Global Production and Trade Trends — from Australia's Perspective

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Fresh Intelligence
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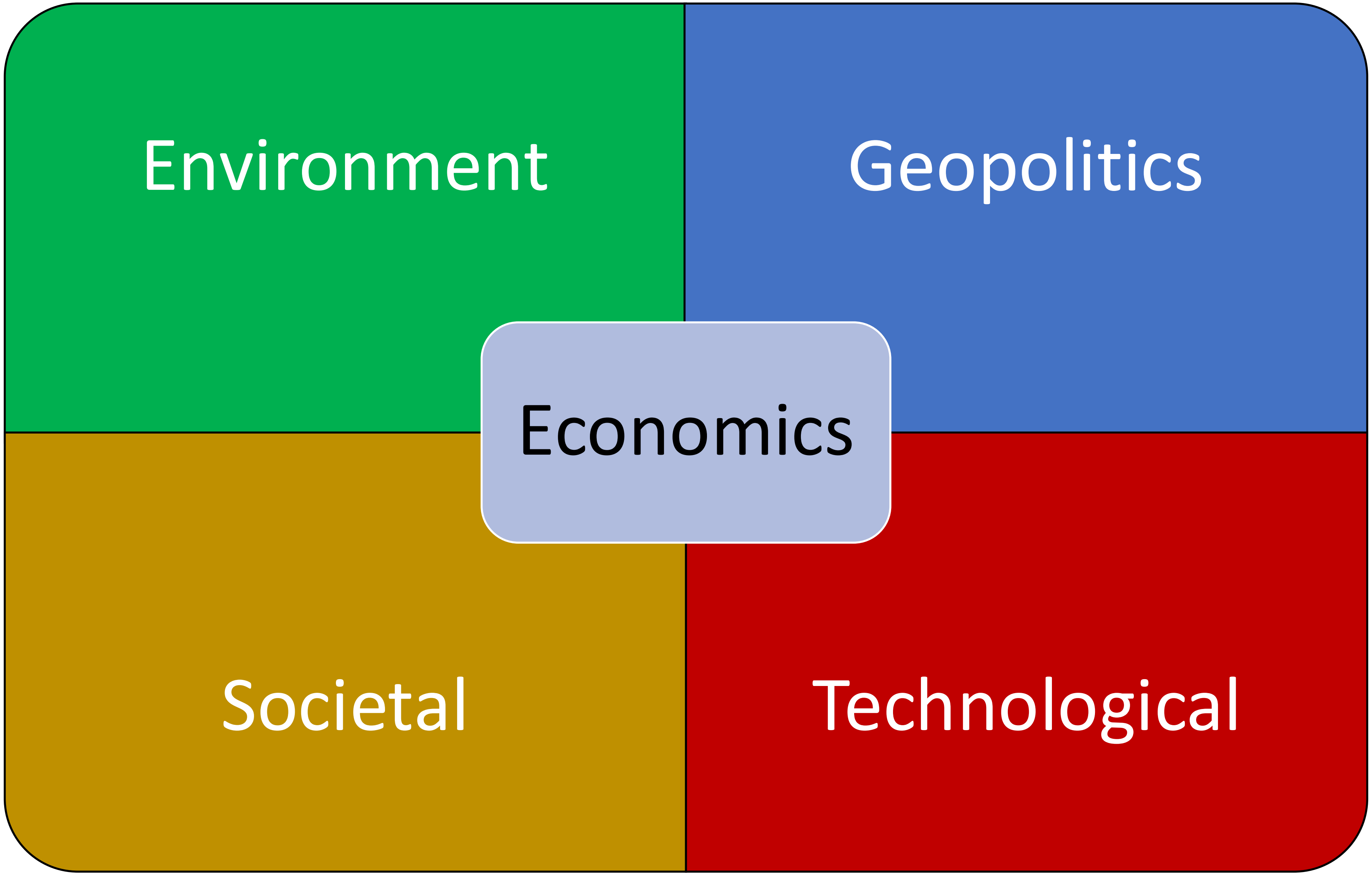
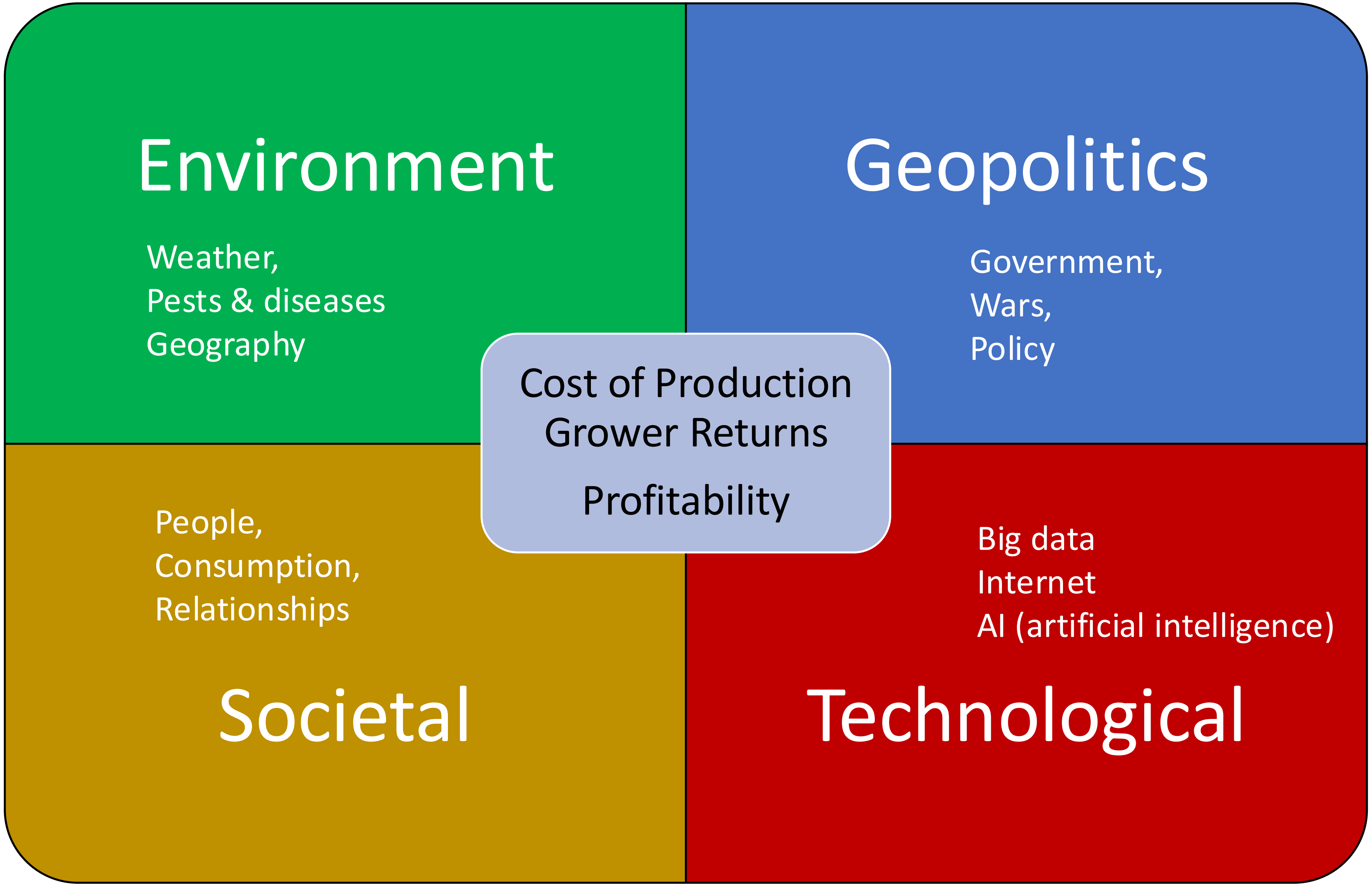
Hort Innovation CHERRY FUND



