



Fresh Fruit Trade Market Asia

Import trends 2019



Market Data Background & Disclaimer

Top-15 Asia - Countries in the list

- ✓ China
- ✓ Hong Kong
- ✓ Japan
- ✓ Thailand
- ✓ Malaysia
- ✓ Singapore
- ✓ Sri Lanka
- ✓ Myanmar
- ✓ Taipeh
- ✓ India
- ✓ Indonesia
- ✓ Philippines
- ✓ Viet Nam
- ✓ Bangladesh
- ✓ Korea
- ✓ Nepal

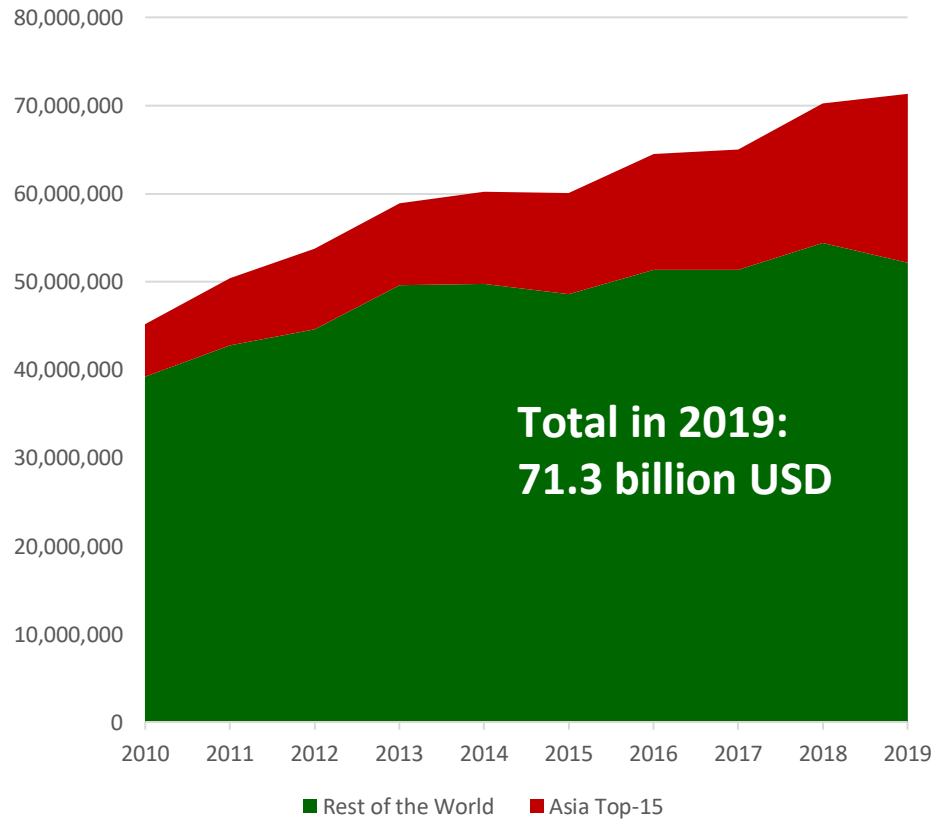
- Data sourced by TradeMap, Reporting improved – but still no 100% figures for tonnage retroactively
- No general data available yet on overall market figures 2020
- Maldives and Cambodia left Asia-Top-15 – Myanmar & Nepal joined Top-15 importing Asian countries
- The data sourced covers specifically temperate fruit imports



Global temperate fruit imports: total vs. other destinations vs. Asia (Value in 1000 USD)

Top-15 Asia continues to grow, while the rest of the world is flattening out

Global Fruit Imports in \$ 1000 USD



Growth rate: Rest of the World (-4% from 18-19) vs. Asia-Top 15 continues to grow at same average pace of 15% (21% from 18-19)



Average Global Temperate Fruit Import Growth: 5.2% (In 2018: still at 6%) – 2010-19: 58% total growth

