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Snapshot and trends in the production and overseas trade of fruits from Western Australia

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Rohan Prince

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Snapshot and trends in the production and overseas trade of fruits from Western Australia
Snapshot and trends in the production and overseas trade of fruits from Western Australia
List of contributors

Diana Fisher, Chris Shelfhout, Bronwyn Walsh, Kristen Brodison, Andrew Taylor, Anne Bennett, Aileen Reid, Deborah Pett
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Explanations

Terms explained

**Exports and imports**: Exports and imports refer to supply of goods and services to and from international destinations only. Any trade with Eastern states are not included due to lack of information.

**Real value**: Value of a product after accounting for inflation. This means that the value in 2007 and 2017 are comparable if it is in real value. This is important in trend analysis.

**Nominal value**: Value of a product before accounting for inflation

**Real price**: Price of a product after accounting for inflation

**CAGR**: Compound Annual Growth Rate

**Customs value**: Value of items in the shipment based on which import duty is calculated

Year of calculations

(least available in each section)

**Production**: 2015–16

**Production trends**: 2011–12 to 2015–16

**Exports**: 2017

**Export trends**: 2007 to 2017

**Imports**: 2017

**Import trends**: 2007 to 2017

Latest available data is used for production and trade

Data sources

**Production and production trends**: Fresh Logic

(Data purchased from Fresh Logic because of the number of product lines available.)

**Export, import and its trends**: Global Trade Atlas, Australian Bureau of Statistics

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1 All values given in the report are real values unless otherwise specified
Executive summary

Western Australia produced 129 046 tonnes of fruit in 2015–16, worth $477 million. This was a 62% increase in the value of the industry in a five-year period, driven by strong growth in sales to eastern states and overseas markets.

Production expansion in the fruit industry is being led by continued growth of the avocado sector, which was worth an estimated $193m in 2015–16 and now accounts for just over 40% of WA's total fruit production value. Increased production, WA consumption and demand from the eastern states have led to a 780% increase in the value of avocado sales from WA between 2011–12 and 2015–16.

Apples are the biggest crop by quantity and the third biggest by value. Across all fruit sectors there has been a rising trend in export values, which increased 115% between 2007 and 2017 in real terms (after accounting for inflation). Strong sales of strawberries have been a major contributing factor.

WA exported $38m worth of fruits in 2017. Of this total, strawberries accounted for 67%, worth $25 million and 3509 tonnes in sales. Strawberries command the state’s biggest fruit export market share and global sales are increasing. But, despite the rising trend in exports, the real export price of strawberries fell in 2016 and 2017.
A drop in plum exports in recent years is another concern for the WA industry, as this fruit was identified as a high potential industry by the Department of Primary Industries and Regional Development (DPIRD) in 2017.1

WA orange sector experienced the highest growth in export values between 2007 and 2017 and it is expected this trend will continue. It is hoped that export expansion will change the current trade deficit in oranges to a trade surplus.

WA’s biggest global markets for fruit are the UAE, which takes about 21% of the state’s total exports, worth about $8m annually, followed by Singapore, which takes 19% of total exports worth $7m. Key emerging markets include China, Saudi Arabia and Kuwait.

Exports of WA fruit to Hong Kong have been almost stagnant in recent years. Despite orange exports to this market recently picking-up, plum exports fell and this has left the total value almost unchanged. At the same time, the nominal value of total fruit imports to Hong Kong from the rest of the world has increased from about $900m to $3.5 billion. Further opportunities for WA fruit sales to Hong Kong need exploring.

The outlook for fruit exports is positive, with potential to boost WA’s share of total Australian fruit export value from its current level of 3.6%. This is worth about $38m of the total national value of fruit exports at $1.05 billion.

Fruit imports to WA have been increasing in recent years, predominantly during out-of-season periods for local production, and were worth $31m in 2017. This was up 133% from 2007 levels (after accounting for inflation).