Factors that impact on the global economy

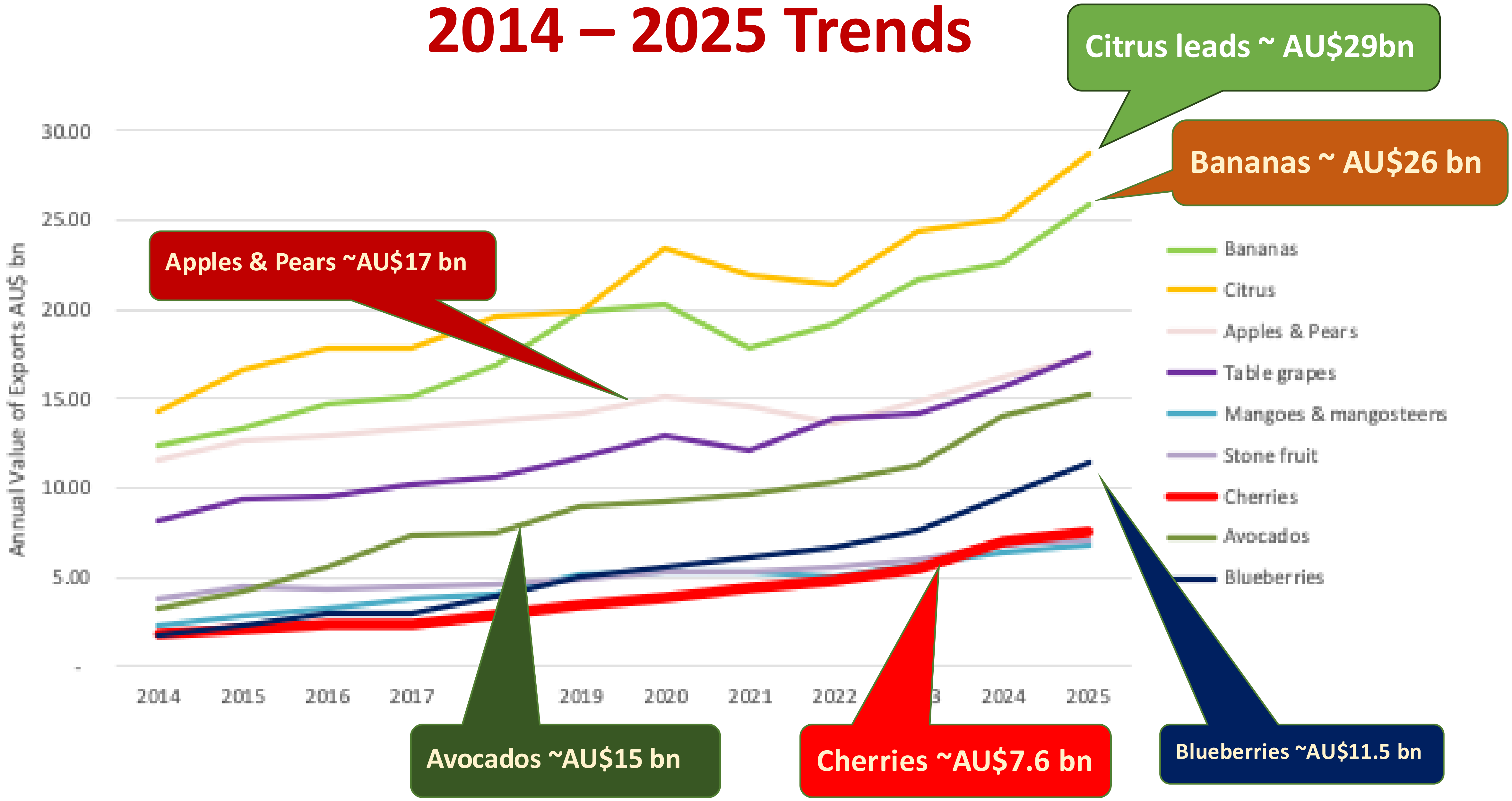
Source: World Economic Forum



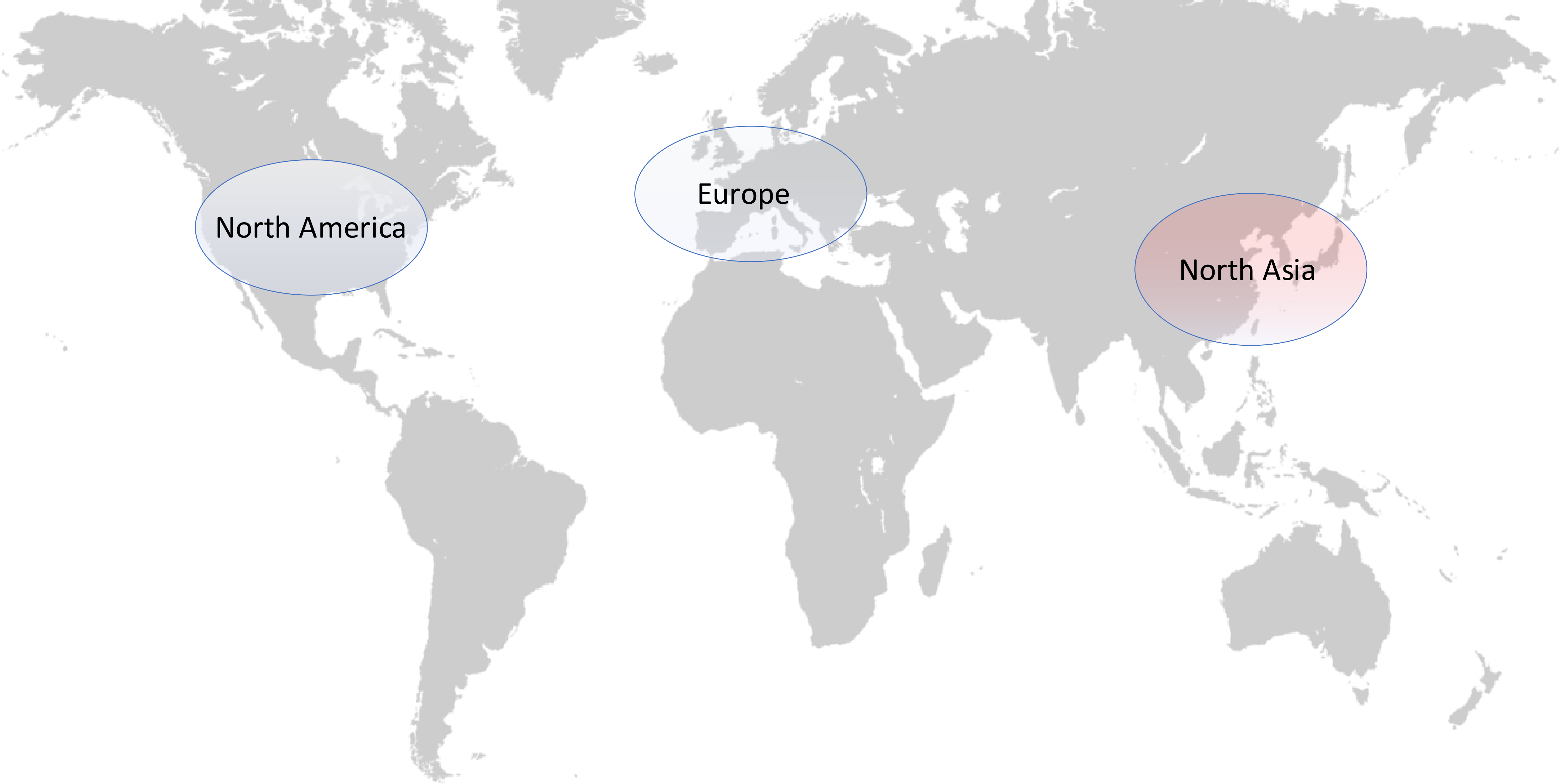
Factors that impact on the global economy

Source: World Economic Forum

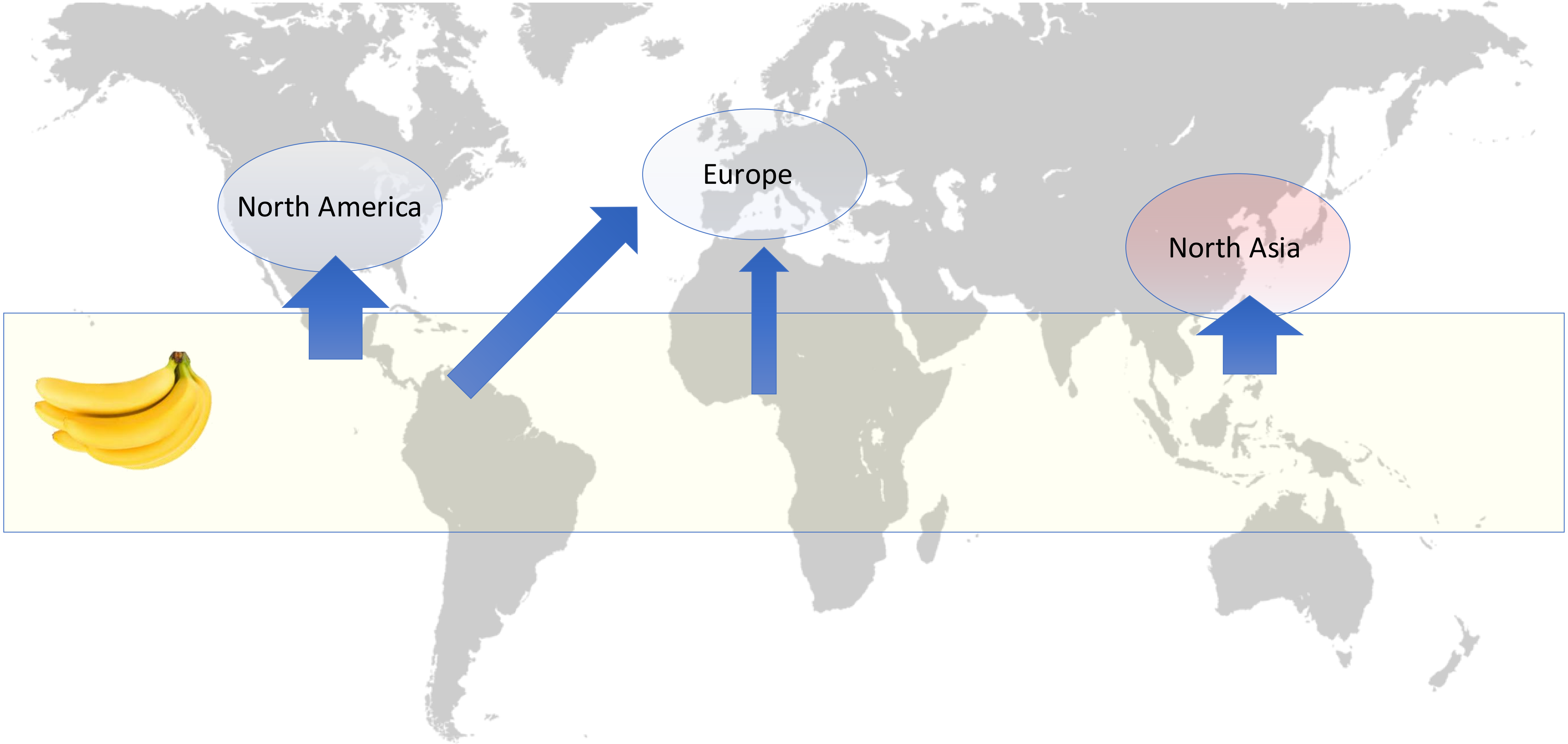
Global Fresh Fruit Trade ~ AU$175 bn
2014 – 2025 Trends



