



# Export opportunities for Australia

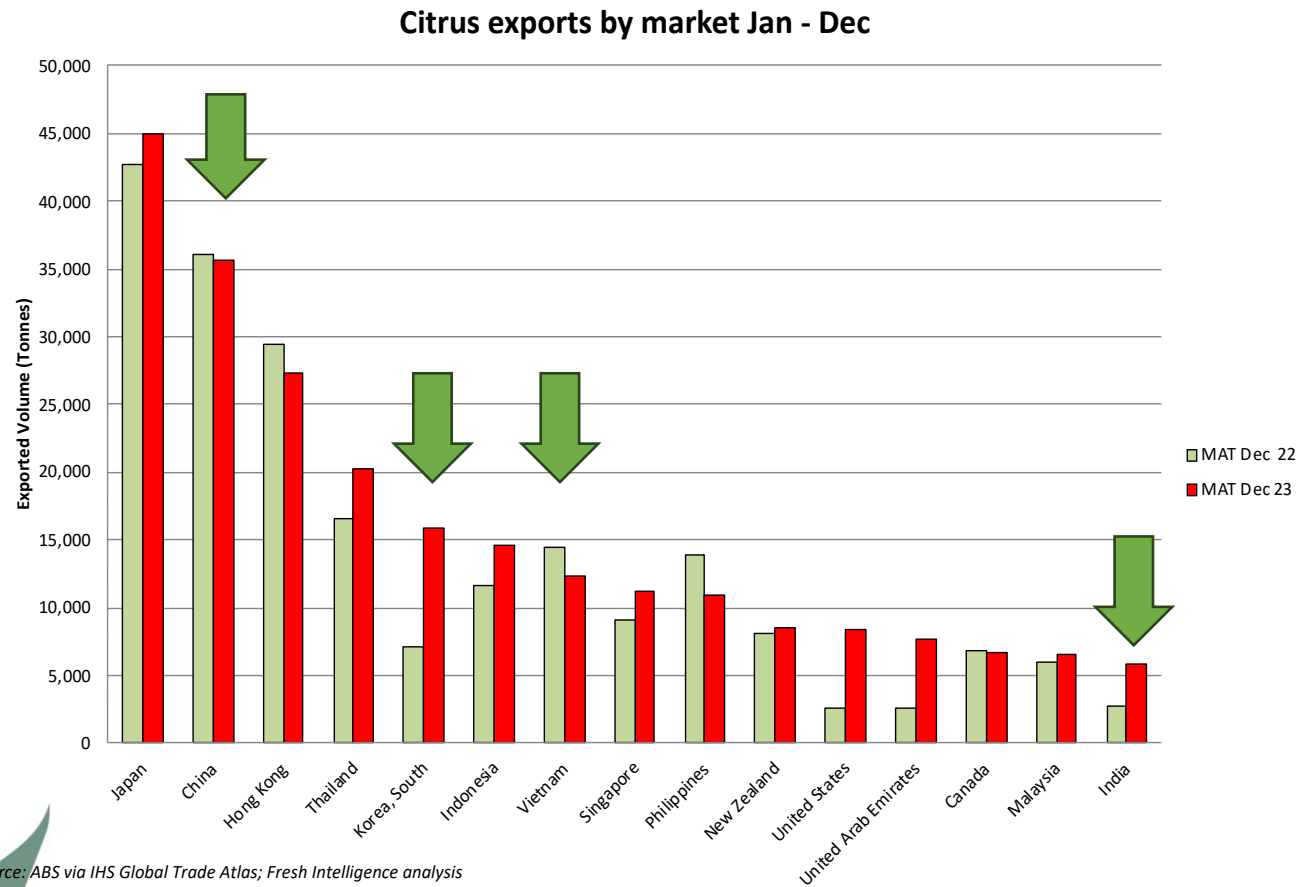
China, Vietnam, South Korea, India

Wayne Prowse

Fresh Intelligence Consulting



# Citrus Exports by Market 2023



Source: ABS via IHS Global Trade Atlas; Fresh Intelligence analysis

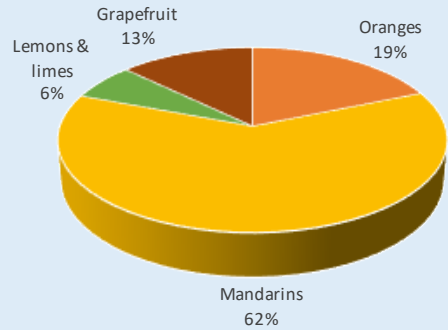
Market	Tonnes 2023	Unit Value A\$ pr kg	Change to LY	Share %
Japan	44,916	\$1.79	5%	17.6%
China	35,630	\$2.46	-1%	13.9%
Hong Kong	27,263	\$1.83	-8%	10.7%
Thailand	20,308	\$2.18	22%	7.9%
Korea, South	15,832	\$1.99	120%	6.2%
Indonesia	14,673	\$2.07	27%	5.7%
Vietnam	12,367	\$2.41	-15%	4.8%
Singapore	11,194	\$1.47	23%	4.4%
Philippines	10,961	\$1.77	-21%	4.3%
New Zealand	8,582	\$1.66	5%	3.4%
United States	8,460	\$2.58	216%	3.3%
United Arab Emirates	7,672	\$1.66	187%	3.0%
Canada	6,671	\$2.22	-2%	2.6%
Malaysia	6,588	\$1.71	9%	2.6%
India	5,847	\$1.38	114%	2.3%
all other	18,949	\$1.80	63%	7.4%
<b>TOTAL Citrus</b>	<b>255,914</b>	<b>\$1.98</b>	<b>15.3%</b>	<b>100%</b>

source : ABS via IHS Global Trade Atlas; Fresh Intelligence analysis



# China

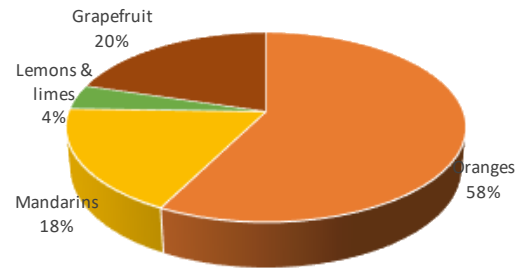
**Production 40,321,932 tonnes**



Population 1,412 million  
 Consumption 39,819,059 tonnes  
 Per Capita 28.2 kg p.p.  
 Imports 373,282 tonnes