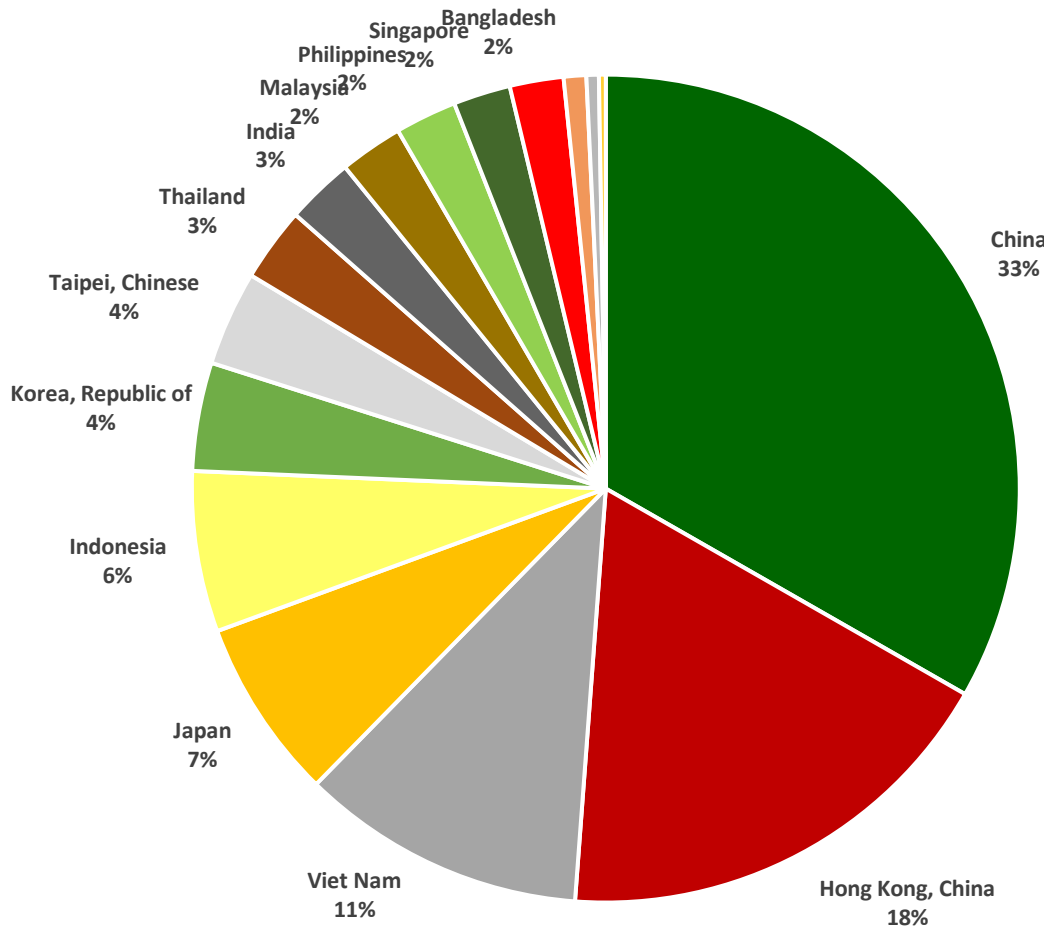


Asia Fruit Trade: 27% of World exports (2018: 23%)

| Import destination | Value in USD 2010 | Value in USD 2019 | Growth in % |
|--------------------------------------|--------------------|--------------------|---|
| Global Fruit imports other than Asia | US \$ 39,3 billion | US \$ 52,1 billion | Average Annual 10y Growth 3% Total: 33% |
| Fruit imports to Asia Top-15 | US \$ 5, 9 billion | US \$ 19,2 billion | Average Annual 10y Growth rate : 15%, Total: 220 % |

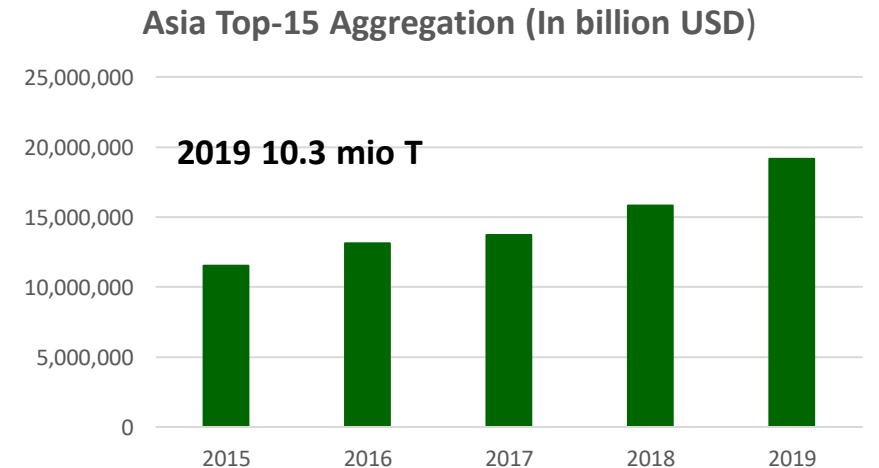


Key import markets in Asia 2019: Total Market Share from all origins (Value in billion USD)



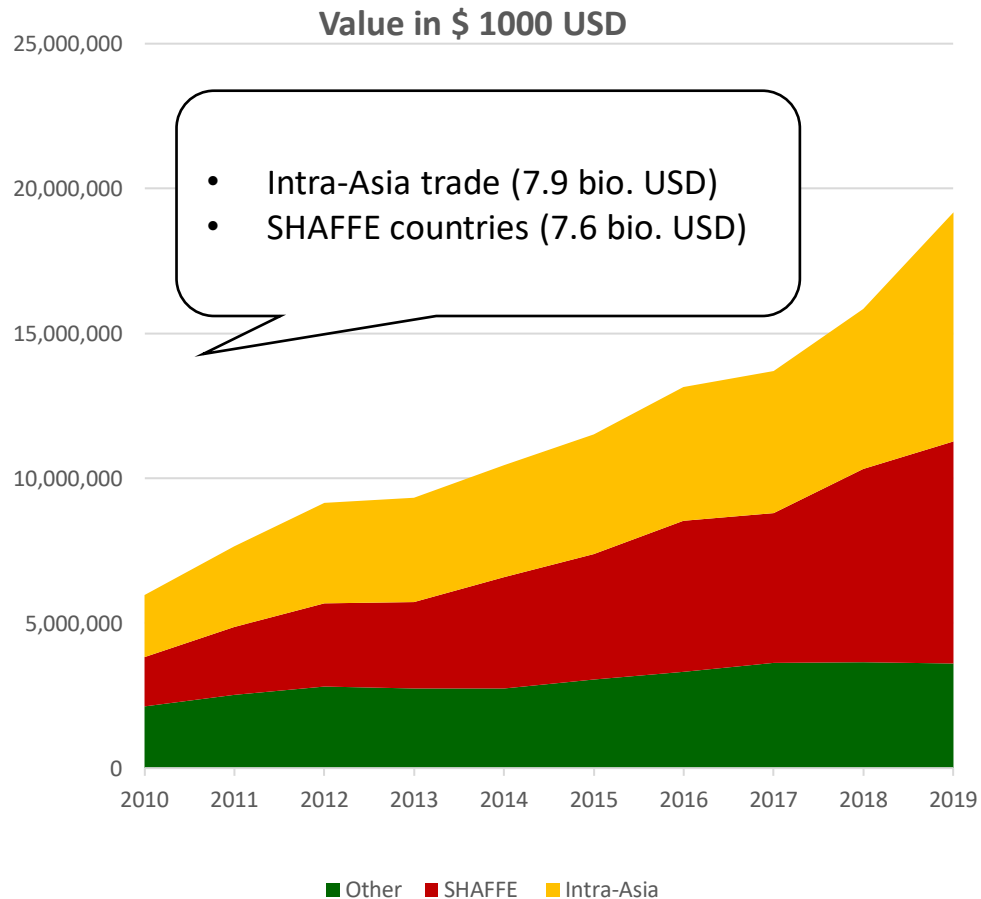
| 2019 | Value in \$ 1000 USD |
|--------------------|----------------------|
| China | 6,380,364 |
| Hong Kong, China | 3,435,719 |
| Viet Nam | 2,138,336 |
| Japan | 1,355,636 |
| Indonesia | 1,203,446 |
| Korea, Republic of | 811,539 |
| Taipei, Chinese | 709,652 |
| Thailand | 554,996 |
| India | 507,104 |
| Malaysia | 474,739 |
| Philippines | 461,438 |
| Singapore | 428,410 |
| Bangladesh | 402,744 |
| Myanmar | 168,869 |
| Nepal | 92,796 |
| Sri Lanka | 51,138 |

