SUMMERFRUIT GLOBAL MARKET TRADE ANALYSIS 2021/22

A statistics resource for Australian Summerfruit growers and exporters prepared by Fresh Intelligence for Summerfruit Australia Limited and Hort Innovation

September 2022

This report has been produced as part of the strategic levy investment project *Summerfruit market access and trade development project (SF19000)*, part of the Hort Innovation Summerfruit Fund.

Contents

Definitions

AUD	Australian Dollars
CIF	Cost, Insurance and Freight (nominally import price measures)
FAOSTAT	Food and Agriculture Organization Corporate Statistical Database
FOB	Free on Board (nominally export price measures)
IHS	IHS Markit – Market Intelligence Services
ITC	International Trade Centre
MIRROR DATA	An aggregate measure of supplier country data when primary data is not available
PPP	Purchase Power Parity
USD	United States Dollars

Guide to Tables

		Calendar years (unless noted otherwise)					1 yr change 2019 vs 2018	5 year CAGR Compound annual growth rate	share of total in 2019		
		2015	2016	2017	2018	2019	1 yr chg	5 yr trend	2019 share		
Total Tonnes imported	Volume Tonnes	1,075	2,076	2,327	3,156	3,914	24%	38%	100%		
Total CIF Value imported	Value Million AUD	**4.5**	**9.2**	**10.9**	**14.9**	**18.5**	**24%**	**42%**	**100%**		
Average CIF price	Unit Value AU$ / Kg	4.21	4.41	4.68	4.74	4.73	0%	3%		1.00	Index : 2019 average CIF price all imports = 1.00 Example 4.73 = 1.00
Tonnes from supplier 1	Australia	626	1,045	825	1,335	1,901	42%	32%	48.6%		
CIF Value supplied by 1	Value Million AUD	**3.09**	**5.37**	**5.88**	**8.61**	**11.21**	**30%**	**38%**	**60.5%**		
CIF Unit Value of supplied	Unit Value AU$ / Kg	4.94	5.14	7.13	6.45	5.90	-9%	5%		1.25	Supplier's Index price to average CIF price: Example 1.25 = 25% premium to average price
Tonnes from supplier 2	Kenya	80	226	607	595	589	-1%	65%	15.0%		
CIF Value supplied by 2	Value Million AUD	**0.20**	**0.64**	**1.94**	**1.72**	**2.00**	**16%**	**77%**	**10.8%**		
CIF Unit Value of supplied	Unit Value AU$ / Kg	2.53	2.81	3.20	2.90	3.39	17%	8%		0.72	Supplier's Index price to average CIF price: Example 0.72 = 28% discount to average price

Introduction – Global Summerfruit Trade

The global production of summerfruit (peaches, nectarines, plums and apricots) in 2020 was 40 million tonnes (FAOSTAT data). China produced 53 per cent of the world's summerfruit. Collectively European countries produced 15 per cent of the global supply. Chile was the largest producer in the southern hemisphere producing 729,000 tonnes or 1.8 per cent of global production.

Global trade in summerfruit reported by UN Comtrade in 2021/22 was 2.8 million tonnes. This means that approximately 7 per cent of production is traded internationally as fresh fruit. The exports of Southern Hemisphere producers were almost 26 per cent of their production indicating a strong demand for counter seasonal fruit. Southern Hemisphere producers account for 4.3 per cent of global production of summerfruit yet account for 15.9 per cent of global export trade (Table A).

Table A: Global Production and Trade for Summerfruit

	Production	**Market share**	**Exports**	**Export share**	**Market share**
	Tonnes	of production	Tonnes	of production	of exports
Australia	**105,466**	**0.3%**	**17,548**	**16.6%**	**0.6%**
Chile	729,697	1.8%	301,452	41.3%	10.6%
South Africa	252,615	0.6%	127,459	50.5%	4.5%
New Zealand	4,700	0.0%	269	5.7%	0.0%
Argentina	397,579	1.0%	2,056	0.5%	0.1%
Peru	48,048	0.1%	1,409	2.9%	0.0%
Brazil	201,880	0.5%	83	0.0%	0.0%
Uruguay	13,457	0.0%	2	0.0%	0.0%
Total Southern Hemisphere	**1,753,442**	**4.3%**	**450,279**	**25.7%**	**15.9%**
EUROPE	6,374,709	15.7%	1,479,561	23.2%	52.1%
Turkey	2,054,502	5.1%	279,129	13.6%	9.8%
United States	836,462	2.1%	112,097	13.4%	3.9%
Iran	1,373,839	3.4%	111,602	8.1%	3.9%
China	21,518,340	53.1%	78,857	0.4%	2.8%
Other	*6,603,497*	*16%*	*326,559*		*12%*
Total	**40,514,791**	**100%**	**2,838,084**	**7.0%**	**100%**

Source: USDA, FAOSTAT, ITC Trade Map; Fresh Intelligence analysis

By comparison Australia's production of just over 105,000 tonnes is equivalent to 0.3 per cent of the global production and 0.6 per cent of global trade.

The global trade volume (2.8 million tonnes) has decreased on average by 5.1 per cent per year over the past 5 years however exports from the southern hemisphere have increased 6.5 per cent over the same period indicating increased supply of counter seasonal fruit from a smaller supply base (Table B).

Chile is the largest single country exporter of summerfruit exported over 300,000 tonnes in 2021/22, which was over 40 per cent of their production, mainly to United States and Europe though increasingly to Asia. Europe is the largest supplier by region with combined exports of 1.48 million tonnes although intra-European trade reduces the net exports. The largest external suppliers to Europe are South Africa and Chile.

Due to the aligned production seasons with Australia only Chile and South Africa directly impact as a competitor in Australia's markets of interest in Asia and Middle East. New Zealand is a very small player, and Argentine and Peruvian volumes are not directed to Asian markets.

China is the largest exporter of summerfruit in Asia, recording 78,857 tonnes in 2021, though falling 40.5 per cent in the year with most trade to regional Asia outside Australia's supply season.

Table B Major export suppliers of summerfruit 2017 – 2022 with some of Australia's key competitors

	2017/18	2018/19	2019/20	2020/21	2021/22	1 yr chg	5 yr trend	2021/22
	Tonnes	Tonnes	Tonnes	Tonnes	Tonnes			
Australia	**17,769**	**23,045**	**21,269**	**20,983**	**17,548**	**-16.4%**	**-0.3%**	**0.6%**
Chile	244,356	281,263	254,088	246,383	301,452	22.4%	5.4%	10.6%
South Africa	80,241	69,207	73,273	116,982	127,459	9.0%	12.3%	4.5%
New Zealand	744	461	768	257	269	4.8%	-22.4%	0.0%
Argentina	5,900	6,469	3,787	4,891	2,056	-58.0%	-23.2%	0.1%
Peru	1,424	1,122	1,871	1,950	1,409	-27.7%	-0.3%	0.0%
Brazil	4	28	58	101	83	-18.3%	118.7%	0.0%
Uruguay	2	3	2	2	2	1.3%	7.7%	0.0%
Total Southern Hemisphere	**350,440**	**381,598**	**355,117**	**391,550**	**450,279**	**15.0%**	**6.5%**	**15.9%**
EUROPE	2,321,469	1,780,853	1,884,660	1,501,585	1,479,561	-1.5%	-10.7%	52.1%
Turkey	198,049	265,694	217,422	275,928	279,129	1.2%	9.0%	9.8%
United States	95,999	108,197	105,237	88,269	112,097	27.0%	4.0%	3.9%
Iran	68,361	49,294	86,281	187,574	111,602	-40.5%	13.0%	3.9%
China	117,952	97,761	160,616	132,557	78,857	-40.5%	-9.6%	2.8%
Other	339,921	446,835	584,515	460,354	326,559	-29.1%	-1.0%	12%
Global Exports	**3,492,191**	**3,130,232**	**3,393,848**	**3,037,817**	**2,838,084**	**-6.6%**	**-5.1%**	**100%**

Source: ITC Trademap; Fresh Intelligence analysis

Australian Summerfruit Export Summary

Exports of summerfruit in the 2021/22 season were **17,548** tonnes worth A$79.6m. This was 16.4 per cent lower than last year by volume (Table 1). The unit value was 3.4 per cent higher, and the overall value has decreased by 13.6 per cent. The MAT also at 17,548 tonnes in June was 3.0 per cent higher than in March indicating a slightly stronger finish.

Table 1 : Summerfruit Key Measures

EXPORTS	YTD	Chg LY	MAT
Volume (tonnes)	17,548	-16.4%	17,548
Value (M AUD)	79.59	-13.6%	79.6
$ per kg	$4.54	3.4%	$4.54

Source: IHS Global Trade Atlas (2022); Fresh Intelligence analysis

Exports to China recorded 11,646 tonnes, up 3 per cent and 66 per cent market share. The combined Hong Kong / China volume is 3 per cent lower. Singapore is 19 per cent lower to 1,739 tonnes and Malaysia is 28 per cent lower to 675 tonnes. Most other markets were also lower (Table 3). Access to Vietnam was gained late in the season and 51 tonnes were exported to Vietnam under the new protocol.

Peaches and Nectarines accounted for 63.7 per cent of the shipments to date and plums were 34.8 per cent share.

Table 2 Summerfruit exports by product

	July to June			
Market	**2021/22**	**Chg LY**	***Share***	MAT
	Tonnes	%	*%*	
Nectarines	7,646	-17%	*43.6%*	7,646
Peaches	3,533	-12%	*20.1%*	3,533
Plums	6,105	-17%	*34.8%*	6,105
Apricots	264	-36%	*1.5%*	264
Total Tonnes	**17,548**	**-16.4%**	*100.0%*	17,548

Table 3 : Summerfruit Exports by Market

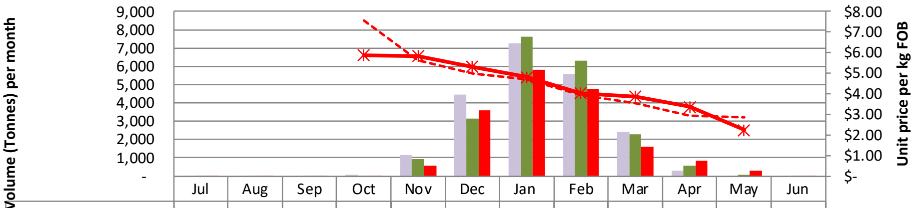
	July to June			
Market	**2021/22**	**Chg LY**	***Share***	***MAT***
	Tonnes	%	*%*	*Tonnes*
China	11,646	3%	*66.4%*	*11,646*
Singapore	1,739	-19%	*9.9%*	*1,739*
Hong Kong	880	-48%	*5.0%*	*880*
Malaysia	675	-28%	*3.8%*	*675*
United Arab Emirates	610	-53%	*3.5%*	*610*
Canada	300	-46%	*1.7%*	*300*
Taiwan	286	-28%	*1.6%*	*286*
Indonesia	285	-46%	*1.6%*	*285*
Qatar	224	-38%	*1.3%*	*224*
Kuwait	163	-64%	*0.9%*	*163*
Saudi Arabia	157	-61%	*0.9%*	*157*
New Caledonia	142	53%	*0.8%*	*142*
Cambodia	96	26%	*0.5%*	*96*
Philippines	80	-16%	*0.5%*	*80*
Oman	52	-74%	*0.3%*	*52*
Vietnam	51	new access	*0.3%*	*51*
all other	*441*		*2.5%*	*0.0%*
Total YTD Tonnes	**17,548**	**-16.4%**	*100.0%*	*17,548*

Table 4 Summerfruit exports by state

	July to June			
Market	**2021/22**	**Chg LY**	***Share***	MAT
	Tonnes	%	*%*	
Victoria	15,291	-18%	*87.1%*	15,291
New South Wales	1,279	-26%	*7.3%*	1,279
South Australia	694	129%	*4.0%*	694
Queensland	193	238%	*1.1%*	193
Western Australia	83	-75%	*0.5%*	83
Tasmania	1		*0.0%*	1
Total Tonnes	**17,548**	**-16.4%**	*100.0%*	17,548

By state, 87 per cent have been exported from Victoria.
On a month to month basis the April to June exports were higher than previous years.

Figure 1 Summerfruit Exports per month vs last 2 years



	Jul	Aug	Sep	Oct	Nov	Dec	Jan	Feb	Mar	Apr	May	Jun
FY 2020	12	8	11	63	1,154	4,456	7,278	5,601	2,402	279	4	0
FY 2021	0	0	5	38	946	3,149	7,619	6,289	2,296	585	53	3
FY 2022	3	26	1	37	583	3,583	5,827	4,750	1,589	823	301	25
$ per kg FY 2021				$7.57	$5.61	$5.00	$4.71	$3.94	$3.53	$2.93	$2.87	
$ per kg FY 2022				$5.88	$5.84	$5.32	$4.81	$4.02	$3.87	$3.37	$2.23	

Key Protocol Markets

China

China's imports are heavily influenced by counter season suppliers including Australia. In 2020/21 China recorded imports of 148,829 tonnes of summerfruit, of which 98 per cent was imported from Southern Hemisphere suppliers. Imports accounted for 0.7 per cent of the total summerfruit consumption since China is a major producer for their own needs in the northern season.

China – Key Numbers		
Population	1,402	million
Urban share	61%	
GDP per capita	10,500	USD
Summerfruit Production	21,518,340	tonnes
Imports	148,829	tonnes
5 yr import trend	19.9%	per year
Reliance on Imports	0.7%	
Southern seasonality	98%	
Imports from Australia	11,615	tonnes
Key Competitor	Chile	
Market share (seasonal)	8.0%	
Tariff	Eliminated	
Access	Protocol	PFA, CT, Fum
Exports	78,857	tonnes
Per Capita Consumption	15.40	kg p.a.

Summerfruit imports increased 50 per cent overall, though Australia was 2 per cent lower while supplies from Chile increased by 61 per cent and account for 90 per cent of the imports. Small volume are recorded from United States and Spain during the northern season though these compete with the large local production.

The import growth trend has been 20 per cent per year over the last 5 years (Table 1.1).

Plums account for 70 per cent of summerfruit imports by China and peaches and nectarines account for the remaining 30 per cent with no recorded imports of apricots.

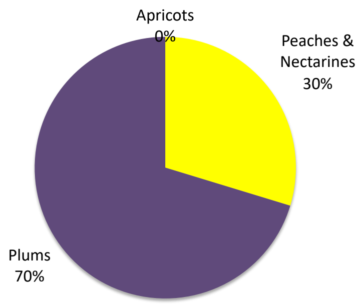
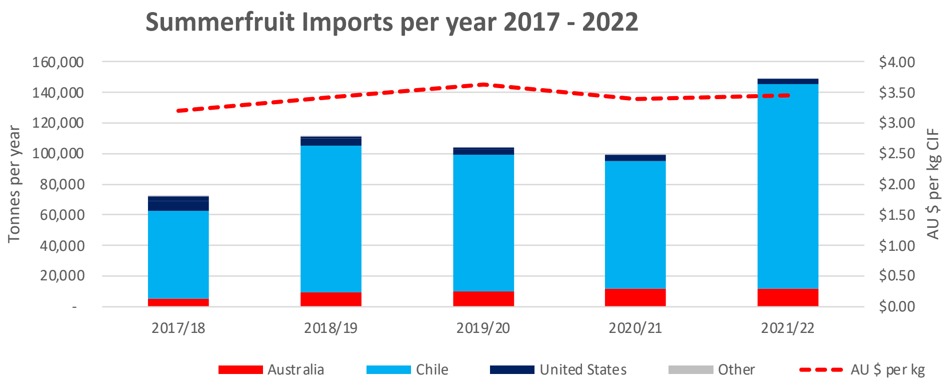


Figure 1.1 Import share by product



Source: IHS Global Trade Atlas; Fresh Intelligence analysis

Figure 1.2 Summerfruit imports by annual volume and unit price (AU$ per kg CIF equivalent)

Australia retained the No.2 southern supplier to China after Chile albeit at a smaller volume. South Africa does not have access and New Zealand does not have a large export capability for summerfruit in contrast to their other products.

Table 1.1 Summerfruit imports by supplier volume, CIF value and unit value (net imports)

	2017/18	2018/19	2019/20	2020/21	2021/22	1 yr chg	5 yr trend	2021/22
						%	% CAGR	share %
Volume Tonnes	72,066	111,596	103,911	99,371	148,829	50%	20%	100%
Value Million AUD	**231.0**	**381.4**	**377.3**	**336.4**	**514.5**	**53%**	**22%**	**100%**
Unit Value AU$ / Kg	3.21	3.42	3.63	3.39	3.46	2%	2%	1.00
Australia	5,149	9,452	10,216	11,910	11,615	-2%	23%	7.8%
Value Million AUD	**20.7**	**46.0**	**54.6**	**59.5**	**56.3**	**-5%**	**28%**	**10.9%**
Unit Value AU$ / Kg	4.02	4.87	5.34	5.00	4.85	-3%	5%	1.40
Chile	57,243	95,930	88,901	83,080	133,907	61%	24%	90.0%
Value Million AUD	**172.3**	**308.6**	**300.6**	**250.8**	**436.6**	**74%**	**26%**	**84.9%**
Unit Value AU$ / Kg	3.01	3.22	3.38	3.02	3.26	8%	2%	0.94
United States	6,926	4,479	3,683	3,991	2,987	-25%	-19%	2.0%
Value Million AUD	29.48	21.14	18.24	24.32	19.86	**-18%**	**-9%**	**3.9%**
Unit Value AU$ / Kg	4.26	4.72	4.95	6.09	6.65	9%	12%	1.92
Spain	2,741	1,386	1,111	391	320	-18%	-42%	0.2%
Value Million AUD	**8.47**	**4.48**	**3.96**	**1.71**	**1.73**	**1%**	**-33%**	**0.3%**
Unit Value AU$ / Kg	3.09	3.23	3.57	4.38	5.39	23%	15%	1.56
All Other	0	0	-	-	-			
Value Million AUD	**0.00**	**0.00**	**0.00**	**0.00**	**0.00**			
Unit Value AU$ / Kg								

Seasonality by Hemisphere	2017/18	2018/19	2019/20	2020/21	2021/22	1 yr chg	5 yr trend	2021/22
							% CAGR	share
Southern Hemisphere	**62,399**	**105,383**	**99,117**	**94,989**	**145,522**	**53%**	**24%**	**97.8%**
Value Million AUD	**193.08**	**354.62**	**355.14**	**310.40**	**492.88**	**59%**	**26%**	**95.8%**
Unit Value AU$ / Kg	3.09	3.37	3.58	3.27	3.39	4%	2%	0.98
Northern Hemisphere	**9,667**	**6,214**	**4,794**	**4,382**	**3,307**	**-25%**	**-24%**	**2.2%**
Value Million AUD	38.0	26.8	22.2	26.0	21.6	**-17%**	**-13%**	**4.2%**
Unit Value AU$ / Kg	3.93	4.31	4.63	5.94	6.53	10%	14%	1.89

Source: IHS Global Trade Atlas; Fresh Intelligence analysis

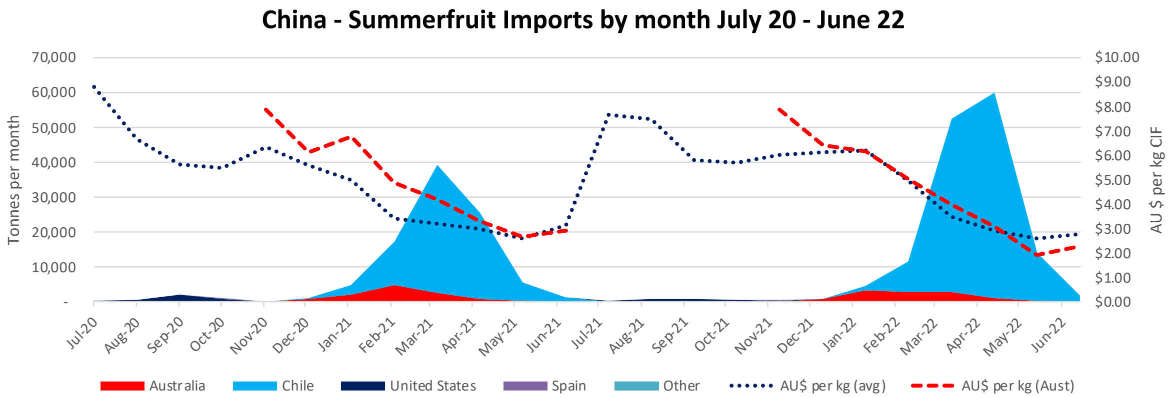
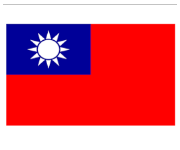


Figure 1.3 Monthly Summerfruit imports by volume and unit price (AU$ per kg CIF equivalent)

Insight

Given the strong counter seasonal demand that cannot be replaced by local production, and the known issues with the COVID19 related distribution imports should continue to increase and Australia remains in a competitive position geographically and quality wise.