**Import reliance 0.9%**

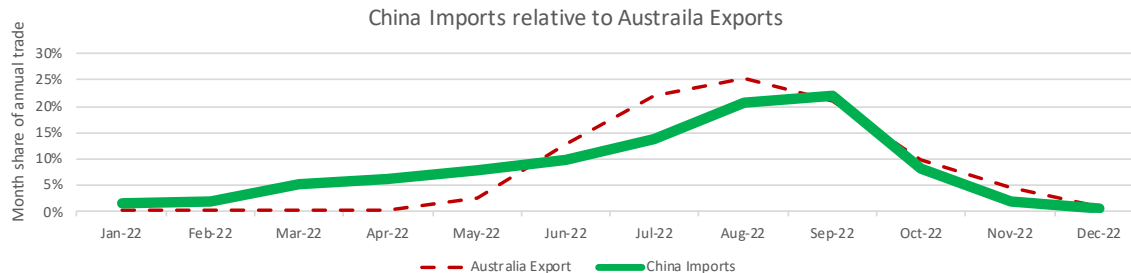
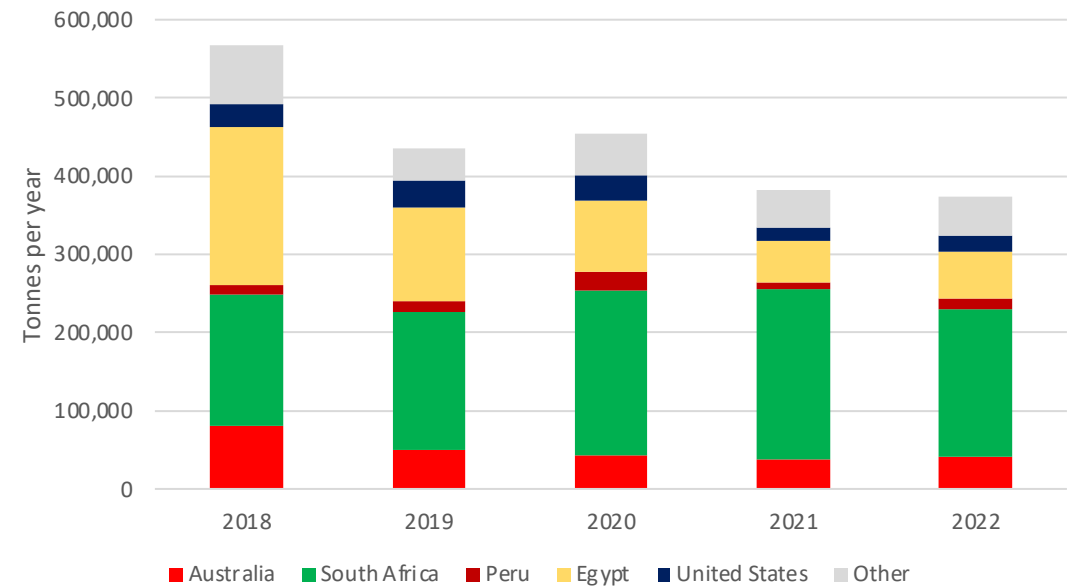
**Imports 373,282 tonnes**



Imports	Tonnes	5 year Trend
Oranges	214,715	-16.0%
Mandarins	67,063	1.0%
Lemons & limes	15,668	11.8%
Grapefruit	75,836	5.9%
<b>Total</b>	<b>373,282</b>	<b>-9.9%</b>
<b>S Hemisphere</b>	<b>268,685</b>	<b>-3.2%</b>
share of imports	<b>72%</b>	

World's largest producer of citrus - 40m tonnes  
 62 per cent is mandarins  
 Only 1% reliant on imports  
 Imports are trending down 10 per cent per year  
 - though 2% lower from Southern Hemisphere  
 72 per cent from Southern Hemisphere  
 11 per cent from Australia

