative have shaped the trade pattern. The millennial drought, Global Financial Crisis and tri-state floods impacted results, as has the implementation of free trade agreements, new market access and the unprecedented demand from China.

Global trade movements of fresh fruit in 2017 stood at around 80 million tonnes according to ITC Trademap and UN Comtrade data of which Australia's export share of 466 thousand tonnes was just 0.58 per cent.

Australia's imports decreased 16.5 per cent to 119,579 tonnes worth **\$410.8m**. This included 90,247 tonnes of fresh fruit and 29,332 tonnes of fresh vegetables. Avocados from New Zealand dropped some 50 per cent due to an "off" season and were the greatest contributor the lower import measure.

Horticulture Imports

	2015/16	2016/17	2017/18	2017/18 change to LY	2017/18 vol share	2017/18 Value
Value \$A Million	411.6	489.3	410.8	-16.1%		
Volume Tonnes	118,375	143,170	119,579	-16.5%		
A\$ per kg	\$3.48	\$3.42	\$3.44	0.5%		
	Tonnes	Tonnes	Tonnes			A\$ million
Fresh Fruit	90,472	110,367	90,247	-18.2%	13.4%	333.7
Fresh Vegetables	27,903	32,803	29,332	-10.6%	4.3%	76.8
Total	118,375	143,170	119,579	-16.5%	18%	410.8

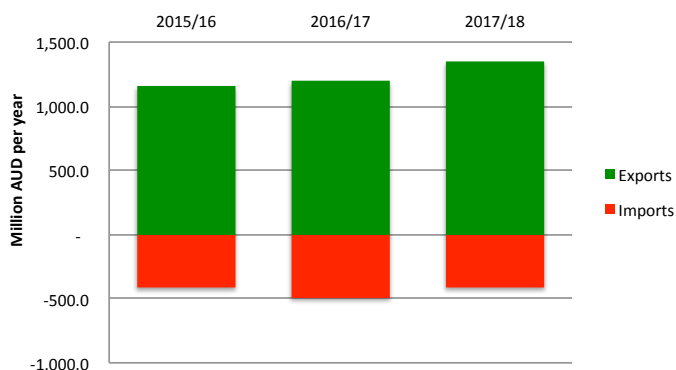
Source: Australian Bureau of Statistics; Fresh Intelligence analysis

The combined exports accounted for 77 per cent of the total 2-way trade up from 71 per cent last year as exports surged 16 per cent and imports eased back 17 per cent. Overall 2-way trade in fresh fruit and vegetables reached 1.8 billion with an A\$993,000 exports trade surplus.

2- Way Trade for Auustralian Fresh Fruit and Vegetables

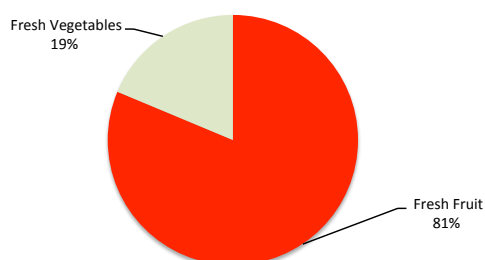
	2015/16	2016/17	2017/18	2017/18 change to LY	2017/18 share
	Million AUD	Million AUD	Million AUD		
Imports	411.6	489.3	410.8	-16%	23%
Exports	1,158.8	1,195.3	1,404.2	17%	77%
Total Trade	1,570.35	1,684.61	1,814.94	8%	100%
<i>Balance</i>	<i>747.20</i>	<i>705.93</i>	<i>993.41</i>	<i>41%</i>	

2-way Trade Fresh Fruit and Vegetables

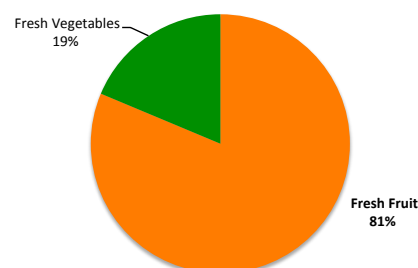


Source: ABS (2018) via Trademap; Fresh Intelligence analysis

Fresh Fruit & Vegetable Imports by Value
A\$410 million (Jul - June 2018)



Fresh Fruit & Vegetable Exports by Value
A\$1.81 bn (Jul - Jun 2018)



Fresh Fruit Exports & Imports

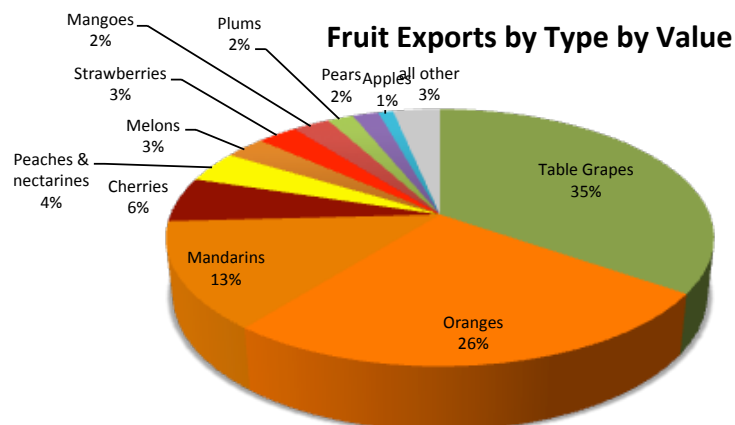
By volume fresh fruit **exports** increased 19.6 per cent to 466,546 tonnes in the year to June 2018 and the value lifted 19.3 per cent to \$1.14 billion. This is the first time the A\$1 Billion milestone has been reached in a financial year.

Citrus lifted strongly, with mandarins increasing 37 per cent to 71,000 tonnes and oranges by 20 per cent to almost 200,000 tonnes. Table grapes had a strong start and weak finish though managed a record result at 114,000 tonnes. Cherries recovered after a poor 2017 season to exceed 4,000 tonnes while summerfruit exceed 17,000 tonnes to the best result since 2003.

Fresh Fruit Exports by Product 2017/18 vs previous 2 years

	2015/16	2016/17	2017/18	2017/18 change to LY	2017/18 vol share	2017/18 Value	2017/18 A\$ per kg
Value \$A Million	933.8	954.6	1,141.8	19.6%			
Volume Tonnes	393,968	391,040	466,546	19.3%			
A\$ per kg	\$2.37	\$2.44	\$2.45	0.2%			
	Tonnes	Tonnes	Tonnes			A\$ million	A\$ per kg
Table Grapes	110,007	106,841	114,075	7%	24.5%	396.2	3.47
Oranges	160,580	164,585	197,437	20%	42.3%	296.7	1.50
Mandarins	48,974	52,498	71,720	37%	15.4%	153.8	2.14
Cherries	5,593	2,462	4,273	74%	0.9%	64.4	15.08
Peaches & nectarines	10,018	9,023	12,498	39%	2.7%	44.9	3.59
Melons	19,243	19,401	20,774	7%	4.5%	32.7	1.57
Strawberries	3,009	3,897	4,585	18%	1.0%	31.9	6.96
Mangoes	7,006	7,120	8,092	14%	1.7%	29.9	3.69
Plums	3,748	4,521	5,551	23%	1.2%	20.9	3.76
Pears	12,260	7,165	13,170	84%	2.8%	20.9	1.58
Apples	4,665	4,958	5,364	8%	1.1%	12.0	2.23
Avocados	1,546	2,323	1,833	-21%	0.4%	11.9	6.48
Lemons & limes	4,088	1,730	2,945	70%	0.6%	6.2	2.11
Blueberries	254	356	235	-34%	0.1%	4.7	20.17
Kiwifruit	1,004	970	1,034	7%	0.2%	3.6	3.49
all other	29,537	25,214	33,092	31%	7.1%	91.3	2.76
Total	393,968	391,040	466,546	19%	100%	1,141.8	2.45

Source: ABS (2018) via ITC Trademap; Fresh Intelligence analysis



Source: Australian Bureau of Statistics; Fresh Intelligence analysis

China established its position as the No.1 destination for Australian fresh fruit by both volume and value of fruit lifting 38 per cent to 120,986 tonnes and worth \$335.7 million. Trade to Hong Kong lifted 4 per cent reflecting the increased direct trade to China such that the combined Hong Kong / China trade lifted 26 per cent by volume.

Trade to Japan lifted 21 per cent with stronger citrus and table grape results.

Fresh Fruit Exports by Market 2017/18 vs previous 2 years

	2015/16	2016/17	2017/18	2017/18 change to LY	2017/18 vol share	2017/18 Value	2017/18 A\$ per kg
Value \$A Million	933.8	954.6	1,141.8	19.6%			
Volume Tonnes	393,968	391,040	466,546	19.3%			
A\$ per kg	\$2.37	\$2.44	\$2.45	0.2%			
	Tonnes	Tonnes	Tonnes			A\$ million	A\$ per kg
China	61,784	87,642	120,986	38%	25.9%	335.7	2.77
Hong Kong	71,226	49,874	52,113	4%	11.2%	133.5	2.56
Japan	41,472	46,162	56,009	21%	12.0%	112.9	2.02
Indonesia	32,481	27,162	28,859	6%	6.2%	77.8	2.70
Singapore	29,534	25,761	26,956	5%	5.8%	71.2	2.64
United Arab Emirates	33,472	27,215	24,907	-8%	5.3%	50.0	2.01
Thailand	15,719	14,436	16,958	17%	3.6%	51.3	3.03
New Zealand	22,530	19,341	24,559	27%	5.26%	48.8	1.99
Malaysia	19,252	18,580	20,757	12%	4.45%	44.7	2.15
Vietnam	5,425	8,182	8,942	9%	1.92%	37.4	4.18
United States	9,865	9,637	11,220	16%	2.40%	24.3	2.17
Philippines	9,794	9,936	13,330	34%	2.86%	25.2	1.89
Taiwan	5,111	7,367	6,650	-10%	1.43%	17.4	2.62
Canada	5,524	8,133	7,700	-5%	1.65%	14.0	1.81
Saudi Arabia	3,410	3,489	6,882	97%	1.48%	13.6	1.97
Kuwait	1,859	2,114	1,953	-8%	0.42%	7.0	3.57
all other	25,510	26,010	37,765	45%	8.1%	77.1	2.04
Total	393,968	391,040	466,546	19%	100%	1,141.8	2.45

Source: ABS (2018) via ITC Trademap; Fresh Intelligence analysis

Source: ABS data; Fresh Intelligence analysis

Imports of fresh fruit declined 14 per cent by value to **\$334** million in 2017/18 and 18 per cent lower to **90,328** tonnes by volume at the same level of 2015/16.

An off year for New Zealand avocados saw the fruit fall 52 per cent while kiwifruit dipped 7 per cent. Fruit from the United States also declined except for table grapes, which increased 6 per cent. Apple imports increased a further 9 per cent with increased volumes from New Zealand albeit off a low base while Summerfruit imports from United States were lower overall.