Three regions that drive the world economy, North America, Europe and Asia, are major fruit importers



Bananas are grown in tropics and almost all consumption in North America, Europe and North Asia are imported, leading to being the largest volume of all fruits traded

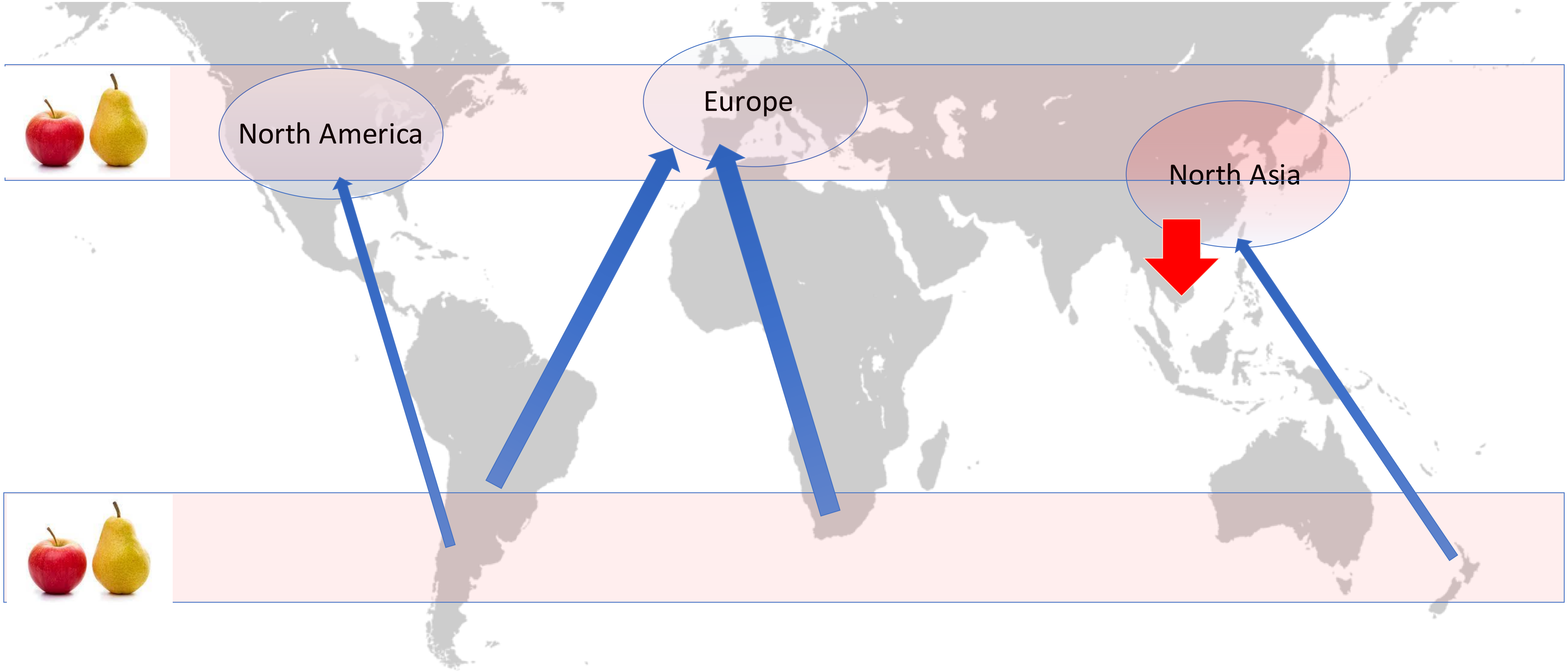


Citrus is grown in warmer temperate areas including inside the large markets. Citrus cannot be cold stored for many months, thus demand for seasonal international trade is strong.

Most traded volume is within Europe, with significant counter season trade

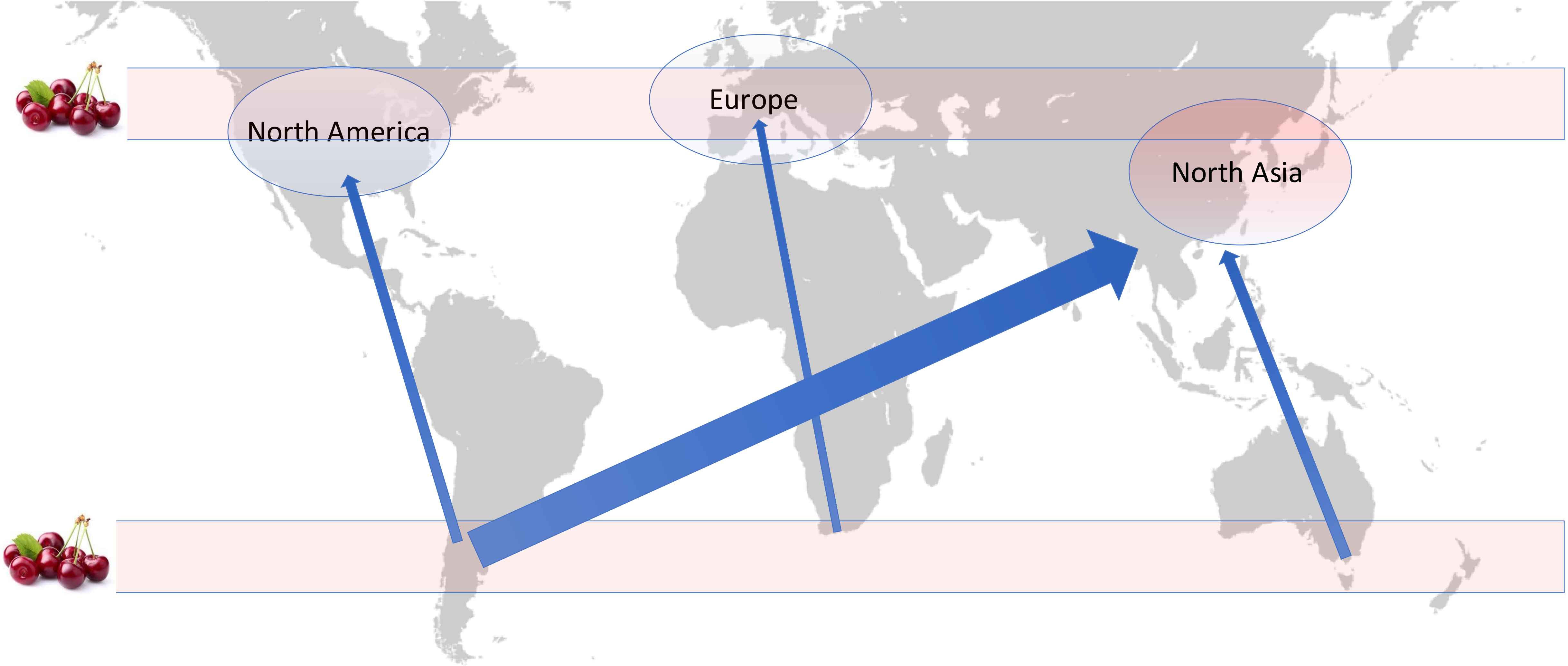
Apples & pears are grown in cooler temperate areas including inside the large markets. Apples & pears can be cold stored and demand for seasonal international trade is reduced.

Most traded volume is within Europe though with small volumes of counter season trade



Cherries, also being grown in cooler temperate areas including inside the large markets <u>cannot be cold stored</u> thus creates more demand for seasonal international trade.

Most traded volume is from Chile to China, driven strategically by Chile.



Global Fresh Fruit Production and Trade

	Production	Trade	% traded	Value KG
	Million Tonnes	Million Tonnes		AU$ / kg
Bananas	184.0	24.7	13.4%	$0.90
Citrus	**165.6**	**18.1**	**10.9%**	$1.45
Apples & Pears	125.5	10.7	8.5%	$1.49
Table Grapes	30.0	5.3	17.7%	$3.31
Mangoes & mangosteens	62.2	3.1	5.0%	$2.04
Stone fruit	45.2	3.2	7.0%	$2.14
Cherries	**4.6**	**0.8**	**18.1%**	**$7.37**
Avocados	*11.2*	*3.4*	*30.0%*	$4.07
Blueberries	*1.8*	*1.0*	*58.3%*	$9.38
Other	252.8	13.3	5.3%	$3.37
World	**882.9**	**83.5**	**9.5%**	**$1.94**