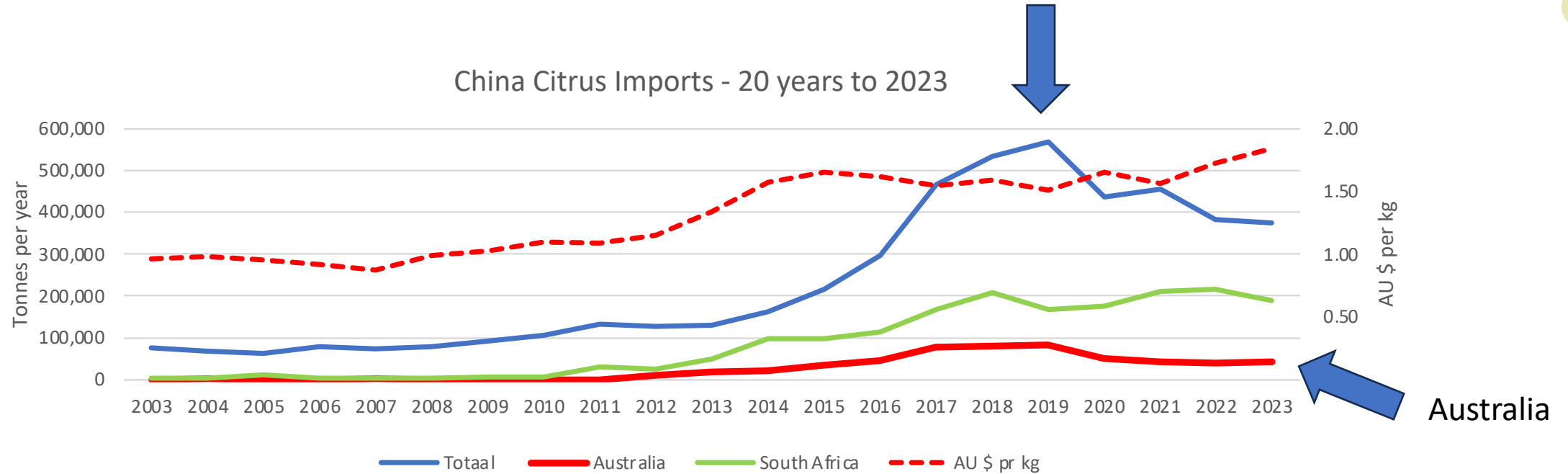
Citrus Imports - China



Source: ITC TradeMap; Fresh Intelligence analysis



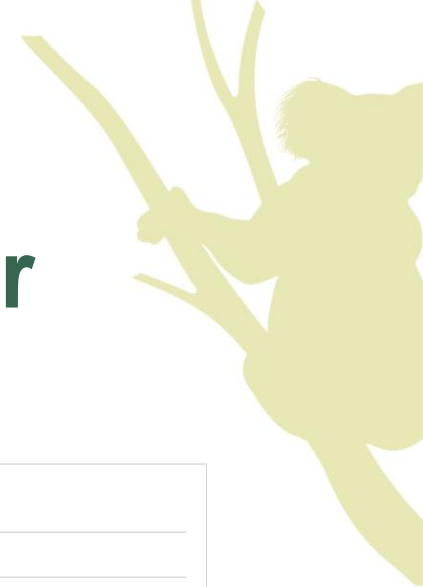
# China imports peaked in 2019



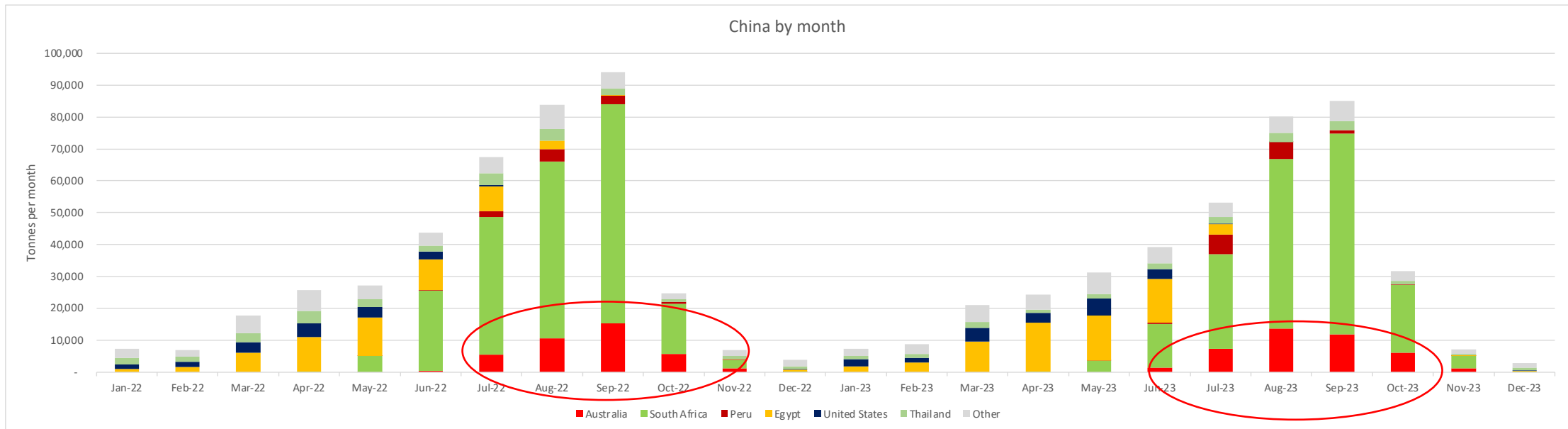
Source: ITC TradeMap; Fresh Intelligence analysis

US imports are decreasing thus driving overall imports lower  
 COVID 19 impacts since 2020  
 South Africa is the largest southern supplier followed by Australia  
 Unit values are increasing





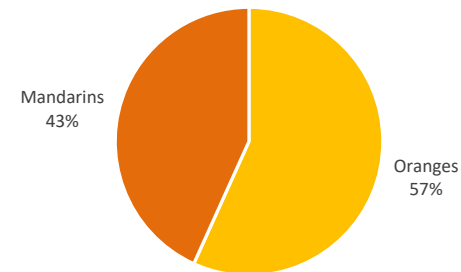
# China - Seasonal citrus imports by supplier



Australia supplied 57% oranges and 43% mandarins in 2023

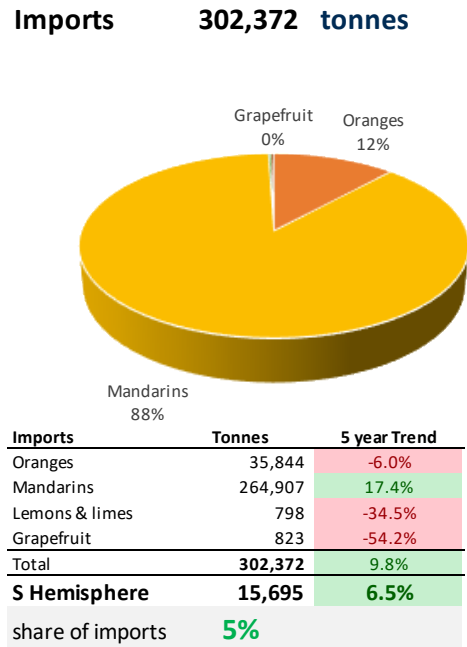
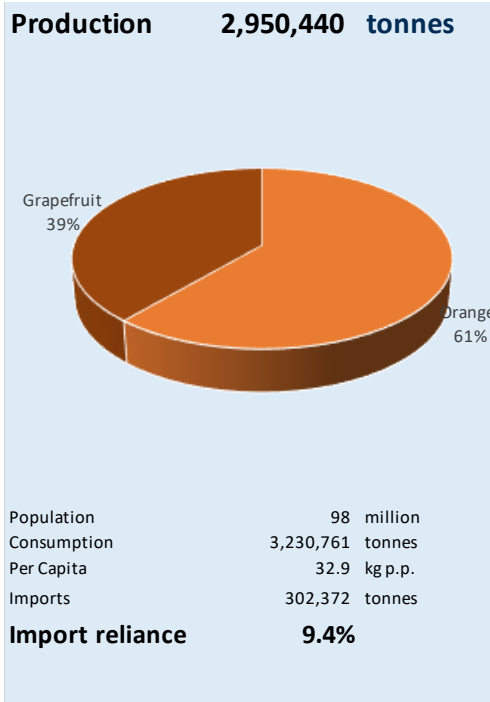
Egyptian citrus may have difficulty accessing the China market in 2024