Fresh Fruit Imports by Product 2017/18 vs previous 2 years

	2015/16	2016/17	2017/18	2017/18 change to LY	2017/18 vol share	2017/18 Value	2017/18 A\$ per kg
Value \$A Million	325.8	389.0	334.0	-14.1%			
Volume Tonnes	90,472	110,367	90,328	-18.2%			
A\$ per kg	\$3.60	\$3.52	\$3.70	4.9%			
	Tonnes	Tonnes	Tonnes			A\$ million	A\$ per kg
Kiwifruit	23,254	23,527	21,772	-7%	24.1%	54.6	2.51
Oranges	14,587	20,694	18,116	-12%	20.1%	30.4	1.68
Table Grapes	13,784	14,405	15,265	6%	16.9%	69.5	4.55
Avocados	13,108	23,478	11,370	-52%	12.6%	72.0	6.34
Lemons & limes	6,464	7,812	4,739	-39%	5.2%	12.3	2.60
Mandarins	3,375	4,324	3,805	-12%	4.2%	9.0	2.37
Peaches & nectarines	3,653	2,235	2,281	2%	2.5%	10.7	4.67
Cherries	1,505	2,295	2,196	-4%	2.4%	15.5	7.05
Pears	1,487	2,158	1,826	-15%	2.0%	3.1	1.72
Blueberries	1,432	1,211	1,234	2%	1.4%	29.5	23.89
Apples	619	1,053	1,145	9%	1.3%	2.9	2.51
Grapefruit	1,036	1,291	1,125	-13%	1.2%	2.3	2.03
Mangoes	887	1,111	866	-22%	1.0%	4.1	4.74
Persimmons	546	492	445	-10%	0.5%	2.5	5.71
Apricots	900	794	434	-45%	0.5%	1.9	4.34
Plums	798	548	380	-31%	0.4%	1.6	4.15
all other	3,034	2,939	3,330	13%	3.7%	12.1	3.64
Total	90,472	110,367	90,328	-18%	100%	334.0	3.70

Source: ABS (2018) via ITC Trademap; Fresh Intelligence analysis

United States and **New Zealand** accounted for 77 per cent of the fresh fruit supplied to Australia, with New Zealand falling 33 per cent mostly due to avocados. Citrus, grapes, cherries and summerfruit arriving counter seasonally from United States were 13 per cent lower overall while citrus from Egypt increased 11 per cent. Italy, which supplemented kiwifruit in the New Zealand off-season, also dipped 9 per cent.

Fresh Fruit Imports by Supplier 2017/18 vs previous 2 years

	2015/16	2016/17	2017/18	2017/18 change to LY	2017/18 vol share	2017/18 Value	2017/18 A\$ per kg
Value \$A Million	325.8	389.0	334.0	-14.1%			
Volume Tonnes	90,472	110,367	90,328	-18.2%			
A\$ per kg	\$3.60	\$3.52	\$3.70	4.9%			
	Tonnes	Tonnes	Tonnes			A\$ million	A\$ per kg
United States	42,708	46,228	40,333	-13%	44.7%	144.8	3.59
New Zealand	32,771	43,688	29,422	-33%	32.6%	146.0	4.96
Egypt	1,685	7,085	7,846	11%	8.7%	9.8	1.25
Italy	7,387	6,927	6,306	-9%	7.0%	15.9	2.53
China	1,917	2,832	2,450	-13%	2.7%	4.7	1.94
Israel	1,206	1,228	1,385	13%	1.5%	2.5	1.83
Vietnam	93	218	599	175%	0.7%	2.3	3.90
Thailand	838	613	522	-15%	0.58%	3.2	6.21
Spain	690	89	484	446%	0.54%	0.9	1.91
Mexico	424	486	263	-46%	0.29%	0.7	2.61
all other	1,868	1,548	1,464	-5%	1.6%	4.6	3.14
Total	90,472	110,367	90,328	-18%	100%	334.0	3.70

Source: Australian Bureau of Statistics; Fresh Intelligence analysis

China

China further established its position as the leading export destination by value and volume following very strong growth in citrus exports, new access for summerfruit including plums for the first time, recovery from the 2017 season for cherries and sustained table grape trade.

Fresh Fruit Exports to China

	2015/16	2016/17	2017/18	2017/18 change to LY	2017/18 vol share	2017/18 Value
Value \$A Million	175.8	244.8	335.7	37.1%		
Volume Tonnes	61,784	87,642	120,986	38.0%		
A\$ per kg	\$2.84	\$2.79	\$2.77	-0.7%		
	Tonnes	Tonnes	Tonnes			A\$ million
Table Grapes	29,936	41,196	42,851	4.0%	35.4%	153.5
Oranges	23,034	34,159	51,732	51.4%	42.8%	97.6
Mandarins	7,789	9,812	20,040	104.2%	16.6%	49.6
Peaches & nectarines	-	1,866	4,144	122.0%	3.4%	15.4
Cherries	791	373	764	104.5%	0.6%	13.1
Plums	-	-	1,097	++	0.9%	5.3
Mangoes	83	80	124	54.9%	0.1%	0.8
Apples	92	138	125	-10.0%	0.1%	0.2
Grapefruit	18	-	65	++	0.1%	0.1
Lemons & limes	42	-	43	++	0.0%	0.1
all other	0	17	3	++	0.0%	0.1
Total	61,784	87,642	120,986	38.0%	100%	335.7

Source: ABS (2018) via ITC Trademap; Fresh Intelligence analysis

(++) more than 500% increase

Imports from China comprise mostly apples and pears though volumes are low. Forty tonnes of peaches & nectarines imported were recorded. The “all other” category records as products “not specified” though appear as lychees on the China Customs export data.

The balance of trade for fresh fruit with China is strongly favouring exports with a 98.6 per cent share of the two-way trade and increasing.

Fresh Fruit Imports from China

	2015/16	2016/17	2017/18	2017/18 change to LY	2017/18 vol share	2017/18 Value
Value \$A Million	4.4	5.1	4.8	-6.5%		
Volume Tonnes	1,917	2,832	2,450	-13.5%		
A\$ per kg	\$2.29	\$1.80	\$1.94	8.1%		
	Tonnes	Tonnes	Tonnes			A\$ million
Pears	1,374	1,959	1,638	-16.3%	66.9%	2.5
Apples	357	698	594	-14.8%	24.3%	1.3
Peaches & nectarines	0	34	40	17.0%	1.6%	0.1
all other	186	141	178	25.6%	7.2%	1.0
Total	1,917	2,832	2,450	-13.5%	100%	4.8

Source: ABS (2018) via ITC Trademap; Fresh Intelligence analysis

Hong Kong

Although Hong Kong has been more often by-passed with more fruit shipped direct to China, it is still an important market that increased 4.5 per cent to 52,113 tonnes worth \$133 million. Both citrus and grapes, which achieved strong gains in China, also increased trade into Hong Kong.

Apples and pears increased off a small base, and pears in particular may be benefiting from the market development for European style pears in China by USA Pears and Belgian Pears.

Mangoes and summerfruit products, blueberry and melons were the only lines to decrease volumes into Hong Kong in 2017/18.

Fresh Fruit Exports to	Hong Kong			2017/18	2017/18	2017/18
	2015/16	2016/17	2017/18	change to LY	vol share	Value
Value \$A Million	164.0	129.1	133.5	3.4%		
Volume Tonnes	71,226	49,874	52,113	4.5%		
A\$ per kg	\$2.30	\$2.59	\$2.56	-1.0%		
	Tonnes	Tonnes	Tonnes			A\$ million
Oranges	39,641	25,967	28,009	7.9%	53.7%	26.2
Table Grapes	13,097	8,026	8,578	6.9%	16.5%	28.9
Cherries	2,259	895	1,247	39.3%	2.4%	17.3
Mandarins	3,411	3,743	5,359	43.2%	10.3%	8.9
Mangoes	3,010	3,328	2,557	-23.2%	4.9%	14.3
Plums	1,948	3,096	2,123	-31.4%	4.1%	11.3
Peaches & nectarines	4,434	1,711	1,220	-28.7%	2.3%	7.3
Strawberries	197	368	510	38.5%	1.0%	2.7
Blueberries	115	169	119	-29.3%	0.2%	4.1
Melons	1,273	1,174	873	-25.7%	1.7%	2.2
Avocados	87	217	212	-2.5%	0.4%	1.4
Apples	297	343	440	28.4%	0.8%	0.9
Pears	896	147	447	203.3%	0.9%	0.3
Apricots	30	50	52	4.2%	0.1%	0.2
all other	1,841	1,397	1,519	8.8%	2.9%	5.7
Total	71,226	49,874	52,113	4.5%	100%	129.1

Source: ABS (2018) via ITC Trademap; Fresh Intelligence analysis

There are no recorded fresh fruit imports by Australia from Hong Kong.

Japan

While citrus continues to lead the fresh fruit exports to Japan table grapes also gained further traction in the market and has become these leading southern supplier ahead of Chile according to Japan Customs data. Access for Melons granted by Japan in 2016 generated 530 tonnes for the second year of access. Australian bananas also started to gain some recurring trade with 129 tonnes of organic bananas. This of course is minute in the scale of some 1 million tonnes of bananas imported by Japan from Philippines and Ecuador.

Fresh Fruit Exports to	Japan			2017/18 change to LY	2017/18 vol share	2017/18 Value
	2015/16	2016/17	2017/18			
Value \$A Million	75.7	86.5	112.9	30.5%		
Volume Tonnes	41,472	46,162	56,009	21.3%		
A\$ per kg	\$1.82	\$1.87	\$2.02	7.6%		
	Tonnes	Tonnes	Tonnes			A\$ million
Oranges	29,898	33,101	38,253	15.6%	68.3%	58.6
Table Grapes	9,383	8,397	11,235	33.8%	20.1%	39.2
Mandarins	1,895	3,430	4,868	41.9%	8.7%	11.0
Grapefruit	117	779	778	-0.1%	1.4%	1.4
Melons	-	165	530	220.7%	0.9%	1.0
Cherries	36	30	33	8.9%	0.1%	0.5
Mangoes	59	48	35	-27.2%	0.1%	0.4
Bananas	-	45	129	187.0%	0.2%	0.2
all other	86	167	149	-11.0%	0.3%	0.8
Total	41,472	46,162	56,009	21.3%	100%	112.9

Source: ABS (2018) via ITC Trademap; Fresh Intelligence analysis

Indonesia

Exports to Indonesia increased 6.2 per cent to 28,859 tonnes with growth from table grapes, lemons & limes and plums. Ongoing changing market access conditions arguably inhibit growth with some uncertainty for longer-term development, though Australia's close proximity and more favourable access than competitors has been an advantage.

Fresh Fruit Exports to	Indonesia			2017/18 change to LY	2017/18 vol share	2017/18 Value
	2015/16	2016/17	2017/18			
Value \$A Million	88.1	75.0	77.8	3.8%		
Volume Tonnes	32,481	27,162	28,859	6.2%		
A\$ per kg	\$2.71	\$2.76	\$2.70	-2.4%		
	Tonnes	Tonnes	Tonnes			A\$ million
Table Grapes	17,363	15,586	16,563	6.3%	57.4%	52.1
Mandarins	3,313	3,389	3,362	-0.8%	11.6%	6.9
Oranges	3,515	4,305	3,135	-27.2%	10.9%	5.0
Pears	4,700	1,757	2,581	46.9%	8.9%	4.2
Lemons & limes	2,752	943	1,999	112.0%	6.9%	3.8
Cherries	95	105	128	21.4%	0.4%	2.4
Apples	434	671	401	-40.3%	1.4%	1.3
Plums	164	276	563	103.7%	2.0%	1.5
Peaches & nectarines	64	64	61	-4.1%	0.2%	0.2
all other	81	64	67	4.7%	0.2%	0.5
Total	32,481	27,162	28,859	6.2%	100%	77.8

Source: ABS (2018) via ITC Trademap; Fresh Intelligence analysis

India

Australian fresh fruit exports to India lifted almost 240 per cent off a small base with a larger percentage lift in oranges, apples and pears. Overall fresh fruit trade to India from Australia was 6,568 tonnes worth \$8.7 million. India's ban on Chinese apple imports may have assisted the result for Australian apples although Australia's contribution to India's 330,000 tonnes of apple imports is marginal.