Taiwan

Taiwan's imports are heavily influenced by United States supply with Chile being the main supplier in the southern season.

In 2021/22 Taiwan recorded imports of 21,023 tonnes of summerfruit, of which 36 per cent was imported from Southern Hemisphere suppliers including Australia.

Summerfruit imports increased 12 per cent overall, and 20 per cent during the southern season although Australia was down 28 per cent to 286 tonnes. Chile increased by 24 per cent to 7,350 tonnes.

Taiwan – Key Numbers		
Population	24	million
Urban share	79%	
GDP per capita	28,306	USD
Summerfruit Production	45,191	tonnes
Imports	21,023	tonnes
5 yr import trend	3.3%	per year
Reliance on Imports	46.5%	
Southern seasonality	36%	
Imports from Australia	286	tonnes
Key Competitor	Chile	
Market share (seasonal)	3.7%	
Tariff	20%	
Access	Protocol	PFA, CT, (Peach Nect only)
Exports	1	tonnes
Per Capita Consumption	2.77	kg p.a.

The United States was the largest supplier (62 per cent share). The import growth trend has lifted 3 per cent per year over the last 5 years (Table 2.1).

Peaches and Nectarines are the main products imported accounting for 81 per cent share and plums accounted for 19 per cent of the imported summerfruit, and no apricots. (Figure 2.1)

Imports accounted for 64 per cent of the total summerfruit consumption since Taiwan is only a small producer for their own needs in the northern season.

Price levels from United States are higher than Chile and contribute to higher average annual prices. Australia may target CIF prices in the range of US levels although selling summerfruit in the northern winter is more challenging competing with lower priced Chilean product.

Freight logistics during the COVID19 pandemic particularly in the United States contributed to the fall in import volumes in 2020/21 with the growth in 2021/22 returning to the longer-term growth trend.

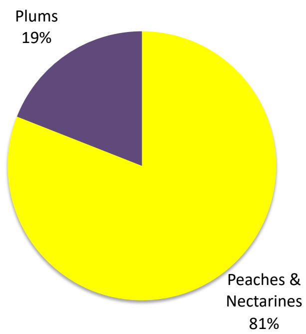
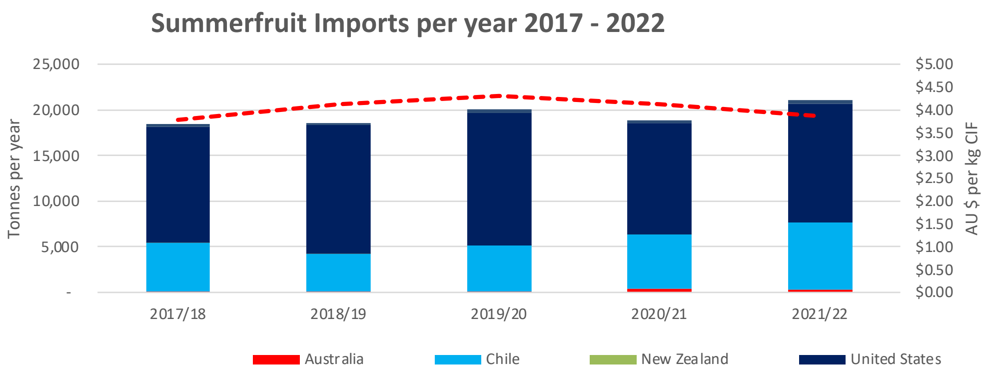


Figure 2.1 Import share by product



Source: IHS Global Trade Atlas; Fresh Intelligence analysis

Figure 2.2 Summerfruit imports by annual volume and unit price (AU$ per kg CIF equivalent)

Table 2.1 Summerfruit imports by supplier volume, CIF value and unit value (net imports)

	2017/18	2018/19	2019/20	2020/21	2021/22	1 yr chg	5 yr trend	2021/22
						%	% CAGR	share %
Volume Tonnes	18,443	18,573	20,053	18,808	21,023	12%	3%	100%
Value Million AUD	**69.9**	**76.5**	**86.5**	**77.7**	**81.0**	**4%**	**4%**	**100%**
Unit Value AU$ / Kg	3.79	4.12	4.31	4.13	3.85	-7%	0%	1.00
Australia	81	84	91	397	286	-28%	37%	1.4%
Value Million AUD	**0.2**	**0.2**	**0.3**	**1.4**	**0.9**	**-36%**	**38%**	**1.1%**
Unit Value AU$ / Kg	3.00	2.61	3.75	3.47	3.08	-11%	1%	0.80
Chile	5,374	4,185	5,000	5,920	7,350	24%	8%	35.0%
Value Million AUD	**12.5**	**9.4**	**13.8**	**12.9**	**16.6**	**29%**	**7%**	**20.5%**
Unit Value AU$ / Kg	2.32	2.25	2.77	2.17	2.25	4%	-1%	0.58
New Zealand	19	10	11	28				
Value Million AUD	0.12	0.05	0.07	0.27				
Unit Value AU$ / Kg	6.29	5.23	6.24	9.64				
United States	12,653	14,052	14,586	12,175	13,009	7%	1%	61.9%
Value Million AUD	**52.61**	**63.17**	**66.15**	**58.50**	**57.46**	**-2%**	**2%**	**70.9%**
Unit Value AU$ / Kg	4.16	4.50	4.54	4.81	4.42	-8%	2%	1.15
Japan	317	242	365	288	378	31%	5%	1.8%
Value Million AUD	4.42	3.66	6.06	4.69	6.09	**30%**	**8%**	**7.5%**
Unit Value AU$ / Kg	13.97	15.16	16.60	16.27	16.13	-1%	4%	4.19

Seasonality by Hemisphere	2017/18	2018/19	2019/20	2020/21	2021/22	1 yr chg	5 yr trend	2021/22
Southern Hemisphere	**5,474**	**4,279**	**5,102**	**6,345**	**7,636**	**20%**	**9%**	**36.3%**
Value Million AUD	**12.85**	**9.70**	**14.26**	**14.52**	**17.45**	**20%**	**8%**	**21.5%**
Unit Value AU$ / Kg	2.35	2.27	2.79	2.29	2.28	0%	-1%	0.59
Northern Hemisphere	**12,970**	**14,294**	**14,951**	**12,463**	**13,387**	**7%**	**1%**	**63.7%**
Value Million AUD	57.0	66.8	72.2	63.2	63.6	**1%**	**3%**	**78.5%**
Unit Value AU$ / Kg	4.40	4.68	4.83	5.07	4.75	-6%	2%	1.23

Source: IHS Global Trade Atlas; Fresh Intelligence analysis

Season Trade patterns – supplies from United States and Chile somewhat balance the northern and southern seasons while Australia maintains as small share of the southern season.

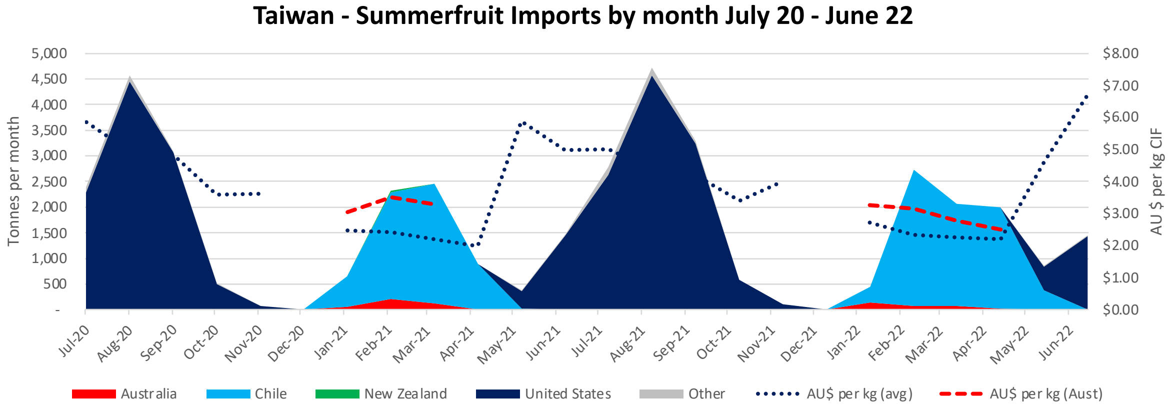
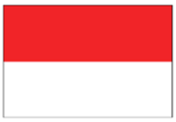


Figure 2.3 Monthly Summerfruit imports by volume and unit price (AU$ per kg CIF equivalent)

Insight

The Taiwan market is relatively lucrative compared based in the GDP 28,306 USD per capita and consumers seek high quality produce from retailers. Australia is in a good position to build market share in the southern season. A 20 per cent market share would generate 1,500 tonnes.

Indonesia



Indonesia is 100 per cent reliant on imported summerfruit with no recorded local production given the tropical climate. Imports however have been declining.

Summerfruit imports decreased 40 per cent overall, with Australia down 46 per cent to 286 tonnes while South Africa increased by 231 per cent to 69 tonnes.

In 2021/22 Indonesia recorded imports of 1,015 tonnes of summerfruit, of which 36 per cent was imported from Southern Hemisphere suppliers including Australia. Australia was the largest supplier from the Southern Hemisphere season

Indonesia – Key Numbers		
Population	274	million
Urban share	57%	
GDP per capita	3,870	USD
Summerfruit Production	-	tonnes
Imports	1,015	tonnes
5 yr import trend	1.9%	per year
Reliance on Imports	101.8%	
Southern seasonality	36%	
Imports from Australia	286	tonnes
Key Competitor	South Africa	
Market share (seasonal)	79.1%	
Tariff	Eliminated	AANZFTA
Access	Protocol	PFA (Tas) or CT, Fum, IRR, or VHT
Exports	18	tonnes
Per Capita Consumption	0.00	kg p.a.

During the northern season China was the largest supplier with 578 tonnes though also declining. The import growth trend has been falling since a peak in 2018/19 influenced by China (Table 3.1).

Plums are the main product imported accounting for 78 per cent share and peaches and nectarines accounted for 21 per cent of the imported summerfruit, and 1 per cent apricots. (Figure 3.1)

With imports accounting for 100 per cent of the consumption the total consumption of 1,000 tonnes for a 274 million population is less than 0.01 kg thus negligible. Few Indonesians are aware of summerfruit and the handling challenges in the tropical climate with limited cold chain infrastructure is problematic.

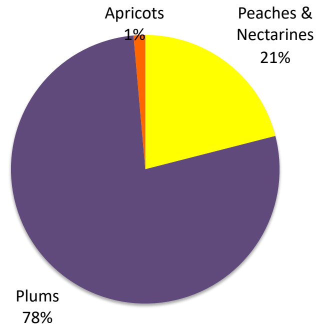
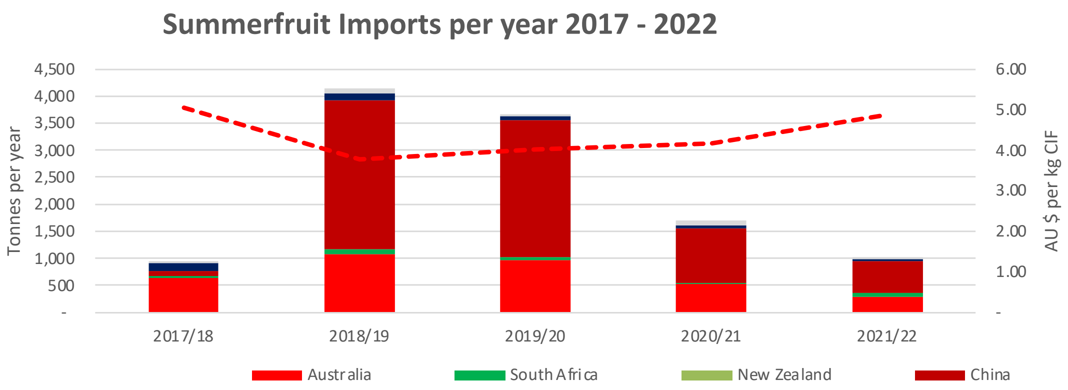


Figure 3.1 Import share by product



Source: IHS Global Trade Atlas; Fresh Intelligence analysis

Figure 2.2 Summerfruit imports by annual volume and unit price (AU$ per kg CIF equivalent)

Table 3.1 Summerfruit imports by supplier volume, CIF value and unit value (net imports)

	2017/18	2018/19	2019/20	2020/21	2021/22	1 yr chg	5 yr trend	2021/22
						%	% CAGR	share %
Volume Tonnes	941	4,137	3,662	1,705	1,015	-40%	2%	100%
Value Million AUD	**4.8**	**15.6**	**14.7**	**7.1**	**5.0**	**-30%**	**1%**	**100%**
Unit Value AU$ / Kg	5.06	3.78	4.01	4.16	4.88	17%	-1%	1.00
Australia	638	1,074	969	528	286	-46%	-18%	28.2%
Value Million AUD	**3.4**	**6.2**	**5.1**	**2.7**	**1.8**	**-33%**	**-15%**	**36.0%**
Unit Value AU$ / Kg	5.35	5.74	5.25	5.05	6.23	23%	4%	1.28
South Africa	38	87	45	21	69	231%	16%	6.7%
Value Million AUD	**0.2**	**0.4**	**0.1**	**0.0**	**0.1**	**338%**	**-3%**	**2.9%**
Unit Value AU$ / Kg	4.20	4.69	2.50	1.58	2.09	32%	-16%	0.43
New Zealand					7			
Value Million AUD					0.06			
Unit Value AU$ / Kg					9.26			
China	88	2,762	2,543	997	578	-42%	60%	56.9%
Value Million AUD	**0.32**	**7.82**	**8.58**	**3.26**	**1.94**	**-40%**	**57%**	**39.2%**
Unit Value AU$ / Kg	3.61	2.83	3.37	3.27	3.36	3%	-2%	0.69
United States	154	132	65	72	39	-46%	-29%	3.8%
Value Million AUD	0.71	0.90	0.61	0.68	0.61	**-11%**	**-4%**	**12.2%**
Unit Value AU$ / Kg	4.60	6.84	9.39	9.56	15.56	63%	36%	3.18

Seasonality by Hemisphere	2017/18	2018/19	2019/20	2020/21	2021/22	1 yr chg	5 yr trend	2021/22
Southern Hemisphere	**676**	**1,161**	**1,014**	**549**	**362**	**-34%**	**-14%**	**35.6%**
Value Million AUD	**3.57**	**6.57**	**5.20**	**2.70**	**1.99**	**-26%**	**-14%**	**40.2%**
Unit Value AU$ / Kg	5.29	5.66	5.13	4.92	5.51	12%	1%	1.13
Northern Hemisphere	**265**	**2,976**	**2,648**	**1,156**	**653**	**-43%**	**25%**	**64.4%**
Value Million AUD	1.2	9.0	9.5	4.4	3.0	**-33%**	**26%**	**59.8%**
Unit Value AU$ / Kg	4.47	3.04	3.59	3.80	4.54	19%	0%	0.93

Source: IHS Global Trade Atlas; Fresh Intelligence analysis

Supplies from China and Australia combine to create a year-round supply.

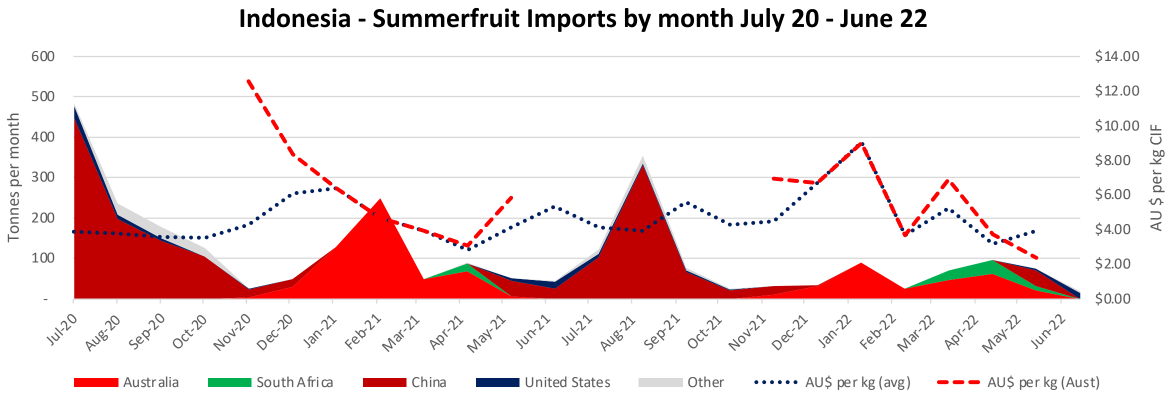


Figure 3.3 Monthly Summerfruit imports by volume and unit price (AU$ per kg CIF equivalent)

Insight

Summerfruit growth in Indonesia will require deeper understanding of customer opportunities, possibly in tourist destinations such as Bali and tighter supply chain opportunities to manage the cold chain at critical temperatures to maintain quality.

Thailand

Thailand is a large producer and exporter of tropical fruits, and the market is a large consumer of fresh fruit. However, Thailand is 100 per cent reliant on imports of temperate fruits such as summerfruit and volumes are small.

In 2021/22 Thailand recorded imports of 1,967 tonnes of summerfruit, almost all of which were imported from China and United States during the northern season. Australia was the only southern supplier and account for just 1.3 per cent of the imports or 26 tonnes.

Thailand – Key Numbers		
Population	70	million
Urban share	51%	
GDP per capita	7,189	USD
Summerfruit Production	-	tonnes
Imports	1,967	tonnes
5 yr import trend	14.4%	per year
Reliance on Imports	100.9%	
Southern seasonality	1%	
Imports from Australia	26	tonnes
Key Competitor	China	(No southern)
Market share (seasonal)	100.0%	
Tariff	Eliminated	
Access	Protocol	PFA or CT
Exports	17	tonnes
Per Capita Consumption	0.03	kg p.a.