Peru and Chile are very small players

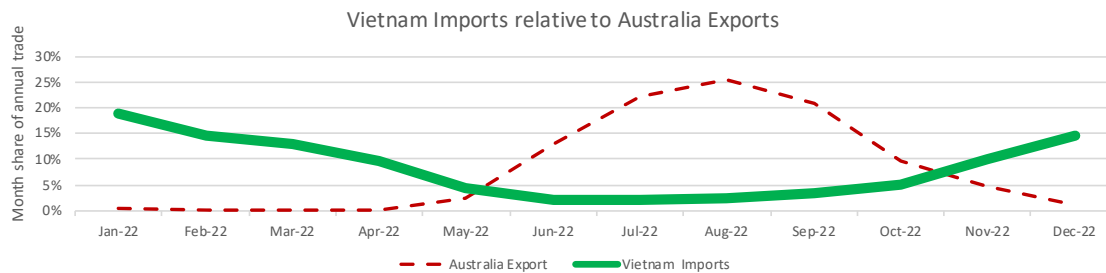




# Vietnam

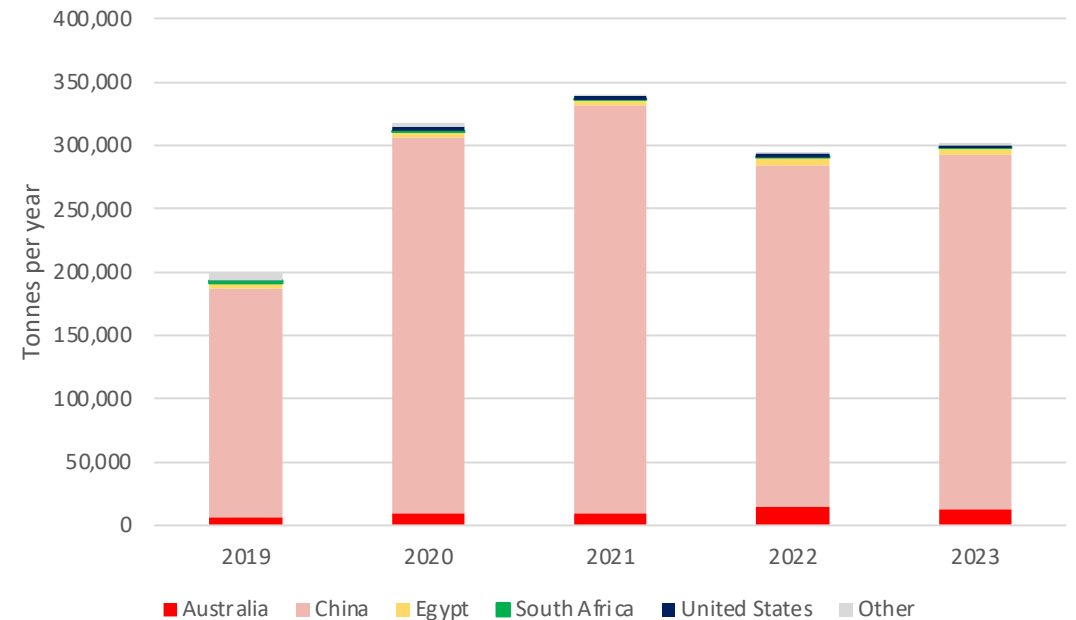


Significant producer of citrus – 2.9m tonnes  
 61 per cent is oranges  
 9.4% reliant on imports – mostly mandarins  
 Imports are trending up 10 per cent per year  
 5 per cent from Southern Hemisphere  
 Australia now is the only southern supplier



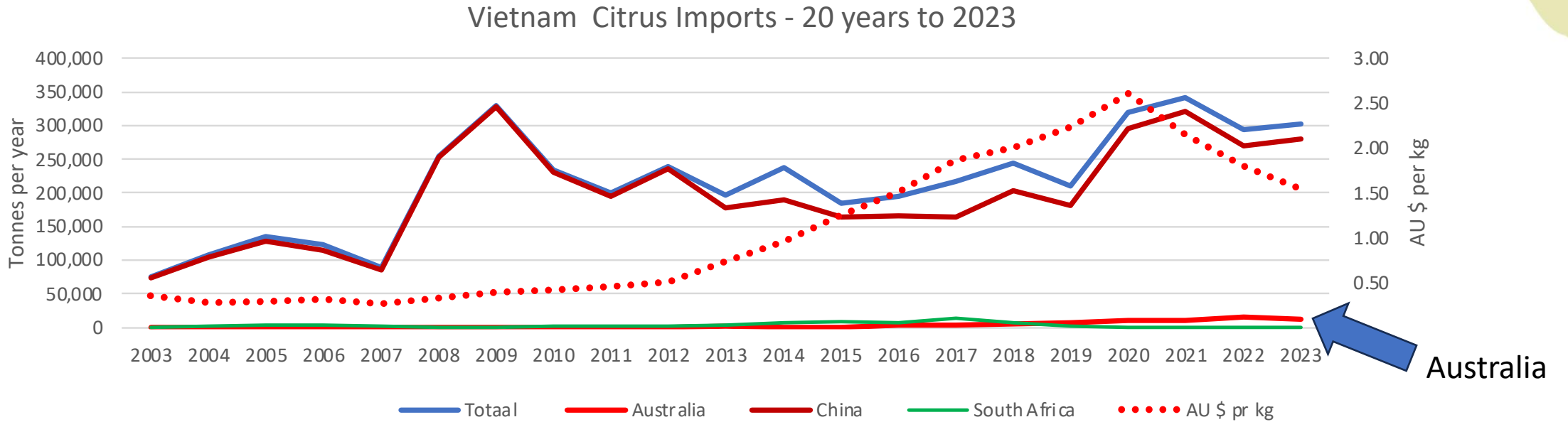
Source: ITC TradeMap; Fresh Intelligence analysis