India's huge market potential with 1.3 billion consumers is a reason for plugging away to develop trade albeit at low volumes. High tariff and non-tariff barriers are problematic along with lack of reliable cold chain infrastructure to deliver fruit in peak condition to consumers.

Fresh Fruit Exports to		India			2017/18	2017/18	2017/18
	2015/16	2016/17	2017/18	change to LY	vol share	Value	
Value \$A Million	3.6	3.0	8.7	186.4%			
Volume Tonnes	2,701	1,938	6,568	238.9%			
A\$ per kg	\$1.32	\$1.57	\$1.33	-15.5%			
	Tonnes	Tonnes	Tonnes			A\$ million	
Oranges	1,911	1,200	4,172	247.7%	63.5%	4.0	
Pears	-	121	1,149	849.5%	17.5%	1.5	
Table Grapes	204	279	468	67.5%	7.1%	1.4	
Mandarins	337	276	403	46.1%	6.1%	0.7	
Cherries	37	23	39	71.4%	0.6%	0.4	
Apples	62	19	269	1296.2%	4.1%	0.4	
Peaches & nectarines	3	12	39	232.3%	0.6%	0.1	
Blueberries	-	-	4		0.1%	0.1	
Plums	80	3	16	530.6%	0.2%	0.04	
all other	145	8	25	220.8%	0.4%	0.05	
Total	2,701	1,938	6,568	238.9%	100%	8.73	

Source: ABS (2018) via ITC Trademap; Fresh Intelligence analysis

South Korea

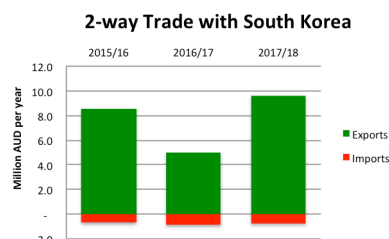
Oranges to South Korea increased 70 per cent in the 2017 season to 2,494 tonnes and overall trade increased 100 per cent with substantial growth of table grapes off a small base. These figures are small in comparison to the 140,000 tonnes of oranges, 50,000 tonnes of grapes and 18,000 tonnes of cherries imported by South Korea from all sources, which demonstrates potential opportunities.

Fresh Fruit Exports to	South Korea			2017/18 change to LY	2017/18 vol share	2017/18 Value
	2015/16	2016/17	2017/18			
Value \$A Million	8.5	5.0	9.6	92.6%		
Volume Tonnes	1,752	1,749	3,493	99.8%		
A\$ per kg	\$4.86	\$2.86	\$2.75	-3.6%		
	Tonnes	Tonnes	Tonnes			A\$ million
Oranges	1,015	1,461	2,494	70.7%	71.4%	4.7
Cherries	365	77	116	50.6%	3.3%	1.6
Table Grapes	256	162	808	398.5%	23.1%	2.7
Mangoes	115	49	74	51.9%	2.1%	0.7
all other	0	0	2		0.0%	0.0
Total	1,752	1,749	3,493	99.8%	100%	9.6

Source: ABS (2018) via ITC Trademap; Fresh Intelligence analysis

South Korea is also a supplier of Asian pears and recently began to supply table grapes counter seasonal to the Australian season though only very low volumes.

Access for strawberries from Korea was approved in October 2017 and reported 908 KG of Korean strawberries were imported during Korea's peak production season from January to March 2018.



Fresh Fruit Imports from	South Korea			2017/18 change to LY	2017/18 vol share	2017/18 Value
	2015/16	2016/17	2017/18			
Value \$A Million	0.7	0.9	0.7	-15.0%		
Volume Tonnes	166	223	197	-11.5%		
A\$ per kg	\$4.07	\$3.87	\$3.71	-4.0%		
	Tonnes	Tonnes	Tonnes			A\$ million
Pears	113	200	187	-6.2%	94.9%	0.7
Table Grapes	53	23	10	-56.7%	5.1%	0.1
Strawberries	-	-	1		0.5%	0.0
all other	0	-	-		0.0%	0.0
Total	166	223	197	-11.5%	100%	0.7

Source: ABS (2018) via ITC Trademap; Fresh Intelligence analysis

Malaysia

Malaysia is a major export destination for Australian fruit and enjoys unregulated access for most products. Overall growth was 11.7 per cent to 20,757 tonnes worth \$44.7 million.

Oranges and grapes lead the trade from Australia and account for 77 per cent share the export trade. Pears increased from 24 to 719 tonnes, strawberries increased 34 per cent and cherries were up 116 per cent.

Fresh Fruit Exports to	Malaysia			2017/18 change to LY	2017/18 vol share	2017/18 Value
	2015/16	2016/17	2017/18			
Value \$A Million	40.9	39.7	44.7	12.5%		
Volume Tonnes	19,252	18,580	20,757	11.7%		
A\$ per kg	\$2.12	\$2.14	\$2.15	0.7%		
	Tonnes	Tonnes	Tonnes			A\$ million
Oranges	11,991	11,465	13,132	14.5%	63.3%	15.7
Table Grapes	3,748	3,691	3,061	-17.1%	14.7%	10.9
Avocados	591	900	822	-8.6%	4.0%	5.5
Strawberries	248	278	374	34.4%	1.8%	2.7
Cherries	219	89	192	116.2%	0.9%	2.4
Peaches & nectarines	477	406	664	63.5%	3.2%	2.3
Pears	106	24	719	2925.7%	3.5%	1.2
Mandarins	668	794	504	-36.5%	2.4%	0.9
Plums	214	174	255	46.2%	1.2%	0.9
Apples	411	453	355	-21.6%	1.7%	0.5
Kiwifruit	44	41	170	309.5%	0.8%	0.5
Melons	196	157	264	67.5%	1.3%	0.5
all other	337	109	247	126.0%	1.2%	1.7
Total	19,252	18,580	20,757	11.7%	100%	44.7

Source: ABS (2018) via ITC Trademap; Fresh Intelligence analysis

Taiwan

Cherries partially recovered from the adverse 2017 season and leads by value in Taiwan. A few consignments of nectarines were recorded. Mandarins declined 39 per cent after a sharp increase in the previous year. Overall 6,650 tonnes of fruit was exported to Taiwan worth \$17.4 million, and was 9.7 per cent lower than last year by volume.

Fresh Fruit Exports to	Taiwan			2017/18 change to LY	2017/18 vol share	2017/18 Value
	2015/16	2016/17	2017/18			
Value \$A Million	20.6	17.9	17.4	-2.6%		
Volume Tonnes	5,111	7,367	6,650	-9.7%		
A\$ per kg	\$4.04	\$2.43	\$2.62	7.9%		
	Tonnes	Tonnes	Tonnes			A\$ million
Cherries	508	165	277	67.7%	4.2%	4.9
Table Grapes	1,946	1,374	1,460	6.2%	22.0%	4.6
Mandarins	2,125	3,392	2,067	-39.1%	31.1%	4.3
Oranges	430	2,398	2,738	14.2%	41.2%	3.2
Peaches & nectarines	61	19	98	408.9%	1.5%	0.3
Apples	41	1	9	620.6%	0.1%	0.0
all other	-	18	-		0.0%	
Total	5,111	7,367	6,650	-9.7%	100%	17.4

Source: ABS (2018) via ITC Trademap; Fresh Intelligence analysis

Philippines

Trade to the Philippines continued to lift buoyed by the improved access conditions legislated in 2012 and most tariff reductions reached zero. Volumes exceeded 13,300 tonnes worth \$25.2 million, an increase of almost 30 per cent. Table grapes lifted 46 per cent and mandarins by 163 per cent.

Fresh Fruit Exports to	Philippines			2017/18	2017/18	2017/18
	2015/16	2016/17	2017/18	change to LY	vol share	Value
Value \$A Million	20.3	18.8	25.2	33.9%		
Volume Tonnes	9,794	10,305	13,330	29.4%		
A\$ per kg	\$2.07	\$1.83	\$1.89	3.5%		
	Tonnes	Tonnes	Tonnes			A\$ million
Table Grapes	4,446	3,684	5,385	46.2%	40.4%	15.1
Oranges	3,949	5,067	5,213	2.9%	39.1%	5.9
Mandarins	1,025	938	2,470	163.2%	18.5%	3.6
Lemons & limes	262	218	164	-24.5%	1.2%	0.3
Plums	26	12	16	32.3%	0.1%	0.1
Cherries	9	3	8	200.7%	0.1%	0.1
Peaches & nectarines	14	7	4	-47.7%	0.0%	0.0
all other	64	376	70	-81.4%	0.5%	0.15
Total	9,794	10,305	13,330	29.4%	100%	25.2

Source: ABS (2018) via ITC Trademap; Fresh Intelligence analysis

Australia imports mangoes from Philippines although these were negligible (2 tonnes) in 2017/18.

Fresh Fruit Imports from	Philippines			2017/18	2017/18	2017/18
	2015/16	2016/17	2017/18	change to LY	vol share	Value
Value \$A Million	2.2	1.2	0.0	-96.2%		
Volume Tonnes	136	78	2	-96.9%		
A\$ per kg	\$16.04	\$16.00	\$19.59	22.5%		
	Tonnes	Tonnes	Tonnes			A\$ million
Mangoes	136	78	2	-96.9%	100.0%	0.0
Total	136	78	2	-96.9%	100%	1.2

Source: ABS (2018) via ITC Trademap; Fresh Intelligence analysis

(++) more than 500% increase

Singapore

Singapore is a well-established market for Australian fruit though vulnerable to competitive price movements. Trade increased almost 5 per cent in 2017/18 although there were large swings by product including oranges being 10 per cent lower and cherries being 75 per cent higher. Lychees, the main product in the “other” category more than doubled to 86 tonnes.

Fresh Fruit Exports to	Singapore			2017/18 change to LY	2017/18 vol share	2017/18 Value
	2015/16	2016/17	2017/18			
Value \$A Million	73.2	65.2	71.2	9.2%		
Volume Tonnes	29,534	25,761	26,956	4.6%		
A\$ per kg	\$2.48	\$2.53	\$2.64	4.4%		
	Tonnes	Tonnes	Tonnes			A\$ million
Oranges	11,460	9,929	8,900	-10.4%	33.0%	13.5
Table Grapes	4,521	3,143	3,187	1.4%	11.8%	12.7
Melons	4,863	5,494	5,145	-6.4%	19.1%	7.8
Mangoes	869	1,127	1,845	63.7%	6.8%	5.9
Peaches & nectarines	965	849	1,413	66.5%	5.2%	5.7
Cherries	519	276	484	75.7%	1.8%	5.6
Strawberries	814	940	767	-18.4%	2.8%	4.6
Avocados	792	909	683	-24.8%	2.5%	4.2
Plums	1,011	772	1,013	31.2%	3.8%	3.0
Mandarins	1,638	1,229	1,401	14.0%	5.2%	2.7
Pears	1,018	494	1,496	203.0%	5.6%	2.5
Blueberries	83	79	61	-22.5%	0.2%	1.0
Other (Lychee)	43	37	86	134.3%	0.3%	0.6
all other	939	484	473	-2.2%	1.8%	1.5
Total	29,534	25,761	26,956	4.6%	100%	71.2

Source: ABS (2018) via ITC Trademap; Fresh Intelligence analysis

Vietnam

Access for cherries was regained for the 2017/18 season. Some 200 tonnes were exported under irradiation treatment from Victoria and a further 200 tonnes from Tasmania PFA.

Oranges increased 31 per cent while table grape exports to Vietnam decreased 9.5 per cent.

Overall fresh fruit trade increased 9.3 per cent to 8,942 tonnes and was valued at \$37.4 million.