- ➔ Trade to China/HK continues to shape 50% of Asian Fruit import market but also Vietnam market to watch
- ➔ Top-15 Asia market: 20 billion USD (11.5 billion USD in 2015)
- ➔ Stronger diversification in the rest of the ranking compared to 2018;
- ➔ Average 5 year growth rate: 11%, Total growth 67%





Distribution of Trade by origin/value: Intra-Asia vs. SHAFFE vs. Rest of the World 2019



- ❖ Intra-Asian: 41.2% market share trade showed rapid growth curve
- ❖ SHAFFE No. 2 with 40% market share to Top-15 destinations
- ❖ Rest of the World: 18,8 %

| Exporters | Imported value in 2019 |
|---------------------|------------------------|
| Chile | 3,788,129 |
| Thailand | 3,346,749 |
| China | 3,245,126 |
| U.S.A. | 2,125,949 |
| New Zealand | 1,557,344 |
| Australia | 1,037,311 |
| South Africa | 731,594 |
| Viet Nam | 632,959 |
| Peru | 504,613 |
| Mexico | 340,009 |

*Argentina (No. 23 – 323 mio. USD, Brazil (No.31 – 190 mio. USD, Uruguay No. 64 – 140.000 USD)

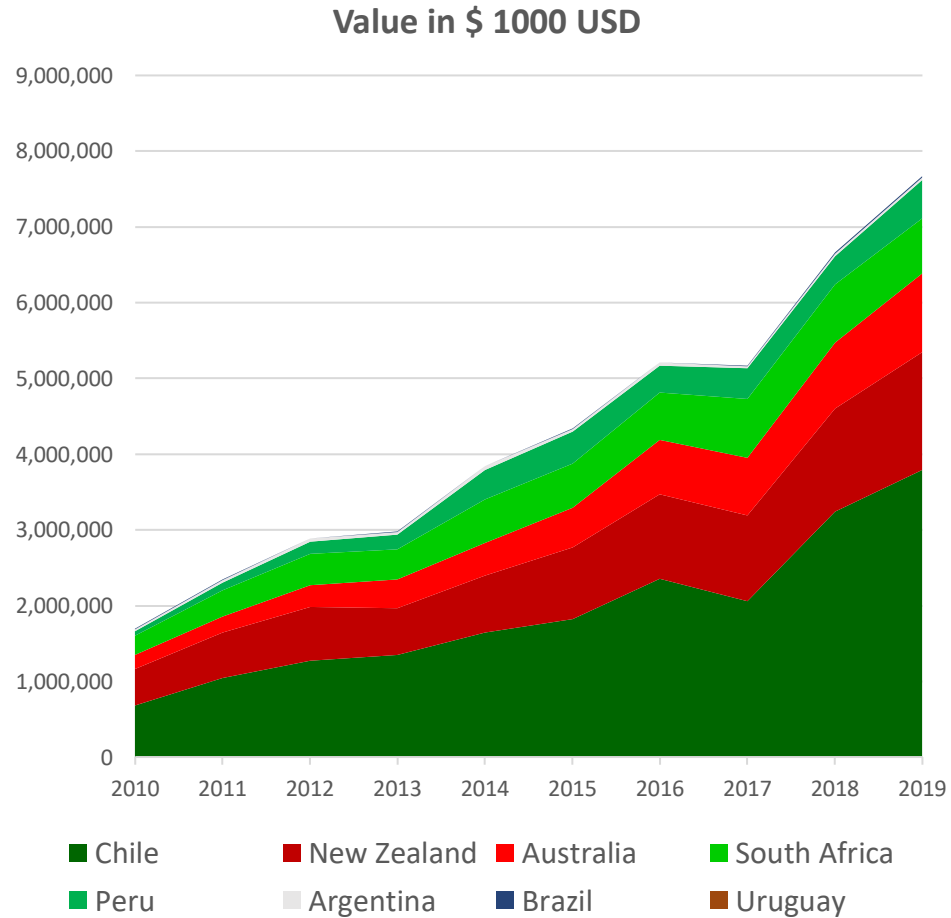


SHAFFE ASIA Market Trends

Import trends 2019



Overall SHAFFE exports to TOP-15 Asian market destinations – Value in billion USD

