

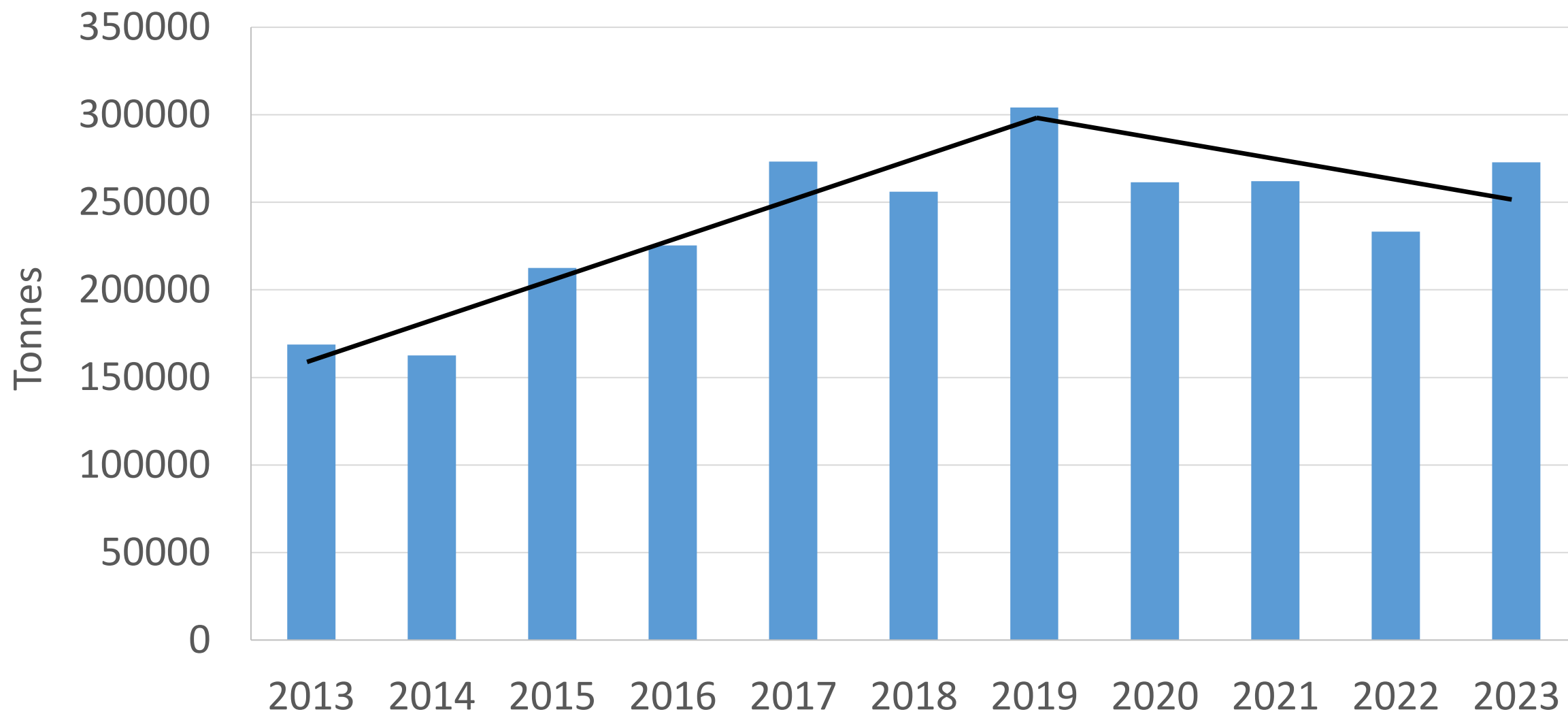
Key Market Insights

David Daniels, General Manager
Market Development

Australian Citrus Congress, March 2024