Fresh Fruit Exports to	Vietnam			2017/18 change to LY	2017/18 vol share	2017/18 Value
	2015/16	2016/17	2017/18			
Value \$A Million	18.4	28.4	37.4	31.7%		
Volume Tonnes	5,425	8,182	8,942	9.3%		
A\$ per kg	\$3.39	\$3.47	\$4.18	20.5%		
	Tonnes	Tonnes	Tonnes			A\$ million
Table Grapes	4,285	5,287	4,784	-9.5%	53.5%	22.4
Oranges	966	2,623	3,450	31.5%	38.6%	7.2
Cherries	0	-	403		4.5%	6.9
Mandarins	170	273	300	10.2%	3.4%	0.8
all other	5	0	4		0.0%	0.0
Total	5,425	8,182	8,942	9.3%	100%	37.4

Source: ABS (2018) via ITC Trademap; Fresh Intelligence analysis

Thailand

Exports to Thailand increased 17.5 per cent to 16,958 tonnes worth \$51.3 million. Mandarins and table grapes were the main products in demand with strawberries increasing steadily. Cherries almost recovered to 2016 levels after the adverse 2017 season.

Trade with the new protocols requiring cold treatment has been problematic for some industries since 2013, in particular avocados where the cold treatment requirement effectively shut down the trade.

Fresh Fruit Exports to	Thailand			2017/18	2017/18	2017/18
	2015/16	2016/17	2017/18	change to LY	vol share	Value
Value \$A Million	45.0	41.8	51.3	22.9%		
Volume Tonnes	15,719	14,436	16,958	17.5%		
A\$ per kg	\$2.87	\$2.89	\$3.03	4.6%		
	Tonnes	Tonnes	Tonnes			A\$ million
Mandarins	7,024	7,884	9,426	19.6%	55.6%	20.7
Table Grapes	6,219	4,659	5,263	13.0%	31.0%	20.1
Strawberries	224	450	674	49.7%	4.0%	5.6
Oranges	1,215	955	1,098	15.0%	6.5%	2.0
Cherries	129	45	111	146.9%	0.7%	1.2
Blueberries	20	36	28	-22.6%	0.2%	0.6
Peaches & nectarines	85	77	95	22.8%	0.6%	0.5
Apples	683	150	149	-0.5%	0.9%	0.4
Pears	70	94	74	-21.0%	0.4%	0.1
Plums	30	43	25	-40.4%	0.2%	0.1
all other	20	42	14	-65.8%	0.1%	0.1
Total	15,719	14,436	16,958	17.5%	100%	51.3

Source: ABS (2018) via ITC Trademap; Fresh Intelligence analysis

United Arab Emirates

The UAE is a major export destination and trading hub for the Middle East region however exports have been declining for the past few years as more trade is going direct to other gulf state markets and / or chasing higher returns.

Fresh Fruit Exports to	United Arab Emirates			2017/18 change to LY	2017/18 vol share	2017/18 Value
	2015/16	2016/17	2017/18			
Value \$A Million	71.2	59.5	50.0	-16.0%		
Volume Tonnes	33,472	27,215	24,907	-8.5%		
A\$ per kg	\$2.13	\$2.19	\$2.01	-8.2%		
	Tonnes	Tonnes	Tonnes			A\$ million
Table Grapes	7,043	4,180	2,142	-48.8%	33.0%	6.4
Melons	6,294	5,457	6,493	19.0%	100.0%	6.2
Mandarins	6,260	4,804	3,845	-20.0%	59.2%	6.6
Oranges	8,924	8,414	8,424	0.1%	129.7%	9.0
Peaches & nectarines	2,343	1,957	1,773	-9.4%	27.3%	5.9
Strawberries	590	760	859	13.1%	13.2%	6.0
Mangoes	805	756	918	21.5%	14.1%	3.3
Cherries	288	109	91	-16.1%	1.4%	0.9
Apples	331	303	35	-88.4%	0.5%	0.1
Apricots	232	120	73	-39.2%	1.1%	0.3
all other	360	355	252	-29.0%	1.0%	5.3
Total	33,472	27,215	24,907	-8.5%	100%	50.0

Source: ABS (2018) via ITC Trademap; Fresh Intelligence analysis

Saudi Arabia

Exports to Saudi Arabia have increased 97 per cent influenced mostly by citrus though most products have growth. The growth is partially driven by direct trade rather than transiting through United Arab Emirates.

Fresh Fruit Exports to	Saudi Arabia			2017/18 change to LY	2017/18 vol share	2017/18 Value
	2015/16	2016/17	2017/18			
Value \$A Million	9.5	10.0	13.6	35.3%		
Volume Tonnes	3,410	3,489	6,882	97.2%		
A\$ per kg	\$2.78	\$2.87	\$1.97	-31.4%		
	Tonnes	Tonnes	Tonnes			A\$ million
Oranges	764	931	3,715	299.1%	54.0%	3.8
Peaches & nectarines	707	991	1,329	34.1%	19.3%	3.1
Mandarins	482	386	666	72.5%	9.7%	1.4
Mangoes	148	188	281	49.5%	4.1%	1.2
Strawberries	118	131	162	23.8%	2.4%	1.1
Table Grapes	812	451	313	-30.7%	4.5%	1.0
Cherries	98	76	134	75.5%	1.9%	0.8
Apricots	151	136	106	-22.0%	1.5%	0.5
all other	130	199	176	-11.4%	2.6%	0.7
Total	3,410	3,489	6,882	97.2%	100%	13.6

Source: ABS (2018) via ITC Trademap; Fresh Intelligence analysis

New Zealand

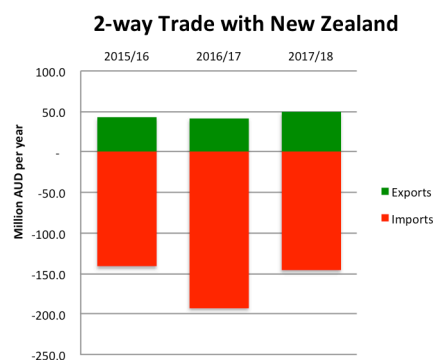
Exports to New Zealand increased 27 per cent to 24,559 tonnes with table grapes and mandarins driving growth.

Fresh Fruit Exports to		New Zealand				
	2015/16	2016/17	2017/18	2017/18 change to LY	2017/18 vol share	2017/18 Value
Value \$A Million	42.3	41.3	48.8	18.4%		
Volume Tonnes	22,530	19,341	24,559	27.0%		
A\$ per kg	\$1.88	\$2.13	\$1.99	-6.8%		
	Tonnes	Tonnes	Tonnes			A\$ million
Table Grapes	3,182	3,127	3,846	23.0%	15.7%	11.4
Mandarins	5,161	3,811	5,612	47.3%	22.9%	9.6
Melons	5,396	5,555	6,031	8.6%	24.6%	8.2
Strawberries	491	579	802	38.5%	3.3%	5.9
Pears	2,985	2,238	3,062	36.8%	12.5%	4.8
Oranges	4,246	2,988	3,764	26.0%	15.3%	4.3
Mangoes	834	828	1,241	49.8%	5.1%	3.7
Other (incl Lychee)	43	44	104	133.6%	0.4%	0.5
Bananas	38	57	-	-100.0%	0.0%	-
all other	156	113	99	-11.7%	0.4%	0.4
Total	22,530	19,341	24,559	27.0%	100%	48.8

Source: ABS (2018) via ITC Trademap; Fresh Intelligence analysis

Australia is a net importer from New Zealand though imports were 33 per cent lower due to an “off” season for avocados.

Kiwifruit is the largest imported product by value from New Zealand as well as nationally.



Fresh Fruit Imports from		New Zealand				
	2015/16	2016/17	2017/18	2017/18 change to LY	2017/18 vol share	2017/18 Value
Value \$A Million	141.7	192.7	146.0	-24.2%		
Volume Tonnes	32,771	43,688	29,422	-32.7%		
A\$ per kg	\$4.32	\$4.41	\$4.96	12.5%		
	Tonnes	Tonnes	Tonnes			A\$ million
Avocados	13,108	23,355	11,330	-51.5%	38.5%	71.9
Kiwifruit	16,445	17,182	15,354	-10.6%	52.2%	38.3
Blueberries	1,432	1,211	1,231	1.7%	4.2%	29.4
Persimmons	544	479	408	-14.8%	1.4%	2.4
Apricots	858	793	412	-48.0%	1.4%	1.8
Apples	262	355	550	54.9%	1.9%	1.6
Lemons & limes	33	243	77	-68.2%	0.3%	0.1
all other	88	70	59	-14.7%	0.2%	0.5
Total	32,771	43,688	29,422	-32.7%	100%	146.0

Source: ABS (2018) via ITC Trademap; Fresh Intelligence analysis

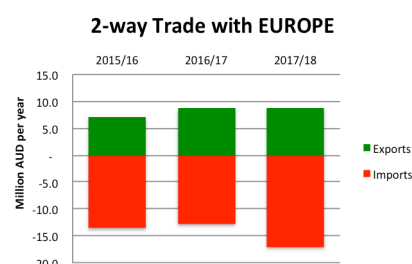
Europe

Trade to Europe increased 11.3 per cent to 3,504 tonnes driven by Pink Lady® apples to UK and Netherlands, and also kiwifruit to Germany. Other fruits lifted with small opportunistic volumes including summerfruit, mangoes and cherries.

Fresh Fruit Exports to EUROPE		2015/16	2016/17	2017/18	2017/18 change to LY	2017/18 vol share	2017/18 Value
Value \$A Million		7.1	8.6	8.8	1.7%		
Volume Tonnes		3,465	3,149	3,504	11.3%		
A\$ per kg		\$2.06	\$2.75	\$2.51	-8.6%		
		Tonnes	Tonnes	Tonnes			A\$ million
Apples		699	1,327	1,523	14.7%	43.4%	3.73
Kiwifruit		328	705	587	-16.8%	16.7%	1.80
Mandarins		2,029	822	797	-3.0%	22.7%	1.25
Oranges		208	184	347	88.1%	9.9%	0.79
Peaches & nectarines		44	36	67	87.8%	1.9%	0.46
Pears		48	-	123	++	3.5%	0.13
Plums		-	5	23	365.5%	0.6%	0.13
Cherries		21	2	6	174.4%	0.2%	0.11
Mangoes		1	4	8	93.5%	0.2%	0.03
Blueberries		11	29	-	-100.0%	0.0%	-
all other		87	63	25	-60.5%	0.7%	0.35
Total		3,465	3,149	3,504	11.3%	100%	8.79

Source: ABS (2018) via ITC Trademap; Fresh Intelligence analysis

Imports from Europe, of which 93 per cent was kiwifruit from Italy dipped 3.2 per cent. Small volumes of citrus, mostly mandarins are imported from Spain.



Fresh Fruit Imports from EUROPE		2015/16	2016/17	2017/18	2017/18 change to LY	2017/18 vol share	2017/18 Value
Value \$A Million		13.5	12.7	17.0	33.8%		
Volume Tonnes		8,077	7,058	6,834	-3.2%		
A\$ per kg		\$1.67	\$1.80	\$2.49	38.2%		
		Tonnes	Tonnes	Tonnes			A\$ million
Kiwifruit		7,387	6,969	6,348	-8.9%	92.9%	16.1
Mandarins		445	23	389	1571.5%	5.7%	0.8
Lemons & limes		196	20	23	14.9%	0.3%	0.0
Oranges		50	45	72	59.1%	1.1%	0.1
Total		8,077	7,058	6,834	-3.2%	100%	17.0

Source: ABS (2018) via ITC Trademap; Fresh Intelligence analysis

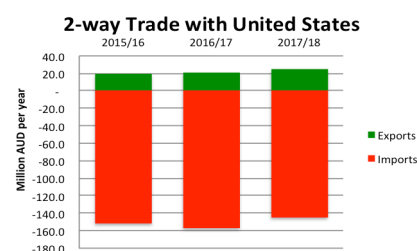
United States

Citrus has dominated the trade to the United States though has declined in recent years since Chile gained access to the market. The market is favouring soft citrus (mandarins), which lifted 40 per cent while oranges declined 2 per cent. Cherry and mango volumes eased back after strong percentage increases last year off very low bases.