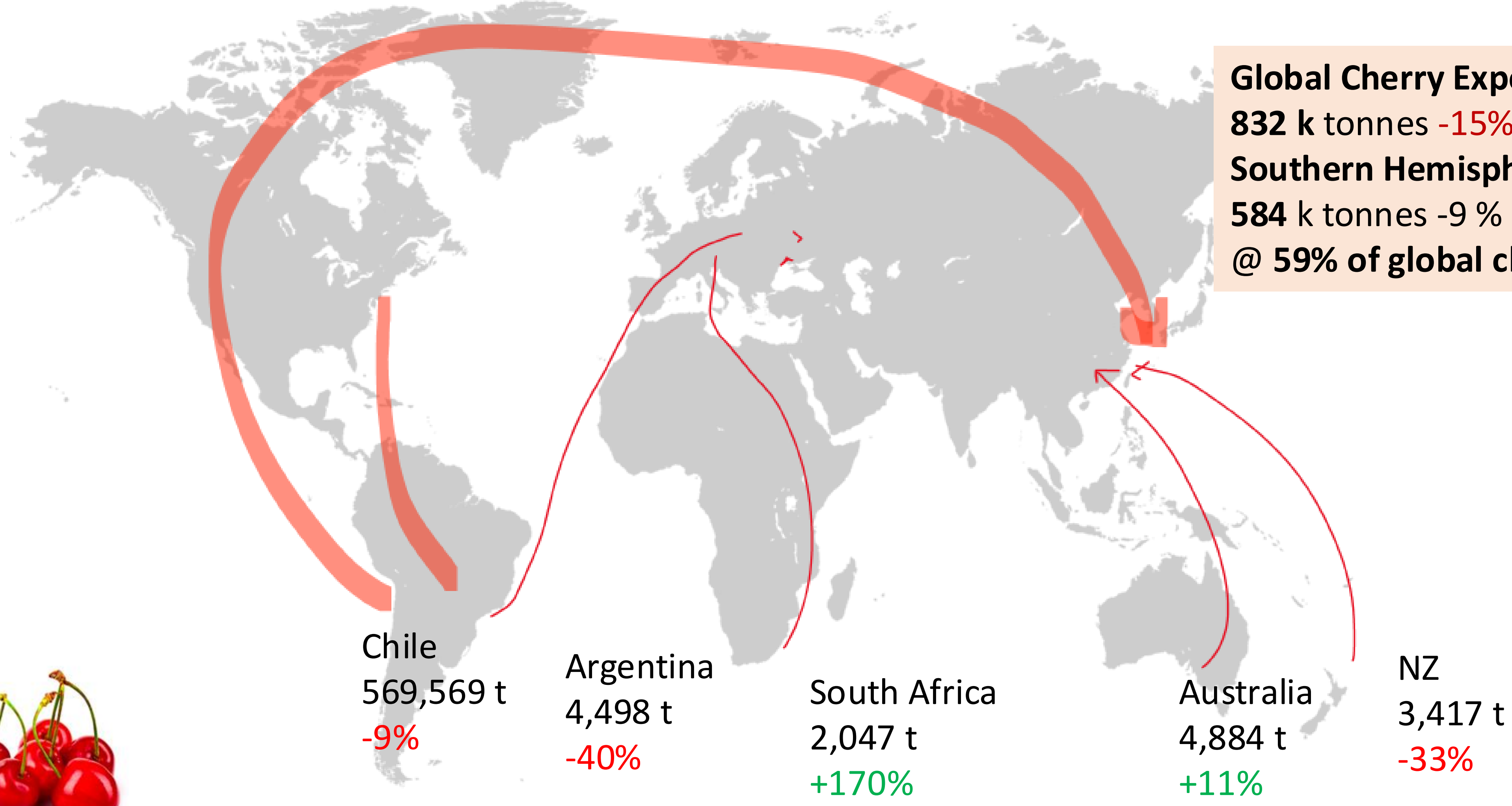
Source: ITC Trademap; Fresh Intelligence analysis

Bananas and Citrus drive fresh fruit production and trade globally

SOUTHERN HEMISPHERE EXPORTERS

Southern Hemisphere cherry producers export mostly to Northern Hemisphere markets. Chile dominates by exporting 569,027 tonnes (97% share) (+51%) of which 95 per cent was exported to Asia. Australia accounts for 0.8% share of exports from the Southern Hemisphere. Chile, Argentina and New Zealand all dropped in volume in 2025/26.

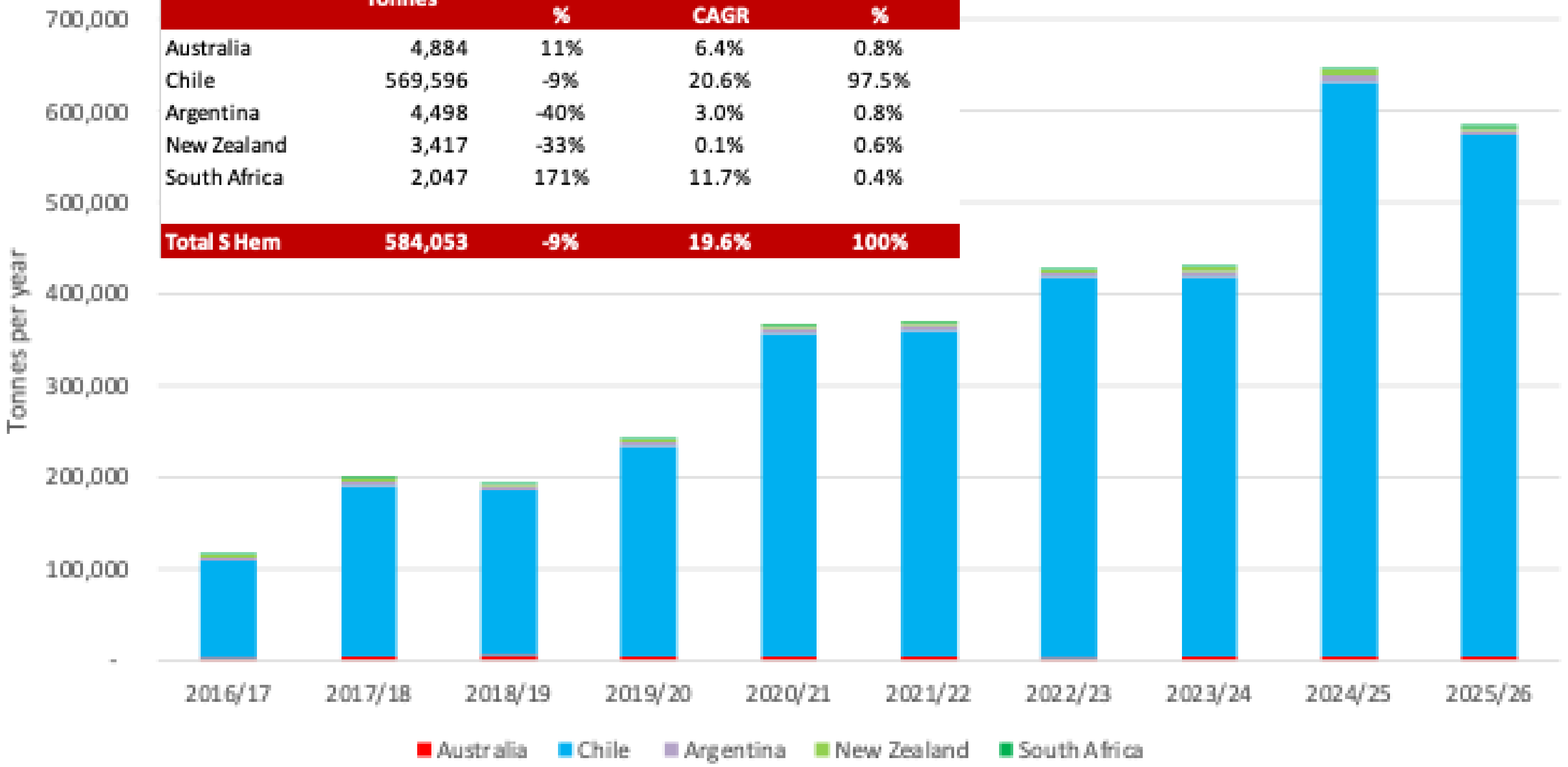
Global Cherry Exports
832 k tonnes -15%
Southern Hemisphere Exports
584 k tonnes -9 %
@ **59% of global cherry trade**