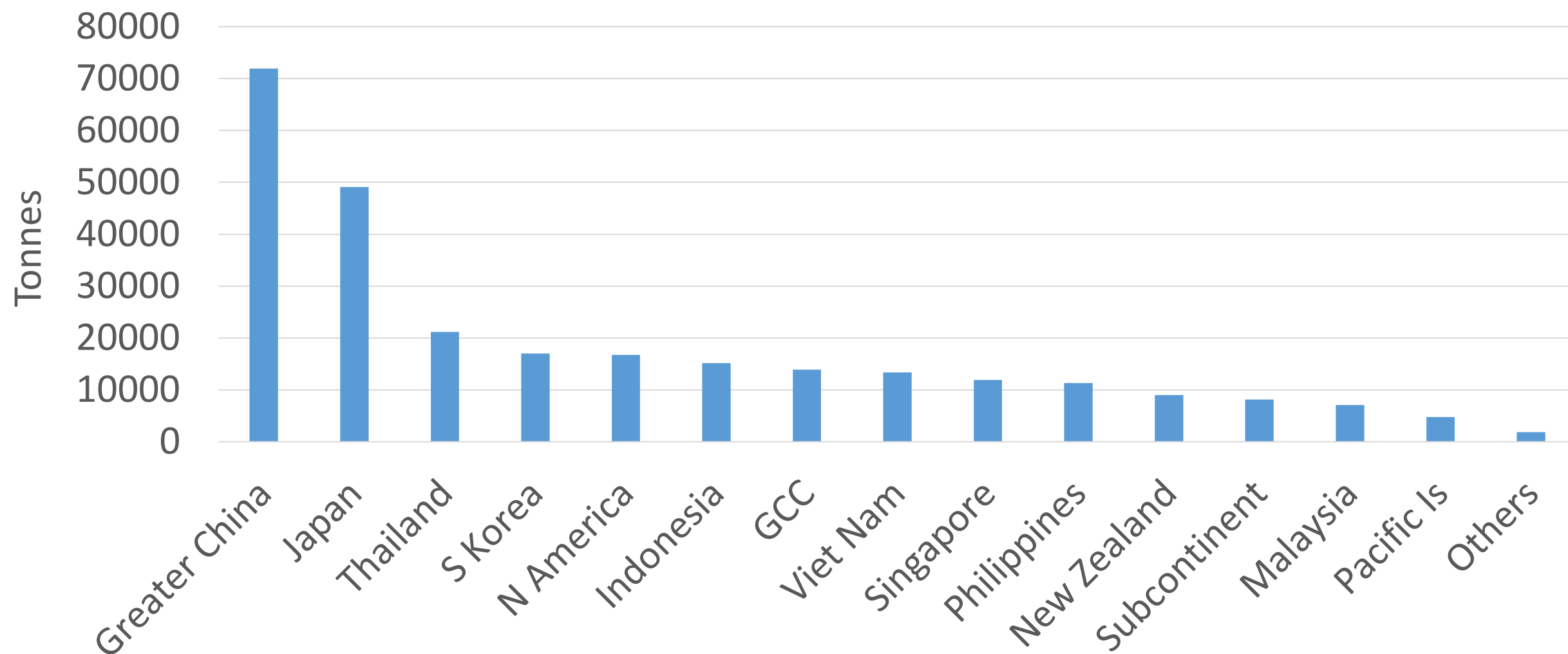


Australian citrus exports (all citrus) 2013-23



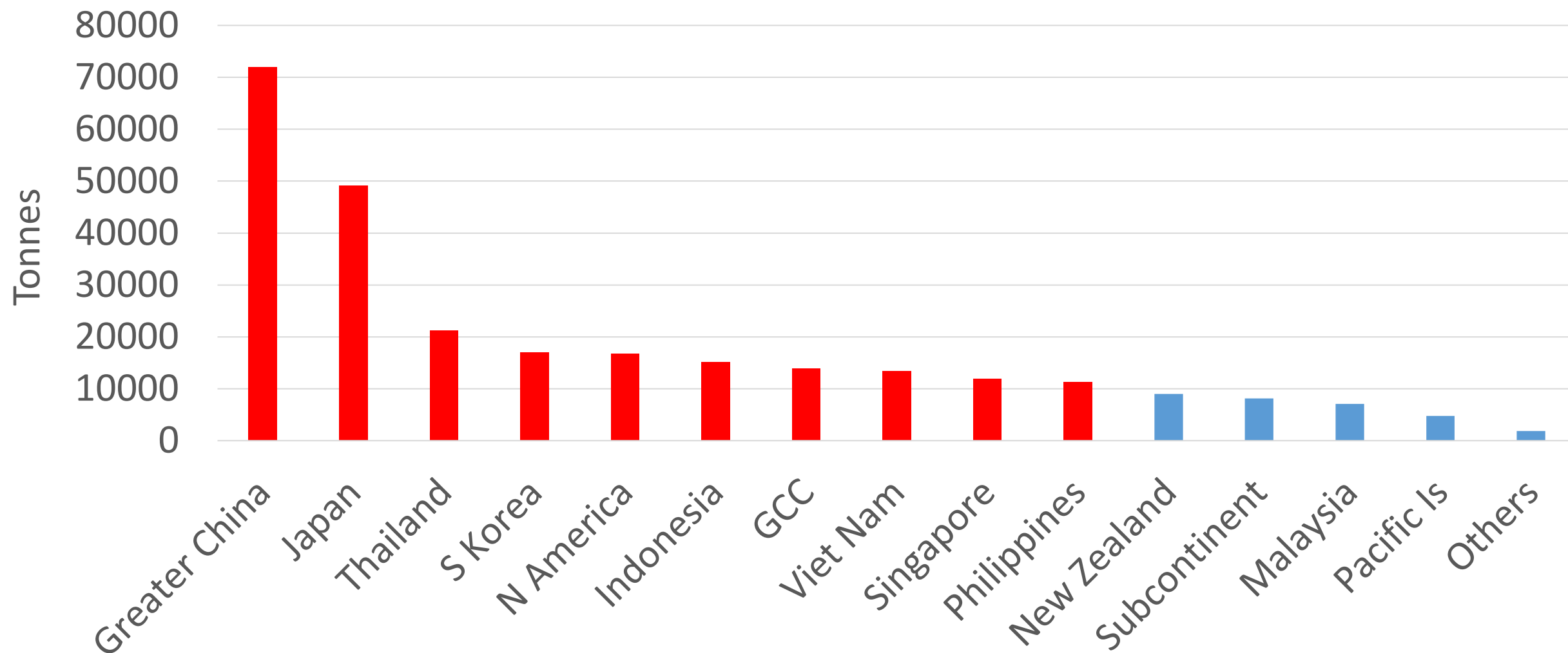