Fresh Fruit Exports to		United States				
	2015/16	2016/17	2017/18	2017/18 change to LY	2017/18 vol share	2017/18 Value
Value \$A Million	19.0	20.7	24.3	17.7%		
Volume Tonnes	9,865	9,637	11,220	16.4%		
A\$ per kg	\$1.93	\$2.15	\$2.17	1.1%		
	Tonnes	Tonnes	Tonnes			A\$ million
Oranges	7,258	5,298	5,180	-2.2%	46.2%	10.1
Mandarins	2,292	4,085	5,712	39.8%	50.9%	11.7
Cherries	64	124	91	-26.5%	0.8%	1.7
Mangoes	45	75	64	-15.2%	0.6%	0.5
all other (other citrus)	207	55	174	216.0%	1.6%	0.9
Total	9,865	9,637	11,220	16.4%	100%	24.3

Source: ABS (2018) via ITC Trademap; Fresh Intelligence analysis

The United States is Australia's second largest supplier of imported fresh fruit by value after New Zealand, and No.1 for volume this year. The trade balance firmly favours imports with 85 per cent of the two-way trade by value. Counter seasonal grapes and citrus dominate the imports



Overall import results were 12.8 per cent lower in 2017/18 at 40,333 tonnes and worth \$144.8m. Oranges for example are now being sourced in greater volumes from Egypt and impacting on the demand for US sourced fruit.

Fresh Fruit Imports from		United States				
	2015/16	2016/17	2017/18	2017/18 change to LY	2017/18 vol share	2017/18 Value
Value \$A Million	151.6	156.9	144.8	-7.7%		
Volume Tonnes	42,708	46,228	40,333	-12.8%		
A\$ per kg	\$3.55	\$3.39	\$3.59	5.8%		
	Tonnes	Tonnes	Tonnes			A\$ million
Table Grapes	13,711	14,382	15,224	5.9%	37.7%	69.4
Oranges	13,116	15,249	13,147	-13.8%	32.6%	25.4
Cherries	1,484	2,286	2,188	-4.3%	5.4%	15.4
Peaches & nectarines	3,653	2,201	2,227	1.2%	5.5%	10.5
Lemons & limes	5,666	6,163	2,986	-51.6%	7.4%	9.3
Other (Pomegranates)	1,334	1,565	1,706	9.0%	4.2%	6.0
Mandarins	2,111	2,814	1,720	-38.9%	4.3%	5.4
Plums	798	548	379	-30.8%	0.9%	1.6
Grapefruit	761	957	624	-34.8%	1.5%	1.3
all other	74	62	132	112.9%	0.3%	0.6
Total	42,708	46,228	40,333	-12.8%	100%	144.8

Source: ABS (2018) via ITC Trademap; Fresh Intelligence analysis

Canada

Although Canada declined by 5.3 per cent there were large differences between products. Pear exports to Canada jumped 80 per cent for the best result in a decade while citrus declined around 18 per cent overall. Mangoes, cherries and plums all recorded increases off small bases.

Fresh Fruit Exports to		Canada			2017/18	2017/18	2017/18
	2015/16	2016/17	2017/18	change to LY	vol share	Value	
Value \$A Million	10.0	13.7	14.0	1.6%			
Volume Tonnes	5,524	8,133	7,700	-5.3%			
A\$ per kg	\$1.81	\$1.69	\$1.81	7.4%			
	Tonnes	Tonnes	Tonnes			A\$ million	
Oranges	3,394	5,765	4,782	-17.0%	11444.0%	6.9	
Pears	998	855	1,540	80.1%	3686.1%	2.9	
Peaches & nectarines	48	281	245	-12.7%	97.7%	1.0	
Mandarins	612	638	486	-23.8%	193.7%	0.9	
Mangoes	142	92	143	55.2%	56.9%	0.7	
Grapefruit	48	153	251	63.7%	100.0%	0.4	
Apples	-	2	42	++	16.7%	0.2	
Cherries	55	3	15	388.5%	5.9%	0.2	
Lemons & limes	147	148	111	-25.3%	44.1%	0.1	
Plums	6	20	30	53.7%	12.1%	0.1	
all other	74	175	55	-68.8%	0.7%	0.6	
Total	5,524	8,133	7,700	-5.3%	100%	14.0	

Source: ABS (2018) via ITC Trademap; Fresh Intelligence analysis

Egypt

Egypt has further strengthened its impact in the citrus trade and supplied 7,846 tonnes of citrus worth \$9.8m in 2017/18. This was an increase of 10.7 per cent by volume.

Fresh Fruit Imports from	Egypt			2017/18 change to LY	2017/18 vol share	2017/18 Value
	2015/16	2016/17	2017/18			
Value \$A Million	2.2	9.2	9.8	6.8%		
Volume Tonnes	1,685	7,085	7,846	10.7%		
A\$ per kg	\$1.28	\$1.30	\$1.25	-3.6%		
	Tonnes	Tonnes	Tonnes			A\$ million
Oranges	987	4,855	4,572	-5.8%	58.3%	4.5
Lemons & limes	563	1,367	1,651	20.8%	21.0%	2.9
Mandarins	136	862	1,425	65.2%	18.2%	2.2
all other	-	-	199		2.5%	0.2
Total	1,685	7,085	7,846	10.7%	100%	9.8

Source: ABS (2018) via ITC Trademap; Fresh Intelligence analysis

There are no recorded exports to Egypt.

Israel

Israel has also started to make a stronger impact in the citrus trade and supplied 1,385 tonnes of citrus worth \$2.5m in 2017/18, an increase of 12.7 per cent on the previous year.

Fresh Fruit Imports from	Israel			2017/18 change to LY	2017/18 vol share	2017/18 Value
	2015/16	2016/17	2017/18			
Value \$A Million	2.0	2.0	2.5	23.9%		
Volume Tonnes	1,206	1,228	1,385	12.7%		
A\$ per kg	\$1.69	\$1.67	\$1.83	9.9%		
	Tonnes	Tonnes	Tonnes			A\$ million
Mandarins	647	597	682	14.1%	49.2%	1.3
Grapefruit	275	320	374	17.0%	27.0%	0.8
Oranges	282	310	325	4.7%	23.5%	0.4
all other	1	1	4	435.4%	0.3%	0.0
Total	1,206	1,228	1,385	12.7%	100%	2.5

Source: ABS (2018) via ITC Trademap; Fresh Intelligence analysis

There are no recorded exports to Israel.

Fresh Vegetable Exports and Imports

Australian vegetable **exports** increased 9 per cent by volume to **208,505 tonnes** in 2017/18 worth **\$262 million**. Carrots contributed to 54 per cent of the volume, followed by potatoes and onions. Asparagus was the second largest vegetable export by value although falling 24 per cent in volume. There was strong volume growth across some of the smaller vegetable lines including broccoli, beans and celery.

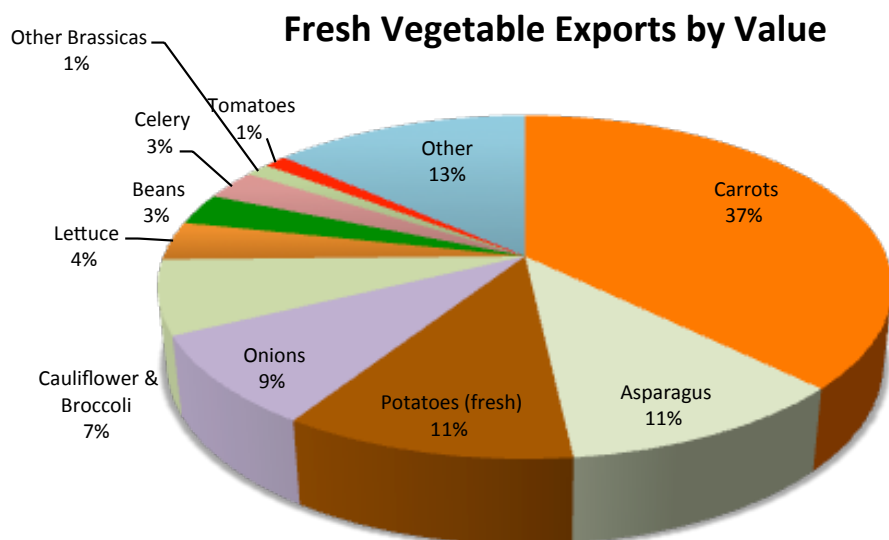
Onions recovered some of the declines of the previous year although well behind earlier years with a slow down in demand from Europe. All the onion gains were made in Asian markets.

The “all other category” includes high value mushrooms and truffles.

Fresh Vegetable Export by Product 2017/18 vs previous 2 years

	2015/16	2016/17	2017/18	2017/18 change to LY	2017/18 vol share	2017/18 Value	2017/18 A\$ per kg
Value \$A Million	205.9	254.1	262.4	3.3%			
Volume Tonnes	208,237	191,652	208,505	8.8%			
A\$ per kg	\$0.99	\$1.33	\$1.26	-5.1%			
	Tonnes	Tonnes	Tonnes			A\$ million	A\$ per kg
Carrots	100,214	103,335	111,833	8%	53.6%	97.8	0.87
Asparagus	4,086	5,056	3,819	-24%	1.8%	28.7	7.52
Potatoes (fresh)	37,212	34,800	37,343	7%	17.9%	28.6	0.77
Onions	43,888	24,825	31,831	28%	15.3%	22.5	0.71
Cauliflower & Broccoli	6,106	5,717	6,866	20%	3.3%	18.3	2.67
Lettuce	1,315	1,503	1,377	-8%	0.7%	9.6	6.94
Beans	1,787	1,603	1,856	16%	0.9%	7.8	4.21
Celery	3,557	3,913	4,693	20%	2.3%	7.4	1.58
Other Brassicas	2,118	2,631	2,575	-2%	1.2%	3.3	1.28
Tomatoes	939	530	828	56%	0.4%	3.1	3.77
Pumpkins & Squash	1,869	2,089	2,121	1%	1.0%	3.1	1.45
Capsicum	484	351	353	1%	0.2%	1.4	3.89
all other	4,663	5,299	3,010	-43%	1.4%	30.8	10.21
Total	208,237	191,652	208,505	9%	100%	262.4	1.26

Source: ABS (2018) ITC Trademap; Fresh Intelligence analysis



Singapore was the leading market influenced by its proximity to Australia and a wider range of vegetables accepted with no trade barriers. United Arab Emirates and other Middle East markets dominated the carrot exports while Japan led with asparagus and Europe with onions, albeit much lower than in past years.