Citrus Imports - Vietnam





# Vietnam imports over 20 years



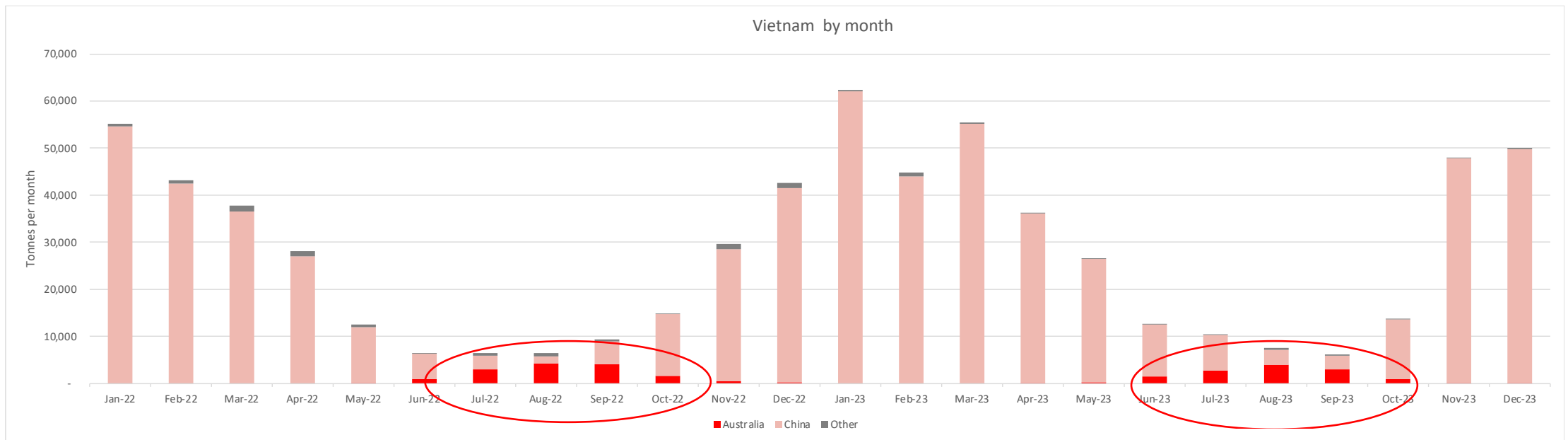
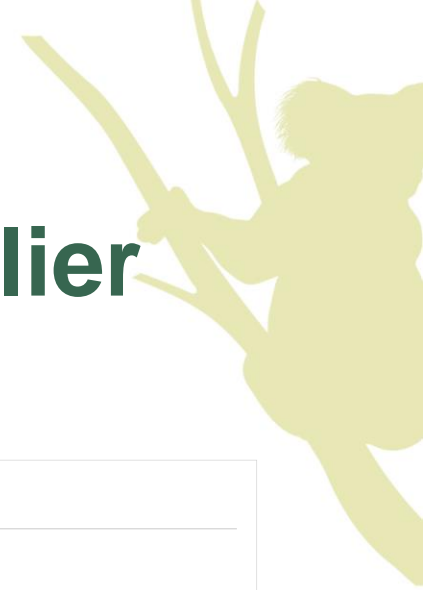
Source: ITC TradeMap; Fresh Intelligence analysis

Dominated by mandarin imports from China  
 Australia has effectively replaced South Africa  
 Pricing records may not be realistic



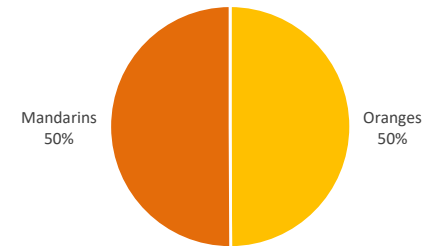


# Vietnam - Seasonal citrus imports by supplier



China supplies of mandarins dominates almost all year round

Australia is effectively the only southern supplier and the only supplier of oranges (50:50 oranges/ mandarins)

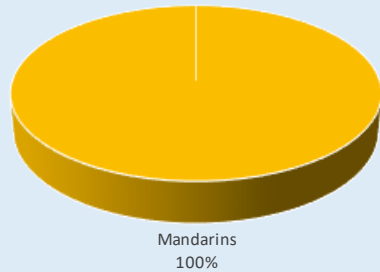






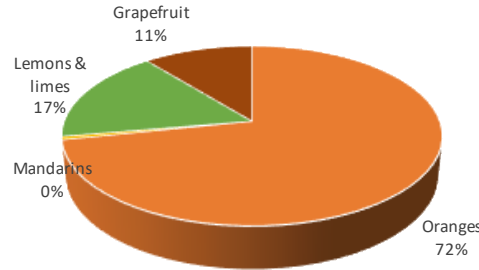
# South Korea

**Production** 651,572 tonnes

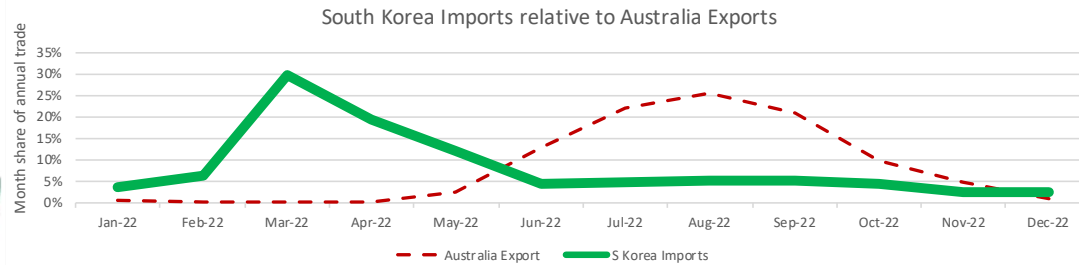


Population 52 million  
 Consumption 770,044 tonnes  
 Per Capita 14.9 kg p.p.  
 Imports 122,036 tonnes  
**Import reliance 15.8%**