SOUTHERN HEMISPHERE EXPORT GROWTH

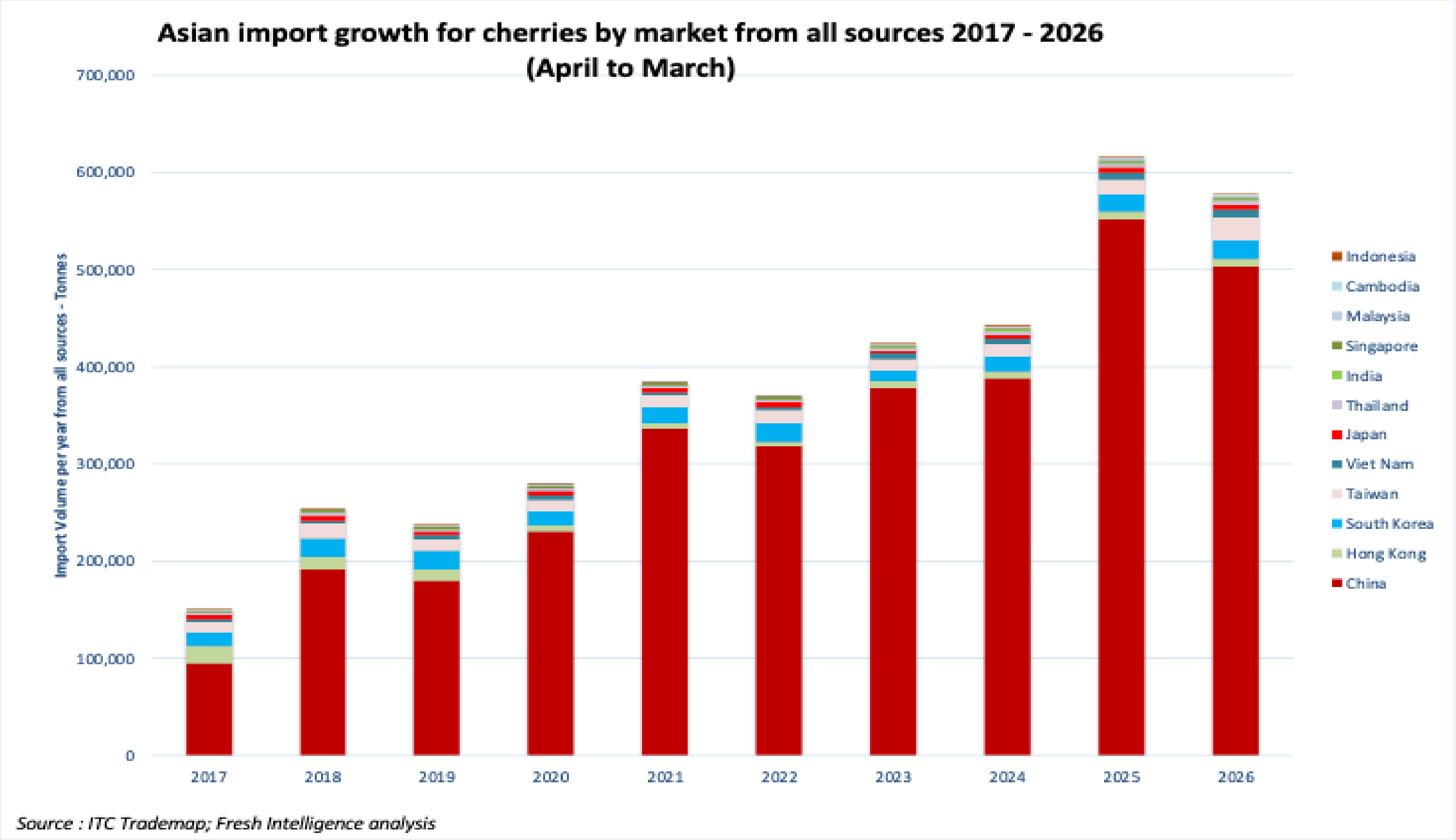
Southern Hemisphere cherry producers exported 584,053 tonnes in 2025/26 season, down 9 per cent on the previous year. Chile dominates by exporting 569,027 tonnes (97% share). Australia along with Argentina and New Zealand hold less that 1 per cent market share. Chile, Argentina and New Zealand all recorded lower volumes.

	Tonnes	1 Yr chg %	5 yr Trend CAGR	share %
Australia	4,884	11%	6.4%	0.8%
Chile	569,596	-9%	20.6%	97.5%
Argentina	4,498	-40%	3.0%	0.8%
New Zealand	3,417	-33%	0.1%	0.6%
South Africa	2,047	171%	11.7%	0.4%
Total S Hem	**584,053**	**-9%**	**19.6%**	**100%**



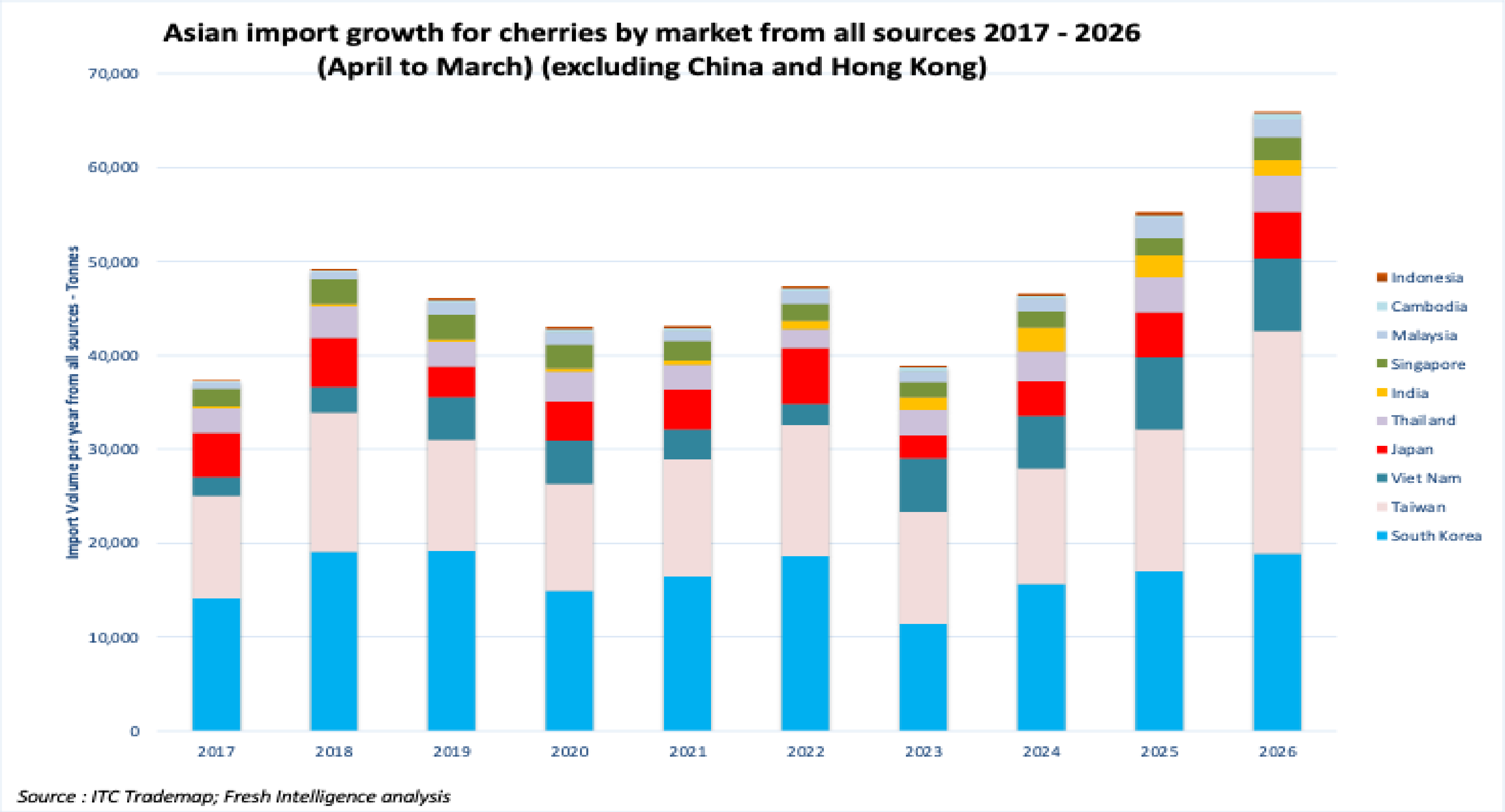
ASIAN MARKET IMPORTS – LONG TERM TREND

China dominated Asian import markets with over 500,000 tonnes imported mostly from Chile though eased 9 per cent last year.
Overall Asian markets imported 576,532 tonnes of cherries in the year ending March 2026
Hong Kong is influenced by re exports to China, which have been removed.



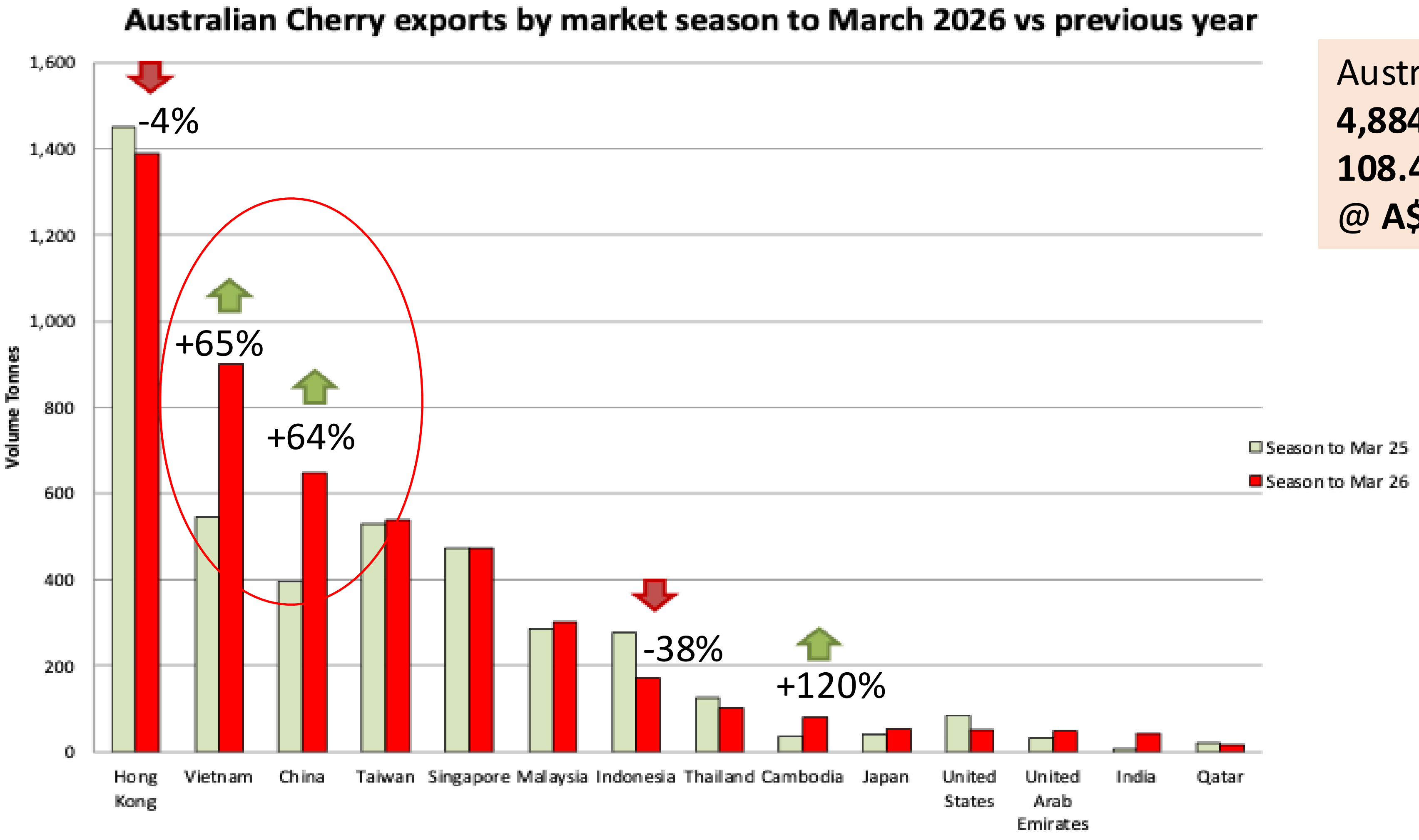
ASIAN MARKET IMPORTS – (excl Hong Kong & China)