Australian citrus trade flows (all citrus) 2023



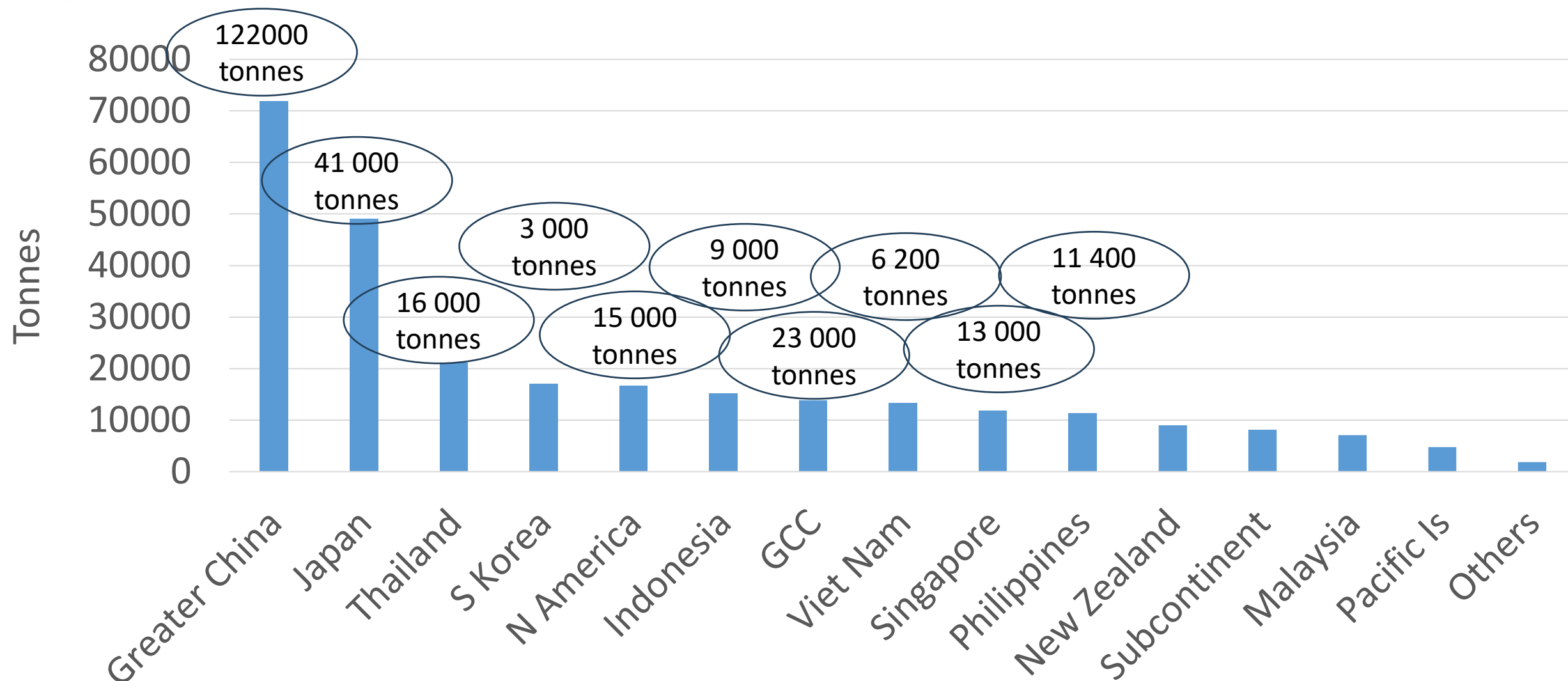


Australian citrus exports (all citrus) 2023