Fresh Vegetable Export by Market 2017/18 vs previous 2 years

	2015/16	2016/17	2017/18	2017/18 change to LY	2017/18 vol share	2017/18 Value	2017/18 A\$ per kg
Value \$A Million	205.9	254.1	262.4	3.3%			
Volume Tonnes	208,237	191,652	208,505	8.8%			
A\$ per kg	\$0.99	\$1.33	\$1.26	-5.1%			
	Tonnes	Tonnes	Tonnes			A\$ million	A\$ per kg
Singapore	28,849	26,669	28,334	6%	13.6%	49.4	1.74
United Arab Emirates	38,906	36,774	39,906	9%	19.1%	37.4	0.94
Japan	9,363	14,532	10,604	-27%	5.1%	30.4	2.87
Malaysia	25,989	19,828	21,436	8%	10.3%	22.0	1.03
Hong Kong	6,853	7,431	8,769	18%	4.2%	17.1	1.96
Saudi Arabia	11,316	14,953	15,789	6%	7.6%	14.7	0.93
South Korea	24,612	20,826	20,718	-1%	9.9%	13.7	0.66
New Zealand	3,413	3,008	3,556	18%	1.7%	12.3	3.47
Taiwan	4,326	6,437	6,674	4%	3.2%	6.9	1.04
EUROPE	23,449	11,206	9,086	-19%	4.4%	9.4	1.03
Qatar	7,670	7,345	10,588	44%	5.1%	9.3	0.88
Indonesia	5,036	6,333	1,951	-69%	0.9%	4.3	2.22
Thailand	6,316	4,093	8,683	112%	4.2%	7.3	0.84
Bahrain	3,803	3,473	4,380	26%	2.1%	3.8	0.88
Kuwait	2,718	2,966	3,830	29%	1.8%	3.4	0.88
all other	5,619	5,779	14,200	146%	6.8%	20.8	1.47
Total	208,237	191,652	208,505	9%	100%	262.4	1.26

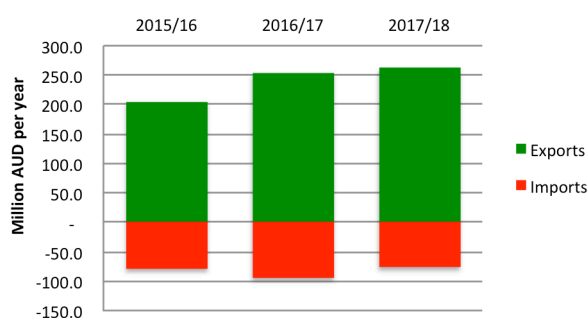
Source: ABS (2018) ITC Trademap; Fresh Intelligence analysis

Imported vegetables declined 11 per cent by volume in 2017/18 influenced mostly by onions and also capsicums.

Fresh garlic from China is the major imported product followed by asparagus (by value) from Mexico and Peru.

Exports of fresh vegetables were 77 per cent of the two-way trade balance and imports were 23 per cent in contrast to the 73:27 split last season.

2-way Trade Fresh Vegetables



Fresh Vegetable Imports by Product 2017/18 vs previous 2 years

	2015/16	2016/17	2017/18	2017/18 change to LY	2017/18 vol share	2017/18 Value	2017/18 A\$ per kg
Value \$A Million	79.4	94.8	76.8	-19.0%			
Volume Tonnes	27,903	32,803	29,332	-10.6%			
A\$ per kg	\$2.85	\$2.89	\$2.62	-9.4%			
	Tonnes	Tonnes	Tonnes			A\$ million	A\$ per kg
Garlic	12,521	12,787	12,216	-4%	41.6%	27.5	2.25
Asparagus	3,679	4,249	4,287	1%	14.6%	22.4	5.22
Mushrooms	2,508	3,150	3,274	4%	11.2%	11.0	3.37
Onions	4,670	8,335	5,479	-34%	18.7%	4.6	0.84
Capsicum	1,507	1,388	1,196	-14%	4.1%	4.6	3.85
Peas	570	782	925	18%	3.2%	2.6	2.77
Tomatoes	1,386	932	926	-1%	3.2%	1.8	1.93
all other	1,061	1,179	1,029	-13%	3.5%	2.3	2.21
Total	27,903	32,803	29,332	-11%	100%	76.8	2.62

Source: ABS (2018) ITC Trademap; Fresh Intelligence analysis

China is the largest supplier of imported vegetables, mostly garlic and onions accounting for almost 50 per cent of the imported volume. Counter season asparagus from Mexico and Peru, mushrooms from South Korea and tomatoes and capsicums from New Zealand are other main suppliers.

Fresh Vegetable Imports by supplier 2017/18 vs previous 2 years

	2015/16	2016/17	2017/18	2017/18 change to LY	2017/18 vol share	2017/18 Value	2017/18 A\$ per kg
Value \$A Million	79.4	94.8	76.8	-19.0%			
Volume Tonnes	27,903	32,803	29,332	-10.6%			
A\$ per kg	\$2.85	\$2.89	\$2.62	-9.4%			
	Tonnes	Tonnes	Tonnes			A\$ million	A\$ per kg
China	11,882	15,518	14,456	-7%	49.3%	25.1	1.74
Mexico	4,694	4,245	3,748	-12%	12.8%	19.2	5.12
South Korea	2,034	2,562	2,713	6%	9.2%	8.6	3.18
New Zealand	2,809	2,382	2,098	-12%	7.2%	6.0	2.84
EUROPE	1,547	2,163	2,421	12%	8.3%	5.7	2.37
Peru	1,130	1,055	1,037	-2%	3.5%	5.4	5.24
United States	1,888	2,551	937	-63%	3.2%	2.0	2.08
Argentina	334	676	602	-11%	2.1%	1.7	2.87
Thailand	197	210	186	-12%	0.6%	1.0	5.22
all other	1,386	1,440	1,133	-21%	3.9%	2.0	1.81
Total	27,903	32,803	29,332	-11%	100%	76.8	2.62

Source: ABS (2018) ITC Trademap; Fresh Intelligence analysis

Singapore

Singapore is the largest export destination (by value) for Australian fresh vegetables and is supplied with a much wider range than other markets. Singapore relies almost 100 per cent on imported produce to meet the needs of its 7 million consumers.

Fresh vegetable exports to Singapore have increased 6.2 per cent to 28,334 tonnes worth \$49.4 million with carrots accounting for almost half the volume. A range of smaller, higher value lines such as celery and head lettuce recorded strong gains of small bases.

Fresh Vegetable Exports to Singapore

	2015/16	2016/17	2017/18	2017/18 change to LY	2017/18 vol share	2017/18 Value
Value \$A Million	40.9	45.5	49.4	8.6%		
Volume Tonnes	28,849	26,669	28,334	6.2%		
A\$ per kg	\$1.42	\$1.71	\$1.74	2.2%		
	Tonnes	Tonnes	Tonnes			A\$ million
Carrots	14,733	13,292	13,613	2.4%	48.0%	12.5
Broccoli	4,128	4,227	4,889	15.7%	17.3%	12.5
Lettuce	317	471	618	31.2%	2.2%	4.4
Potatoes	1,645	1,707	1,876	9.9%	6.6%	2.7
Celery	854	1,250	1,956	56.5%	6.9%	2.6
Asparagus	346	307	313	2.2%	1.1%	2.2
Pumpkins & squash	1,349	1,527	1,625	6.5%	5.7%	2.1
Head Lettuce	166	118	323	172.7%	1.1%	1.2
Tomatoes	154	138	222	60.9%	0.8%	1.1
Onions	1,948	747	1,219	63.2%	4.3%	0.9
Cabbages & brassicas	1,183	995	477	-52.1%	1.7%	0.7
Spinach	50	48	67	41.0%	0.2%	0.5
Brussels Sprouts	59	38	38	-1.4%	0.1%	0.2
all other	1,915	1,805	1,098	-39.2%	3.9%	5.7
Total	28,849	26,669	28,334	6.2%	100%	49.4

Source: ABS (2018) via ITC Trademap; Fresh Intelligence analysis

Indonesia

Trade to Indonesia dropped 69 per cent to 1,951 tonnes due to access issues with potatoes. Most other lines less than 100 tonnes and carrots have almost disappeared.

Fresh Vegetable Exports to Indonesia

	2015/16	2016/17	2017/18	2017/18 change to LY	2017/18 vol share	2017/18 Value
Value \$A Million	6.5	6.2	4.4	-29.8%		
Volume Tonnes	5,036	6,333	1,951	-69.2%		
A\$ per kg	\$1.29	\$0.98	\$2.23	127.8%		
	Tonnes	Tonnes	Tonnes			A\$ million
Potatoes	1,980	5,278	1,366	-74.1%	70.0%	1.2
Lettuce	52	90	67	-25.1%	3.5%	0.4
Cabbages & brassicas	92	92	83	-9.3%	4.3%	0.3
Tomatoes	38	30	33	12.1%	1.7%	0.2
Broccoli	46	89	43	-51.8%	2.2%	0.2
Head Lettuce	116	16	28	80.0%	1.4%	0.1
Onions	234	338	182	-46.2%	9.3%	0.1
Pumpkins & squash	96	86	49	-43.5%	2.5%	0.1
Celery	50	74	55	-25.7%	2.8%	0.1
Spinach	13	14	15	8.4%	0.8%	0.1
Carrots	2,192	188	1	-99.3%	0.1%	0.0
all other	127	39	29	-26.5%	1.5%	1.5
Total	5,036	6,333	1,951	-69.2%	100%	4.4

Source: ABS (2018) via ITC Trademap; Fresh Intelligence analysis

Japan

Exports to Japan decreased 27 per cent with falls of 16 – 30 per cent in the major lines and over 90 per cent falls in the smaller lines that had been showing some promising growth. Japan is the main export market for Australian asparagus.

Fresh Vegetable Exports to Japan

	2015/16	2016/17	2017/18	2017/18 change to LY	2017/18 vol share	2017/18 Value
Value \$A Million	20.4	34.3	30.4	-11.2%		
Volume Tonnes	9,363	14,532	10,604	-27.0%		
A\$ per kg	\$2.17	\$2.36	\$2.87	21.7%		
	Tonnes	Tonnes	Tonnes			A\$ million
Asparagus	3,222	4,085	2,861	-30.0%	27.0%	21.4
Onions	4,364	5,494	4,223	-23.1%	39.8%	3.3
Carrots	1,084	3,875	3,223	-16.8%	30.4%	3.0
Broccoli	479	812	159	-80.4%	1.5%	0.4
Brussels Sprouts	62	69	69	0.4%	0.7%	0.3
Leeks	57	57	34	-40.6%	0.3%	0.1
Celery	76	64	3	-95.8%	0.0%	0.0
Pumpkins & squash	13	47	4	-92.2%	0.0%	0.0
all other	5	29	29	-0.4%	0.3%	2.0
Total	9,363	14,532	10,604	-27.0%	100%	30.4

Source: ABS (2018) via ITC Trademap; Fresh Intelligence analysis

South Korea

Potatoes account for 99 per cent of Australian fresh vegetable exports to South Korea. Under the KAFTA (Korea Australia Free Trade Agreement) since December 2014 Australia has a seasonal tariff free access for chipping potatoes from December to April and this outcome has helped drive export volumes. The United States is the only other potato supplier and Australia holds 60 per cent share of the potato imports for processing.

Overall South Korea's imports of fresh vegetables from all sources were 337,000 tonnes, with carrots, mostly from China accounting for 30 per cent of the total imports of fresh vegetables.

Fresh Vegetable Exports to South Korea

	2015/16	2016/17	2017/18	2017/18 change to LY	2017/18 vol share	2017/18 Value
Value \$A Million	15.0	13.2	13.7	3.9%		
Volume Tonnes	24,612	20,826	20,718	-0.5%		
A\$ per kg	\$0.61	\$0.63	\$0.66	4.4%		
	Tonnes	Tonnes	Tonnes			A\$ million
Potatoes	24,269	20,634	20,519	-0.6%	99.0%	12.5
Asparagus	87	105	92	-12.2%	0.4%	0.7
Brussels Sprouts	113	83	104	25.9%	0.5%	0.4
Carrots	143	0	3	++	0.0%	0.0
all other	1	4	-		0.0%	0.0
Total	24,612	20,826	20,718	-0.5%	100%	13.7

Source: ABS (2018) via ITC Trademap; Fresh Intelligence analysis

Australia imported 2,709 tonnes of mushrooms from South Korea worth \$8.4 million.