Removing China and Hong Kong figures more clearly shows the rest of Asia
South Korea and Taiwan are largest importers in this group. Vietnam and India are increasing off small bases
Japan has been decreasing, though is mostly US fruit with negligible volumes in southern season.



AUSTRALIAN CHERRY EXPORTS – BY MARKET GROWTH

Hong Kong was the largest export destination though decreased 4 per cent to 1,389 tonnes while **China and Vietnam** increased around 65 per cent each. Taiwan and Singapore were steady while Indonesia dropped 38 per cent to 172 tonnes. Cambodia appears as an emerging market increasing 120 per cent to 81 tonnes, and India increased 4 x fold to 44 tonnes.



Source : ABS Data , Fresh Intelligence Analysis

Australian Cherry Exports
4,884 tonnes +11.4%
108.4 million AUD + 19.5%
@ **A$22.20** per kg

SOUTHERN HEMISPHERE CHERRY SUPPLIERS to ASIA

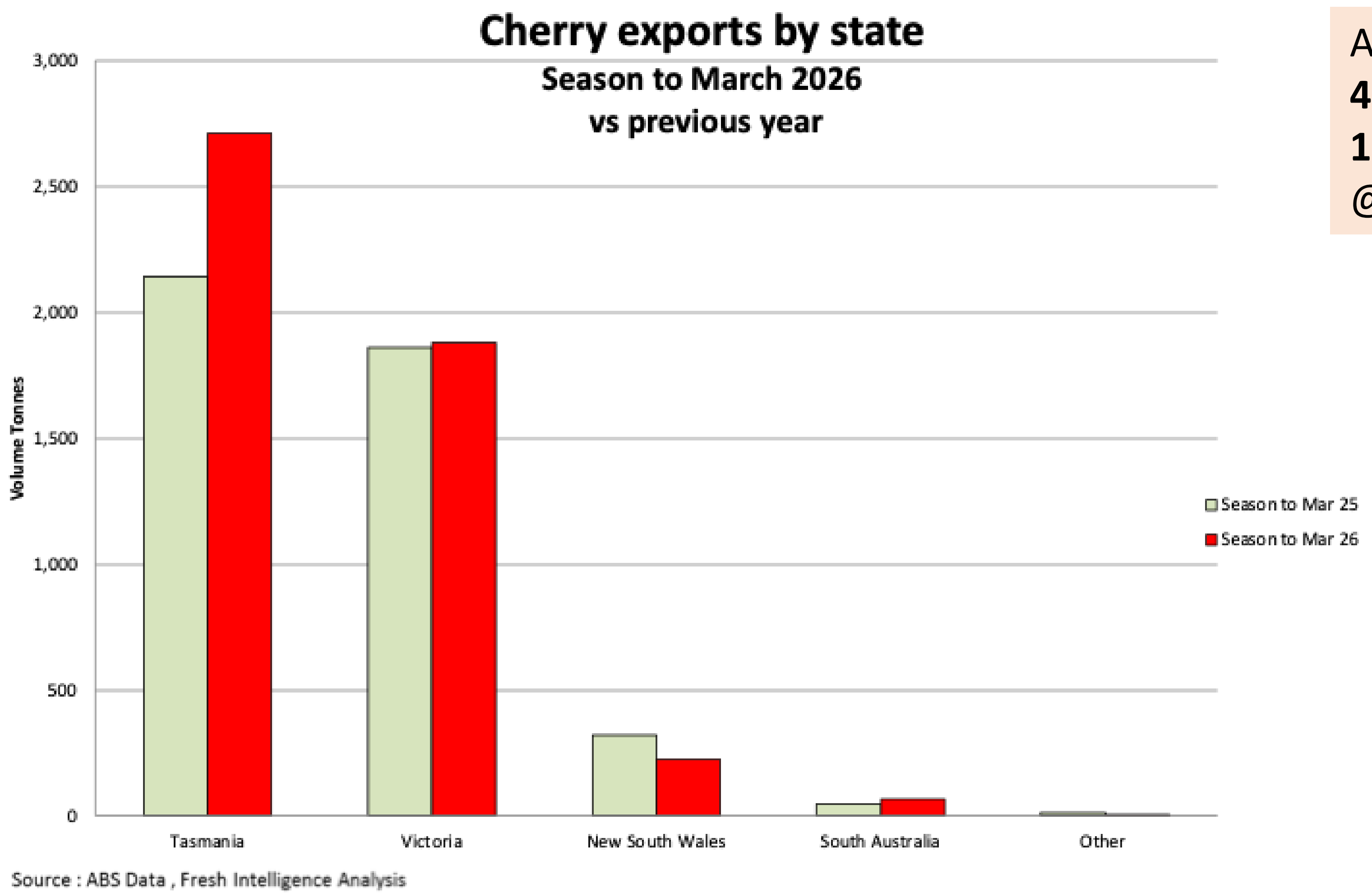
Chile dominates the Asian market by exporting 519,417 tonnes exported to Asia in 2025/26, albeit 9 per cent lower
Australia is market leader in Hong Kong, Singapore, Malaysia and Indonesia where the volumes are smaller
Argentina is making inroads to some markets notably China and Singapore
New Zealand is ahead of Australia in Taiwan, China and Japan.

	Australia	share	Chile	New Zealand	Argentina	South Africa	Total
	Tonnes	% of total	Tonnes	Tonnes	Tonnes	Tonnes	Tonnes
China	649	*0.1%*	494,417	675	1,022	3	**496,765**
Hong Kong	1,389	*60%*	735	175	30	4	**2,333**
Taiwan	539	*4%*	10,653	1,368	-	-	**12,560**
South Korea	1	*0%*	7,057	0	-	-	**7,059**
Vietnam	899	*22%*	2,883	316	-	-	**4,098**
Thailand	102	*4%*	2,106	68	-	-	**2,275**
Singapore	472	*39%*	268	123	141	210	**1,214**
India	44	*5%*	800	-	-	10	**854**
Malaysia	303	*56%*	17	178	-	44	**543**
Japan	53	*11%*	258	177	-	-	**488**
Indonesia	172	*87%*	18	9	-	-	**198**
Total	**4,636**	**1%**	**519,417**	**3,134**	**1,193**	**271**	**528,651**

Source: IHS Global Trade Atlas; Fresh Intelligence analysis

AUSTRALIAN CHERRY EXPORTS – BY STATE

Tasmania accounted for 55 per cent of the total cherry export crop with 2,711 tonnes, increasing 27 per cent, followed by Victoria with 1,880 tonnes or 38 per cent share.