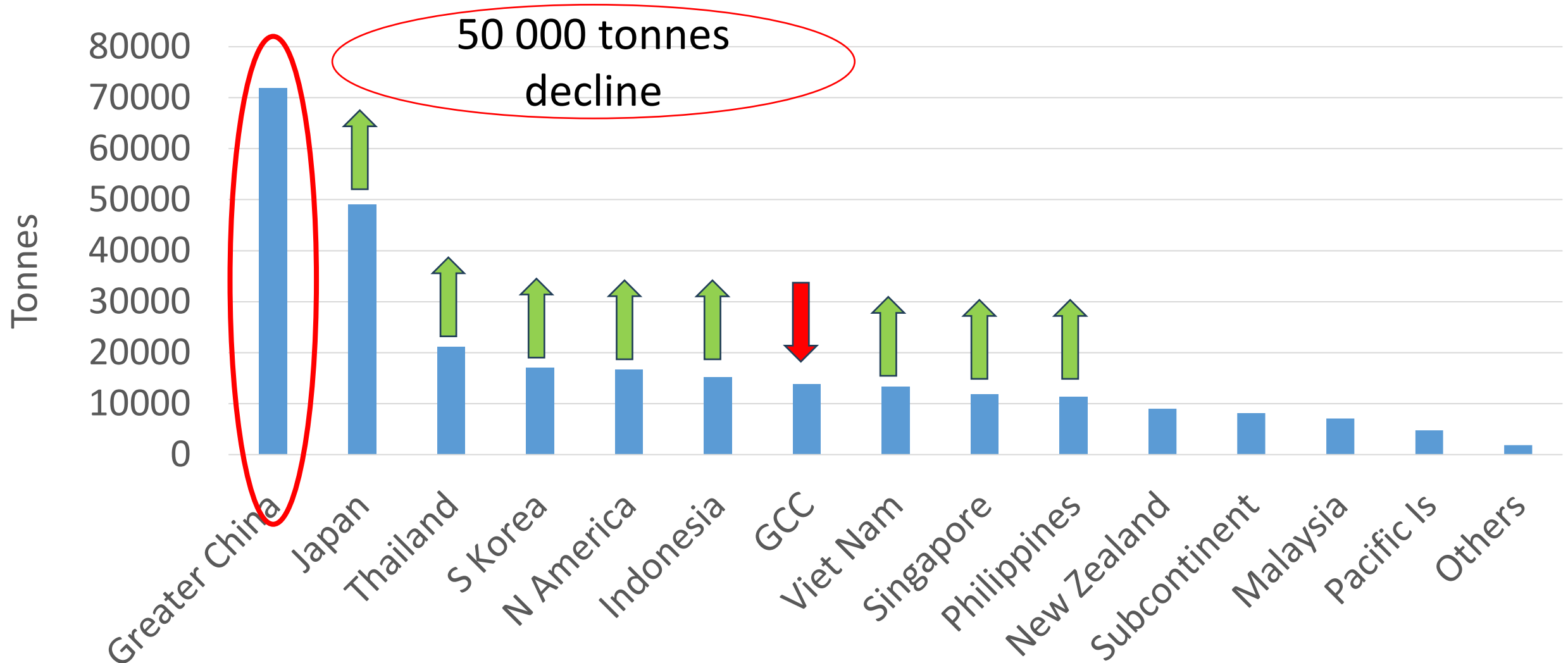




Australian citrus exports (all citrus) 2023

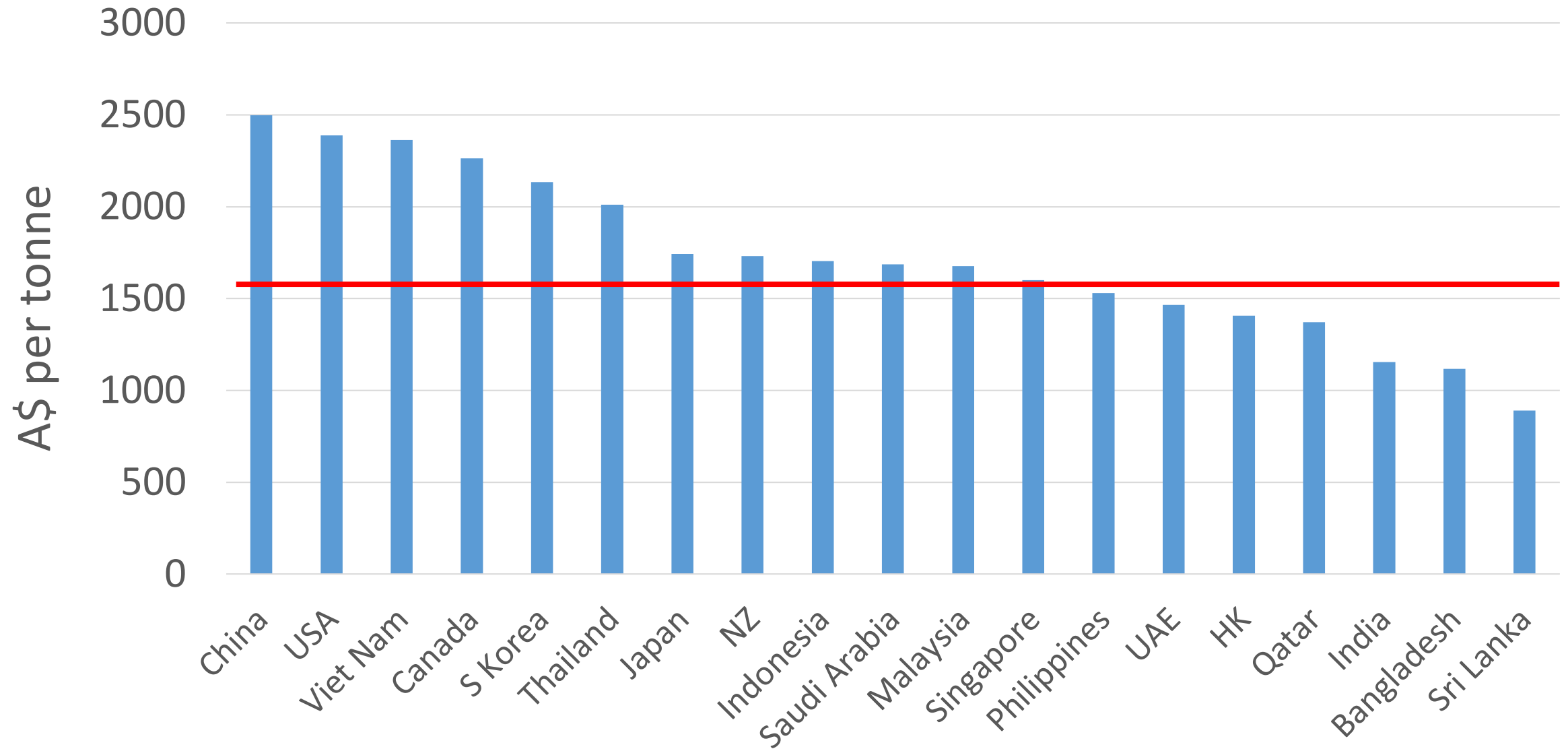