Plums are the main product imported accounting for 57 per cent share and peaches and nectarines accounted for 43 per cent of the imported summerfruit, and no apricots. (Figure 4.1)

Summerfruit imports decreased 52 per cent overall heavily influence by China. Australian supply doubled to 26 tonnes albeit off a very small base and have been up to almost 100 tonnes in recent years (Table 4.1).

Imports accounted for 100 per cent of the total summerfruit consumption since Thailand is not a producer of summerfruit.

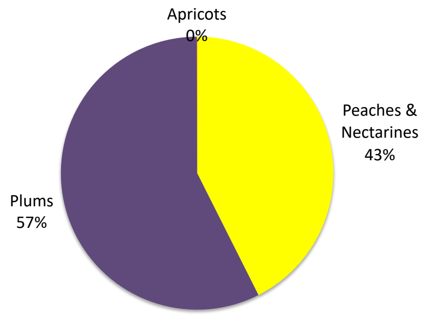
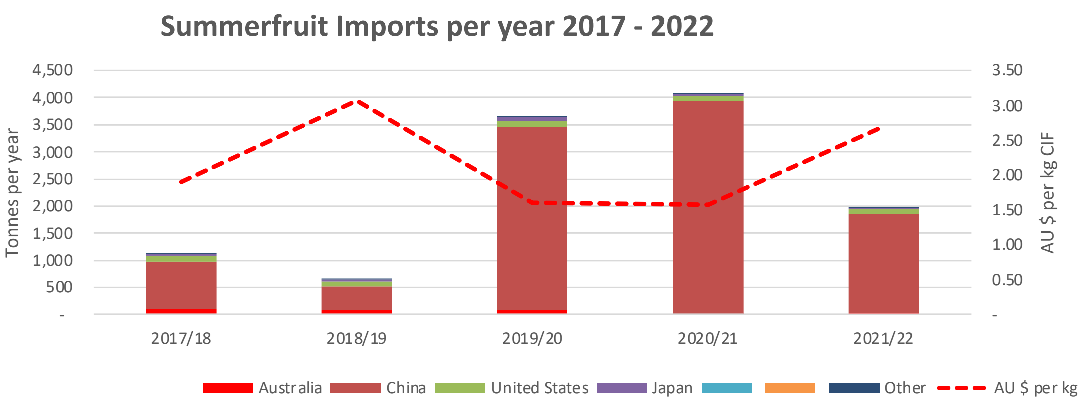


Figure 4.1 Import share by product

Freight logistics during the COVID19 pandemic may have contributed to the fall in import volumes in 2021/22 along with the restricted demand due to loss of tourists impacted by the border closures.



Source: IHS Global Trade Atlas; Fresh Intelligence analysis

Figure 4.2 Summerfruit imports by annual volume and unit price (AU$ per kg CIF equivalent)

Table 4.1 Summerfruit imports by supplier volume, CIF value and unit value (net imports)

	2017/18	2018/19	2019/20	2020/21	2021/22	1 yr chg	5 yr trend	2021/22
						%	% CAGR	share %
Volume Tonnes	1,149	665	3,646	4,069	1,967	-52%	14%	100%
Value Million AUD	**2.2**	**2.0**	**5.8**	**6.4**	**5.3**	**-17%**	**25%**	**100%**
Unit Value AU$ / Kg	1.90	3.07	1.60	1.57	2.69	71%	9%	1.00
Australia	94	74	88	12	26	123%	-28%	1.3%
Value Million AUD	**0.5**	**0.5**	**0.5**	**0.1**	**0.1**	**60%**	**-30%**	**2.3%**
Unit Value AU$ / Kg	5.37	6.73	6.03	6.65	4.78	-28%	-3%	1.77
China	891	437	3,380	3,926	1,824	-54%	20%	92.7%
Value Million AUD	**0.8**	**0.5**	**3.3**	**5.1**	**3.5**	**-30%**	**46%**	**67.0%**
Unit Value AU$ / Kg	0.87	1.07	0.96	1.29	1.95	50%	22%	0.72
United States	103	97	110	95	96	1%	-2%	4.9%
Value Million AUD	0.27	0.28	0.38	0.38	0.38	**0%**	**9%**	**7.2%**
Unit Value AU$ / Kg	2.64	2.83	3.46	4.02	4.00	-1%	11%	1.48
Japan	40	39	60	25	15	-38%	-21%	0.8%
Value Million AUD	**0.55**	**0.72**	**1.63**	**0.80**	**1.21**	**50%**	**22%**	**22.8%**
Unit Value AU$ / Kg	13.57	18.44	27.30	32.25	78.38	143%	55%	29.11
Korea, South	7	6	8	11	6	-44%	-2%	0.3%
Value Million AUD	0.03	0.03	0.03	0.05	0.03	**-38%**	**0%**	**0.6%**
Unit Value AU$ / Kg	4.68	4.68	4.02	4.55	5.07	11%	2%	1.88

Seasonality by Hemisphere	2017/18	2018/19	2019/20	2020/21	2021/22	1 yr chg	5 yr trend	2021/22
Southern Hemisphere	**96**	**74**	**88**	**12**	**26**	**123%**	**-28%**	**1.3%**
Value Million AUD	**0.52**	**0.50**	**0.53**	**0.08**	**0.12**	**60%**	**-30%**	**2.3%**
Unit Value AU$ / Kg	5.39	6.73	6.03	6.65	4.78	-28%	-3%	1.77
Northern Hemisphere	**1,053**	**591**	**3,558**	**4,057**	**1,941**	**-52%**	**17%**	**98.7%**
Value Million AUD	1.7	1.5	5.3	6.3	5.2	**-18%**	**33%**	**97.7%**
Unit Value AU$ / Kg	1.59	2.61	1.49	1.56	2.66	71%	14%	0.99

Source: IHS Global Trade Atlas; Fresh Intelligence analysis

Supplies from China dominate the trade with negligible volumes recorded from Australia during the southern season and no other southern suppliers.

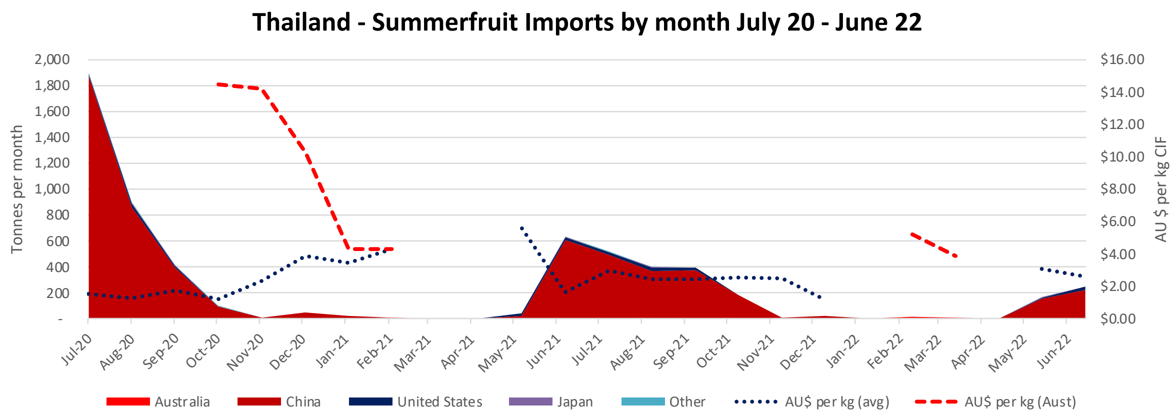


Figure 4.3 Monthly Summerfruit imports by volume and unit price (AU$ per kg CIF equivalent)

Insight

There would seem to be an opportunity to target tourist area with appropriate cold chain infrastructure to grown demand from Australia during the southern season.

Philippines

Philippines – Key Numbers		
Population	110	million
Urban share	47%	
GDP per capita	3,299	USD
Summerfruit Production	-	tonnes
Imports	83	tonnes
5 yr import trend	-19.6%	per year
Reliance on Imports	100.0%	
Southern seasonality	96%	
Imports from Australia	80	tonnes
Key Competitor	United States	
Market share (seasonal)	100.0%	
Tariff	Eliminated	
Access	Protocol	PFA (Tas) or CT
Exports	-	tonnes
Per Capita Consumption	0.00	kg p.a.

The Philippines is a large producer of tropical fruit and a very small importer of summerfruit. Australia is the main supplier. The United States now records negligible volumes and there is no access from China.

In 2021/22 Philippines recorded imports of just 83 tonnes of summerfruit, almost all from Australia. For a market of 110 million the consumption is negligible.

Summerfruit imports dropped 20 per cent last year and have been falling around 20 per cent per year over 5 years. United States fell to just 3 tonnes from 156 tonnes over 5 years and appears to be exiting the market (Table 5.1). However, Australia has lifted 42 per cent per year over 5 years from a low base.

Plums are the main product imported accounting for 60 per cent share and peaches and nectarines accounted for 40 per cent of the imported summerfruit, and no apricots. (Figure 5.1)

Price levels from United States were lower and Australia appears to be achieving higher price points being the only southern hemisphere supplier.

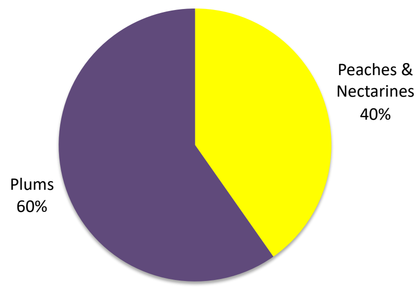


Figure 5.1 Import share by product

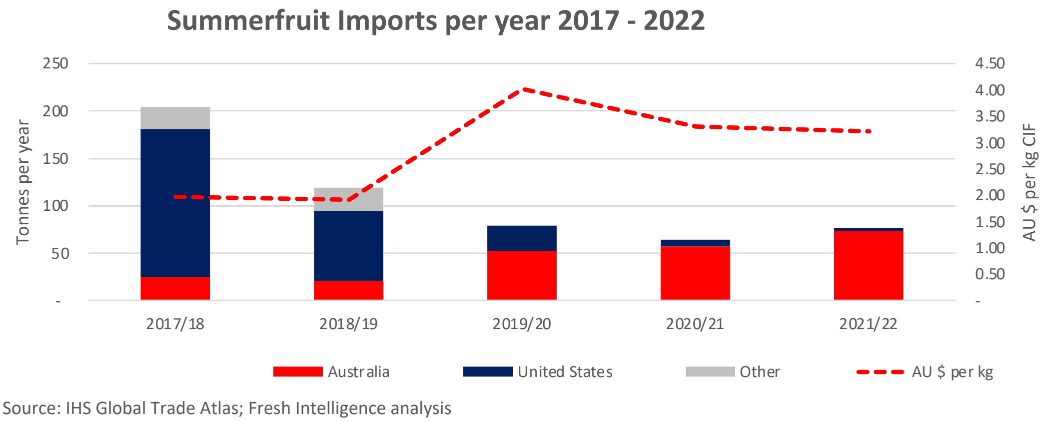


Figure 5.2 Summerfruit imports by annual volume and unit price (AU$ per kg CIF equivalent)

Market access from Australia is difficult and requires in transit cold treatment with no option for air freight.

Table 5.1 Summerfruit imports by supplier volume, CIF value and unit value (net imports)

Philippines Summerfruit			Imports by Volume			Category	Fresh Fruit	
	2017/18	2018/19	2019/20	2020/21	2021/22	1 yr chg	5 yr trend	2021/22
						%	% CAGR	share %
Volume Tonnes	199	146	110	103	83	-19%	-20%	100%
Value Million AUD	**0.4**	**0.3**	**0.4**	**0.3**	**0.3**	**-20%**	**-9%**	**100%**
Unit Value AU$ / Kg	1.95	2.08	3.70	3.26	3.22	-1%	13%	1.00
Australia	20	48	82	96	80	-16%	42%	96.4%
Value Million AUD	**0.1**	**0.1**	**0.2**	**0.3**	**0.3**	**-16%**	**50%**	**97.0%**
Unit Value AU$ / Kg	2.60	2.76	2.85	3.23	3.24	0%	6%	1.01
United States	156	74	27	7	3	-57%	-63%	3.6%
Value Million AUD	**0.3**	**0.1**	**0.2**	**0.0**	**0.0**	**-69%**	**-60%**	**3.0%**
Unit Value AU$ / Kg	1.99	1.95	6.19	3.71	2.67	-28%	8%	0.83
Other	23	24	1				-100%	0.0%
Value Million AUD	0.0	0.0	0.0				**-100%**	**0.0%**
Unit Value AU$ / Kg	1.17	1.13	7.00				-100%	-

Seasonality by Hemisphere	2017/18	2018/19	2019/20	2020/21	2021/22	1 yr chg	5 yr trend	2021/22
Southern Hemisphere	**20**	**48**	**82**	**96**	**80**	**-16%**	**42%**	**96.4%**
Value Million AUD	**0.05**	**0.13**	**0.23**	**0.31**	**0.26**	**-16%**	**50%**	**97.0%**
Unit Value AU$ / Kg	2.60	2.76	2.85	3.23	3.24	0%	6%	1.01
Northern Hemisphere	**179**	**98**	**28**	**7**	**3**	**-57%**	**-64%**	**3.6%**
Value Million AUD	0.3	0.2	0.2	0.0	0.0	**-69%**	**-61%**	**3.0%**
Unit Value AU$ / Kg	1.88	1.75	6.21	3.71	2.67	-28%	9%	0.83

Source: IHS Global Trade Atlas; Fresh Intelligence analysis

Supplies from United States and Australia are counter seasonal although United States supply has reduced to negligible levels (Figure 5.3)

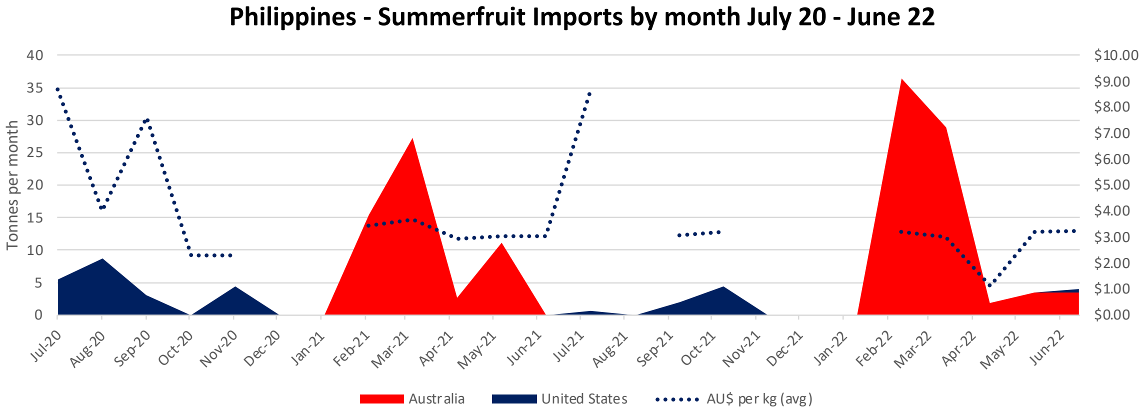


Figure 5.3 Monthly Summerfruit imports by volume and unit price (AU$ per kg CIF equivalent)

Insight

The Philippines is a large producer of tropical fruit with almost no summerfruit in the market. Australia is almost the only supplier and is essentially introducing a “new” product to the market.

India

India is importing a small volume of summerfruit to supplement local production, with a very low per capita consumption. India's lack of cold chain infrastructure inhibits summerfruit development.

India – Key Numbers		
Population	1,380	million
Urban share	35%	
GDP per capita	1,901	USD
Summerfruit Production	509,658	tonnes
Imports	4,888	tonnes
5 yr import trend	9.1%	per year
Reliance on Imports	1.0%	
Southern seasonality	28%	
Imports from Australia	40	tonnes
Key Competitor	South Africa	
Market share (seasonal)	2.9%	
Tariff	25 - 30%	varies
Access	Protocol	CT for Med fly
Exports	267	tonnes
Per Capita Consumption	0.37	kg p.a.

In 2021/22 India recorded imports of 4,888 tonnes of summerfruit, of which 28 per cent was imported from Southern Hemisphere suppliers including Australia.

Summerfruit imports decreased 40 per cent overall, with Australia down 90 per cent to 40 tonnes after 389 tonnes in the previous year. South Africa and China were the largest suppliers (around 25 per cent share each). The import growth trend has lifted 9 per cent per year over the last 5 years although peaked in 2020/21 (Table 6.1).

Plums are the main product imported accounting for 81 per cent share, apricots accounted for 13 per cent of the imported summerfruit, and peaches and nectarines 6 per cent. (Figure 6.1)

Only apricots will receive preferential tariffs in the AIECTA (Australia India Economic Cooperation Trade Agreement). Apricots fall from 30 per cent to 15 per cent (final) over 7 years. Under the agreement plums remain at 25 per cent and peaches and nectarines remain at 30 per cent tariffs.

Price levels from China are lower than others and influenced lower average prices when the supply from China peaked in 2020/21. Volumes are most sensitive to prices and Australia's higher volume in 2020/21 correlated with lower and arguably unsustainable price points

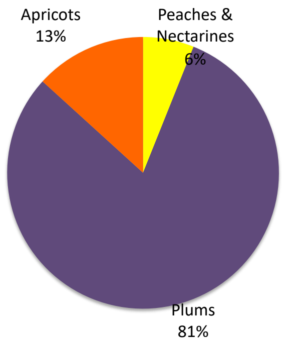
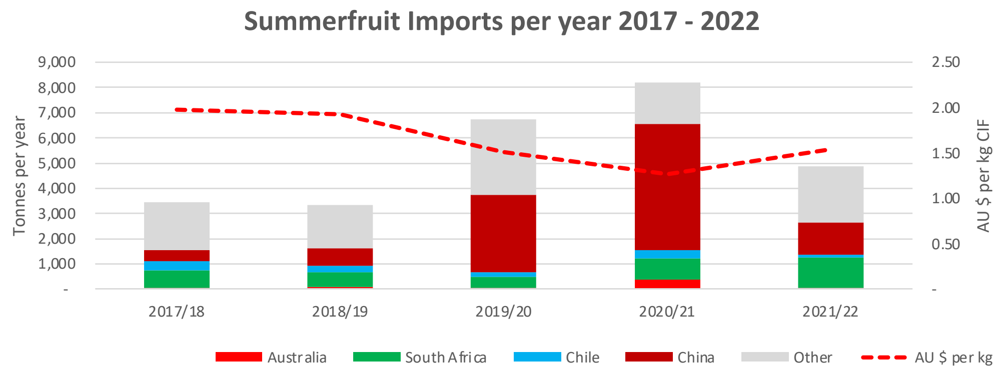


Figure 6.1 Import share by product



Source: IHS Global Trade Atlas; Fresh Intelligence analysis

Figure 6.2 Summerfruit imports by annual volume and unit price (AU$ per kg CIF equivalent)

Table 6.1 Summerfruit imports by supplier volume, CIF value and unit value (net imports)

	2017/18	2018/19	2019/20	2020/21	2021/22	1 yr chg	5 yr trend	2021/22
						%	% CAGR	share %
Volume Tonnes	3,452	3,323	6,748	8,188	4,888	-40%	9%	100%
Value Million AUD	**6.8**	**6.4**	**10.2**	**10.3**	**7.5**	**-27%**	**2%**	**100%**
Unit Value AU$ / Kg	1.98	1.93	1.51	1.26	1.54	22%	-6%	1.00
Australia	48	93	41	389	40	-90%	-5%	0.8%
Value Million AUD	**0.2**	**0.4**	**0.2**	**0.5**	**0.1**	**-78%**	**-13%**	**1.4%**
Unit Value AU$ / Kg	3.80	4.07	4.37	1.22	2.61	115%	-9%	1.69
South Africa	684	598	454	825	1,201	46%	15%	24.6%
Value Million AUD	**1.7**	**1.6**	**1.3**	**1.7**	**2.5**	**47%**	**10%**	**32.8%**
Unit Value AU$ / Kg	2.51	2.74	2.82	2.03	2.06	1%	-5%	1.33
Chile	364	225	178	340	112	-67%	-26%	2.3%
Value Million AUD	0.75	0.48	0.42	0.68	0.20	**-71%**	**-29%**	**2.6%**
Unit Value AU$ / Kg	2.07	2.15	2.36	2.01	1.74	-13%	-4%	1.13
China	471	720	3,075	4,987	1,289	-74%	29%	26.4%
Value Million AUD	**0.51**	**0.97**	**3.37**	**4.69**	**1.48**	**-68%**	**30%**	**19.7%**
Unit Value AU$ / Kg	1.09	1.34	1.10	0.94	1.15	22%	1%	0.75
Iran	12	5	1	338	835	147%	187%	17.1%
Value Million AUD	0.01	0.00	0.00	0.36	0.51	**40%**	**147%**	**6.7%**
Unit Value AU$ / Kg	1.12	0.74	3.56	1.07	0.61	-43%	-14%	0.39

Seasonality by Hemisphere	2017/18	2018/19	2019/20	2020/21	2021/22	1 yr chg	5 yr trend	2021/22
Southern Hemisphere	**1,096**	**916**	**673**	**1,554**	**1,353**	**-13%**	**5%**	**27.7%**
Value Million AUD	**2.65**	**2.50**	**1.88**	**2.83**	**2.77**	**-2%**	**1%**	**36.7%**
Unit Value AU$ / Kg	2.42	2.73	2.79	1.82	2.05	12%	-4%	1.33
Northern Hemisphere	**2,356**	**2,407**	**6,075**	**6,634**	**3,535**	**-47%**	**11%**	**72.3%**
Value Million AUD	4.2	3.9	8.3	7.5	4.8	**-36%**	**3%**	**63.3%**
Unit Value AU$ / Kg	1.78	1.62	1.37	1.13	1.35	19%	-7%	0.87

Source: IHS Global Trade Atlas; Fresh Intelligence analysis

China dominates the northern season supplies from July to December and then Australia competes with South Africa during the southern season. Supplies are ramping up from Iran during the northern season competing with China at even lower recorded price points.