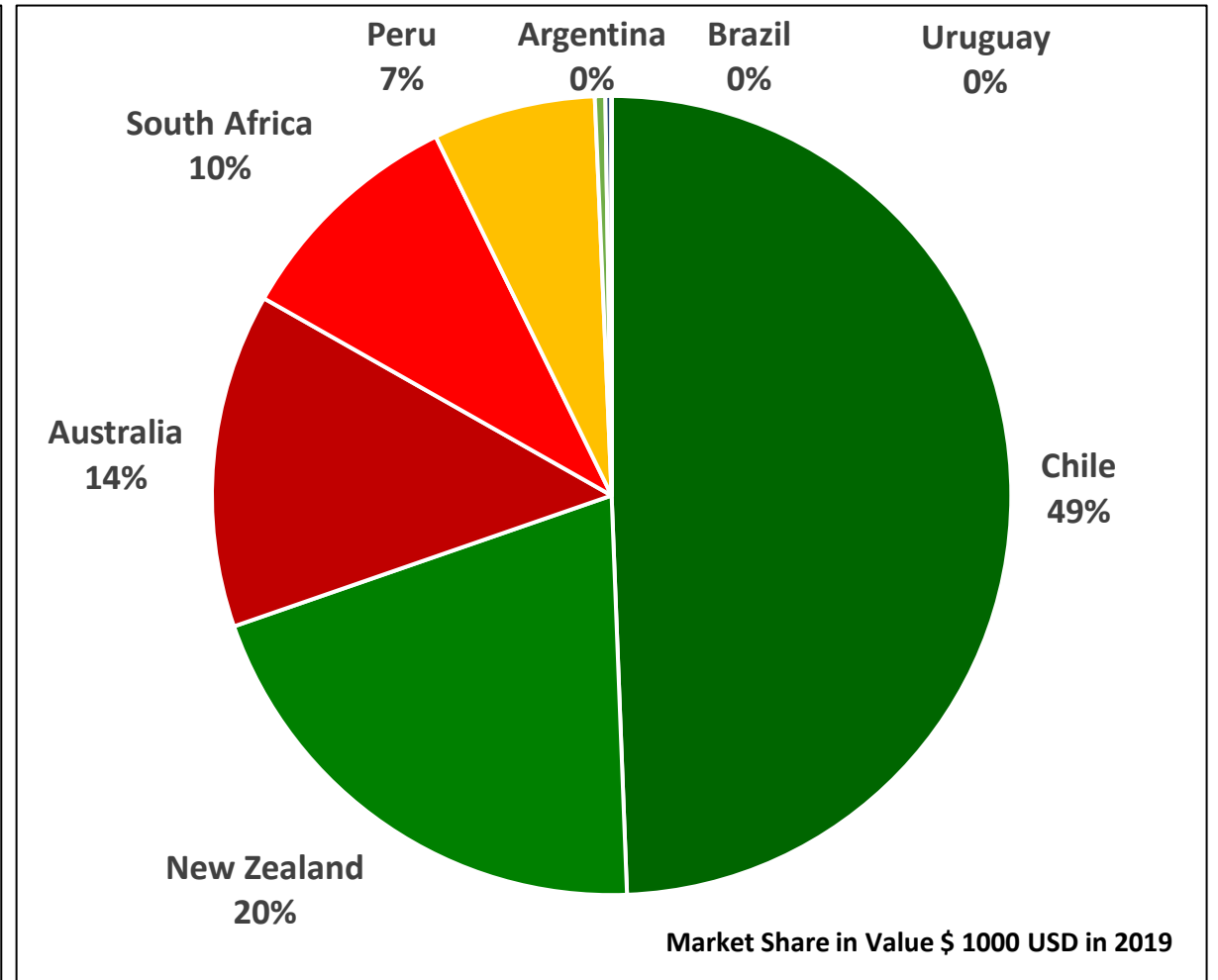
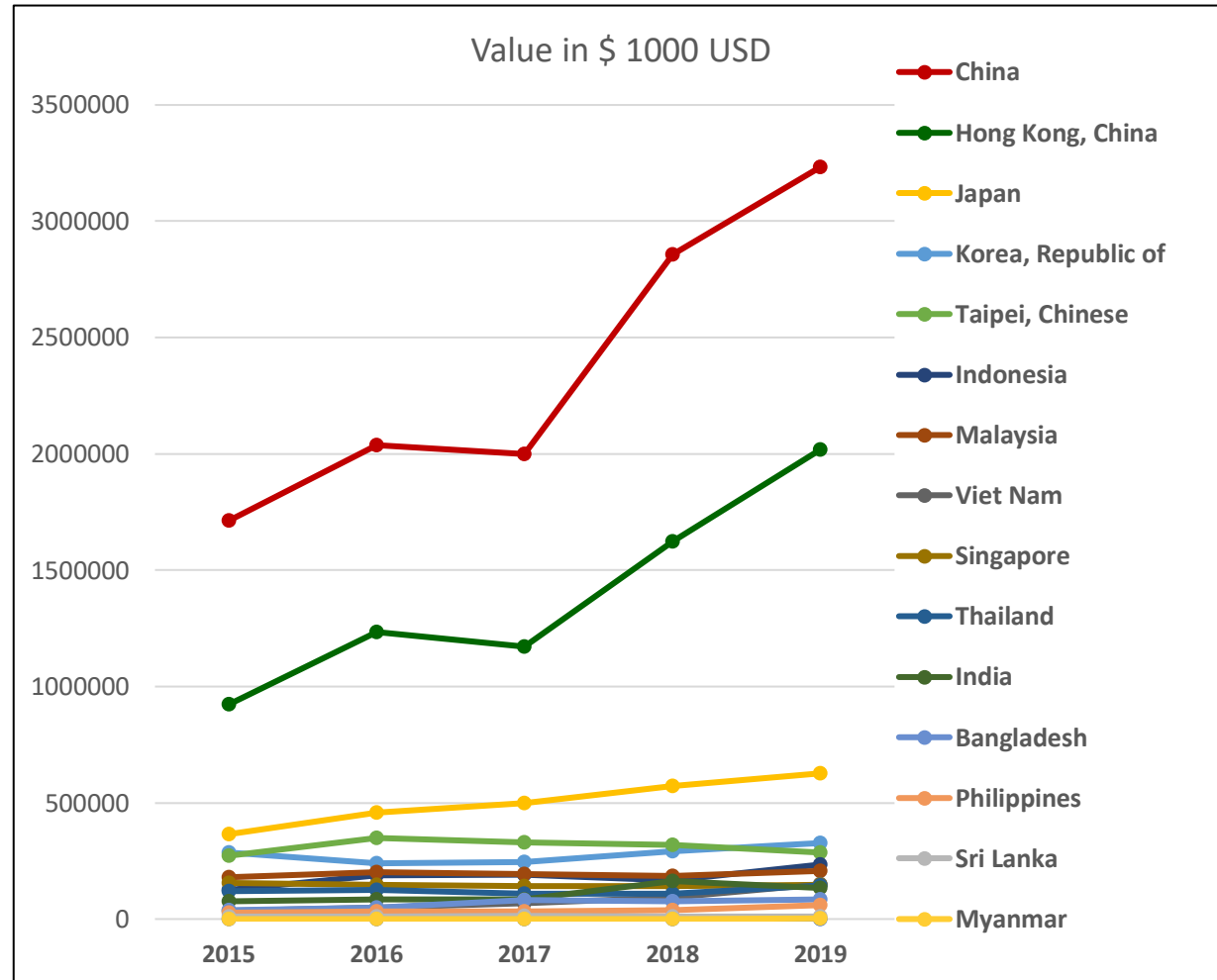


- ❖ Total Import Value: \$ 7.6 bio USD in 2019
- ❖ Steady value growth trend for the Top 5 SHAFFE exporters

| Exporters | Average 5-year growth |
|--------------|-----------------------|
| Chile | 20% |
| New Zealand | 16% |
| Australia | 20% |
| South Africa | 5% |
| Peru | 7% |
| Argentina | -2% |
| Brazil | 30% |
| Uruguay | 30% |