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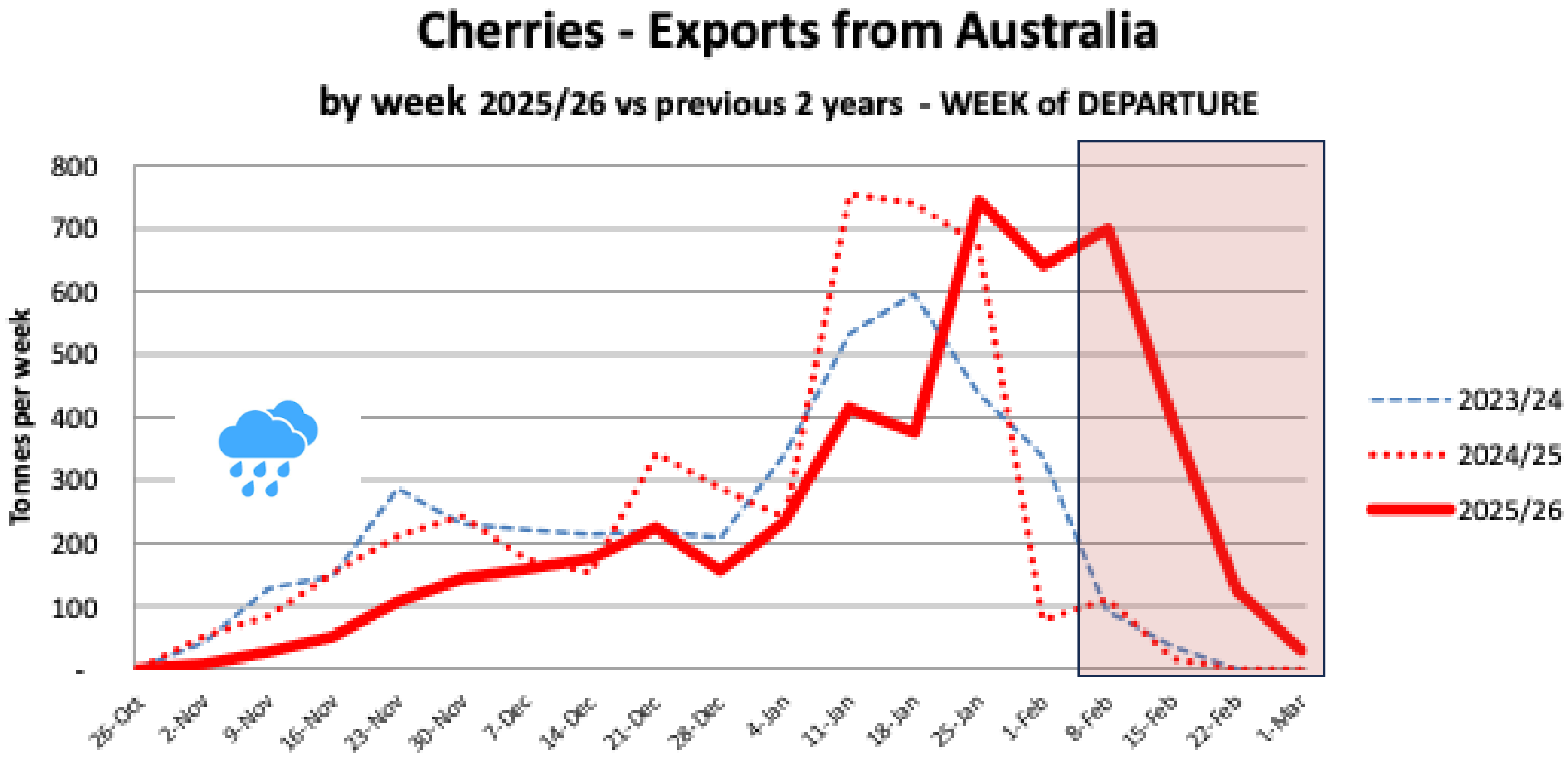
CHERRY EXPORTS – BY WEEK

The 2025/26 exports lagged previous years until late January, then impacted by steady rain through December affecting the Victorian harvest. The unusually high level of demand and supply resulted in the highest ever recorded exports for a February and brought the total season result to an 11 per cent higher than the previous season.

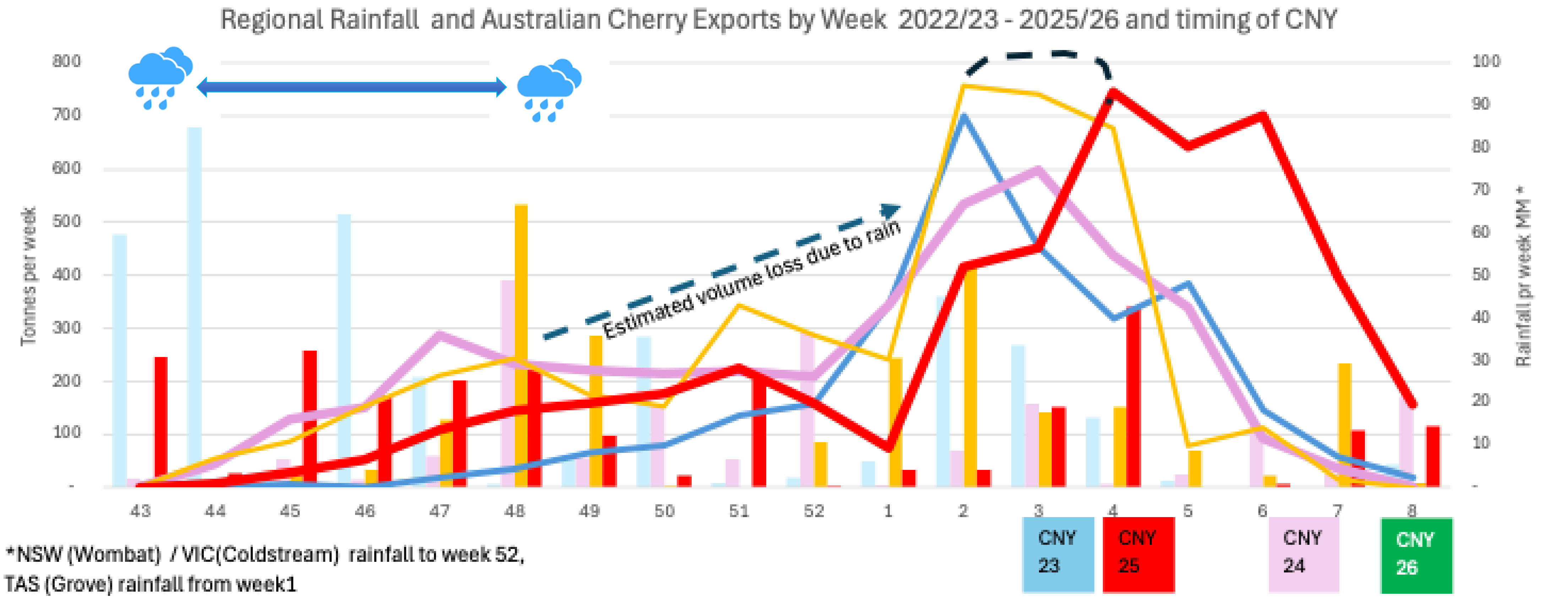


Source: DAFF; Fresh Intelligence analysis

CHERRY EXPORTS – BY WEEK – with RAINFALL

Almost steady rain from weeks 43-48 slowed the 2025/26 harvest resulting in lower exports until January (week 3)

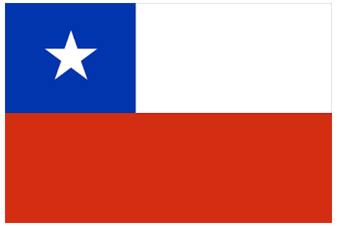
The late Lunar New Year in February 2026 and a shortage from other southern suppliers created demand that pulled more trade into February.

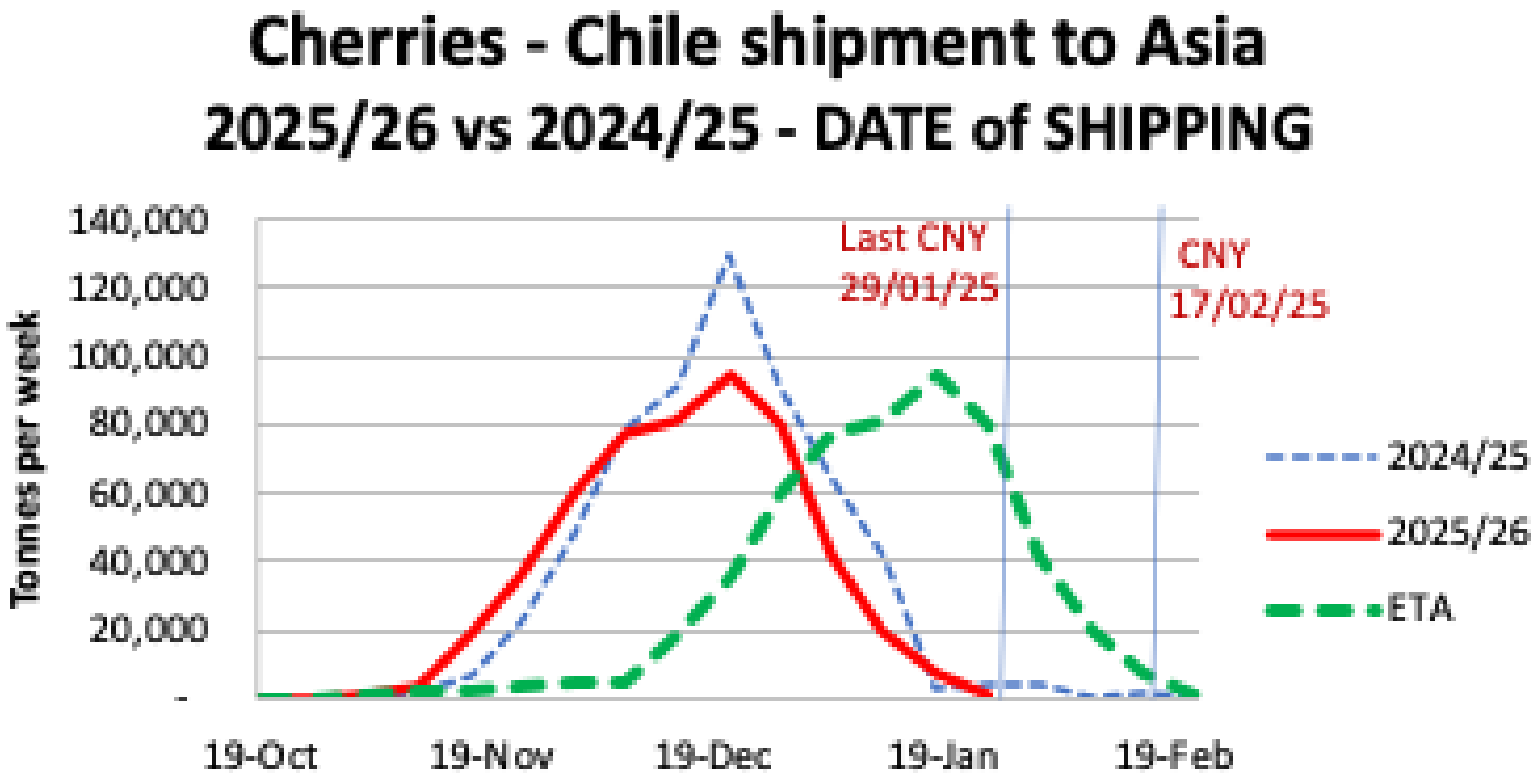


Source: DAFF, BOM; Fresh Intelligence analysis

CHERRY EXPORTS FROM CHILE

Chilean cherry exports started 10 days early due to favourable climatic conditions – 18,000 tonnes by air
Chinese New Year fell later, misaligning Chilean cherry shipments with the peak of demand.
Prices were pushed downwards driven by less than optimum quality.