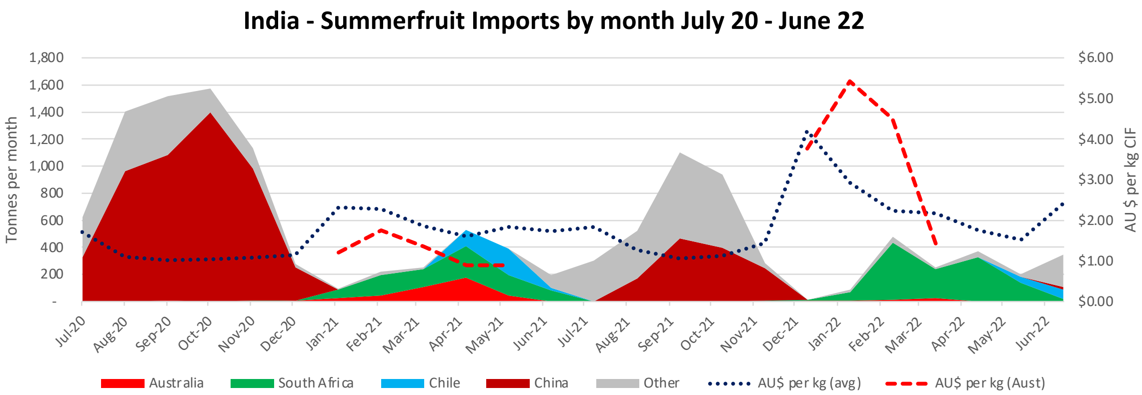


Figure 6.3 Monthly Summerfruit imports by volume and unit price (AU$ per kg CIF equivalent)

Insight

Due to lack of cold chain infrastructure plums perform better than peaches and nectarines. Success for Australia will most likely be achieved targeting high end consumers and expats in the high-tech cities such as Hyderabad and Bangalore.

Vietnam

Vietnam imports almost all its summerfruit from China and is 100 per cent reliant on imported summerfruit. Until 2020/21 there were no southern season suppliers.

In 2021/22 Vietnam recorded imports of 52,188 tonnes of summerfruit, of which 99 per cent was imported from China.

Australia regained access in 2022, having been out of the market since 2014 and shipped 52 tonnes in April just before the end of the season.

Viet Nam – Key Numbers		
Population	97	million
Urban share	37%	
GDP per capita	2,786	USD
Summerfruit Production	-	tonnes
Imports	52,188	tonnes
5 yr import trend	8.1%	per year
Reliance on Imports	101.3%	
Southern seasonality	0%	
Imports from Australia	52	tonnes
Key Competitor	China	
Market share (seasonal)	82.5%	
Tariff	Eliminated	
Access	Protocol	PFA (Tas) or CT, IRR (peach nect only) No access others
Exports	680	tonnes
Per Capita Consumption	0.53	kg p.a.

Summerfruit imports decreased 44 per cent overall, mostly China however Australian and New Zealand supplied small volumes in 2022 that should increase. Small volumes from Singapore are mostly likely exports from Australia (Table 2.1).

Plums are the main product imported accounting for 52 per cent share, peaches and nectarines accounted for 47 per cent of the imported summerfruit, and apricots 1 per cent. (Figure 7.1)

Price levels recorded are inconclusive as they are measured by export suppliers (China) as there is no reliable Vietnam import data.

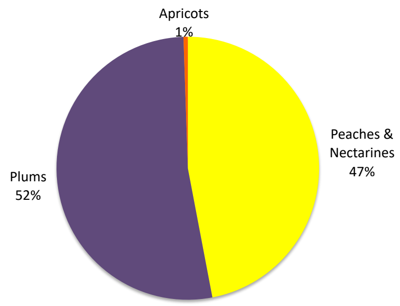
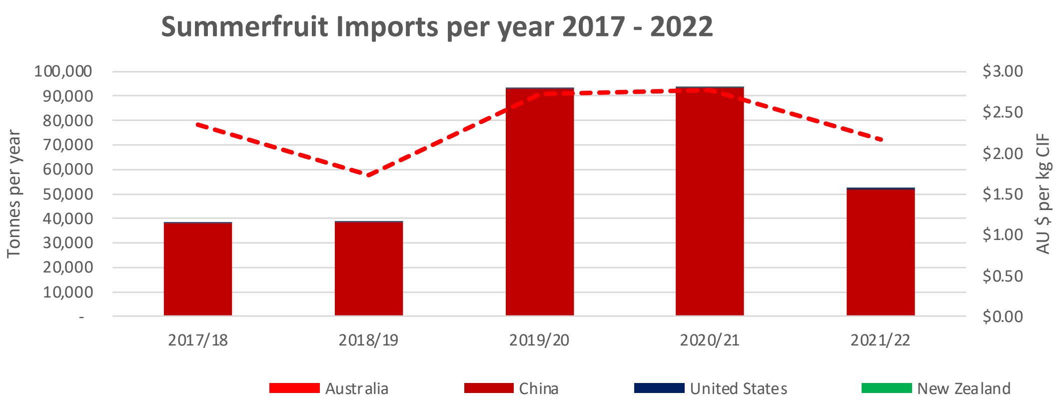


Figure 7.1 Import share by product



Source: IHS Global Trade Atlas; Fresh Intelligence analysis

Figure 7.2 Summerfruit imports by annual volume and unit price (AU$ per kg CIF equivalent)

Table 7.1 Summerfruit imports by supplier volume, FOB value (ex supplier) and unit value

	2017/18	2018/19	2019/20	2020/21	2021/22	1 yr chg	5 yr trend	2021/22
						%	% CAGR	share %
Volume Tonnes	38,174	38,642	93,270	93,515	52,188	-44%	8%	100%
Value Million AUD	**89.4**	**66.9**	**253.7**	**259.0**	**113.2**	**-56%**	**6%**	**100%**
Unit Value AU$ / Kg	2.34	1.73	2.72	2.77	2.17	-22%	-2%	1.00
Australia					52			0.1%
Value Million AUD					**0.4**			**0.3%**
Unit Value AU$ / Kg					7.54			3.47
China	38,166	38,569	92,868	93,415	51,718	-45%	8%	99.1%
Value Million AUD	**89.3**	**66.5**	**253.1**	**258.7**	**111.3**	**-57%**	**6%**	**98.3%**
Unit Value AU$ / Kg	2.34	1.72	2.73	2.77	2.15	-22%	-2%	0.99
United States	2	5	25	32	383	1097%	272%	0.7%
Value Million AUD	0.02	0.04	0.05	0.16	1.24	**701%**	**197%**	**1.1%**
Unit Value AU$ / Kg	8.00	8.60	2.00	4.84	3.24	-33%	-20%	1.49
New Zealand				3	11	267%		0.0%
Value Million AUD				**0.06**	**0.13**	**132%**		**0.1%**
Unit Value AU$ / Kg				18.67	11.82	-37%		5.45
Singapore		48	36	13	15	15%		0.0%
Value Million AUD		0.24	0.23	0.07	0.11	**72%**		**0.1%**
Unit Value AU$ / Kg		4.90	6.31	5.00	7.47	49%		3.44

Seasonality by Hemisphere	2017/18	2018/19	2019/20	2020/21	2021/22	1 yr chg	5 yr trend	2021/22
Southern Hemisphere				**3**	**63**	**2000%**		**0.1%**
Value Million AUD				**0.06**	**0.52**	**832%**		**0.5%**
Unit Value AU$ / Kg				18.67	8.29	-56%		3.82
Northern Hemisphere	**38,174**	**38,642**	**93,270**	**93,512**	**52,125**	**-44%**	**8%**	**99.9%**
Value Million AUD	89.4	66.9	253.7	259.0	112.7	**-56%**	**6%**	**99.5%**
Unit Value AU$ / Kg	2.34	1.73	2.72	2.77	2.16	-22%	-2%	1.00

Source: IHS Global Trade Atlas; Fresh Intelligence analysis

China supplies from May to August. With Australian access in place there are now opportunities for counter seasonal supply from December to April.

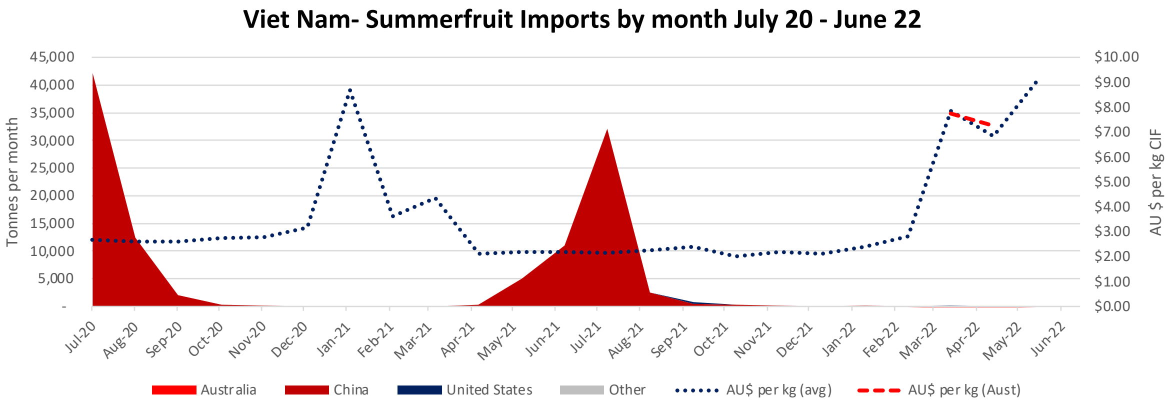


Figure 7.3 Monthly Summerfruit imports by volume and unit price (AU$ per kg CIF equivalent)

Insight

The Vietnam market has potential for growth in tourist areas.

Canada

Ontario and British Columbia are the main gateways to Canada where Australian summerfruit enters the market.

Canada – Key Numbers		
Population	38.0	million
Urban share	82%	
GDP per capita	43,242	USD
Summerfruit Production	26,657	tonnes
Imports	57,044	tonnes
5 yr import trend	1.1%	per year
Reliance on Imports	68.3%	
Southern seasonality	17%	
Imports from Australia	635	tonnes
Key Competitor	Chile	
Market share (seasonal)	6.4%	
Tariff	Eliminated	
Access	Protocol	Fum (LBAM)
Exports	135	tonnes
Per Capita Consumption	2.20	kg p.a.

In 2021/22 Canada recorded imports of 26,657 tonnes of summerfruit, of which 17 per cent was imported from Southern Hemisphere suppliers including Australia.

Summerfruit imports increased 6 per cent overall, though Australia was down 45 per cent to 635 tonnes offsetting some market share to South Africa which lifted 61 per cent to 1,488 tonnes. United States was the largest supplier (79 per cent share). The import growth trend has lifted 1 per cent per year over the last 5 years (Table 8.1). Imports accounted for 68 per cent of the total summerfruit consumption.

Peaches and Nectarines are the main summerfruit products imported accounting for 68 per cent share and plums accounted for 27 per cent of the imported summerfruit, and 5 per cent were apricots. (Figure 8.1)

Canada grows around 26,657 tonnes of summerfruit (84% peaches & nectarines, 13% plums, 3% apricots) and mainly in Ontario (80%) and British Columbia (18%).

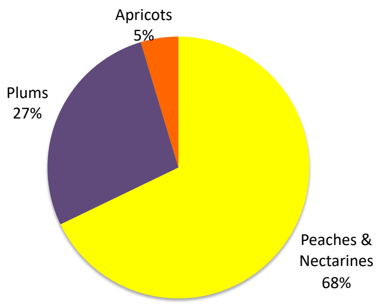
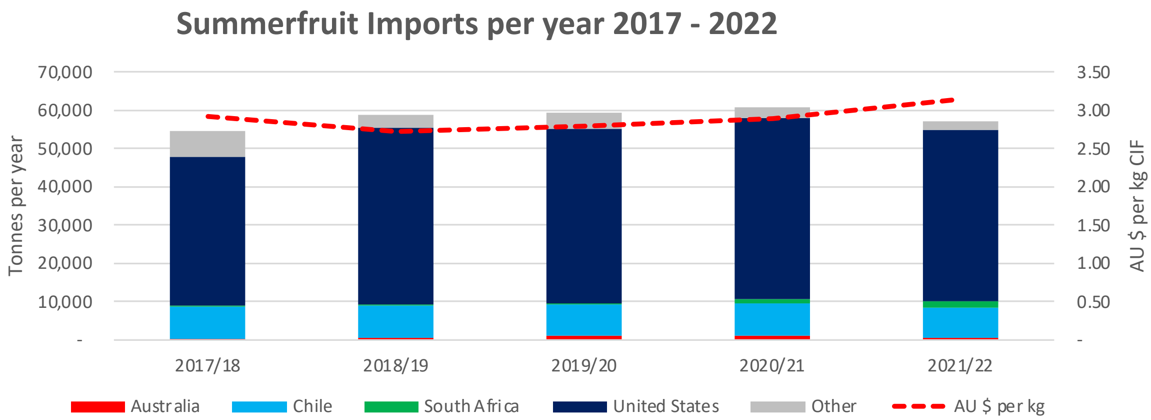


Figure 8.1 Import share by product



Source: IHS Global Trade Atlas; Fresh Intelligence analysis

Figure 8.2 Summerfruit imports by annual volume and unit price (AU$ per kg CIF equivalent)

Table 8.1 Summerfruit imports by supplier volume, CIF value and unit value (net imports)

	2017/18	2018/19	2019/20	2020/21	2021/22	1 yr chg	5 yr trend	2021/22
						%	% CAGR	share %
Volume Tonnes	54,555	58,951	59,437	60,704	57,044	-6%	1%	100%
Value Million AUD	**159.6**	**160.4**	**166.1**	**175.6**	**179.5**	**2%**	**3%**	**100%**
Unit Value AU$ / Kg	2.93	2.72	2.79	2.89	3.15	9%	2%	1.00
Australia	293	573	1,172	1,149	635	-45%	21%	1.1%
Value Million AUD	**1.5**	**2.8**	**5.8**	**4.7**	**3.1**	**-33%**	**20%**	**1.8%**
Unit Value AU$ / Kg	5.26	4.82	4.94	4.10	4.95	21%	-1%	1.57
Chile	8,396	8,379	8,123	8,480	7,847	-7%	-2%	13.8%
Value Million AUD	**27.7**	**27.8**	**29.0**	**24.8**	**27.1**	**9%**	**-1%**	**15.1%**
Unit Value AU$ / Kg	3.30	3.32	3.57	2.93	3.46	18%	1%	1.10
South Africa	304	372	387	923	1,488	61%	49%	2.6%
Value Million AUD	1.02	1.36	1.57	2.66	4.61	**73%**	**46%**	**2.6%**
Unit Value AU$ / Kg	3.37	3.66	4.06	2.88	3.10	7%	-2%	0.98
United States	38,739	46,190	45,422	47,540	45,026	-5%	4%	78.9%
Value Million AUD	**116.27**	**120.63**	**121.48**	**137.00**	**138.87**	**1%**	**5%**	**77.3%**
Unit Value AU$ / Kg	3.00	2.61	2.67	2.88	3.08	7%	1%	0.98
Spain	5,484	2,759	3,143	1,864	1,253	-33%	-31%	2.2%
Value Million AUD	10.44	5.95	6.10	3.91	2.89	**-26%**	**-27%**	**1.6%**
Unit Value AU$ / Kg	1.90	2.16	1.94	2.10	2.31	10%	5%	0.73

Seasonality by Hemisphere	2017/18	2018/19	2019/20	2020/21	2021/22	1 yr chg	5 yr trend	2021/22
Southern Hemisphere	**8,993**	**9,324**	**9,682**	**10,552**	**9,970**	**-6%**	**3%**	**17.5%**
Value Million AUD	**30.31**	**31.93**	**36.36**	**32.22**	**34.88**	**8%**	**4%**	**19.4%**
Unit Value AU$ / Kg	3.37	3.42	3.75	3.05	3.50	15%	1%	1.11
Northern Hemisphere	**45,562**	**49,627**	**49,755**	**50,152**	**47,074**	**-6%**	**1%**	**82.5%**
Value Million AUD	129.3	128.5	129.8	143.4	144.7	**1%**	**3%**	**80.6%**
Unit Value AU$ / Kg	2.84	2.59	2.61	2.86	3.07	7%	2%	0.98

Source: IHS Global Trade Atlas; Fresh Intelligence analysis

Supplies from United States dominate the northern season while Australia is the main supplier during the southern season albeit at small volumes and higher price points.