Australian citrus exports (all citrus) 2023



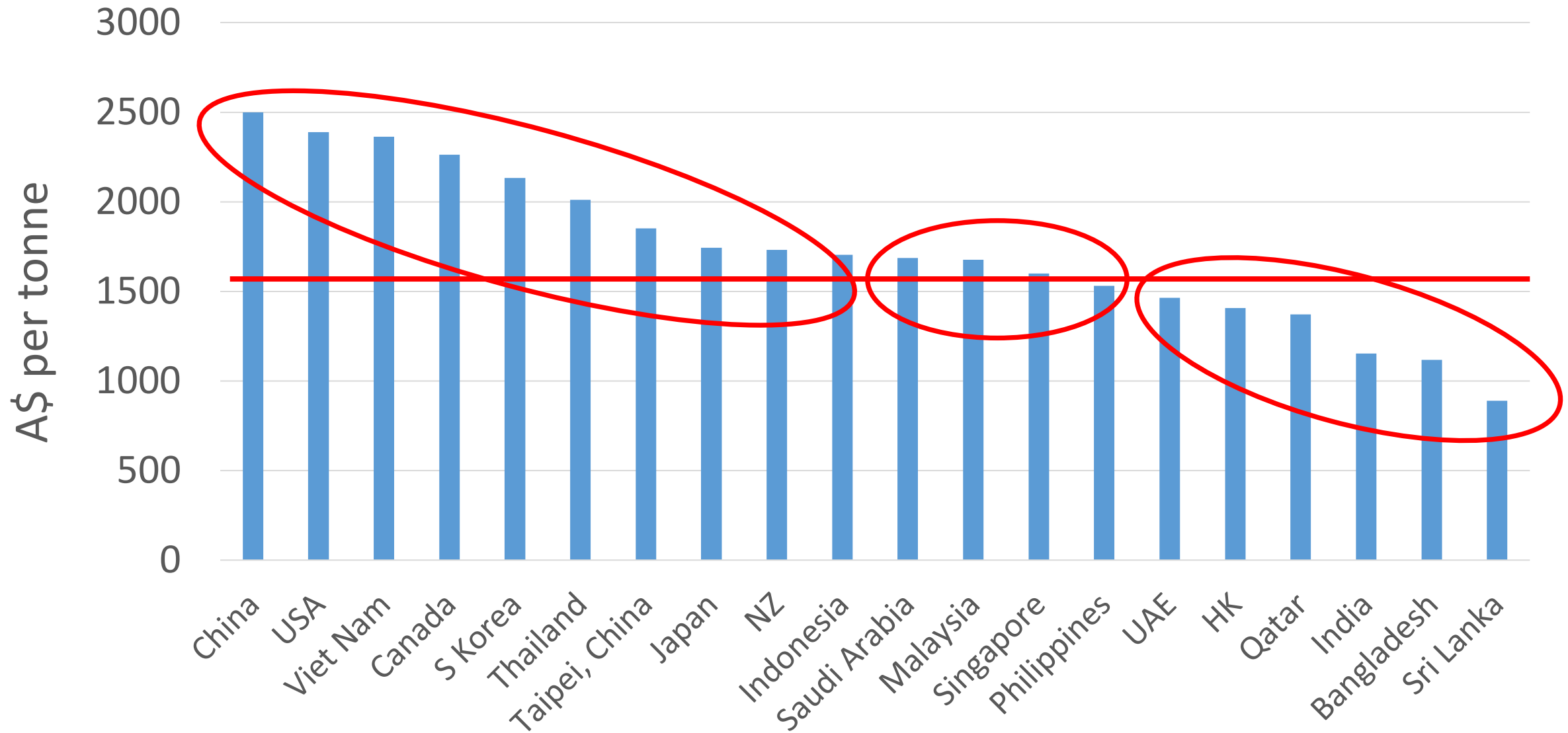


Australian citrus exports market returns