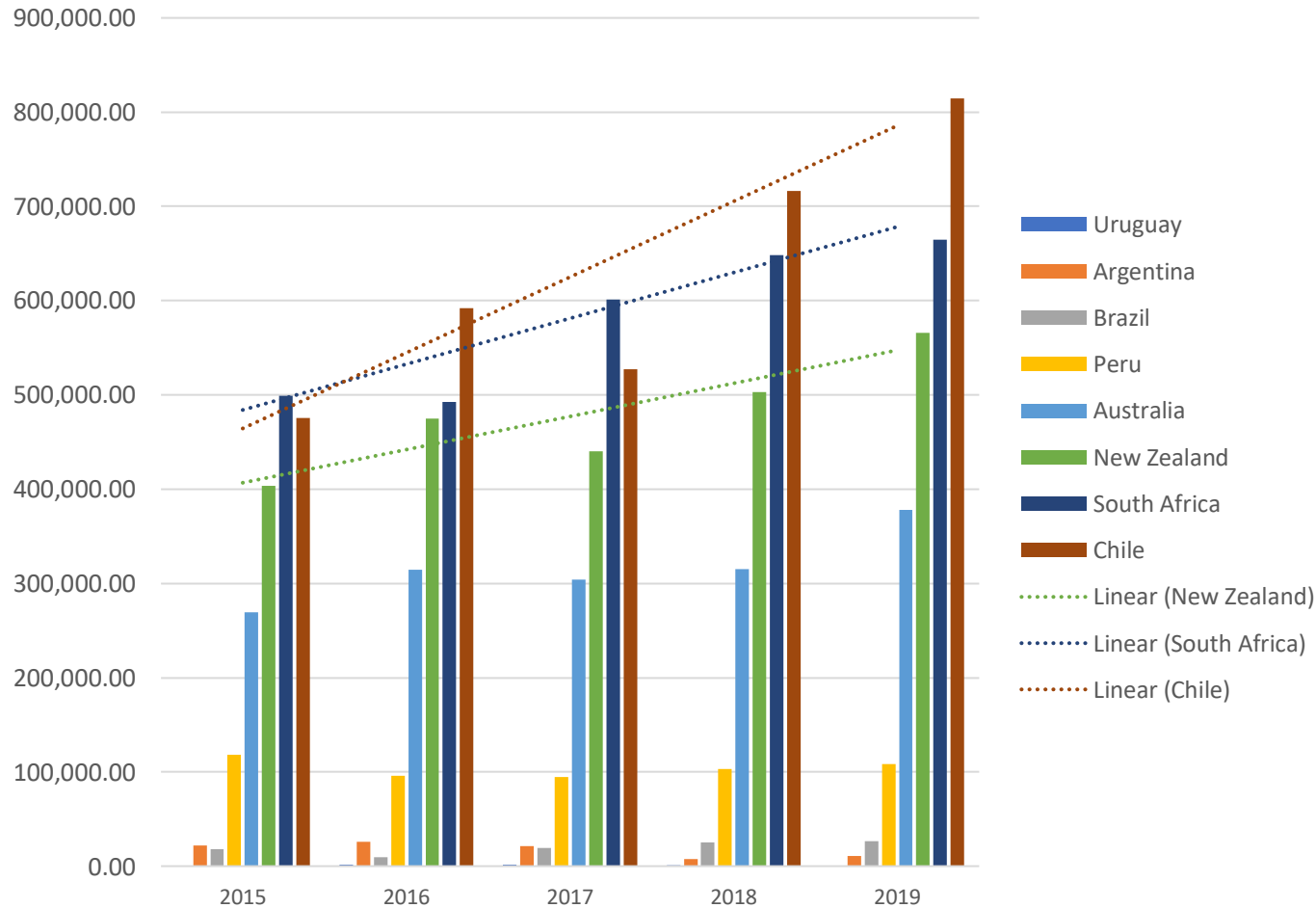


Overall SHAFFE exports by receiving destination and market share in value (\$ 1000 USD)





Market Developments 2019 in Volume: Total SHAFFE imports: 2.6 mio. T



SHAFFE – Top 5 Exporters in Volume in T

| Volume in T | 2018 | 2019 | Growth 18-19 |
|--------------|------------------|------------------|--------------|
| Chile | 716,556 | 814,230 | 14% |
| South Africa | 648,563 | 664,469 | 2% |
| New Zealand | 502,831 | 565,739 | 13% |
| Australia | 315,452 | 377,942 | 20% |
| Peru | 103,517 | 108,247 | 5% |
| Total | 2,320,615 | 2,568,000 | 11% |