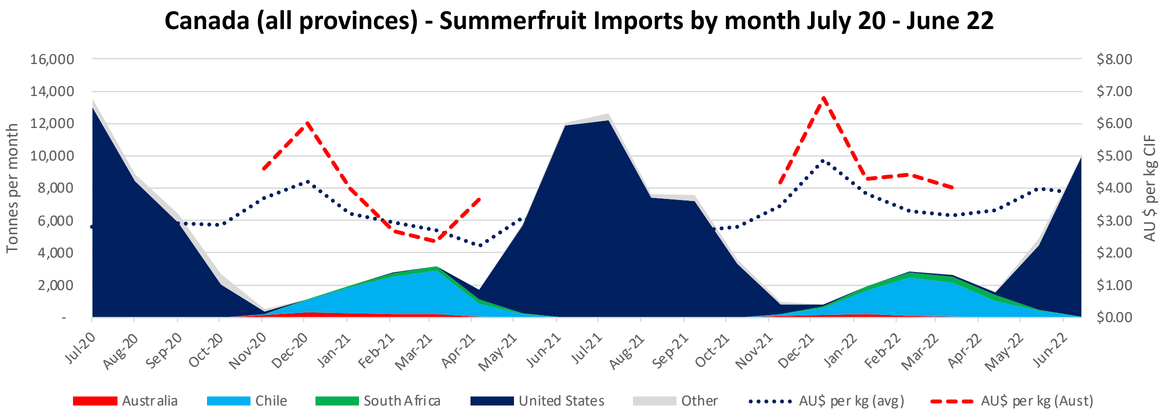
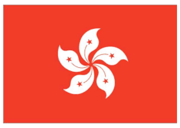


Figure 8.3 Monthly Summerfruit imports by volume and unit price (AU$ per kg CIF equivalent)

Insight

Australia has good trade networks for citrus and pears in Canada BC and has good opportunities to increase summerfruit trade with competitive pricing and almost no competition. Chile does not appear to be active in the BC market though is sending mainly to the more populous Ontario market.

Unregulated Markets



Hong Kong

Hong Kong – Key Numbers		
Population	7.5	million
Urban share	100%	
GDP per capita	46,324	USD
Summerfruit Production	-	tonnes
Imports	15,799	tonnes
5 yr import trend	-8.6%	per year
Reliance on Imports	100.0%	
Southern seasonality	14%	
Imports from Australia	893	tonnes
Key Competitor	Chile	
Market share (seasonal)	40.5%	
Tariff	Nil	
Access	Unregulated	
Exports	0	tonnes
Per Capita Consumption	2.11	kg p.a.

Hong Kong remains a key trade hub for access to China and all data needs to be used with caution due to distortion by re exports to China. The market however is suffering from the impact of COVID19 and the geopolitical tensions with China.

In 2021/22 Hong Kong recorded net* imports of 15,799 tonnes of summerfruit, of which 14 per cent was imported from Southern Hemisphere suppliers including Australia. (*excludes fruit for re-export to China)

Summerfruit imports decreased 10 per cent overall, though Australia was 48 per cent lower to 893 tonnes while Chile increased by 443 per cent to 957 tonnes. China was the largest supplier (53 per cent share) in the northern season. The import growth trend has declined 9 per cent per year over the last 5 years (Table 9.1).

Plums are the main product imported accounting for 67 per cent share and peaches and nectarines accounted for 33 per cent of the imported summerfruit, and 1 per cent were apricots. (Figure 9.1)

Imports accounted for the total summerfruit consumption since Hong Kong has no local production.

Price levels from United States are higher than Chile and contribute to higher average annual prices though Australia should target levels like US levels although selling summerfruit in the northern winter is more challenging.

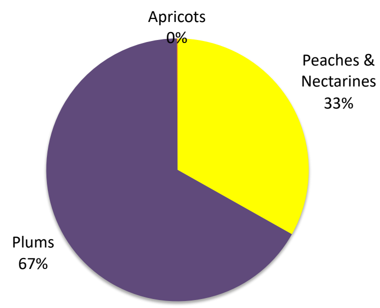
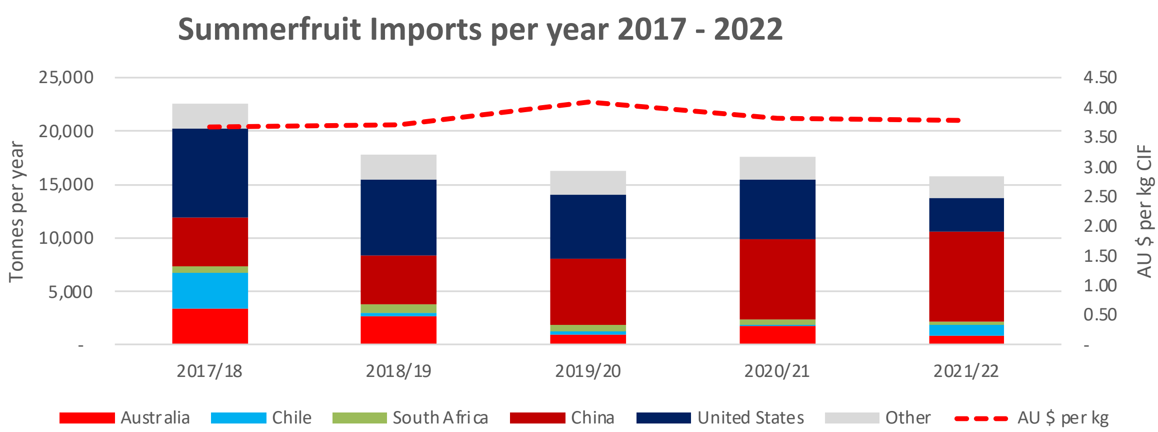


Figure 9.1 Import share by product



Source: ITC TradeMap; Fresh Intelligence analysis

Figure 9.2 Summerfruit supplied by annual volume and unit price (AU$ per kg CIF equivalent)

Table 9.1 Summerfruit imports by supplier volume, CIF value and unit value (net imports)

	2017/18	2018/19	2019/20	2020/21	2021/22	1 yr chg	5 yr trend	2021/22
						%	% CAGR	share %
Volume Tonnes	22,591	17,777	16,321	17,572	15,799	-10%	-9%	100%
Value Million AUD	**82.8**	**66.0**	**66.7**	**67.1**	**59.8**	**-11%**	**-8%**	**100%**
Unit Value AU$ / Kg	3.66	3.72	4.09	3.82	3.79	-1%	1%	1.00
Australia	3,395	2,686	977	1,734	893	-48%	-28%	5.7%
Value Million AUD	**14.7**	**10.9**	**5.3**	**7.5**	**4.0**	**-46%**	**-28%**	**6.8%**
Unit Value AU$ / Kg	4.33	4.04	5.40	4.33	4.53	5%	1%	1.20
Chile	3,383	345	268	176	957	443%	-27%	6.1%
Value Million AUD	**6.0**	**0.7**	**0.5**	**0.3**	**1.9**	**587%**	**-25%**	**3.3%**
Unit Value AU$ / Kg	1.78	1.91	1.76	1.61	2.03	26%	3%	0.54
South Africa	576	773	607	424	356	-16%	-11%	2.3%
Value Million AUD	2.34	3.28	3.21	1.47	1.25	**-15%**	**-14%**	**2.1%**
Unit Value AU$ / Kg	4.06	4.25	5.28	3.47	3.51	1%	-4%	0.93
China	4,559	4,525	6,224	7,586	8,442	11%	17%	53.4%
Value Million AUD	**10.33**	**9.51**	**15.46**	**16.20**	**17.65**	**9%**	**14%**	**29.5%**
Unit Value AU$ / Kg	2.26	2.10	2.48	2.14	2.09	-2%	-2%	0.55
United States	8,348	7,113	5,956	5,574	3,087	-45%	-22%	19.5%
Value Million AUD	30.17	19.76	17.74	17.81	9.21	**-48%**	**-26%**	**15.4%**
Unit Value AU$ / Kg	3.61	2.78	2.98	3.20	2.98	-7%	-5%	0.79

Seasonality by Hemisphere	2017/18	2018/19	2019/20	2020/21	2021/22	1 yr chg	5 yr trend	2021/22
Southern Hemisphere	**7,354**	**3,804**	**1,853**	**2,334**	**2,206**	**-5%**	**-26%**	**14.0%**
Value Million AUD	**23.06**	**14.80**	**8.96**	**9.26**	**7.24**	**-22%**	**-25%**	**12.1%**
Unit Value AU$ / Kg	3.14	3.89	4.84	3.97	3.28	-17%	1%	0.87
Northern Hemisphere	**15,238**	**13,973**	**14,468**	**15,238**	**13,592**	**-11%**	**-3%**	**86.0%**
Value Million AUD	59.7	51.2	57.7	57.8	52.6	**-9%**	**-3%**	**87.9%**
Unit Value AU$ / Kg	3.92	3.67	3.99	3.80	3.87	2%	0%	1.02

Source: ITC TradeMap; Fresh Intelligence analysis (MIRROR data)

United States and China supply during the northern season while Australia and South Africa supplies during the southern season.

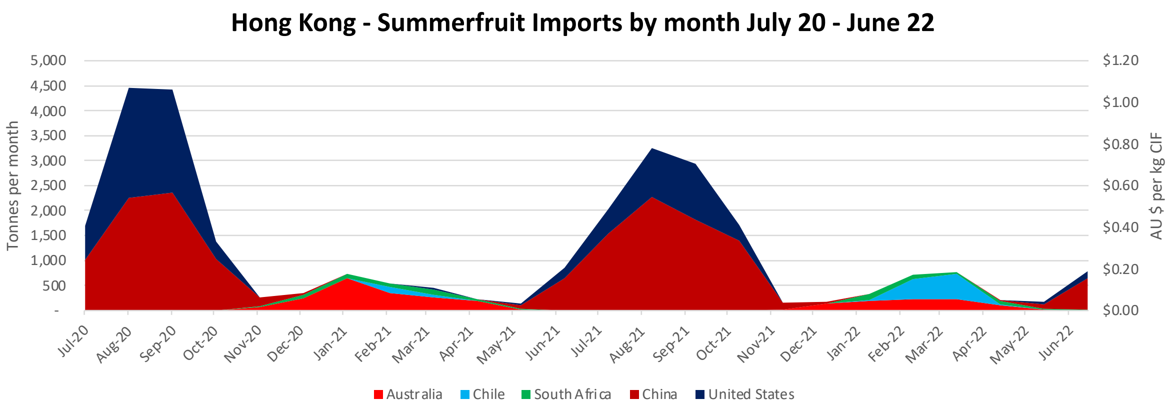
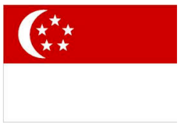


Figure 9.3 Monthly Summerfruit supplied by volume and unit price (AU$ per kg CIF equivalent)

Insight

Hong Kong is distorted by re exports to China. As far as possible these figures exclude the re-exports.



Singapore

Singapore – Key Numbers		
Population	5.7	million
Urban share	100%	
GDP per capita	59,798	USD
Summerfruit Production	-	tonnes
Imports	5,209	tonnes
5 yr import trend	-4.4%	per year
Reliance on Imports	108.3%	
Southern seasonality	50%	
Imports from Australia	2,211	tonnes
Key Competitor	South Africa	
Market share (seasonal)	84.7%	
Tariff	Nil	
Access	Unregulated	
Exports	399	tonnes
Per Capita Consumption	0.85	kg p.a.

Singapore is one of Australia's main destinations, and us an unregulated market with no tariffs or import restrictions.

In 2021/22 Singapore recorded imports of 5,209 tonnes of summerfruit, of which 50 per cent were imported from Southern Hemisphere suppliers including Australia. Northern suppliers include China, United States and Europe (Spain)

Summerfruit imports decreased 20 per cent overall, with Australia accounting for 42 per cent market share was down 10 per cent to 286 tonnes due to the COVID19 pandemic. The import growth trend has decreased 4 per cent per year over the last 5 years (Table 10.1) although the 2021/22 result should turn around in 2022/23 as the market re opens to visitors. Summerfruit imports increased each year to 2020/21.

Peaches and Nectarines are the main products imported accounting for 55 per cent share and plums accounted for 42 per cent of the imported summerfruit, and 3 per cent were apricots. (Figure 10.1)

Imports accounted for all the summerfruit consumption since Singapore does not produce any fruit of its own.

Price levels are relatively steady increasing in 2021/22 with the lower demand.

However, consumption is very low (0.85 kg) for a sophisticated market like Singapore and could be increased.

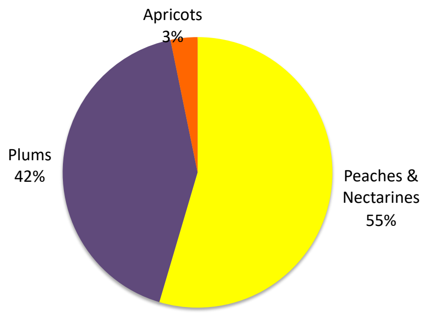
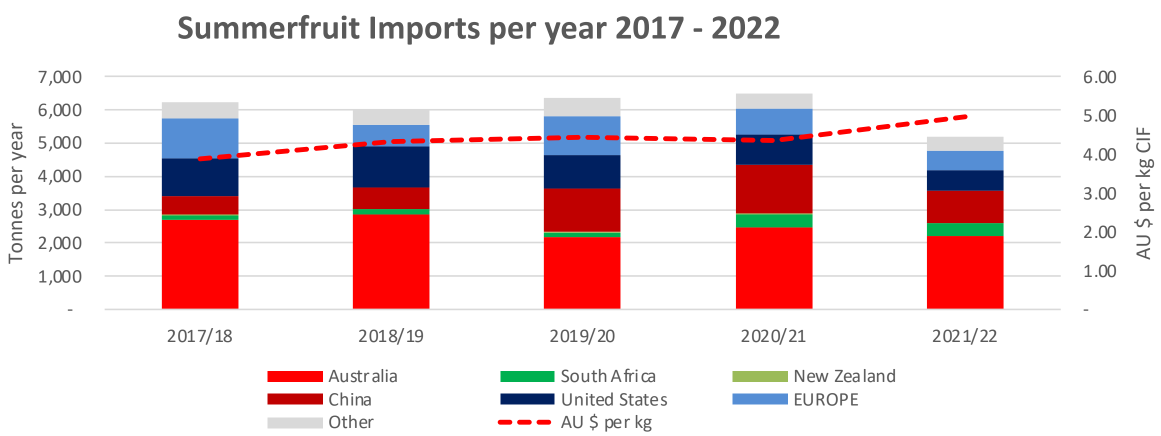


Figure 10.1 Import share by product



Source: IHS Global Trade Atlas; Fresh Intelligence analysis

Figure 10.2 Summerfruit imports by annual volume and unit price (AU$ per kg CIF equivalent)

Table 10.1 Summerfruit imports by supplier volume, CIF value and unit value

	2017/18	2018/19	2019/20	2020/21	2021/22	1 yr chg	5 yr trend	2021/22
						%	% CAGR	share %
Volume Tonnes	6,225	6,015	6,374	6,483	5,209	-20%	-4%	100%
Value Million AUD	**24.2**	**26.0**	**28.4**	**28.2**	**25.9**	**-8%**	**2%**	**100%**
Unit Value AU$ / Kg	3.88	4.32	4.45	4.35	4.97	14%	6%	1.00
Australia	2,684	2,863	2,174	2,460	2,211	-10%	-5%	42.4%
Value Million AUD	**9.5**	**10.9**	**9.4**	**10.3**	**10.2**	**-1%**	**2%**	**39.3%**
Unit Value AU$ / Kg	3.55	3.79	4.31	4.18	4.60	10%	7%	0.93
South Africa	143	154	134	395	375	-5%	27%	7.2%
Value Million AUD	**0.6**	**0.7**	**0.8**	**1.5**	**1.2**	**-21%**	**17%**	**4.5%**
Unit Value AU$ / Kg	4.35	4.66	5.68	3.72	3.09	-17%	-8%	0.62
New Zealand	29	16	22	27	26	-6%	-3%	0.5%
Value Million AUD	0.22	0.13	0.19	0.27	0.26	**-3%**	**4%**	**1.0%**
Unit Value AU$ / Kg	7.50	8.28	8.69	9.82	10.14	3%	8%	2.04
China	567	627	1,304	1,474	950	-36%	14%	18.2%
Value Million AUD	**1.10**	**1.75**	**3.38**	**3.43**	**2.75**	**-20%**	**26%**	**10.6%**
Unit Value AU$ / Kg	1.93	2.79	2.59	2.32	2.89	24%	11%	0.58
United States	1,138	1,239	1,001	902	627	-30%	-14%	12.0%
Value Million AUD	5.75	6.35	5.70	5.17	4.70	**-9%**	**-5%**	**18.1%**
Unit Value AU$ / Kg	5.05	5.13	5.70	5.74	7.49	31%	10%	1.51
EUROPE	1,184	664	1,188	779	587	-25%	-16%	11.3%
Value Million AUD	4.14	3.02	4.36	3.52	2.64	**-25%**	**-11%**	**10.2%**
Unit Value AU$ / Kg	3.50	4.54	3.67	4.52	4.50	0%	7%	0.91
Seasonality by Hemisphere	**2017/18**	**2018/19**	**2019/20**	**2020/21**	**2021/22**	1 yr chg	5 yr trend	2021/22
Southern Hemisphere	**2,856**	**3,032**	**2,330**	**2,882**	**2,611**	**-9%**	**-2%**	**50.1%**
Value Million AUD	**10.36**	**11.71**	**10.32**	**12.03**	**11.60**	**-4%**	**3%**	**44.8%**
Unit Value AU$ / Kg	3.63	3.86	4.43	4.17	4.44	6%	5%	0.89
Northern Hemisphere	**3,369**	**2,982**	**4,044**	**3,601**	**2,598**	**-28%**	**-6%**	**49.9%**
Value Million AUD	13.8	14.3	18.0	16.2	14.3	**-12%**	**1%**	**55.2%**
Unit Value AU$ / Kg	4.10	4.80	4.46	4.49	5.51	23%	8%	1.11

Source: IHS Global Trade Atlas; Fresh Intelligence analysis

Supplies from Australia and China balance the northern and southern season while the northern season supplemented from United States and Europe.

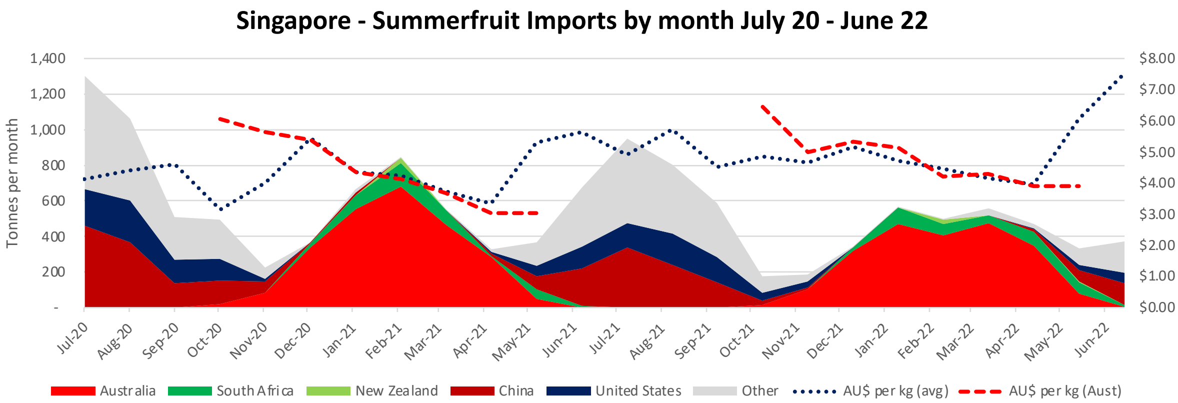
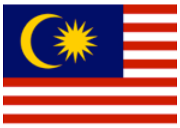


Figure 10.3 Monthly Summerfruit imports by volume and unit price (AU$ per kg CIF equivalent)

Insight

Singapore is an important market for Australia, and being unregulated it has easy access, which may encourage South Africa and New Zealand even though they do not appear a threat at this stage. Per capita consumption is low and could be increased by Australia which has a dominant (85 per cent) market share in season.