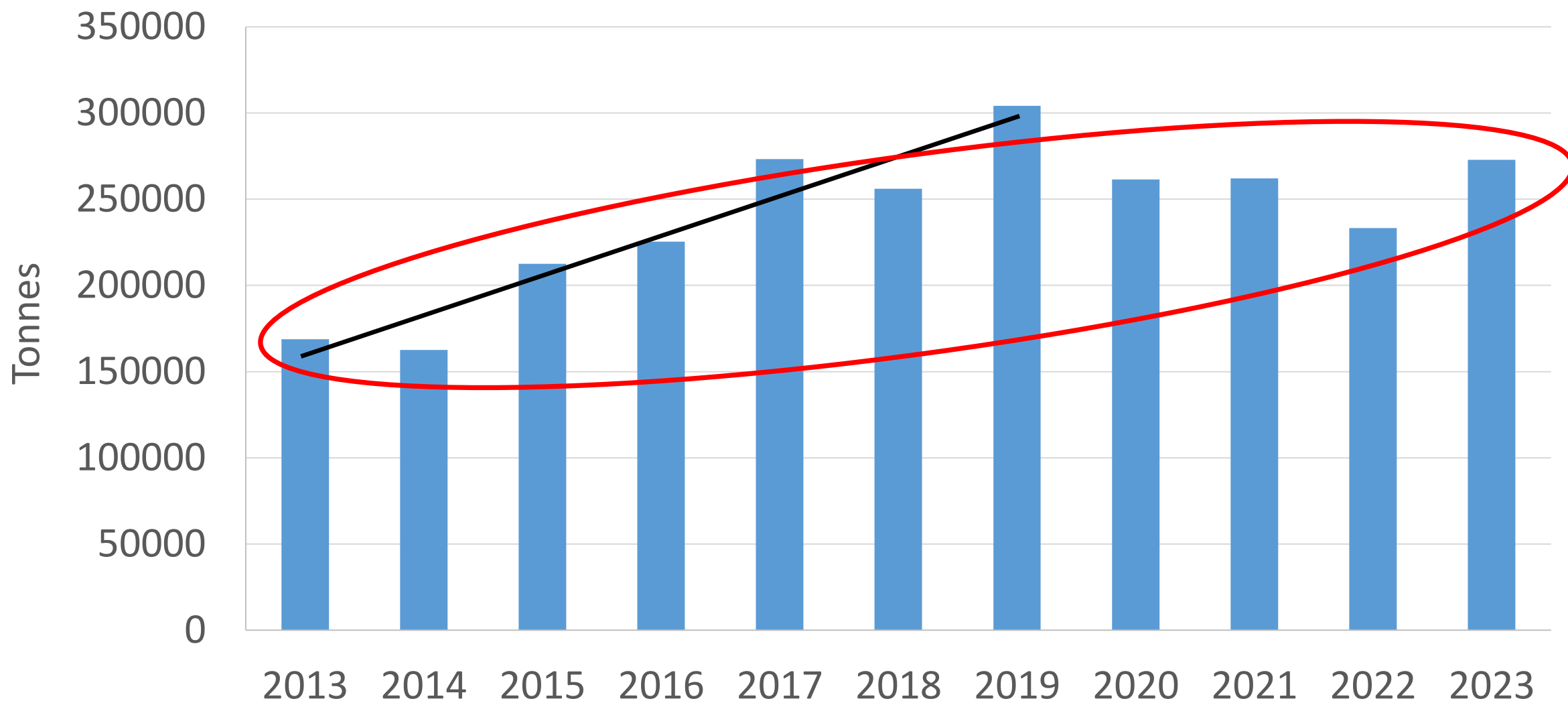


Australian citrus exports market returns



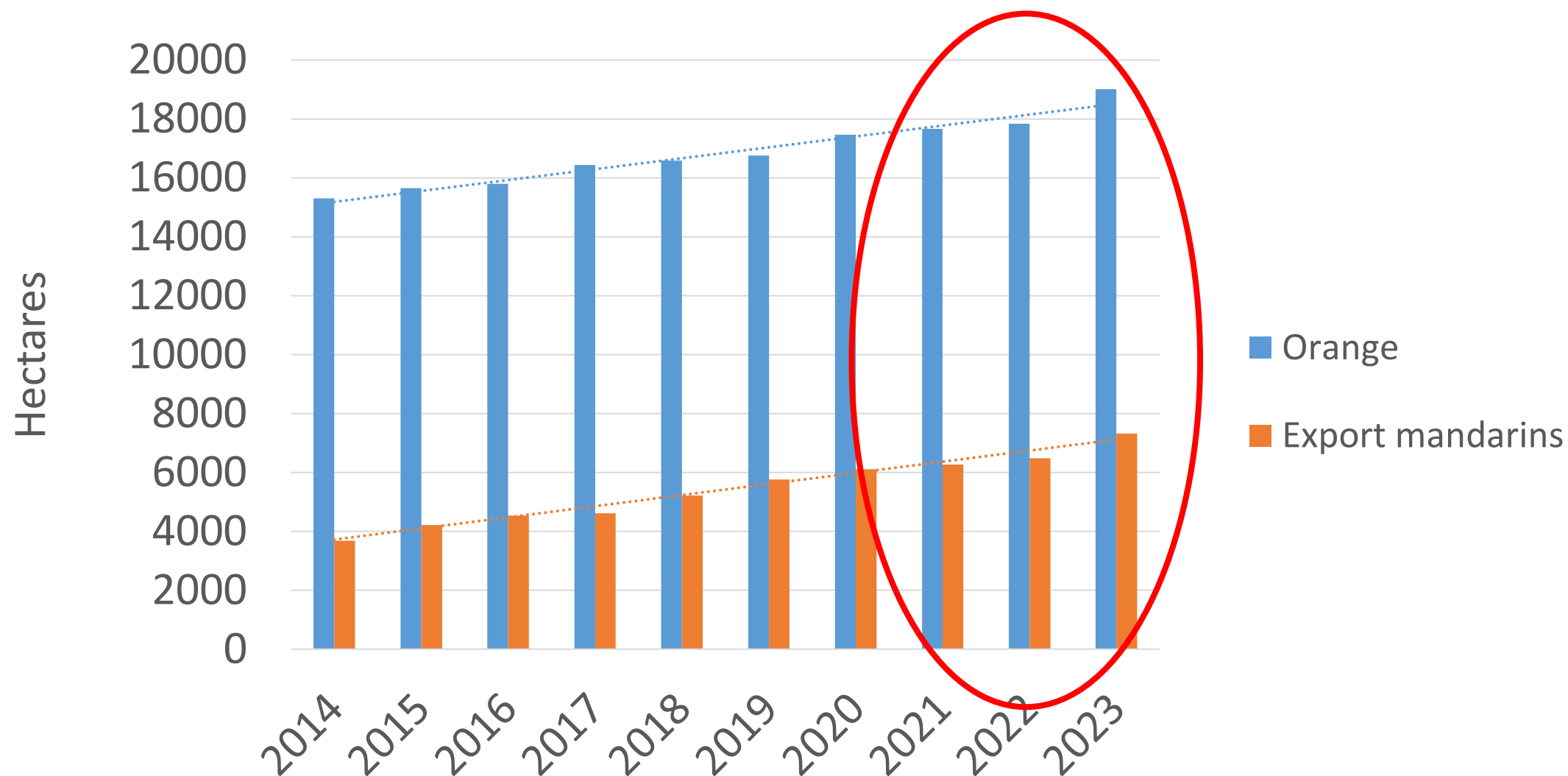