Grapes are the biggest single fruit crop imported to the state by value followed by oranges. Grapes make up 18% of import spend at about $6m annually. The strongest growth in import values has come from fresh cranberries and blueberries. Oranges are the biggest import by quantity.

Despite Australia having reciprocal trade relationships, WA rarely export to the same countries from where we import fruit. Our exports are mainly to UAE and Singapore and imports are mainly from the USA and New Zealand.

Trade in fruit has increased in both exports and imports. Exports have increased by 115% and imports have increased by 133%.

We export more fruits by value than we import. Fruits as a whole have a trade surplus of $6.2m. However, when it comes to certain individual product categories like oranges, grapes etc. we have a trade deficit. Fruits have reasonable growth in both exports and imports mainly because of the seasonality. We export during our production season and we get imports mostly during our off season. Kiwifruit is imported almost throughout the year even though there are seasonal fluctuations. However, when it comes to quantity, we import more than we export. WA imported 11 200t and exported only about 9900t.

Growth in import value (133%) is more than the growth in imported quantity (86%) during the past decade from 2007 to 2017. This could be due to the increased imports of high value fruits such as cranberries and blueberries, peaches and nectarines, cherries and grapes. USA achieved market access to WA around 2013 for these high-value fruits.

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1 Market opportunities for WA fruits
In brief

- Fruit production increased by 17% in quantity and 62% in value between 2011–12 and 2015–16. These trends indicate a shift in production to high value crop such as avocados and possibly a general increase in the price of the fruits.

- Avocados, strawberries and oranges led the growth in production value.

- Export value growth is led by strawberries and more recently by oranges.

- Decline in the export of apples, grapes and plums.

- Most of the traditional markets have grown over the years, however, growth in Hong Kong is almost stagnant.

- Grapes and oranges are the biggest imports, mostly counter-seasonal.

- The USA and New Zealand are the biggest import sources for fruit in to WA.

- Import growth value (133%) is higher than the export growth value (115%) during the past decade (2007–17).

- Growth in import value (133%) is more than the growth in imported quantity (86%) during the past decade from 2007 to 2017.

- Growth in export value (115%) is also more than the export quantity (91%) even though the difference is less than that of imports.

- The general trend is seen as more growth in real value of production, exports and imports compared to quantity. This could be a sign of a general shift towards more premium products.
### Production of fruits (2015–16)
- Production quantity: **129,046t**
- Wholesale value: **$477m**
- Highest share in wholesale value: **Avocados ($193m, 41%)**
- Highest growth: **Avocados (780%)**

### Value of fruit exports from WA (2017)
- Export value: **$38m**
- Highest share in export value: **Strawberries ($25m, 67%)**
- Growth in export value (2007–17): **115%**
- Highest growth: **Oranges**
- Largest export destinations: **UAE ($8m), Singapore ($7m), Thailand ($5m)**

### Value of fruit imports into WA (2017)
- Import value: **$31m**
- Highest share in import value: **Grapes ($6m, 18%)**
- Growth in import value (2007–17): **133%**
- Highest growth: **Cranberries and blueberries (2417%)**
- Trade surplus: **$7m**
Key points

- WA fruit production was valued at $477m in 2015–16
- WA fruit value increased 62% from 2011–12 to 2015–16
- Avocados were the highest value fruit crop at $193m. Avocado had a 780% increase in real value from 2011–12 to 2015–16.
- WA produced 129,046 tonnes of fruit in 2015–16
- Apples were the biggest crop by quantity at 27,650t
- About 25,000t of avocados were produced
- Melons were the third biggest crop by quantity at 20,500t
- WA fruit production quantity increased 17% from 2011–12 to 2015–16
- Quantity increase is 17% and value increase is 62% indicating a shift in production to high value fruit crops
Fruit production in Western Australia 2015–16
(Wholesale value in $m, production in tonnes and share in %)

WA produced $477m worth of fruits of which 41% is avocados followed by strawberries (at 19%). Top five fruits by value are avocados, strawberries, apples, grapes and melons (excluding water melons). These fruits form 81% of the total value of fruits produced in WA.