Malaysia

Malaysia imports summerfruit from various supplier to maintain a year-round supply. Malaysia has no measurable local production due to its tropical climate

In 2021/22 Malaysia recorded imports of 4,818 tonnes of summerfruit, of which 58 per cent was imported from Southern Hemisphere suppliers including Australia and South Africa.

Summerfruit imports decreased 8 per cent overall, with Australia down 5 per cent to 1,211 tonnes while South Africa increased by 2 per cent to 1,432 tonnes. South Africa has been the largest supplier (30 per cent share) for the last 2 years since taking the lead from Australia in 2019/20. The import growth trend is relatively steady, declining just 1 per cent per year over the last 5 years (Table 11.1).

Malaysia – Key Numbers		
Population	32	million
Urban share	77%	
GDP per capita	10,402	USD
Summerfruit Production	-	tonnes
Imports	4,818	tonnes
5 yr import trend	-1.4%	per year
Reliance on Imports	101.8%	
Southern seasonality	58%	
Imports from Australia	1,211	tonnes
Key Competitor	South Africa	
Market share (seasonal)	43.4%	
Tariff	Eliminated	
Access	Protocol	PFA or CT
Exports	85	tonnes
Per Capita Consumption	0.15	kg p.a.

Plums were the main product imported accounting for 57 per cent share, peaches and nectarines accounted for 43 per cent of the imported summerfruit, and no apricots. (Figure 11.1)

Imports accounted for all the total summerfruit consumption since Malaysia has no measurable production.

Price levels have been relatively steady over 5 years on an annual basis though volatile from month to month.

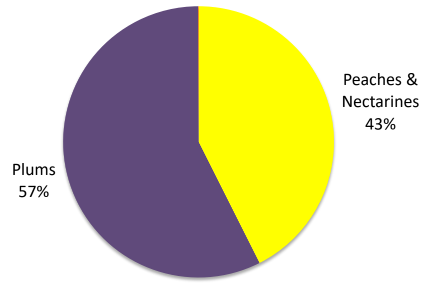
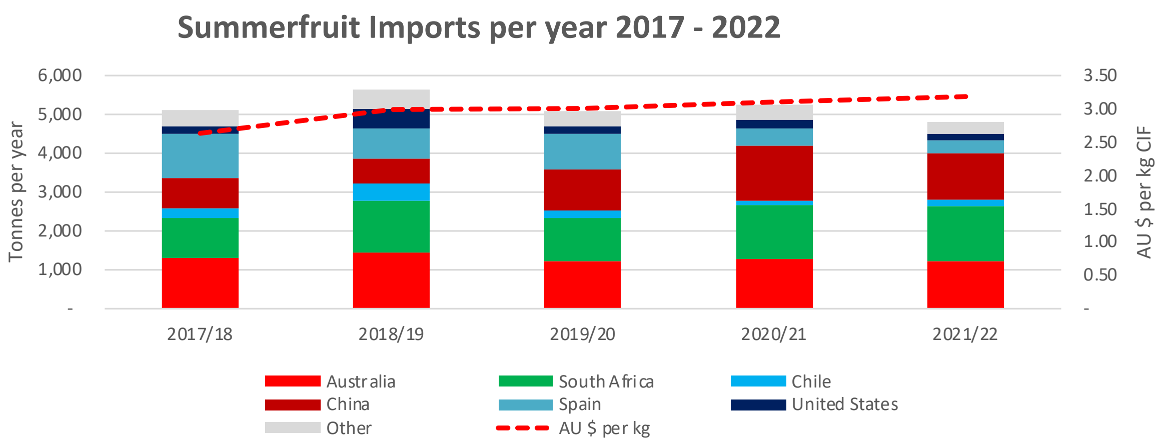


Figure 11.1 Import share by product



Source: IHS Global Trade Atlas; Fresh Intelligence analysis

Figure 11.2 Summerfruit imports by annual volume and unit price (AU$ per kg CIF equivalent)

Table 11.1 Summerfruit imports by supplier volume, CIF value and unit value (net imports)

	2017/18	2018/19	2019/20	2020/21	2021/22	1 yr chg	5 yr trend	2021/22
						%	% CAGR	share %
Volume Tonnes	5,097	5,638	5,091	5,246	4,818	-8%	-1%	100%
Value Million AUD	**13.4**	**16.9**	**15.3**	**16.2**	**15.3**	**-6%**	**3%**	**100%**
Unit Value AU$ / Kg	2.63	2.99	3.01	3.10	3.18	3%	5%	1.00
Australia	1,289	1,452	1,221	1,269	1,211	-5%	-2%	25.1%
Value Million AUD	**4.0**	**5.1**	**5.1**	**5.3**	**4.9**	**-7%**	**5%**	**31.9%**
Unit Value AU$ / Kg	3.10	3.53	4.22	4.15	4.04	-3%	7%	1.27
South Africa	1,040	1,309	1,104	1,404	1,432	2%	8%	29.7%
Value Million AUD	**2.8**	**4.0**	**3.1**	**3.3**	**3.4**	**4%**	**5%**	**22.2%**
Unit Value AU$ / Kg	2.72	3.09	2.81	2.34	2.38	2%	-3%	0.75
Chile	248	454	209	102	145	42%	-13%	3.0%
Value Million AUD	0.58	1.18	0.50	0.39	0.43	**9%**	**-7%**	**2.8%**
Unit Value AU$ / Kg	2.35	2.60	2.39	3.84	2.95	-23%	6%	0.93
China	790	637	1,041	1,431	1,224	-14%	12%	25.4%
Value Million AUD	**1.14**	**1.09**	**1.56**	**2.75**	**2.63**	**-4%**	**23%**	**17.2%**
Unit Value AU$ / Kg	1.45	1.71	1.50	1.92	2.15	12%	10%	0.68
Spain	1,122	791	921	433	313	-28%	-27%	6.5%
Value Million AUD	2.49	2.05	2.09	1.15	0.87	**-24%**	**-23%**	**5.7%**
Unit Value AU$ / Kg	2.22	2.59	2.27	2.65	2.77	5%	6%	0.87

Seasonality by Hemisphere	2017/18	2018/19	2019/20	2020/21	2021/22	1 yr chg	5 yr trend	2021/22
Southern Hemisphere	**2,584**	**3,223**	**2,535**	**2,775**	**2,788**	**0%**	**2%**	**57.9%**
Value Million AUD	**7.44**	**10.41**	**8.76**	**8.94**	**8.74**	**-2%**	**4%**	**57.0%**
Unit Value AU$ / Kg	2.88	3.23	3.46	3.22	3.13	-3%	2%	0.98
Northern Hemisphere	**2,514**	**2,415**	**2,556**	**2,471**	**2,030**	**-18%**	**-5%**	**42.1%**
Value Million AUD	5.9	6.5	6.5	7.3	6.6	**-10%**	**3%**	**43.0%**
Unit Value AU$ / Kg	2.37	2.68	2.56	2.95	3.25	10%	8%	1.02

Source: IHS Global Trade Atlas; Fresh Intelligence analysis

Malaysia has a year-round supply importing from Australia and South Africa during the southern season and from China and Europe.

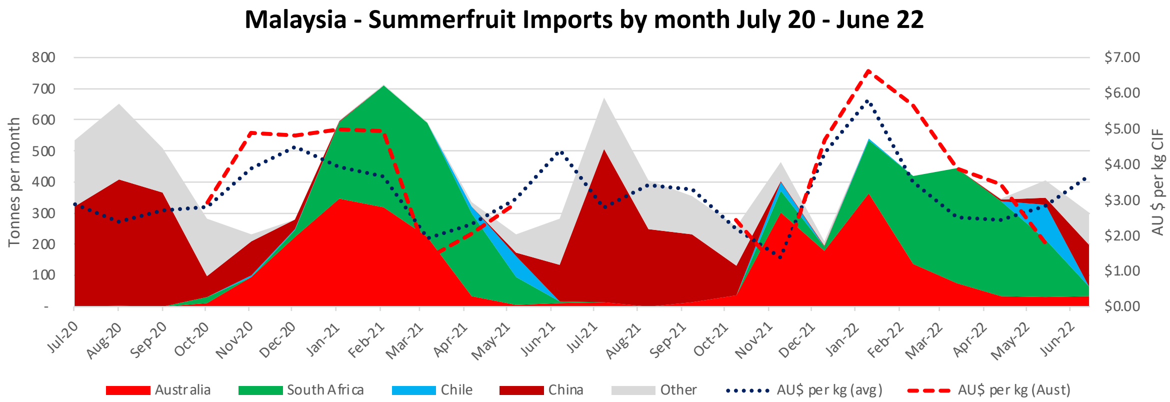


Figure 11.3 Monthly Summerfruit imports by volume and unit price (AU$ per kg CIF equivalent)

Insight

Malaysia is an important market for Australia where market share against South Africa should be protected with regular market development activities.

Other Markets

UAE

The UAE is a trading hub in the Gulf States area of the Middle East.

Summerfruit imports increased 13 per cent in 2021/22 as it recovered from impacts of COVID19 though Australia was down 54 per cent to 617 tonnes, as were many other suppliers. South Africa increased 51 per cent to 18,791 tonnes driving the category growth. United States was the largest supplier (62 per cent share). The import growth trend has lifted 3 per cent per year over the last 5 years (Table 12.1).

UAE – Key Numbers		
Population	9.9	million
Urban share	87%	
GDP per capita	77,182	USD
Summerfruit Production	-	tonnes
Imports	31,023	tonnes
5 yr import trend	-0.8%	per year
Reliance on Imports	101.4%	
Southern seasonality	63%	
Imports from Australia	617	tonnes
Key Competitor	South Africa	
Market share (seasonal)	3.1%	
Tariff	Nil	
Access	Phyto	
Exports	415	tonnes
Per Capita Consumption	3.09	kg p.a.

Plums were the main product imported accounting for 54 per cent share, peaches and nectarines accounted for 37 per cent of the imported summerfruit, and 9 per cent for apricots. (Figure 12.1)

Imports accounted the total summerfruit consumption since the UAE does not produce any summerfruit.

Average price levels are around AY $2.06 CIF though range between AU$1.50 to AU$3.50 through the year depending on the supply source and demand conditions. Whilst Australia achieves around AU$4.00 per kg the volumes are not holding.

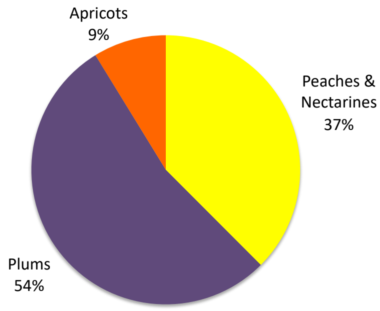
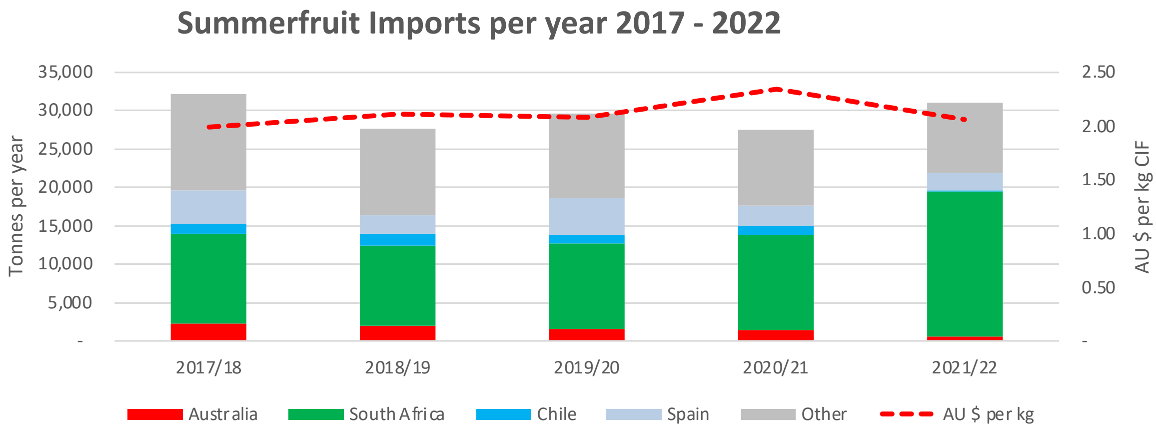


Figure 12.1 Import share by product



Source: IHS Global Trade Atlas; Fresh Intelligence analysis

Figure 12.2 Summerfruit imports by annual volume and unit price (AU$ per kg CIF equivalent)

Table 12.1 Summerfruit imports by supplier volume, CIF value and unit value (net imports)

	2017/18	2018/19	2019/20	2020/21	2021/22	1 yr chg	5 yr trend	2021/22
						%	% CAGR	share %
Volume Tonnes	32,094	27,577	29,599	27,456	31,023	13%	-1%	100%
Value Million AUD	**63.9**	**58.0**	**61.4**	**64.1**	**63.8**	**-1%**	**0%**	**100%**
Unit Value AU$ / Kg	1.99	2.10	2.07	2.34	2.06	-12%	1%	1.00
Australia	2,313	2,013	1,622	1,349	617	-54%	-28%	2.0%
Value Million AUD	**7.9**	**7.6**	**6.6**	**6.0**	**2.5**	**-58%**	**-25%**	**3.9%**
Unit Value AU$ / Kg	3.43	3.80	4.04	4.45	4.05	-9%	4%	1.97
South Africa	11,587	10,334	11,056	12,466	18,791	51%	13%	60.6%
Value Million AUD	**23.5**	**23.2**	**25.5**	**28.4**	**42.7**	**51%**	**16%**	**67.0%**
Unit Value AU$ / Kg	2.03	2.24	2.30	2.28	2.27	0%	3%	1.11
Chile	1,355	1,637	1,198	1,102	235	-79%	-35%	0.8%
Value Million AUD	2.61	3.32	2.50	2.26	0.48	**-79%**	**-34%**	**0.8%**
Unit Value AU$ / Kg	1.93	2.03	2.08	2.05	2.05	0%	2%	1.00
Spain	4,372	2,367	4,673	2,660	2,182	-18%	-16%	7.0%
Value Million AUD	**7.83**	**4.87**	**8.78**	**7.16**	**4.68**	**-35%**	**-12%**	**7.3%**
Unit Value AU$ / Kg	1.79	2.06	1.88	2.69	2.15	-20%	5%	1.04
Jordan	2,657	2,089	1,564	2,144	1,932	-10%	-8%	6.2%
Value Million AUD	2.06	1.66	1.36	1.81	1.61	**-11%**	**-6%**	**2.5%**
Unit Value AU$ / Kg	0.78	0.79	0.87	0.84	0.83	-1%	2%	0.40
Lebanon	1,128	1,260	1,071	1,631	1,321	-19%	4%	4.3%
Value Million AUD	1.23	1.38	1.16	4.58	2.37	**-48%**	**18%**	**3.7%**
Unit Value AU$ / Kg	1.09	1.09	1.08	2.81	1.80	-36%	13%	0.87

Seasonality by Hemisphere	2017/18	2018/19	2019/20	2020/21	2021/22	1 yr chg	5 yr trend	2021/22
Southern Hemisphere	**15,255**	**13,984**	**13,876**	**14,917**	**19,643**	**32%**	**7%**	**63.3%**
Value Million AUD	**34.04**	**34.15**	**34.51**	**36.64**	**45.73**	**25%**	**8%**	**71.7%**
Unit Value AU$ / Kg	2.23	2.44	2.49	2.46	2.33	-5%	1%	1.13
Northern Hemisphere	**16,839**	**13,593**	**15,723**	**12,539**	**11,380**	**-9%**	**-9%**	**36.7%**
Value Million AUD	29.9	23.9	26.9	27.5	18.1	**-34%**	**-12%**	**28.3%**
Unit Value AU$ / Kg	1.77	1.76	1.71	2.19	1.59	-28%	-3%	0.77

Source: ITC TradeMap; Fresh Intelligence analysis

South Africa is the main supplier during the southern season with Middle East (Jordan, Turkey and Lebanon) supplying May to September and Europe (Spain, Italy, Greece) from July to December.

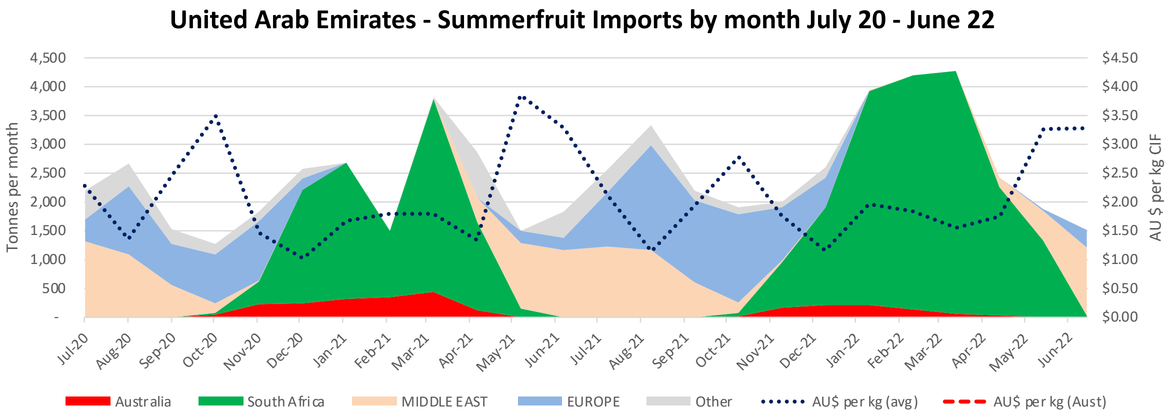


Figure 12.3 Monthly Summerfruit imports by volume and unit price (AU$ per kg CIF equivalent)

Insight

The high-end tourist industry / cruise ships are a significant driver for premium fruit and is recovering from the COVID19 impact in 2020/21.

Saudi Arabia

Saudi Arabia is a relatively large importer of summerfruit in the Middle East with no local production.

Saudi Arabia – Key Numbers		
Population	35	million
Urban share	84%	
GDP per capita	20,110	USD
Summerfruit Production	-	tonnes
Imports	44,717	tonnes
5 yr import trend	-7.9%	per year
Reliance on Imports	100.4%	
Southern seasonality	22%	
Imports from Australia	587	tonnes
Key Competitor	Jordan	
Market share (seasonal)	5.9%	
Tariff	Nil	
Access	Phyto Cert	
Exports	200	tonnes
Per Capita Consumption	1.28	kg p.a.

In 2021/22 Saudi Arabia recorded imports of 44,717 tonnes of summerfruit, of which 22 per cent was imported from Southern Hemisphere suppliers including Australia and Chile.

Summerfruit imports decreased 37 per cent overall, with Australia down 49 per cent to 587 tonnes. Chile decreased by 18 per cent to 1,649 tonnes. Jordon was the largest supplier (50 per cent share). The import growth trend has fallen 8 per cent per year over the last 5 years (Table 13.1) although the steep fall in 2021 is likely COVID related and should bounce in 2022.