Australian citrus exports (all citrus) 2013-23



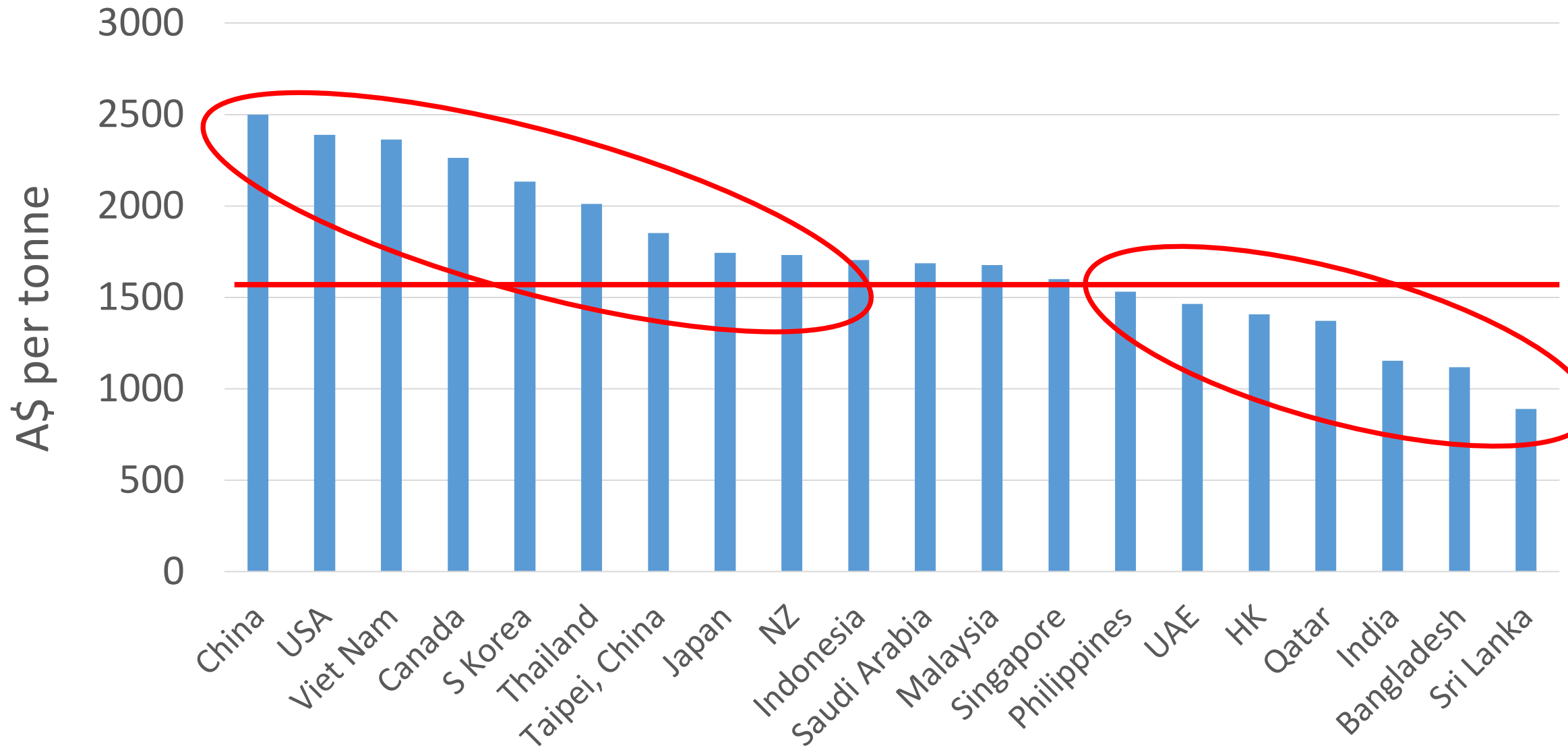


Australian citrus plantings (2014 – 2024)