Malaysia

Malaysia imports a wide range of vegetable products from Australia. The trade has reduced to around 20,000 tonnes from over 60,000 tonnes a decade ago due to the influence of cheaper exports from China exports. Carrots are the main product supplied with over 70 per cent share of exports.

In 2017/18 season exports lifted 8.1 per cent to 21,346 tonnes with good growth from carrots and also smaller lines broccoli and pumpkins.

Fresh Vegetable Exports to Malaysia

	2015/16	2016/17	2017/18	2017/18 change to LY	2017/18 vol share	2017/18 Value
Value \$A Million	22.0	20.9	22.0	5.6%		
Volume Tonnes	25,989	19,828	21,436	8.1%		
A\$ per kg	\$0.85	\$1.05	\$1.03	-2.3%		
	Tonnes	Tonnes	Tonnes			A\$ million
Carrots	14,724	14,084	15,162	7.6%	70.7%	12.8
Celery	2,149	1,915	1,921	0.3%	9.0%	2.7
Potatoes	2,481	1,694	1,646	-2.8%	7.7%	2.0
Onions	5,972	1,464	1,976	35.0%	9.2%	1.2
Broccoli	210	212	302	42.5%	1.4%	0.9
Pumpkins & squash	90	122	161	31.7%	0.7%	0.4
Lettuce	87	95	74	-22.3%	0.3%	0.3
Cabbages & brassicas	42	34	59	73.4%	0.3%	0.2
Asparagus	24	36	33	-7.4%	0.2%	0.2
all other	212	172	102	-40.5%	0.5%	1.3
Total	25,989	19,828	21,436	8.1%	100%	22.0

Source: ABS (2018) via ITC Trademap; Fresh Intelligence analysis

Hong Kong

Exports of fresh vegetables to Hong Kong increased 18 per cent in 2018 to 8,769 tonnes with a strong lift in onions, broccoli and lettuce. Very little, if any, fresh vegetables are re-exported from Hong Kong to China in contrast to the fresh fruit position according to Hong Kong Customs data.

Fresh Vegetable Exports to Hong Kong

	2015/16	2016/17	2017/18	2017/18 change to LY	2017/18 vol share	2017/18 Value
Value \$A Million	7.3	15.7	17.2	9.7%		
Volume Tonnes	6,853	7,431	8,769	18.0%		
A\$ per kg	\$1.06	\$2.11	\$1.96	-7.1%		
	Tonnes	Tonnes	Tonnes			A\$ million
Carrots	3,220	3,427	3,467	1.2%	39.5%	3.3
Lettuce	221	279	382	36.8%	4.4%	2.9
Potatoes	1,544	1,342	1,463	9.0%	16.7%	2.1
Asparagus	165	262	224	-14.4%	2.6%	2.0
Onions	986	882	2,037	131.0%	23.2%	1.5
Broccoli	96	149	223	50.3%	2.5%	0.8
Spinach	44	43	45	3.2%	0.5%	0.3
Celery	47	130	148	13.8%	1.7%	0.3
Pumpkins & squash	89	91	111	22.6%	1.3%	0.2
Tomatoes	67	45	46	2.1%	0.5%	0.2
all other	374	780	623	-20.2%	7.1%	3.7
Total	6,853	7,431	8,769	18.0%	100%	17.2

Source: ABS (2018) via ITC Trademap; Fresh Intelligence analysis

China

Nine tonnes of asparagus was the only recorded fresh vegetable export to China in 2017/18. China imported around 5,000 tonnes from all sources in contrast to 5 million tonnes exported.

Fresh Vegetable Exports to China

	2015/16	2016/17	2017/18	2017/18 change to LY	2017/18 vol share	2017/18 Value
Value \$A Million	0.1	0.2	0.1	-72.3%		
Volume Tonnes	11	51	9	-82.9%		
A\$ per kg	\$4.88	\$3.59	\$5.84	62.3%		
	Tonnes	Tonnes	Tonnes			A\$ million
Asparagus	11	5	9		100.0%	0.05
Cabbages & brassicas	-	17	-	-100.0%	0.0%	-
all other	-	29	-		0.0%	-
Total	11	51	9	-82.9%	100%	0.05

Source: ABS (2018) via ITC Trademap; Fresh Intelligence analysis

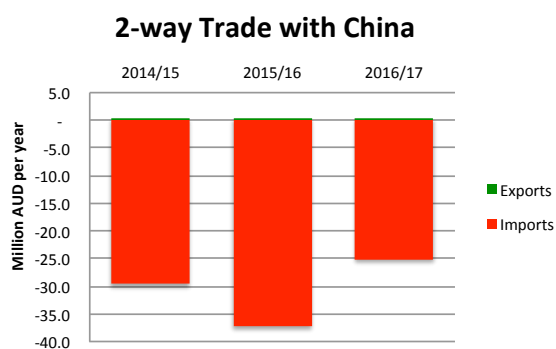
China is a supplier of garlic, peas and onions to Australia. These imports from China declined 6.8 per cent to 14,456 tonnes, mostly garlic and onions with a small volume of Asian style fresh peas.

Fresh Vegetable Imports from China

	2015/16	2016/17	2017/18	2017/18 change to LY	2017/18 vol share	2017/18 Value
Value \$A Million	29.7	37.2	25.1	-32.4%		
Volume Tonnes	11,882	15,518	14,456	-6.8%		
A\$ per kg	\$2.50	\$2.39	\$1.74	-27.4%		
	Tonnes	Tonnes	Tonnes			A\$ million
Garlic	8,415	8,759	9,417	7.5%	65.1%	18.0
Onions	2,272	5,684	3,740	-34.2%	25.9%	2.5
Mushrooms	377	485	526	8.5%	3.6%	2.4
Peas	440	452	483	6.8%	3.3%	1.9
all other	378	138	290	110.6%	2.0%	0.4
Total	11,882	15,518	14,456	-6.8%	100%	25.1

Source: ABS (2018) via ITC Trademap; Fresh Intelligence analysis

The two-way trade balance was heavily import weighted with 99.9 per cent and 0.1 per cent exported.



Thailand

Trade to Thailand increased 112 per cent to 8,683 tonnes with a strong lift in carrots, onions and potatoes to finish higher than the previous 2 seasons.

Fresh Vegetable Exports to Thailand

	2015/16	2016/17	2017/18	2017/18 change to LY	2017/18 vol share	2017/18 Value
Value \$A Million	4.8	4.4	7.3	66.8%		
Volume Tonnes	6,316	4,093	8,683	112.1%		
A\$ per kg	\$0.76	\$1.06	\$0.84	-21.4%		
	Tonnes	Tonnes	Tonnes			A\$ million
Carrots	2,991	2,225	3,273	47.1%	37.7%	2.7
Onions	2,629	1,125	3,201	184.5%	36.9%	1.9
Potatoes	500	500	2,000	300.0%	23.0%	1.1
Lettuce	35	62	55	-11.2%	0.6%	0.5
Broccoli	88	83	88	6.2%	1.0%	0.3
Spinach	17	14	13	-2.0%	0.2%	0.2
Celery	22	36	39	8.6%	0.5%	0.1
all other	33	48	13	-72.8%	0.2%	0.5
Total	6,316	4,093	8,683	112.1%	100%	7.3

Source: ABS (2018) via ITC Trademap; Fresh Intelligence analysis

Taiwan

Onion exports to Taiwan increased 144 per cent and accounted for 82 per cent of the total imports. Despite the large increase overall trade lifted 3.2 per cent after strong demand for carrots in 2016/17 following the typhoon damage abated.

Fresh Vegetable Exports to Taiwan

	2015/16	2016/17	2017/18	2017/18 change to LY	2017/18 vol share	2017/18 Value
Value \$A Million	5.1	8.3	6.9	-16.9%		
Volume Tonnes	4,326	6,437	6,674	3.7%		
A\$ per kg	\$1.17	\$1.30	\$1.04	-19.9%		
	Tonnes	Tonnes	Tonnes			A\$ million
Onions	1,818	2,247	5,495	144.5%	82.3%	3.4
Asparagus	180	227	264	16.5%	4.0%	2.1
Potatoes	1,347	939	571	-39.2%	8.6%	0.6
Cabbages & brassicas	0	199	120	-39.8%	1.8%	0.3
Broccoli	308	219	75	-65.6%	1.1%	0.2
Carrots	659	2,575	138	-94.6%	2.1%	0.1
all other	13	31	10	-66.4%	0.2%	0.2
Total	4,326	6,437	6,674	3.7%	100%	6.9

Source: ABS (2018) via ITC Trademap; Fresh Intelligence analysis

Taiwan supplied 15.3 tonnes of mushrooms as the only import product recorded. This was 5 tonnes less than last year.

United Arab Emirates

The United Arab Emirates, Australia's largest fresh vegetable destination by volume lifted 8.5 per cent to 39,906 tonnes worth \$37.6 million. Carrot exports mostly from Western Australia contributed to 85 per cent of the fresh vegetable exports followed by potatoes and onions. Onion exports lifted 73 per cent and 8 per cent share. There are more than 10 other fresh vegetable products that complete the remaining 5 per cent share with small volumes.

Fresh Vegetable Exports to United Arab Emirates

	2015/16	2016/17	2017/18	2017/18 change to LY	2017/18 vol share	2017/18 Value
Value \$A Million	34.5	35.9	37.5	4.3%		
Volume Tonnes	38,906	36,774	39,906	8.5%		
A\$ per kg	\$0.89	\$0.98	\$0.94	-3.9%		
	Tonnes	Tonnes	Tonnes			A\$ million
Carrots	33,034	32,148	34,122	6.1%	85.5%	29.6
Potatoes	2,129	1,784	1,697	-4.9%	4.3%	2.1
Onions	2,465	1,831	3,181	73.7%	8.0%	2.1
Celery	241	289	420	45.4%	1.1%	1.3
Broccoli	436	207	169	-18.5%	0.4%	0.6
Pumpkins & squash	175	137	96	-29.8%	0.2%	0.2
all other	425	377	221	-41.3%	0.6%	1.6
Total	38,906	36,774	39,906	8.5%	100%	37.5

Source: ABS (2018) via ITC Trademap; Fresh Intelligence analysis

Saudi Arabia

Saudi Arabia is the second largest Middle East export market for Australian vegetables and as with most Middle Eastern markets carrots dominate with 98 per cent share. The market expanded 5.6 per cent and some of this is likely to have stemmed from more direct trade rather than through UAE. There are smaller opportunities for other vegetables although competition with local production and the closer producers in Lebanon, Jordan and Egypt inhibits growth.

Fresh Vegetable Exports to Saudi Arabia

	2015/16	2016/17	2017/18	2017/18 change to LY	2017/18 vol share	2017/18 Value
Value \$A Million	9.5	13.4	14.7	9.0%		
Volume Tonnes	11,316	14,953	15,789	5.6%		
A\$ per kg	\$0.84	\$0.90	\$0.93	3.2%		
	Tonnes	Tonnes	Tonnes			A\$ million
Carrots	11,133	14,796	15,498	4.7%	98.2%	14.1
Broccoli	101	56	196	253.5%	1.2%	0.5
Potatoes	16	61	21	-65.6%	0.1%	0.0
Onions	51	26	65	150.0%	0.4%	0.0
Capsicum	1	-	8		0.1%	0.0
all other	14	14	-	-100.0%	0.0%	0.0
Total	11,316	14,953	15,789	5.6%	100%	14.7

Source: ABS (2018) via ITC Trademap; Fresh Intelligence analysis

Bahrain Kuwait Qatar

Carrots dominate the trade to Bahrain, Kuwait and Qatar as they do with the main Middle East markets with up to 95 per cent share of exports to these markets.