**Imports** 122,036 tonnes



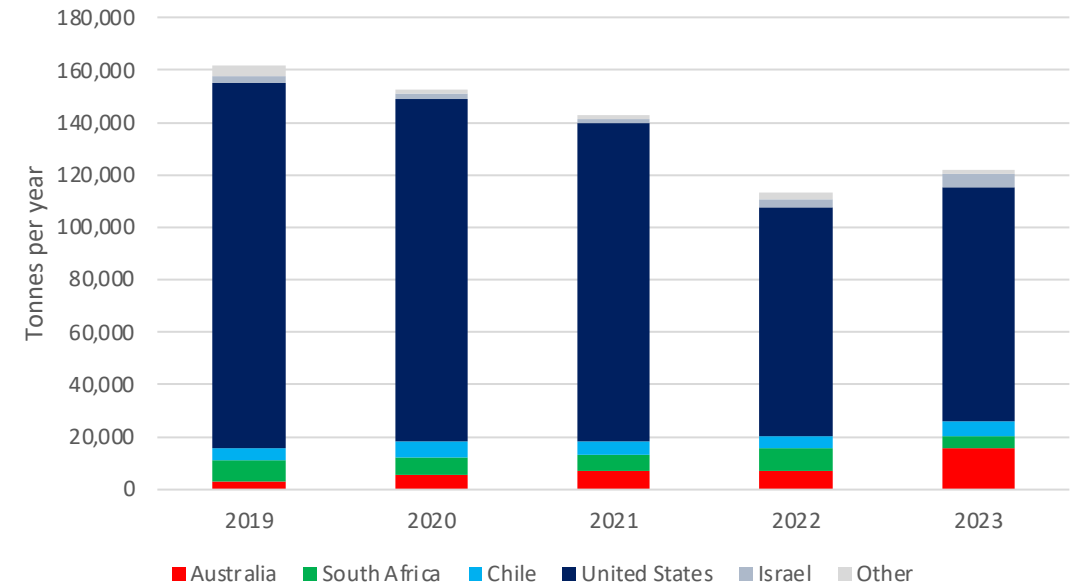
Imports	Tonnes	5 year Trend
Oranges	87,507	-8.4%
Mandarins	727	47.9%
Lemons & limes	20,556	1.4%
Grapefruit	13,246	-7.1%
<b>Total</b>	<b>122,036</b>	<b>-6.8%</b>
<b>S Hemisphere</b>	<b>20,648</b>	<b>-2.2%</b>
share of imports	<b>17%</b>	



Source: ITC TradeMap; Fresh Intelligence analysis

Moderate producer of citrus – 651k tonnes  
 100% are mandarins – highly protective  
 16% reliant on imports – mainly oranges  
 Imports are trending down 7 per cent per year  
 influenced by United States  
 17 per cent from Southern Hemisphere  
 13 per cent from Australia (up from 6% LY)

Citrus Imports - Korea

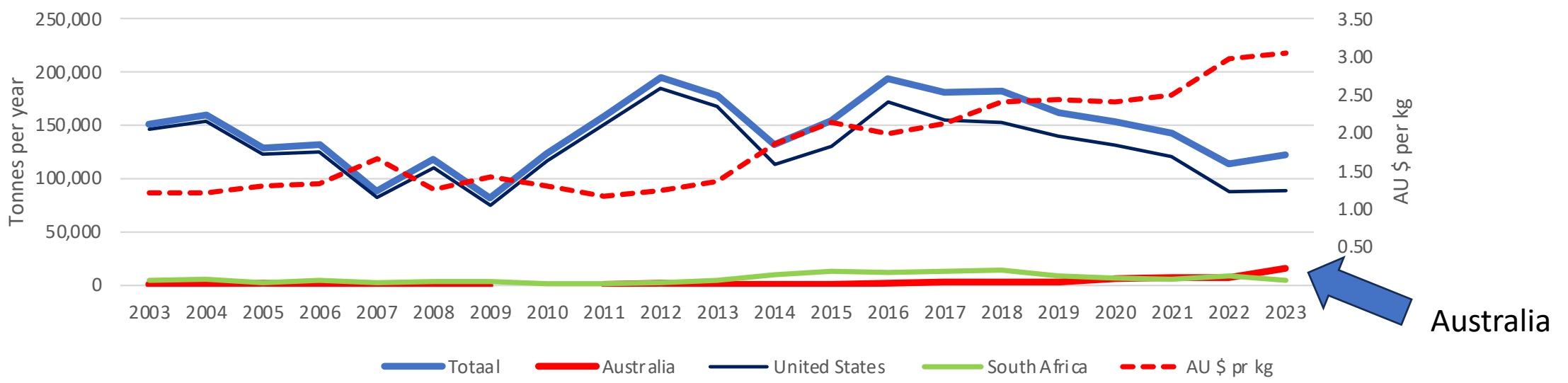




# South Korea imports are below 20 years ago



South Korea Citrus Imports - 20 years to 2023



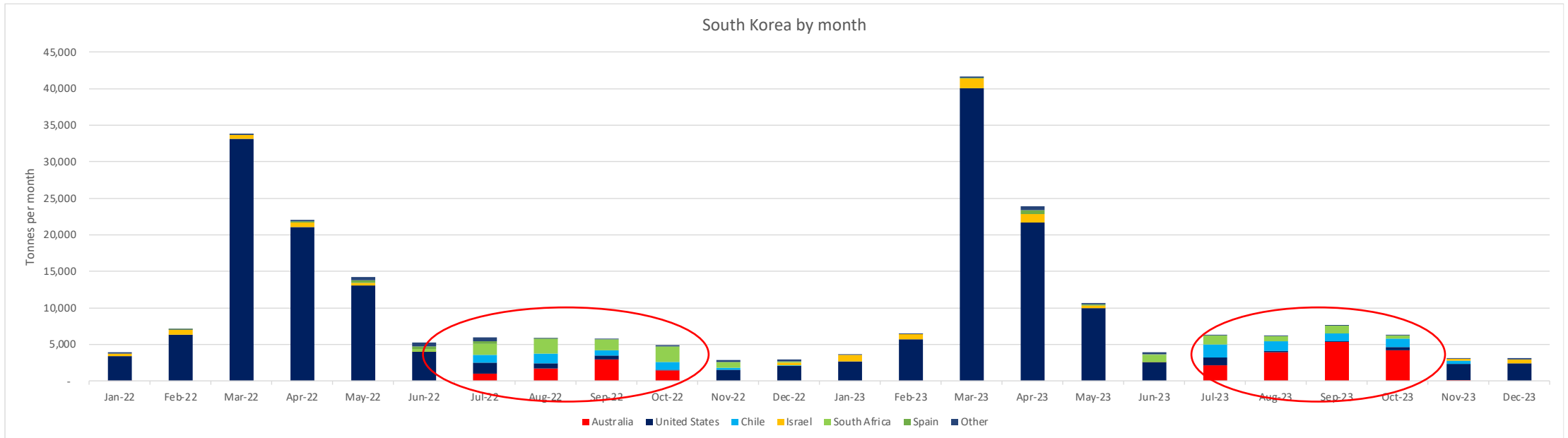
Source: ITC TradeMap; Fresh Intelligence analysis