Peaches and Nectarines are the main products imported accounting for 51 per cent share and plums accounted for 34 per cent of the imported summerfruit, and 15 per cent were apricots. (Figure 13.1)

Price levels lifted in 2021 likely due to a low supply from Lebanon that had previously supplied higher volumes at prices below AU$1.00 per kg CIF pulling the average lower.

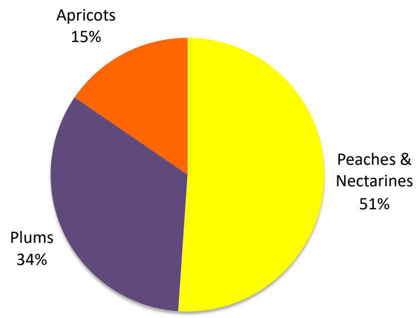
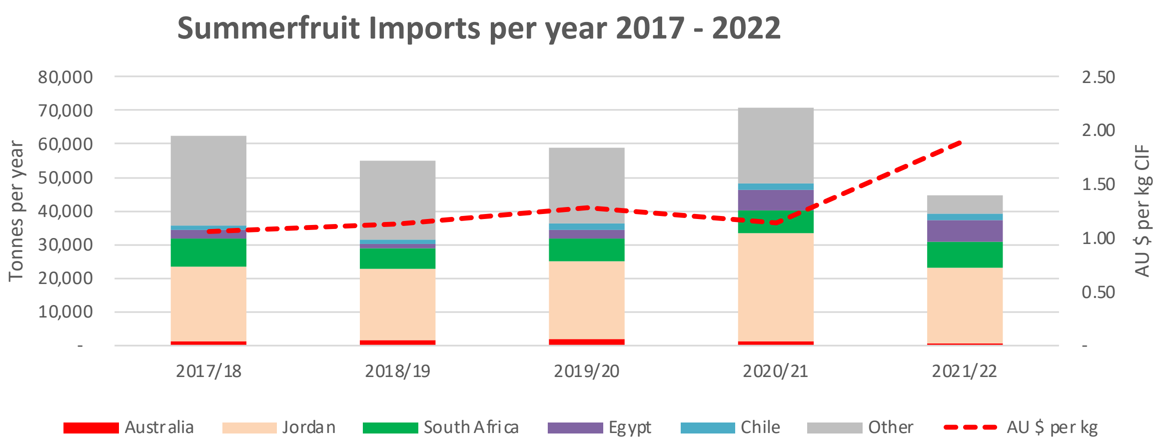


Figure 13.1 Import share by product



Source: IHS Global Trade Atlas; Fresh Intelligence analysis

Figure 13.2 Summerfruit imports by annual volume and unit price (AU$ per kg CIF equivalent)

Table 13.1 Summerfruit imports by supplier volume, CIF value and unit value (net imports)

	2017/18	2018/19	2019/20	2020/21	2021/22	1 yr chg	5 yr trend	2021/22
						%	% CAGR	share %
Volume Tonnes	62,272	55,051	58,808	70,893	44,717	-37%	-8%	100%
Value Million AUD	**65.8**	**62.2**	**75.5**	**81.0**	**85.4**	**5%**	**7%**	**100%**
Unit Value AU$ / Kg	1.06	1.13	1.28	1.14	1.91	67%	16%	1.00
Australia	1,400	1,710	1,973	1,151	587	-49%	-20%	1.3%
Value Million AUD	**6.0**	**5.6**	**7.7**	**4.6**	**3.0**	**-35%**	**-16%**	**3.5%**
Unit Value AU$ / Kg	4.25	3.30	3.90	4.02	5.09	27%	5%	2.67
Jordan	22,158	21,028	23,143	32,145	22,570	-30%	0%	50.5%
Value Million AUD	**14.1**	**13.0**	**16.5**	**22.1**	**34.4**	**56%**	**25%**	**40.3%**
Unit Value AU$ / Kg	0.64	0.62	0.71	0.69	1.52	122%	24%	0.80
South Africa	8,431	6,307	6,673	6,787	7,700	13%	-2%	17.2%
Value Million AUD	13.92	16.64	18.87	18.08	18.99	**5%**	**8%**	**22.2%**
Unit Value AU$ / Kg	1.65	2.64	2.83	2.66	2.47	-7%	11%	1.29
Egypt	2,494	1,323	2,719	6,236	6,575	5%	27%	14.7%
Value Million AUD	**3.16**	**1.28**	**2.81**	**6.05**	**7.43**	**23%**	**24%**	**8.7%**
Unit Value AU$ / Kg	1.27	0.96	1.03	0.97	1.13	16%	-3%	0.59
Chile	1,162	1,264	1,840	2,015	1,649	-18%	9%	3.7%
Value Million AUD	2.27	3.10	4.05	4.52	3.19	**-29%**	**9%**	**3.7%**
Unit Value AU$ / Kg	1.95	2.45	2.20	2.24	1.93	-14%	0%	1.01
Syria	2,312	1,006	1,683	4,673	3,398	-27%	10%	7.6%
Value Million AUD	1.74	0.77	1.15	4.89	6.29	**29%**	**38%**	**7.4%**
Unit Value AU$ / Kg	0.75	0.77	0.68	1.05	1.85	77%	25%	0.97

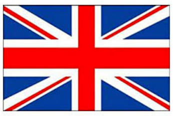
Seasonality by Hemisphere	2017/18	2018/19	2019/20	2020/21	2021/22	1 yr chg	5 yr trend	2021/22
Southern Hemisphere	**10,993**	**9,281**	**10,486**	**9,953**	**9,936**	**0%**	**-2%**	**22.2%**
Value Million AUD	**22.14**	**25.38**	**30.62**	**27.23**	**25.16**	**-8%**	**3%**	**29.5%**
Unit Value AU$ / Kg	2.01	2.73	2.92	2.74	2.53	-7%	6%	1.33
Northern Hemisphere	**51,279**	**45,770**	**48,322**	**60,940**	**34,781**	**-43%**	**-9%**	**77.8%**
Value Million AUD	43.6	36.8	44.9	53.8	60.2	**12%**	**8%**	**70.5%**
Unit Value AU$ / Kg	0.85	0.80	0.93	0.88	1.73	96%	19%	0.91

Source: IHS Global Trade Atlas; Fresh Intelligence analysis

There is no monthly data available however the split between southern and northern hemisphere suppliers suggests that the higher volumes arrive during the northern season from Jordon while South Africa, Chile and Australia supply during the southern season from December to March.

Insight

Australia has been a regular supplier of apricots with an advantage over South Africa and Chile.



United Kingdom

The UK was once a leading importer of Australian summerfruit in early - mid 2,000's where Australia's premium quality program served high end supermarkets such as Waitrose and Sainsbury. Trade declined to near zero by 2014

In 2021/22 the UK recorded imports of 102,366 tonnes of summerfruit, of which 29 per cent was imported from Southern Hemisphere suppliers, mainly South Africa.

Summerfruit imports decreased 1 per cent overall, mostly from Spain and South Africa, both of which increased slightly while trade from Chile declined 42 per cent (Table 14.1).

United Kingdom – Key Numbers		
Population	67.2	million
Urban share	84%	
GDP per capita	40,285	USD
Summerfruit Production	7,371	tonnes
Imports	102,366	tonnes
5 yr import trend	-6.6%	per year
Reliance on Imports	93.7%	
Southern seasonality	29%	
Imports from Australia	-	tonnes
Key Competitor	South Africa	
Market share (seasonal)	0.0%	
Tariff	6.4%	Reducing to nil in 3 yrs. AUKFTA
Access	Phyto Cert only	
Exports	495	tonnes
Per Capita Consumption	1.63	kg p.a.

Peaches and Nectarines are the main products imported accounting for 58 per cent share and plums accounted for 35 per cent of the imported summerfruit, and 7 per cent were apricots. (Figure 14.1)

Imports accounted for 93 per cent of the total summerfruit consumption since the UK is only a small producer of around 7,000 tonnes during the northern season.

Price levels appear to be increasing although some of the growth is tempered by the exchange rate and driven higher due to freight costs.

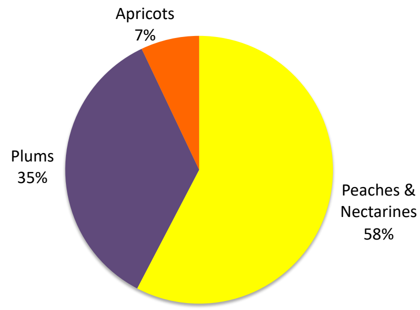
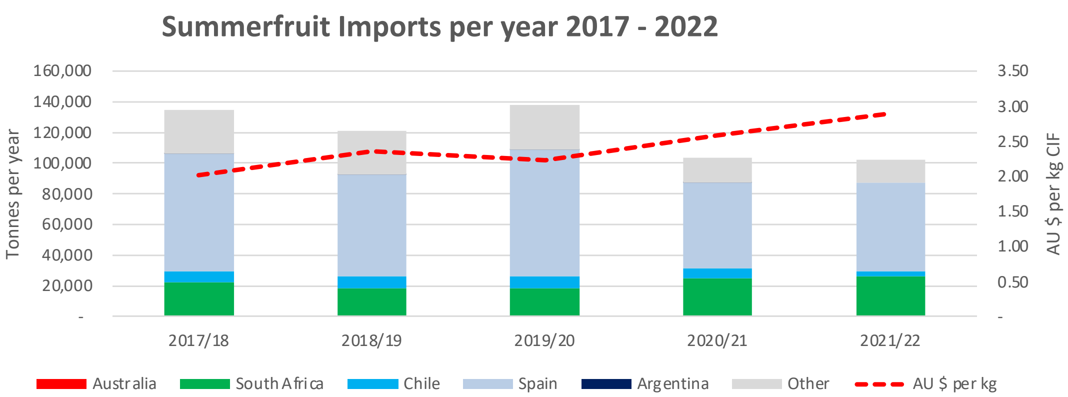


Figure 14.1 Import share by product



Source: IHS Global Trade Atlas; Fresh Intelligence analysis

Figure 14.2 Summerfruit imports by annual volume and unit price (AU$ per kg CIF equivalent)

Table 14.1 Summerfruit imports by supplier volume, CIF value and unit value (net imports)

	2017/18	2018/19	2019/20	2020/21	2021/22	1 yr chg	5 yr trend	2021/22
						%	% CAGR	share %
Volume Tonnes	134,647	121,063	138,222	103,725	102,366	-1%	-7%	100%
Value Million AUD	**271.1**	**285.0**	**307.4**	**268.1**	**297.2**	**11%**	**2%**	**100%**
Unit Value AU$ / Kg	2.01	2.35	2.22	2.58	2.90	12%	10%	1.00
Australia			4	26		-100%		0.0%
Value Million AUD			**0.0**	**0.1**		**-100%**		**0.0%**
Unit Value AU$ / Kg			5.54	3.46		-100%		-
South Africa	22,195	18,346	18,309	25,187	25,976	3%	4%	25.4%
Value Million AUD	**68.4**	**61.4**	**58.4**	**69.6**	**79.3**	**14%**	**4%**	**26.7%**
Unit Value AU$ / Kg	3.08	3.35	3.19	2.76	3.05	10%	0%	1.05
Chile	7,161	8,185	7,747	6,028	3,467	-42%	-17%	3.4%
Value Million AUD	16.19	19.10	17.40	12.07	7.99	**-34%**	**-16%**	**2.7%**
Unit Value AU$ / Kg	2.26	2.33	2.25	2.00	2.30	15%	0%	0.79
Spain	76,961	65,879	82,849	56,256	57,705	3%	-7%	56.4%
Value Million AUD	**127.14**	**138.71**	**167.13**	**141.53**	**167.54**	**18%**	**7%**	**56.4%**
Unit Value AU$ / Kg	1.65	2.11	2.02	2.52	2.90	15%	15%	1.00
all other	28,331	28,653	29,312	16,228	15,217	-6%	-14%	14.9%
Value Million AUD	59.40	65.78	64.50	44.76	42.46	**-5%**	**-8%**	**14.3%**
Unit Value AU$ / Kg	2.10	2.30	2.20	2.76	2.79	1%	7%	0.96

Seasonality by Hemisphere	2017/18	2018/19	2019/20	2020/21	2021/22	1 yr chg	5 yr trend	2021/22
Southern Hemisphere	**29,356**	**26,531**	**26,060**	**31,242**	**29,443**	**-6%**	**0%**	**28.8%**
Value Million AUD	**84.59**	**80.52**	**75.77**	**81.80**	**87.25**	**7%**	**1%**	**29.4%**
Unit Value AU$ / Kg	2.88	3.03	2.91	2.62	2.96	13%	1%	1.02
Northern Hemisphere	**105,291**	**94,532**	**112,162**	**72,484**	**72,923**	**1%**	**-9%**	**71.2%**
Value Million AUD	186.5	204.5	231.6	186.3	210.0	**13%**	**3%**	**70.6%**
Unit Value AU$ / Kg	1.77	2.16	2.07	2.57	2.88	12%	13%	0.99

Source: IHS Global Trade Atlas; Fresh Intelligence analysis

The UK is supplied from Spain and other European countries during northern summer and from South Africa and to a lesser extent Chile during the southern season.

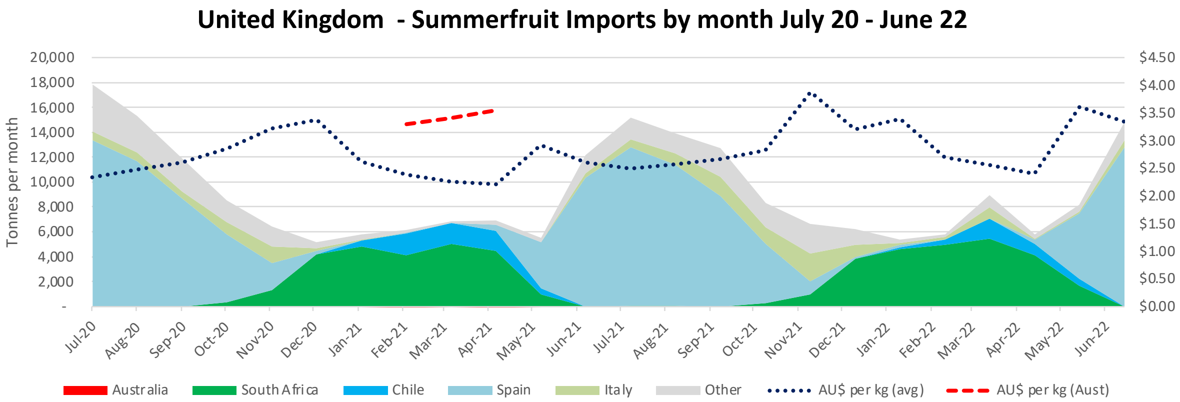
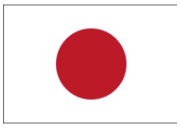


Figure 14.3 Monthly Summerfruit imports by volume and unit price (AU$ per kg CIF equivalent)

Insight

Australia has seen occasional small volumes since 2014 and the geopolitical position with the UK may open new opportunities in the future when the AUKFTA is in place and freight costs are more predictable. Tariffs will be eliminated over 3 years.

Market Access Targets



Japan

Until 2015 Japan did not import stone fruit from any source. The country is a large producer of peaches and plums and is highly protective of their domestic industry.

In 2021/22 Japan recorded imports of 626 tonnes of summerfruit, almost all from United States.

Summerfruit imports have been increasing at over 50 per cent per year over 5 years off a low base, and all in the northern season (Table 15.1).

Japan – Key Numbers		
Population	125.8	million
Urban share	92%	
GDP per capita	40,113	USD
Summerfruit Production	214,100	tonnes
Imports	626	tonnes
5 yr import trend	57.5%	per year
Reliance on Imports	0.3%	
Southern seasonality	0%	
Imports from Australia	624	tonnes
Key Competitor	United States	
Market share (seasonal)		
Tariff	Nil	JAEPA
Access	Prohibited	Application in pool
Exports	1,961	tonnes
Per Capita Consumption	1.69	kg p.a.

Peaches and Nectarines are the main products imported accounting for 68 per cent share and plums accounted for 32 per cent of the imported summerfruit, and no apricots. (Figure 15.1)

Imports accounted less than 1 per cent of the total summerfruit consumption since Japan produces for their own needs in the northern season. Per capita consumption is moderate at 1.59 kg per person.

Summerfruit Australia submitted a market access application to DAFF in 2020 and as of 2022 the application has not been progressed to a negotiation.

Price levels from United States are high and appear attractive for Australia if access in the southern season was successful however the volumes are very low, and the market has a very high demand for quality.

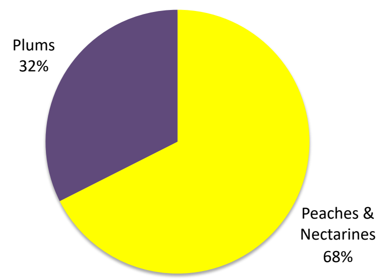
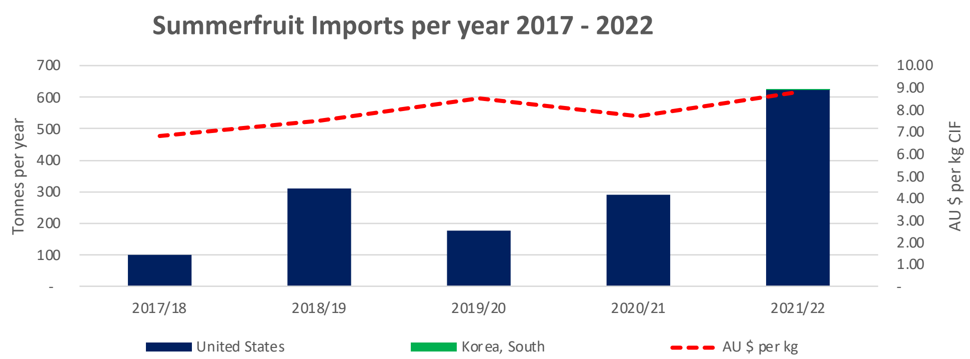


Figure 15.1 Import share by product



Source: IHS Global Trade Atlas; Fresh Intelligence analysis

Figure 15.2 Summerfruit imports by annual volume and unit price (AU$ per kg CIF equivalent)

Table 15.1 Summerfruit imports by supplier volume, CIF value and unit value (net imports)

	2017/18	2018/19	2019/20	2020/21	2021/22	1 yr chg	5 yr trend	2021/22
						%	% CAGR	share %
Volume Tonnes	102	310	176	292	626	114%	57%	100%
Value Million AUD	**0.7**	**2.3**	**1.5**	**2.2**	**5.5**	**145%**	**68%**	**100%**
Unit Value AU$ / Kg	6.80	7.52	8.53	7.69	8.79	14%	7%	1.00
United States	102	310	176	292	624	114%	57%	99.6%
Value Million AUD	**0.7**	**2.3**	**1.5**	**2.2**	**5.5**	**144%**	**68%**	**99.7%**
Unit Value AU$ / Kg	6.80	7.52	8.53	7.69	8.80	14%	7%	1.00
Korea, South					2			0.4%
Value Million AUD					**0.0**			**0.3%**
Unit Value AU$ / Kg					6.90			0.79

Seasonality by Hemisphere	2017/18	2018/19	2019/20	2020/21	2021/22	1 yr chg	5 yr trend	2021/22
Southern Hemisphere	-	-	-	-	-			**0.0%**
Value Million AUD								**0.0%**
Unit Value AU$ / Kg								-
Northern Hemisphere	**102**	**310**	**176**	**292**	**626**	**114%**	**57%**	**100.0%**
Value Million AUD	0.7	2.3	1.5	2.2	5.5	**145%**	**68%**	**100.0%**
Unit Value AU$ / Kg	6.80	7.52	8.53	7.69	8.79	14%	7%	1.00

Source: IHS Global Trade Atlas; Fresh Intelligence analysis

The limited imports are supplied from United States only, with exception of 2 tonnes from Korea than may not represent on going trade.