Source: Decofrut; Fresh Intelligence analysis

- **Early Start**
- **Early Finish**
- **Misaligned CNY**
- **Quality and Price down**
- **90% China reliance**
- **Over supply**

Result - Australian Cherry Exports exceed $100m

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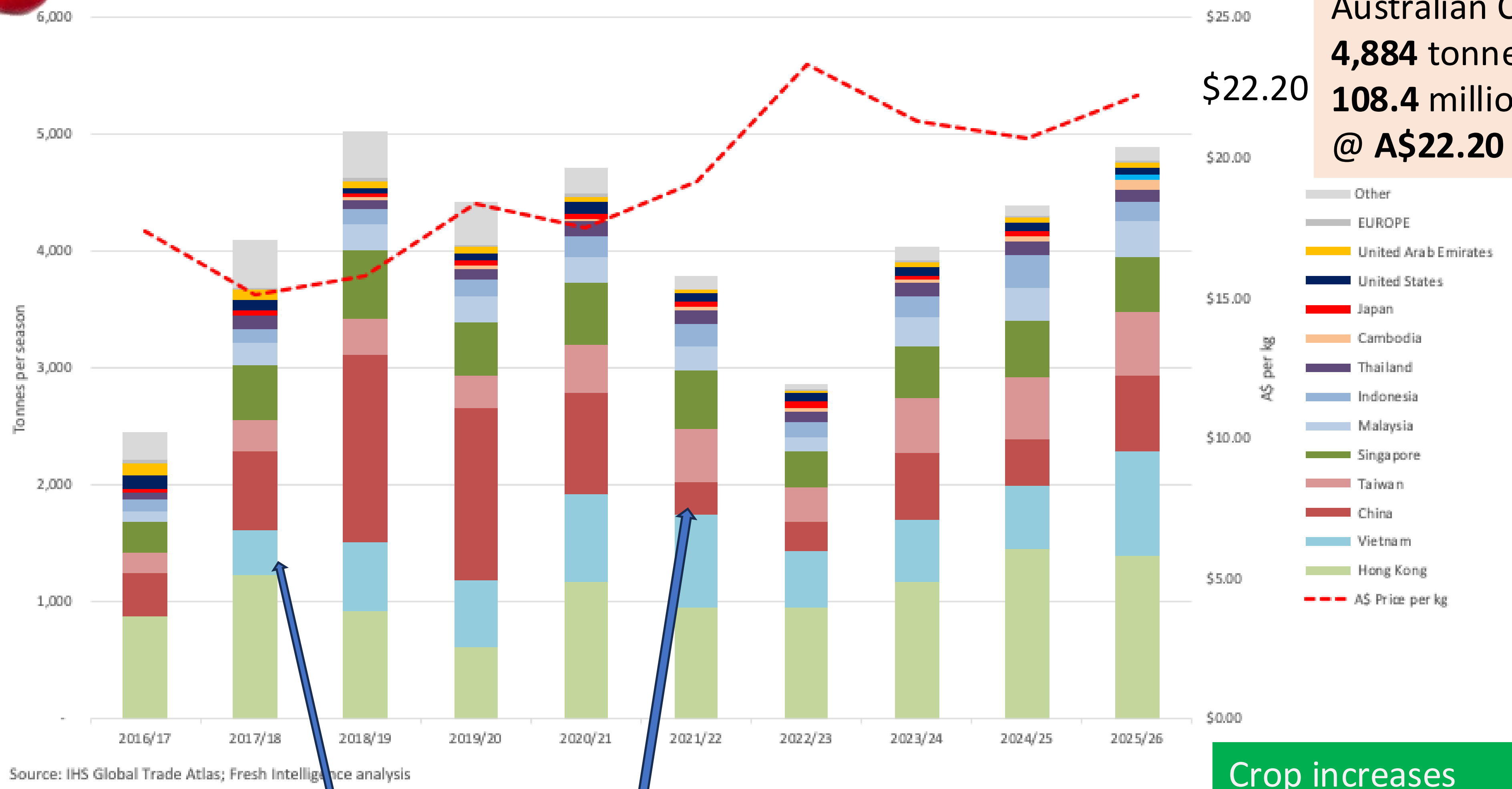
108.4 million AUD + 19.5%
@ **A$22.20** per kg



Short crop high price

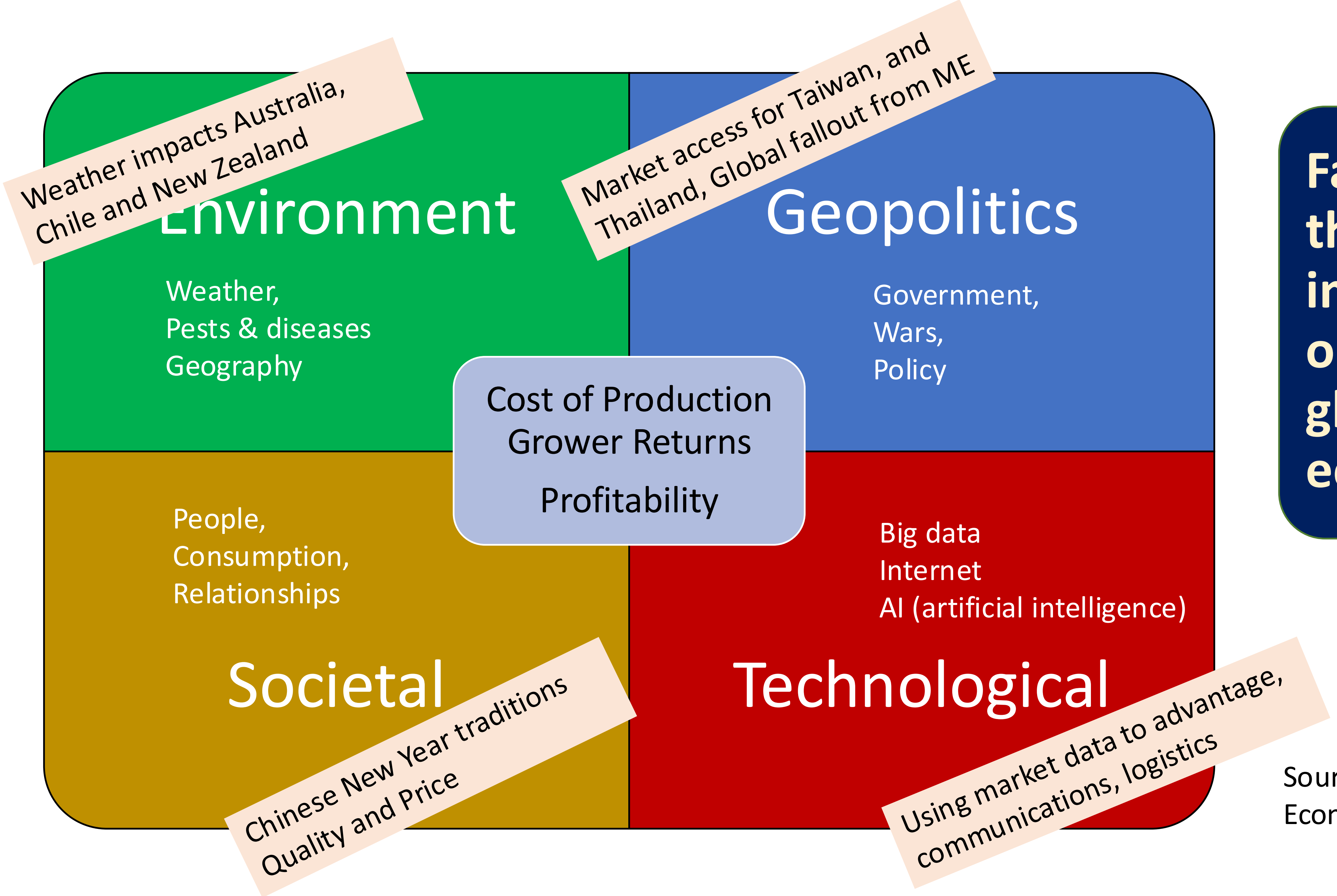
Vietnam access

China tension

Short crop high price

Crop increases
Quality Focus
Late Lunar New Year
Chile finished early

Factors that impact on the global economy



Source: World Economic Forum

Thank you

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31 May 2026

REFERENCES

- International Trade Centre, TRADE MAP www.trademap.org/
- IHS Global Trade Atlas
- FAOSTAT
- USDA (Foreign Agriculture Service)

DISCLAIMER

- Fresh Intelligence Consulting collated the data for Cherry Growers 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 Cherry Growers Australia.

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