Fruit Trade Trends in Top 3 Markets

China/HK

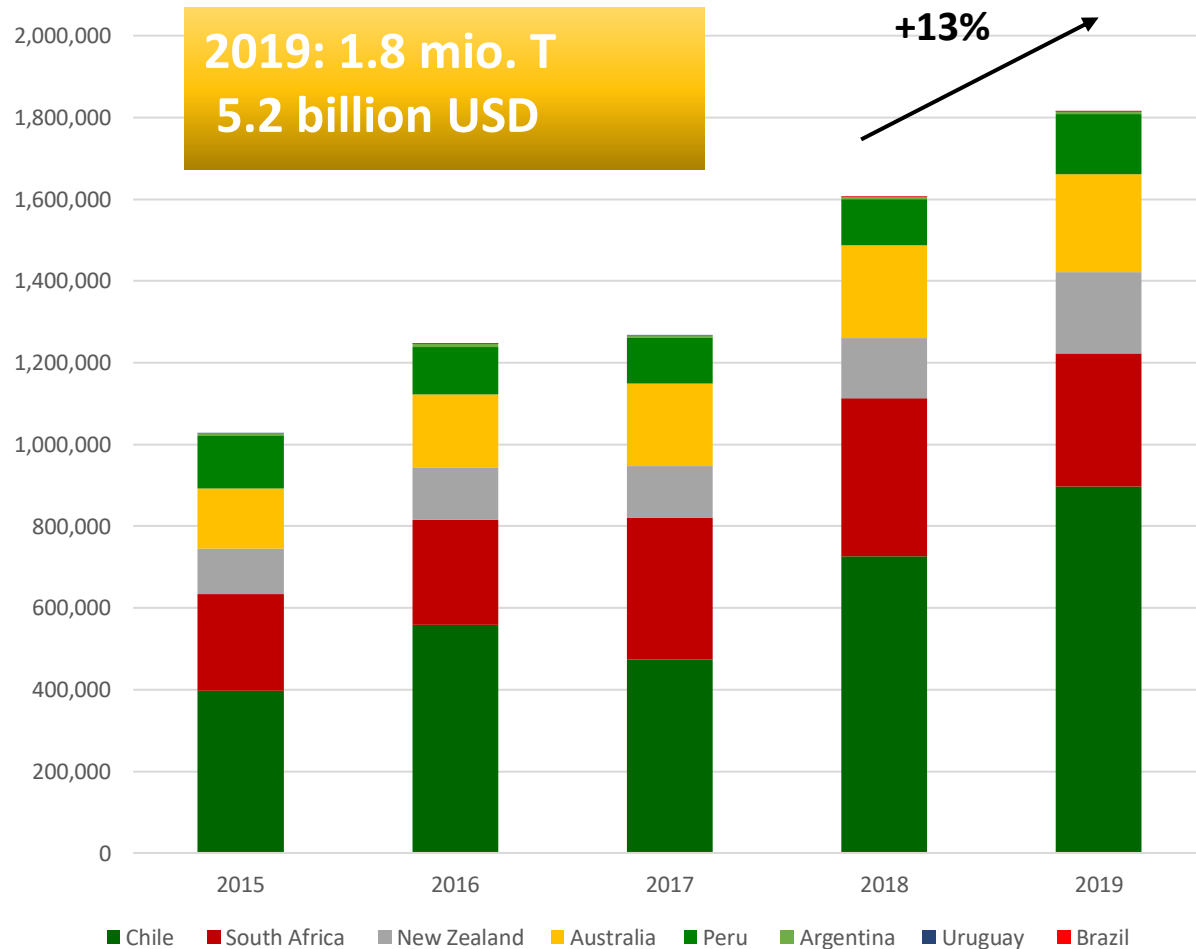
Japan

Korea

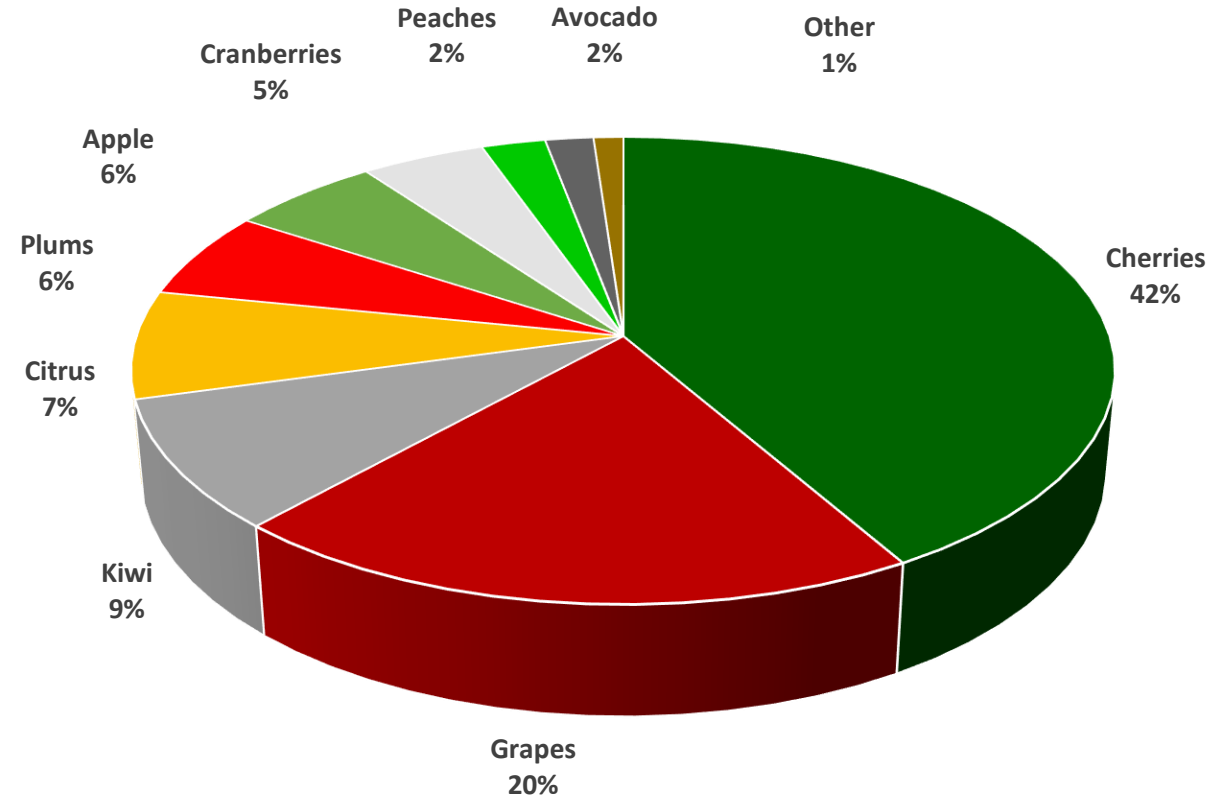


TOP3 Markets: China/HK: Fruit Import Market Trends for SHAFPE countries

Volume in T



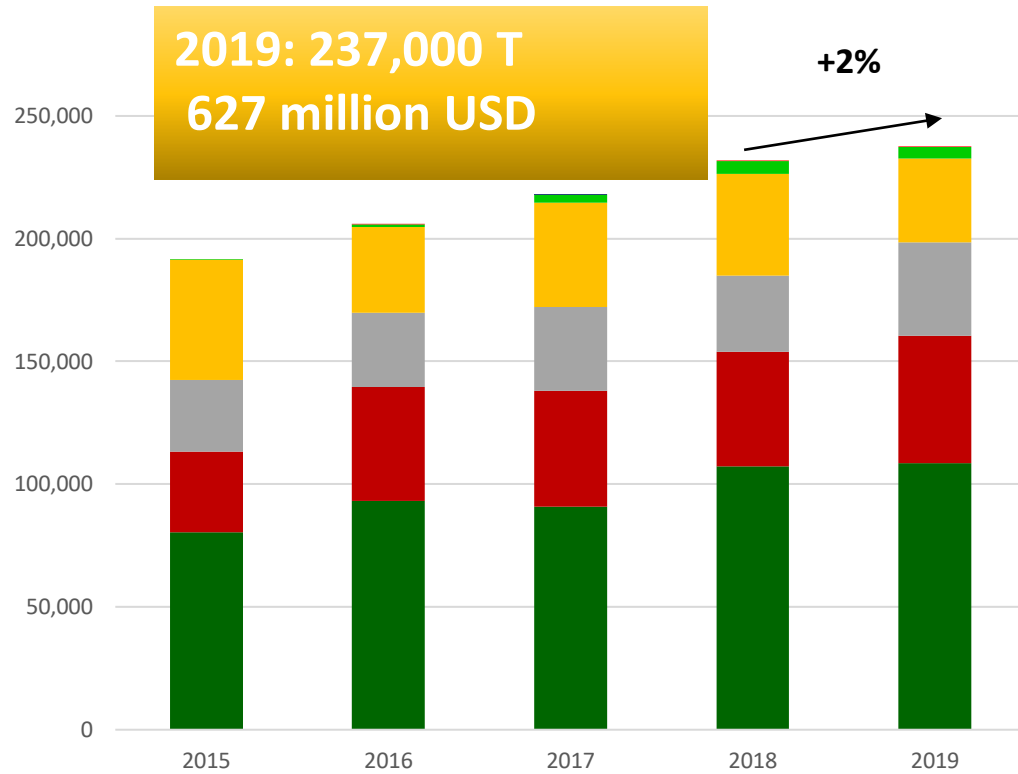
Fruit imports 2019 (Value in USD)



Further increase of Cherries & Grapes (2018: Kiwi – second strongest, Citrus still at 13% market share)