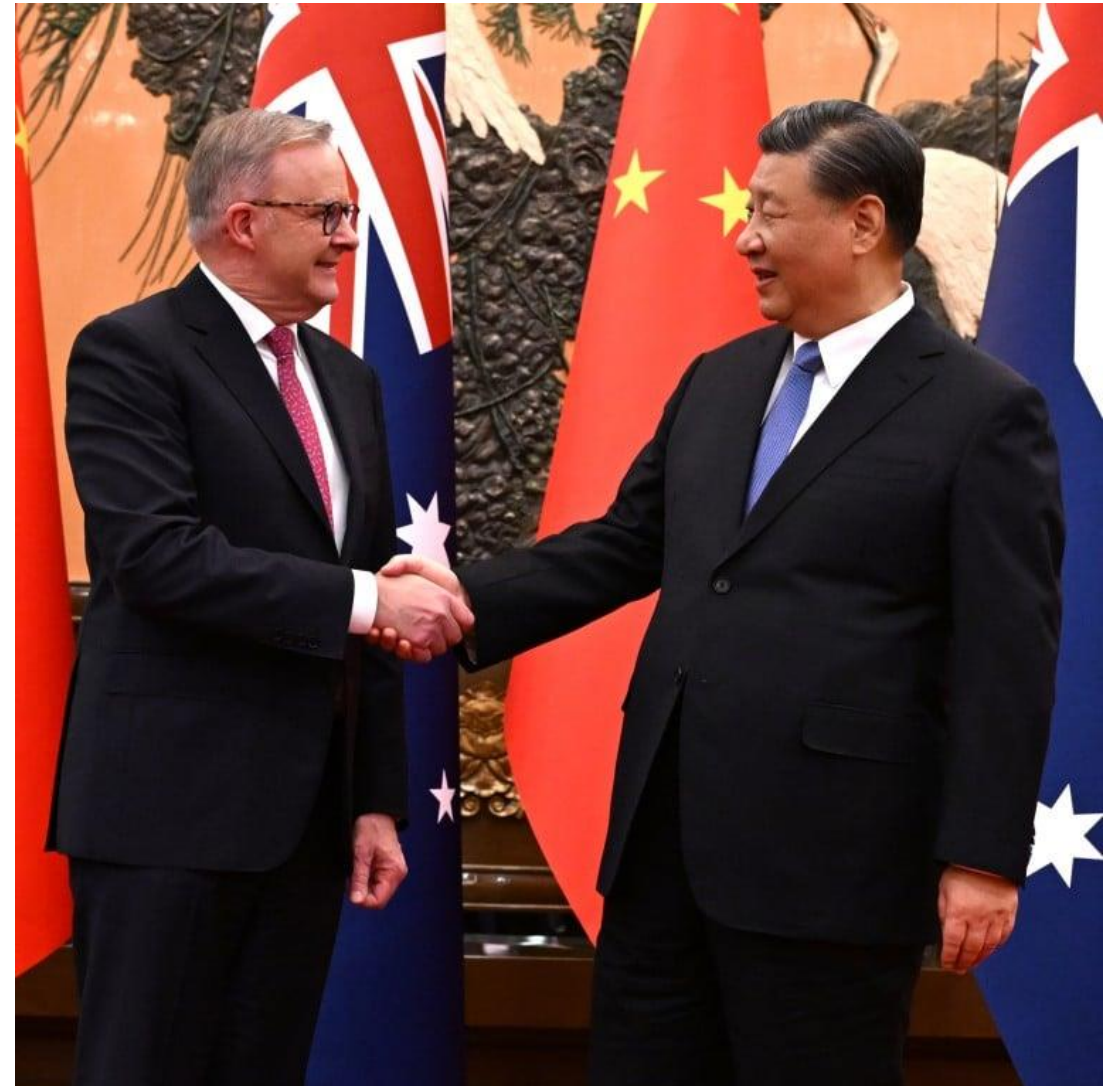


Australian citrus exports



China

- Strong returns – \$2 500 per tonne
- China-Australia ties are now 'on the right path', but – relationship will be difficult to navigate
- Potential for more than 120 000 tonnes
- Currently 70 000 tonnes
- Remain firmly committed and heavily invested in China



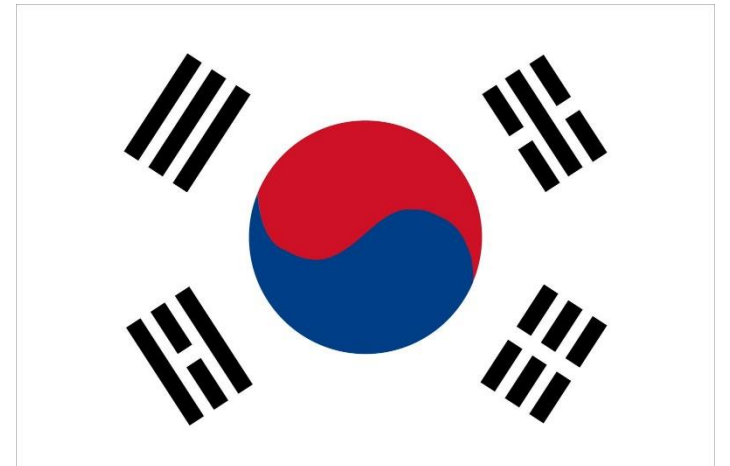
United States and Canada

- High returning markets
- Growth potential
- Strong southern hemisphere competition
- Transparent regulators
- Options for expanded access



South Korea

- High returning market
- One of the largest import markets for citrus in the world
- California slowing down
- Growth potential
- Regulatory challenges
- Virtually no southern hemisphere competition
- Currently limited to oranges and lemons





Viet Nam

- Rapid growth in citrus exports
- Range of different formats
- Further growth opportunities



India and subcontinent

- Dominated by SA and Egypt
- Wholesale and roadside vendors primary channel
- Cold chain?
- Modern retail?
- E-commerce



Thank you.



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