US imports are decreasing thus driving overall imports lower  
 Australia now leads in the Southern season and exceeds South Africa  
 Unit values are increasing

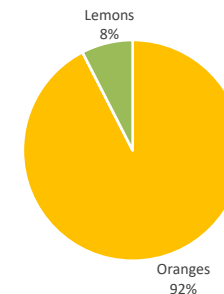




# South Korea - Seasonal citrus imports by supplier



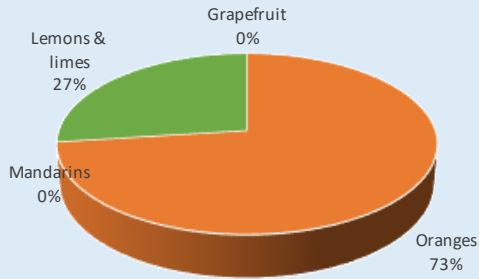
Australia leads in the Southern season – mostly oranges (no mandarins)  
Chile supplies lemons  
Appears more opportunity for oranges in the counter season now that Australia leads - possibly even for lemons





# India

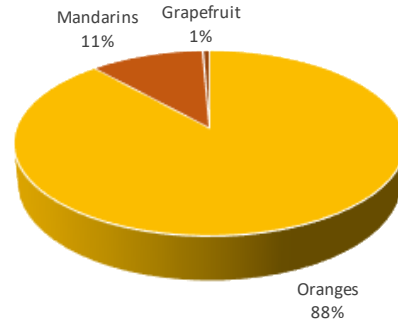
**Production 14,756,000 tonnes**



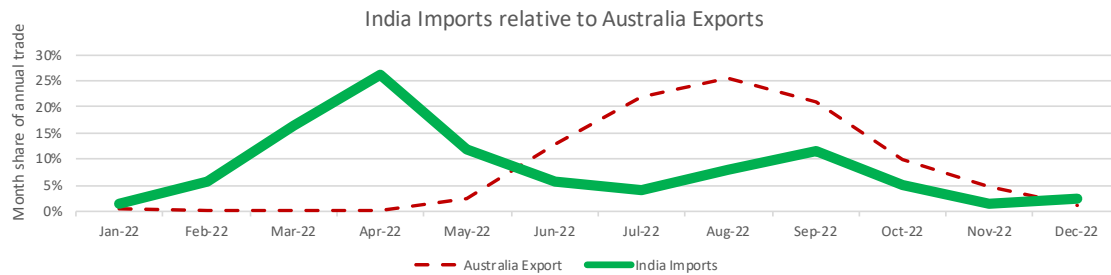
Population 1,393 million  
 Consumption 14,820,002 tonnes  
 Per Capita 10.6 kg p.p.  
 Imports 174,465 tonnes

**Import reliance 1.2%**

**Imports 174,465 tonnes**



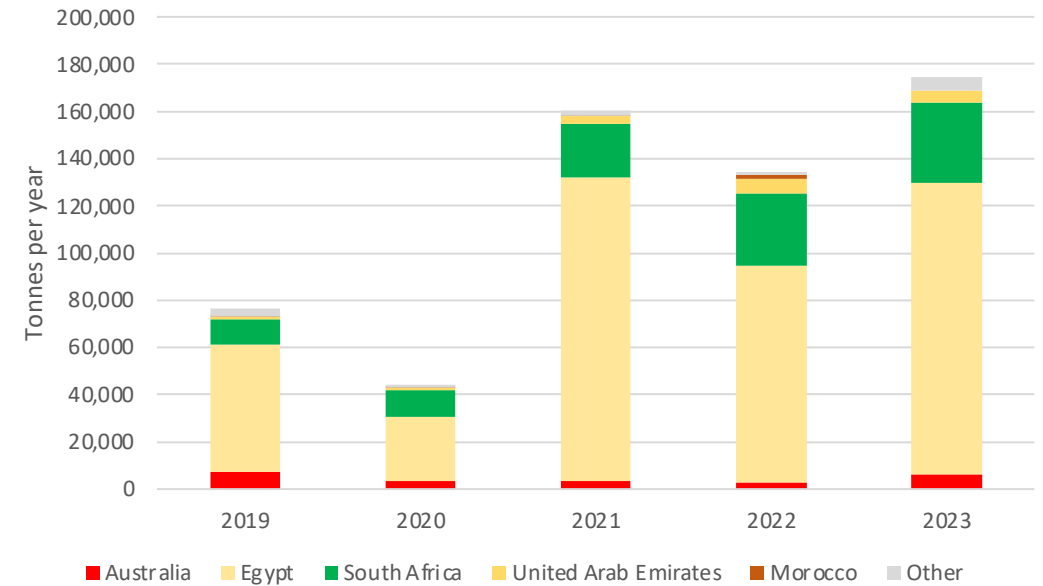
Imports	Tonnes	5 year Trend
Oranges	154,112	20.6%
Mandarins	19,156	65.3%
Lemons & limes	146	8.6%
Grapefruit	1,051	19.9%
<b>Total</b>	<b>174,465</b>	<b>22.9%</b>
<b>S Hemisphere</b>	<b>40,186</b>	<b>36.7%</b>
<b>share of imports</b>	<b>23%</b>	