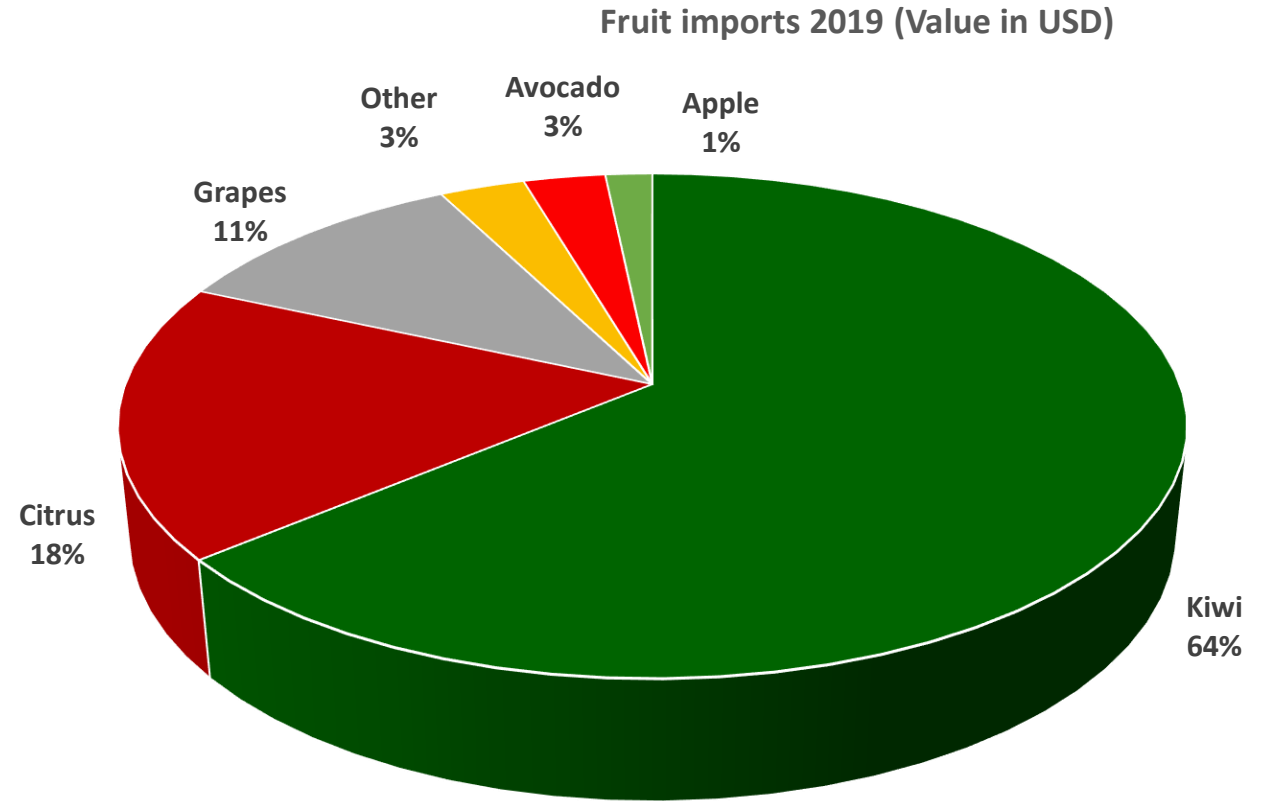


Top 3 Markets: Japan – Fruit Import trends for SHAFFE countries



Volume in T

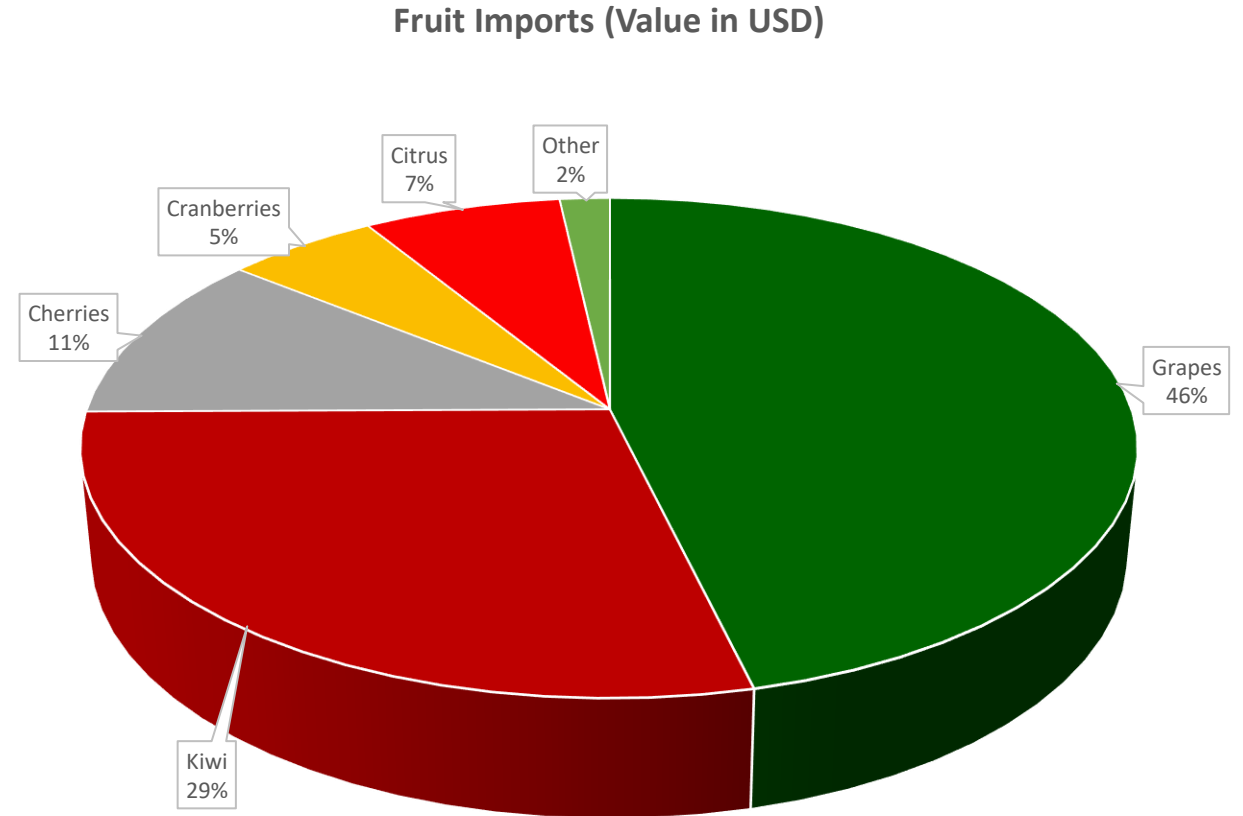
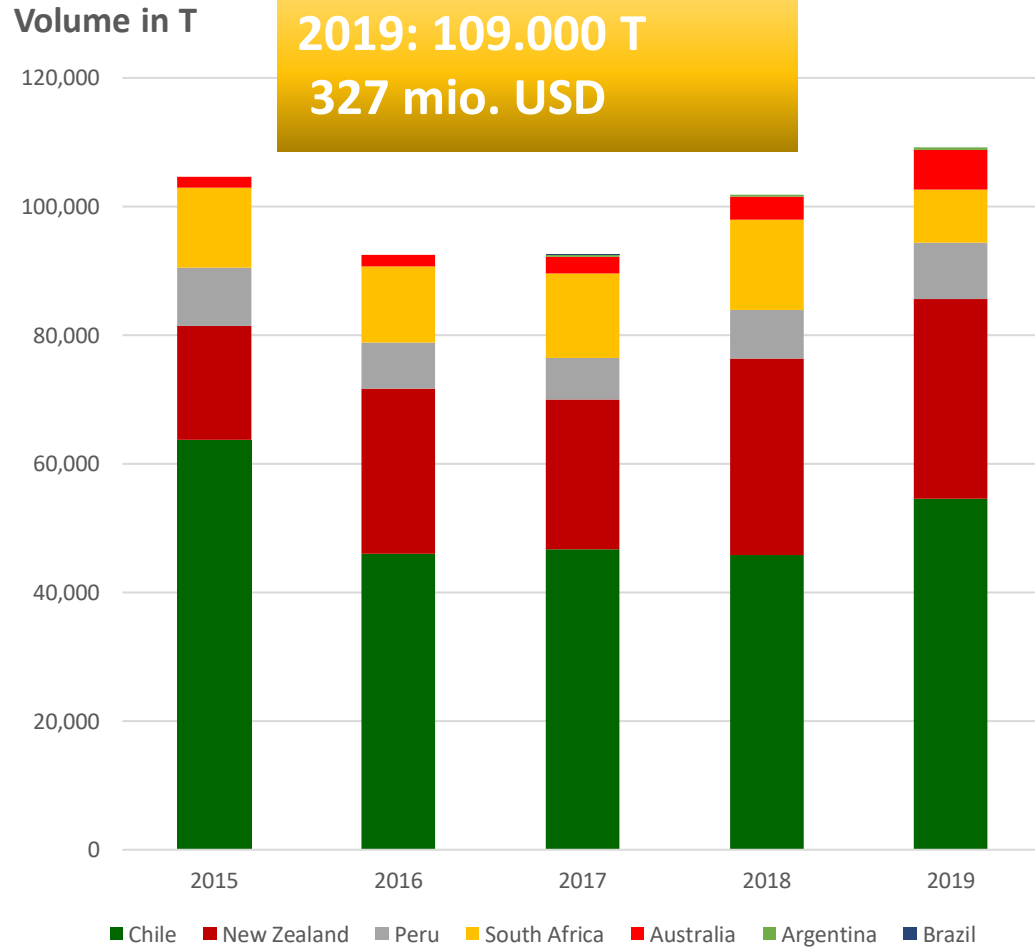
■ New Zealand ■ Australia ■ Chile ■ South Africa ■ Peru ■ Argentina ■ Brazil



Stable market with little changes in the set-up of imported products



Top 3 Markets: Korea – Fruit Import Trends for SHAFPE



Korean import market over Taipei in terms of Value (Taipei: 290 mio USD, 125.000 T)