Fresh Vegetable Exports to Bahrain

	2015/16	2016/17	2017/18	2017/18 change to LY	2017/18 vol share	2017/18 Value
Value \$A Million	3.5	3.3	3.8	16.0%		
Volume Tonnes	3,803	3,473	4,380	26.1%		
A\$ per kg	\$0.92	\$0.95	\$0.88	-8.0%		
	Tonnes	Tonnes	Tonnes			A\$ million
Carrots	3,489	3,276	4,181	27.6%	95.5%	3.52
Potatoes	41	38	38	0.2%	0.9%	0.09
Broccoli	62	28	23	-17.1%	0.5%	0.09
Onions	183	111	118	6.7%	2.7%	0.07
Celery	17	12	12	-3.0%	0.3%	0.04
all other	10	9	9	0.2%	0.2%	0.03
Total	3,803	3,473	4,380	26.1%	100%	3.84

Source: ABS (2018) via ITC Trademap; Fresh Intelligence analysis

Fresh Vegetable Exports to Kuwait

	2015/16	2016/17	2017/18	2017/18 change to LY	2017/18 vol share	2017/18 Value
Value \$A Million	2.46	2.62	3.37	28.6%		
Volume Tonnes	2,718	2,966	3,830	29.1%		
A\$ per kg	\$0.90	\$0.88	\$0.88	-0.4%		
	Tonnes	Tonnes	Tonnes			A\$ million
Carrots	2,420	2,849	3,503	23.0%	91.5%	2.85
Broccoli	99	21	127	491.7%	3.3%	0.33
Onions	169	80	185	130.0%	4.8%	0.14
all other	29	16	15	-3.0%	0.4%	0.05
Total	2,718	2,966	3,830	29.1%	100%	3.37

Source: ABS (2018) via ITC Trademap; Fresh Intelligence analysis

Fresh Vegetable Exports to Qatar

	2015/16	2016/17	2017/18	2017/18 change to LY	2017/18 vol share	2017/18 Value
Value \$A Million	6.2	6.7	9.3	38.2%		
Volume Tonnes	7,670	7,345	10,588	44.1%		
A\$ per kg	\$0.81	\$0.92	\$0.88	-4.1%		
	Tonnes	Tonnes	Tonnes			A\$ million
Carrots	7,302	7,044	9,987	41.8%	94.3%	8.4
Onions	111	122	429	251.4%	4.1%	0.3
Broccoli	58	32	46	42.5%	0.4%	0.2
Potatoes	123	113	90	-20.5%	0.8%	0.2
all other	77	34	37	7.5%	0.3%	0.2
Total	7,670	7,345	10,588	44.1%	100%	9.3

Source: ABS (2018) via ITC Trademap; Fresh Intelligence analysis

Europe

Onions are the major product exported to Europe during the February to April seasonal window, mostly from Tasmania though demand has been falling rapidly and are down to just over 8,000 tonnes. The longer-term average trade to Europe (since 2000) was around 35,000 tonnes of onions per year until 2014.

Carrot exports to France increased 12 per cent.

Fresh Vegetable Exports to EUROPE

	2015/16	2016/17	2017/18	2017/18 change to LY	2017/18 vol share	2017/18 Value
Value \$A Million	15.7	7.4	9.4	25.7%		
Volume Tonnes	23,449	11,206	9,086	-18.9%		
A\$ per kg	\$0.67	\$0.66	\$1.03	55.1%		
	Tonnes	Tonnes	Tonnes			A\$ million
Onions	22,131	10,412	8,195	-21.3%	90.2%	6.2
Carrots	1,318	794	891	12.2%	9.8%	0.9
Total	23,449	11,206	9,086	-18.9%	100%	9.4

Source: ABS (2018) via ITC Trademap; Fresh Intelligence analysis

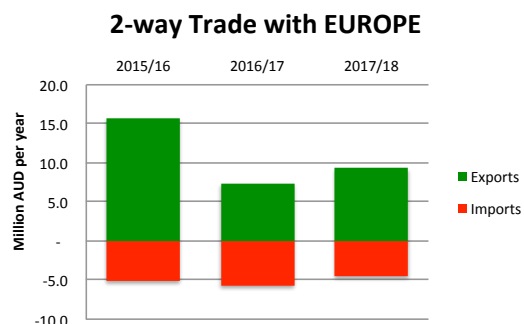
Fresh vegetable imports from Europe consist of mostly garlic from Spain and small quantities of special onions from Netherlands. The imports increased 8.2 per cent last year.

Fresh Vegetable Imports from EUROPE

	2015/16	2016/17	2017/18	2017/18 change to LY	2017/18 vol share	2017/18 Value
Value \$A Million	5.1	5.7	4.5	-21.2%		
Volume Tonnes	1,594	2,238	2,421	8.2%		
A\$ per kg	\$3.19	\$2.53	\$1.84	-27.2%		
	Tonnes	Tonnes	Tonnes			A\$ million
Garlic	1,090	1,321	1,184	-10.4%	48.9%	1.4
Onions	344	541	787	45.5%	32.5%	3.6
Peas	96	290	349	20.3%	14.4%	0.5
Asparagus	-	10	4	-54.3%	0.2%	0.0
Mushrooms	65	76	18	-75.6%	0.8%	0.1
Total	1,594	2,238	2,421	8.2%	100%	4.5

Source: ABS (2018) via ITC Trademap; Fresh Intelligence analysis

The trade balance with Europe still favours exports though the balance is shifting with lower export volumes and increasing imports.



New Zealand

Trade to New Zealand increased 18.2 per cent to 3,556 tonnes worth \$12.4 million.

Most capsicum and tomatoes enter New Zealand under an irradiation protocol. Trade however is a fraction of past volumes. Fresh beans account for over 50 per cent of the fresh vegetable exports.

A large component of “other” includes vegetables “not specified”

Fresh Vegetable Exports to New Zealand

	2015/16	2016/17	2017/18	2017/18 change to LY	2017/18 vol share	2017/18 Value
Value \$A Million	9.9	11.5	12.4	7.6%		
Volume Tonnes	3,413	3,008	3,556	18.2%		
A\$ per kg	\$2.91	\$3.82	\$3.47	-9.0%		
	Tonnes	Tonnes	Tonnes			A\$ million
Beans	1,767	1,557	1,814	16.5%	51.0%	7.6
Capsicum	357	201	167	-16.7%	4.7%	0.7
Tomatoes	354	126	251	100.1%	7.1%	0.5
Cucumbers	32	61	219	259.5%	6.2%	0.2
Lettuce	6	49	3	-94.2%	0.1%	0.0
all other	895	1,015	1,101	8.5%	31.0%	3.3
Total	3,413	3,008	3,556	18.2%	100%	12.4

Source: ABS (2018) via ITC Trademap; Fresh Intelligence analysis

(++) more than 500% increase

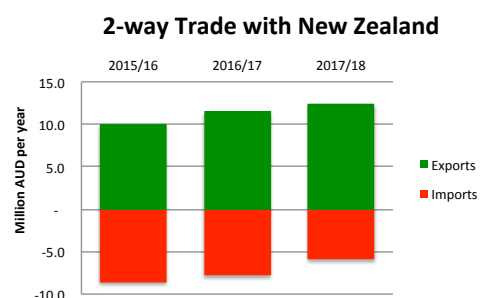
Capsicum and tomatoes are also the key imported products by Australia from New Zealand.

Fresh Vegetable Imports from New Zealand

	2015/16	2016/17	2017/18	2017/18 change to LY	2017/18 vol share	2017/18 Value
Value \$A Million	8.59	7.83	5.96	-23.8%		
Volume Tonnes	2,809	2,382	2,098	-11.9%		
A\$ per kg	\$3.06	\$3.29	\$2.84	-13.5%		
	Tonnes	Tonnes	Tonnes			A\$ million
Capsicum	1,371	1,308	924	-29.4%	44.0%	4.01
Tomatoes	1,386	922	926	0.5%	44.2%	1.79
Onions	2	99	186	87.9%	8.9%	0.11
Peas	-	43	60	39.8%	2.9%	0.05
Asparagus	38	6	2	-65.9%	0.1%	0.01
Beans	2	-	-		0.0%	-
all other	10	4	-	-100.0%	0.0%	0.01
Total	2,809	2,382	2,098	-11.9%	100%	5.96

Source: Australian Bureau of Statistics; Fresh Intelligence analysis

In a two-way trade balance by value between Australia and New Zealand, exports to New Zealand exceed imports 67 per cent to 33 per cent



United States

Onions and Asparagus were **imported** from the United States to meet seasonal and variety niches in addition to small volumes of garlic and beans.

There were no measurable exports to the United States.

Fresh Vegetable Imports from United States

	2015/16	2016/17	2017/18	2017/18 change to LY	2017/18 vol share	2017/18 Value
Value \$A Million	3.12	3.00	1.96	-34.7%		
Volume Tonnes	1,888	2,551	937	-63.3%		
A\$ per kg	\$1.65	\$1.17	\$2.09	77.7%		
	Tonnes	Tonnes	Tonnes			A\$ million
Asparagus	116	75	172	130.2%	18.4%	0.81
Onions	1,568	1,944	530	-72.7%	56.5%	0.63
Garlic	28	149	22	-85.2%	2.3%	0.11
Beans	167	360	116	-67.7%	12.4%	0.21
all other	9	23	97	327.9%	10.3%	0.20
Total	1,888	2,551	937	-63.3%	100%	1.96

Source: ABS (2018) via ITC Trademap; Fresh Intelligence analysis

Mexico

Australia **imports** asparagus from Mexico and Peru to meet Australia's "out of season" needs. Garlic is also imported from Mexico though declined over 40 per cent each year over past 2 years.

Fresh Vegetable Imports from Mexico

	2015/16	2016/17	2017/18	2017/18 change to LY	2017/18 vol share	2017/18 Value
Value \$A Million	21.4	23.8	19.2	-19.4%		
Volume Tonnes	4,694	4,245	3,748	-11.7%		
A\$ per kg	\$4.55	\$5.61	\$5.12	-8.7%		
	Tonnes	Tonnes	Tonnes			A\$ million
Asparagus	2,360	3,098	3,082	-0.5%	82.2%	16.1
Garlic	2,335	1,147	666	-41.9%	17.8%	3.1
Total	4,694	4,245	3,748	-11.7%	100%	19.2

Source: ABS (2018) via ITC Trademap; Fresh Intelligence analysis

Peru

Imports of asparagus from Peru declined a marginal 1.7 per cent in 2017/18 and is the alternative asparagus supplier serving a slightly different window to Mexico mostly from May to August.

Fresh Vegetable Imports from Peru

	2015/16	2016/17	2017/18	2017/18 change to LY	2017/18 vol share	2017/18 Value
Value \$A Million	6.7	6.4	5.4	-15.5%		
Volume Tonnes	1,130	1,055	1,037	-1.7%		
A\$ per kg	\$5.90	\$6.10	\$5.25	-14.0%		
	Tonnes	Tonnes	Tonnes			A\$ million
Asparagus	1,130	1,033	1,015	-1.7%	97.9%	5.3
Garlic	-	22	22		2.1%	0.1
Total	1,130	1,055	1,037	-1.7%	100%	5.4

Source: ABS (2018) via ITC Trademap; Fresh Intelligence analysis

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International Trade Centre – *Trade Map* - retrieved August 2018 from www.trademap.org

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