Source: ITC TradeMap; Fresh Intelligence analysis

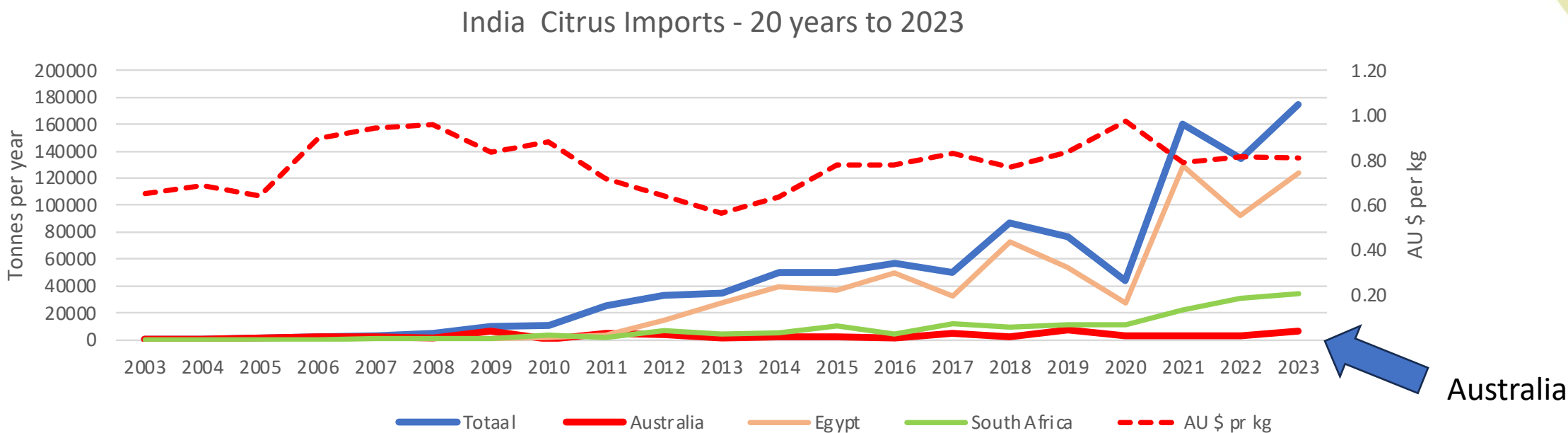
Large producer of citrus – 14.7m tonnes  
 73 per cent oranges  
 1.2% reliant on imports – mainly oranges  
 Imports are trending up 23 per cent per year  
 influenced by Egypt and South Africa  
 23 per cent from Southern Hemisphere  
 4 per cent from Australia (up from 2% LY)

Citrus Imports - India





# India imports are rising rapidly from Egypt



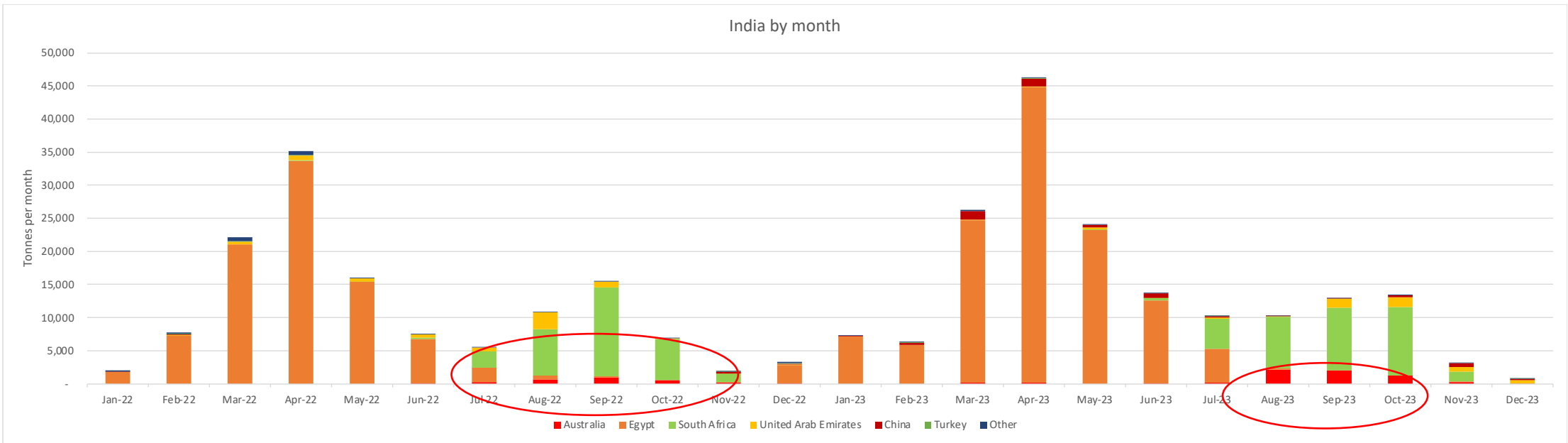
Source: ITC TradeMap; Fresh Intelligence analysis

Import growth fueled from Egypt  
South Africa is steadily increasing  
Unit values are more or less around AU \$0.80c - exchange rates movements  
Given high volume of local production India imports should target high quality

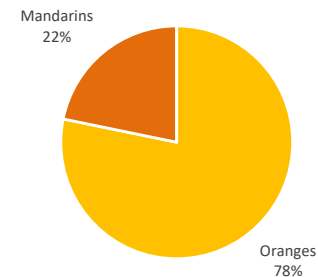




# India - Seasonal citrus imports by supplier



Australia supplied 78% oranges and 22% mandarins  
Egypt dominates the import landscape from December to July with mainly oranges  
Australia has increased market share from South Africa Aug – Oct



# Discussion / Considerations

- **Strategies** for market growth – enlarge the pie,
  - or larger slice of the pie ?
- **China** – larger slice of imports – quality leadership advantage
- **Vietnam** – enlarge the counter season, promote oranges
- **South Korea** - enlarge the counter season for oranges, now on a new trajectory.
- **India** – larger slice of counter season - focus on quality advantage albeit low FOB price that could increase when product is better accepted



## REFERENCES

- International Trade Centre, TRADE MAP [www.trademap.org/](http://www.trademap.org/)
- IHS Global Trade Atlas
- FAOSTAT

## DISCLAIMER

- Fresh Intelligence Consulting collated the data for Citrus Australia from data provided by the international trade databases as referenced.
- While every effort is made to ensure that the data is a true reflection of the trade, some errors may occur due to the reporting and Fresh Intelligence Consulting takes no responsibility for any losses that may occur as a result of decisions based on this data.
- Views expressed are personal and may not reflect the same views of Citrus Australia.

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