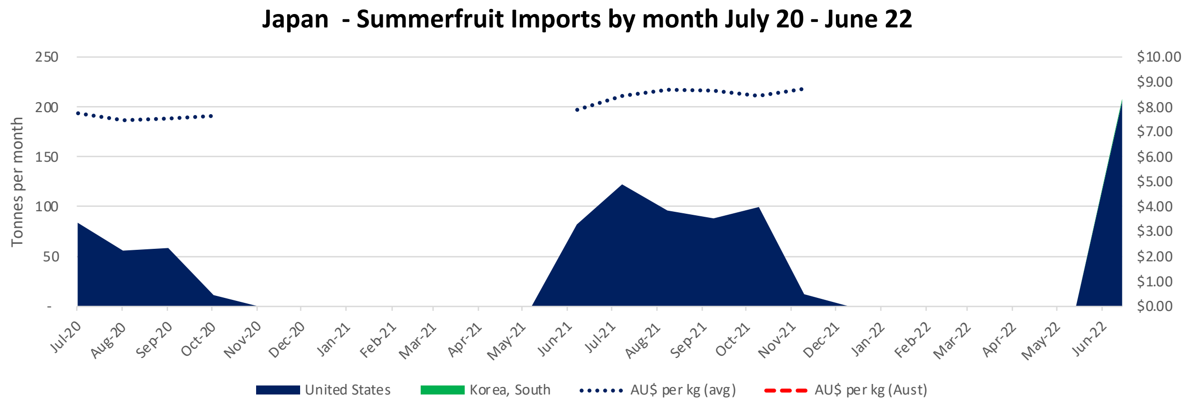


Figure 15.3 Monthly Summerfruit imports by volume and unit price (AU$ per kg CIF equivalent)

Insight

Japanese consumers are sensitive to seasonal fruit and may have difficulty in accepting out of “local” season fruit. United States gained access in 2015 and slowly generating trade. There are no recorded imports for southern season fruit.

South Korea

South Korea is a large producer of stone fruit and does not import from any source. The country is highly protective of local production.

Per capita consumption is similar level to Australia at 5 kg per person demonstrating a strong awareness and consumption by the market.

Summerfruit Australia lodged a market access application with DAFF in 2020. As of 2022 the application has not been progressed to a negotiation. Summerfruit Australia argues that Australian summerfruit supplied in the winter off season to the local product would not be a threat to the local industry.

South Korea – Key Numbers		
Population	51.8	million
Urban share	81%	
GDP per capita	31,489	USD
Summerfruit Production	260,421	tonnes
Imports	-	tonnes
5 yr import trend	n/a	per year
Reliance on Imports	0.0%	
Southern seasonality	n/a	
Imports from Australia	-	tonnes
Key Competitor	0%	
Market share (seasonal)	n/a	
Tariff	Eliminated	KAFTA
Access	Prohibited	Application in pool
Exports	365	tonnes
Per Capita Consumption	5.02	kg p.a.

Insight

South Korea is already an importer if Australian oranges and table grapes. Exporters are building relationships in the trade. Seek opportunities for introducing the benefits of Australian counter seasonal summerfruit to the market before Chile does – though probably already has.

United States

The United States is a large producer and exporter of summerfruit and imports from South America during the southern season.

In 2021/22 United States recorded imports of 54,509 tonnes of summerfruit, of which 98 per cent was imported from Southern Hemisphere suppliers, mainly Chile.

Summerfruit imports were unchanged last year while decreased by average 3 per cent per year over 5 years (Table 17.1). Chile was the largest supplier with 95 per cent share. However, US authorities tightened import regulations on Chilean plums following a pest detection in early 2021 and opened an opportunity for South African fruit that had not been in the market since 2017.

United States – Key Numbers		
Population	329.5	million
Urban share	83%	
GDP per capita	63,544	USD
Summerfruit Production	1,126,450	tonnes
Imports	54,509	tonnes
5 yr import trend	-2.9%	per year
Reliance on Imports	5.1%	
Southern seasonality	98%	
Imports from Australia	No Access	
Key Competitor	Chile	
Market share (seasonal)	96.4%	
Tariff	Nil	AUSFTA
Access	Prohibited	In negotiation
Exports	112,097	tonnes
Per Capita Consumption	3.24	kg p.a.

Peaches and Nectarines are the main products imported accounting for 59 per cent share and plums accounted for 40 per cent of the imported summerfruit, and 1 per cent were apricots. (Figure 17.1)

Imports accounted for 5.1 per cent of the total summerfruit consumption since United States is a large producer for their own needs in the northern season.

Price levels from United States are higher than Chile and contribute to higher average annual prices though Australia should target levels like US levels although selling summerfruit in the northern winter is more challenging.

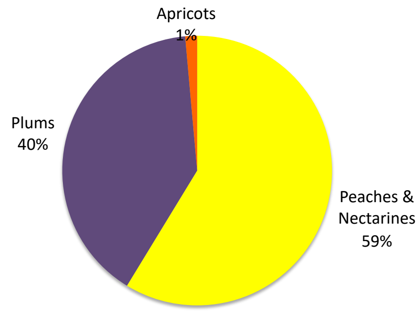
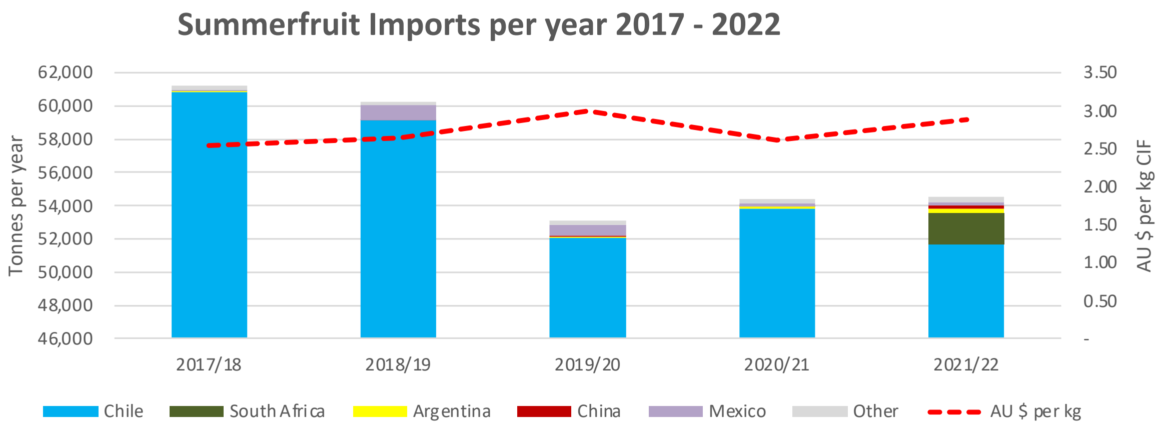


Figure 17.1 Import share by product



Source: IHS Global Trade Atlas; Fresh Intelligence analysis

Figure 17.2 Summerfruit imports by annual volume and unit price (AU$ per kg CIF equivalent)

Table 17.1 Summerfruit imports by supplier volume, CIF value and unit value (net imports)

	2017/18	2018/19	2019/20	2020/21	2021/22	1 yr chg	5 yr trend	2021/22
						%	% CAGR	share %
Volume Tonnes	61,204	60,235	53,117	54,433	54,509	0%	-3%	100%
Value Million AUD	**155.8**	**158.9**	**159.0**	**142.0**	**157.4**	**11%**	**0%**	**100%**
Unit Value AU$ / Kg	2.55	2.64	2.99	2.61	2.89	11%	3%	1.00
Chile	60,847	59,126	52,073	53,799	51,657	-4%	-4%	94.8%
Value Million AUD	**154.8**	**157.3**	**157.3**	**140.9**	**148.7**	**6%**	**-1%**	**94.5%**
Unit Value AU$ / Kg	2.54	2.66	3.02	2.62	2.88	10%	3%	1.00
South Africa					1,918			3.5%
Value Million AUD					**6.3**			**4.0%**
Unit Value AU$ / Kg					3.27			1.13
Argentina	32		55	121	251	107%	67%	0.5%
Value Million AUD	0.13		0.21	0.26	0.36	**38%**	**28%**	**0.2%**
Unit Value AU$ / Kg	4.18		3.79	2.15	1.43	-33%	-23%	0.50
China		21	61	61	213	248%		0.4%
Value Million AUD		**0.03**	**0.07**	**0.06**	**0.72**	**1026%**		**0.5%**
Unit Value AU$ / Kg		1.44	1.21	1.05	3.40	223%		1.18
all other	325	1,088	928	451	470	4%	10%	0.9%
Value Million AUD	0.95	1.58	1.42	0.69	1.33	**93%**	**9%**	**0.8%**
Unit Value AU$ / Kg	2.92	1.45	1.53	1.53	2.84	85%	-1%	0.98

Seasonality by Hemisphere	2017/18	2018/19	2019/20	2020/21	2021/22	1 yr chg	5 yr trend	2021/22
Southern Hemisphere	**60,847**	**59,126**	**52,073**	**53,799**	**53,574**	**0%**	**-3%**	**98.3%**
Value Million AUD	**154.76**	**157.28**	**157.29**	**140.94**	**154.98**	**10%**	**0%**	**98.5%**
Unit Value AU$ / Kg	2.54	2.66	3.02	2.62	2.89	10%	3%	1.00
Northern Hemisphere	**357**	**1,109**	**1,044**	**634**	**934**	**47%**	**27%**	**1.7%**
Value Million AUD	1.1	1.6	1.7	1.0	2.4	**138%**	**22%**	**1.5%**
Unit Value AU$ / Kg	3.03	1.45	1.63	1.61	2.59	61%	-4%	0.90

Source: IHS Global Trade Atlas; Fresh Intelligence analysis

Chile dominates the supply to the United States during the southern season although South Africa reentered the market in 2021. There is no measurable trade in the northern season.

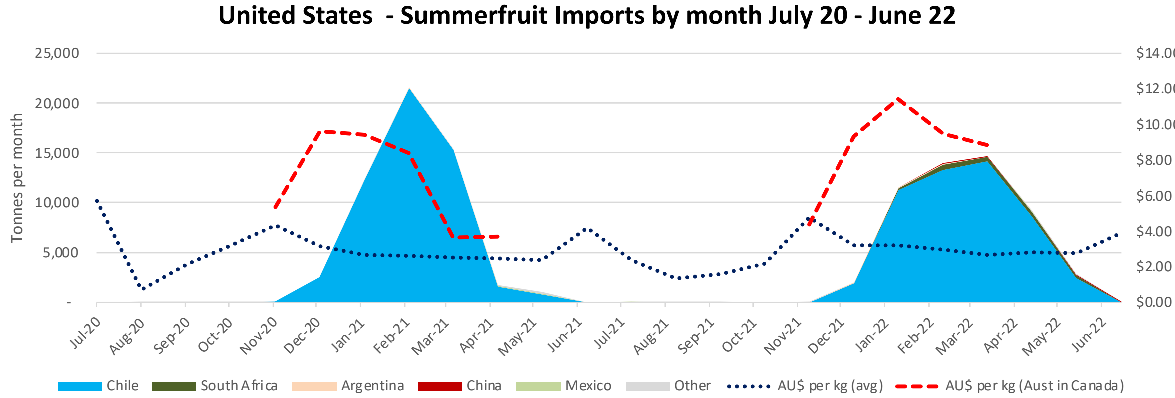


Figure 2.3 Monthly Summerfruit imports by volume and unit price (AU$ per kg CIF equivalent)

Insight

Australia first applied for access in 2006 when Chile did not have some varieties that Australia had, and some growers saw an advantage. The negotiation remains active though not concluded.

New Zealand

New Zealand has a small summerfruit industry and is highly protected. Imports arrive from the United States during the northern season.

In 2021/22 New Zealand recorded imports of 171 tonnes of summerfruit, all from the United States from June to September.

Summerfruit imports decreased 63 per cent last year after falling from a peak of 800 tonnes in 2019/20. The import growth trend has decreased 19 per cent per year over the last 5 years (Table 18.1) although the last 2 years is likely to have been influenced by COVID19 impacts on freight from California and the lost demand from tourism outlets.

New Zealand – Key Numbers		
Population	5.1	million
Urban share	87%	
GDP per capita	41,792	USD
Summerfruit Production	4,700	tonnes
Imports	171	tonnes
5 yr import trend	-19.1%	per year
Reliance on Imports	3.7%	
Southern seasonality	0%	
Imports from Australia	No access	
Key Competitor	United States	
Market share (seasonal)	n/a	
Tariff	Nil	
Access	Prohibited	Application in pool
Exports	256	tonnes
Per Capita Consumption	0.91	kg p.a.

Peaches and Nectarines are the main products imported accounting for 80 per cent share and plums accounted for 20 per cent of the imported summerfruit, and no apricots. (Figure 18.1)

Imports accounted for 3.7 per cent of the total summerfruit consumption since New Zealand produces 4,700 tonnes for their own needs in the southern season. Arguably this is a low volume even comparatively to Australia's 100,000 tonnes.

Price levels from United States appear to be increasing although the exchange rate and higher freight costs would be contributors.

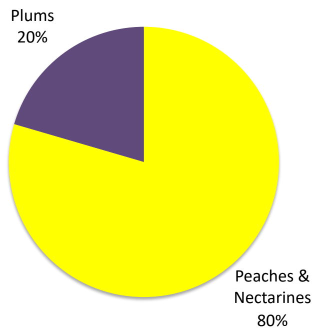
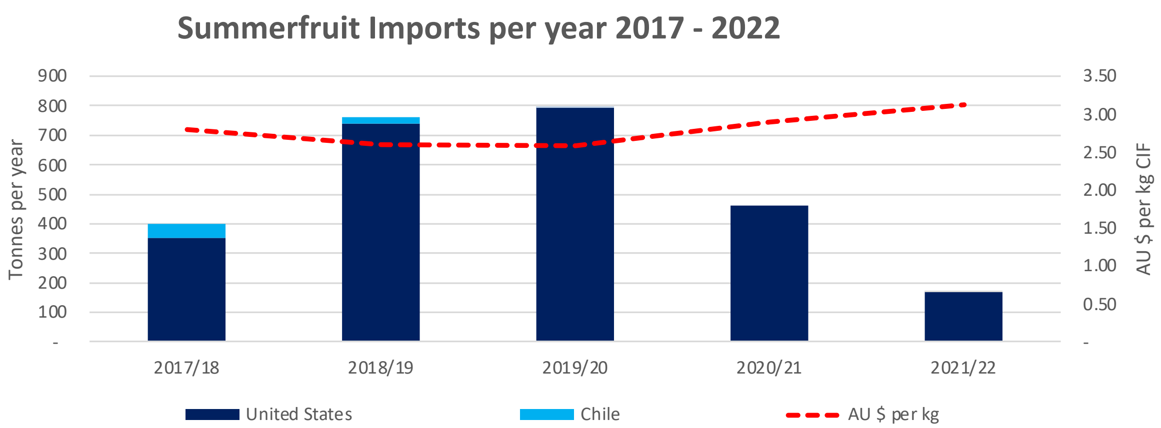


Figure 18.1 Import share by product



Source: IHS Global Trade Atlas; Fresh Intelligence analysis

Figure 18.2 Summerfruit imports by annual volume and unit price (AU$ per kg CIF equivalent)

Table 18.1 Summerfruit imports by supplier volume, CIF value and unit value (net imports)

New Zealand Summerfruit			Imports by Volume			Category	Fresh Fruit	
	2017/18	**2018/19**	**2019/20**	**2020/21**	**2021/22**	1 yr chg	5 yr trend	2021/22
						%	% CAGR	share %
Volume Tonnes	399	763	793	461	171	-63%	-19%	100%
Value Million AUD	**1.1**	**2.0**	**2.0**	**1.3**	**0.5**	**-60%**	**-17%**	**100%**
Unit Value AU$ / Kg	2.79	2.60	2.58	2.89	3.13	8%	3%	1.00
United States	354	741	793	461	171	-63%		99.9%
Value Million AUD	**1.0**	**1.9**	**2.0**	**1.3**	**0.5**	**-60%**		**99.9%**
Unit Value AU$ / Kg	2.88	2.62	2.58	2.89	3.13	8%		1.00
Chile	45	22						
Value Million AUD	**0.1**	**0.0**						
Unit Value AU$ / Kg	2.10	2.21						

Seasonality by Hemisphere	**2017/18**	**2018/19**	**2019/20**	**2020/21**	**2021/22**	1 yr chg	5 yr trend	2021/22
Southern Hemisphere	**45**	**22**						**0.0%**
Value Million AUD	**0.09**	**0.05**						**0.0%**
Unit Value AU$ / Kg	2.10	2.21						-
Northern Hemisphere	**354**	**741**	**793**	**461**	**171**	**-63%**	**-17%**	**100.0%**
Value Million AUD	1.0	1.9	2.0	1.3	0.5	**-60%**	**-15%**	**100.0%**
Unit Value AU$ / Kg	2.88	2.62	2.58	2.89	3.13	8%	2%	1.00

Source: IHS Global Trade Atlas; Fresh Intelligence analysis

Supplies from United States arrive between June and September. Local production is available from December to March.

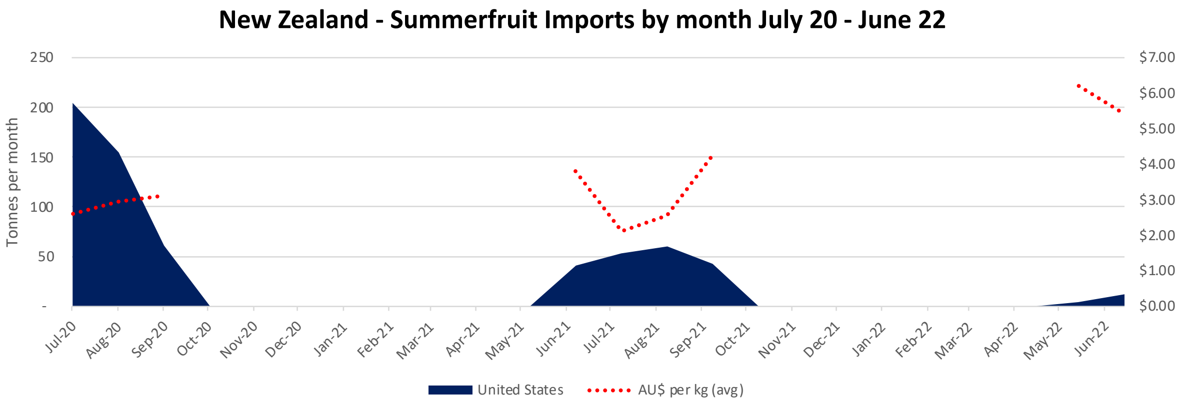


Figure 18.3 Monthly Summerfruit imports by volume and unit price (AU$ per kg CIF equivalent)

Insight

New Zealand has a very low per capita consumption. Opportunities exist for Australian summerfruit to co-exist with New Zealand production to grow the overall demand. Per capita consumption at 0.91kg pp. is around a quarter of Australian per capita consumption.

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Summerfruit AUSTRALIA

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