<table>
<thead>
<tr>
<th>Fruit</th>
<th>Wholesale Value ($m)</th>
<th>Production (tonnes)</th>
<th>Share in (%)</th>
</tr>
</thead>
<tbody>
<tr>
<td>Avocados</td>
<td>$193m</td>
<td>24,959t</td>
<td>40.6%</td>
</tr>
<tr>
<td>Strawberries</td>
<td>$88m</td>
<td>10,512t</td>
<td>18.6%</td>
</tr>
<tr>
<td>Grapes</td>
<td>$25m</td>
<td>4,534t</td>
<td>5.2%</td>
</tr>
<tr>
<td>Melons</td>
<td>$24m</td>
<td>20,492t</td>
<td>5.1%</td>
</tr>
<tr>
<td>Oranges</td>
<td>$14m</td>
<td>11,833t</td>
<td>2.9%</td>
</tr>
<tr>
<td>Nectarines</td>
<td>$11m</td>
<td>3,708t</td>
<td>2.3%</td>
</tr>
<tr>
<td>Pears</td>
<td>$11m</td>
<td>5,999t</td>
<td>2.2%</td>
</tr>
<tr>
<td>Apples</td>
<td>$58m</td>
<td>27,651t</td>
<td>12.1%</td>
</tr>
<tr>
<td>Plums</td>
<td>$10m</td>
<td>4,532t</td>
<td>2.2%</td>
</tr>
<tr>
<td>Bananas</td>
<td>$8m</td>
<td>4,151t</td>
<td>1.7%</td>
</tr>
<tr>
<td>Mangoes</td>
<td>$9m</td>
<td>2,200t</td>
<td>2.0%</td>
</tr>
<tr>
<td>Other citrus</td>
<td>$6m</td>
<td>1,697t</td>
<td></td>
</tr>
</tbody>
</table>

Data source: Fresh Logic
### Production trends in selected fruits (2011–12 to 2015–16)

<table>
<thead>
<tr>
<th>Fruit</th>
<th>% change in production</th>
<th>% change in real total value</th>
<th>% change in real price</th>
</tr>
</thead>
<tbody>
<tr>
<td>Apples</td>
<td>0.5%</td>
<td>3.3%</td>
<td>2.8%</td>
</tr>
<tr>
<td>Avocados</td>
<td>406.8%</td>
<td>778.7%</td>
<td>73.4%</td>
</tr>
<tr>
<td>Bananas</td>
<td>-27.8%</td>
<td>-54.7%</td>
<td>-37.3%</td>
</tr>
<tr>
<td>Grapes</td>
<td>-11.0%</td>
<td>-3.5%</td>
<td>-11.3%</td>
</tr>
<tr>
<td>Manderins</td>
<td>41.0%</td>
<td>25.1%</td>
<td>8.4%</td>
</tr>
<tr>
<td>Mangoes</td>
<td>-26.7%</td>
<td>-6.8%</td>
<td>27.1%</td>
</tr>
<tr>
<td>Melons</td>
<td>-12.8%</td>
<td>-10.1%</td>
<td>3.1%</td>
</tr>
<tr>
<td>Nectarines</td>
<td>7.5%</td>
<td>4.3%</td>
<td>-2.9%</td>
</tr>
<tr>
<td>Oranges</td>
<td>56.0%</td>
<td>41.4%</td>
<td>-9.4%</td>
</tr>
<tr>
<td>Other citrus</td>
<td>-24.4%</td>
<td>-2.9%</td>
<td>-6.2%</td>
</tr>
<tr>
<td>Peaches</td>
<td>37.6%</td>
<td>29.1%</td>
<td>-14.7%</td>
</tr>
<tr>
<td>Pears</td>
<td>-15.3%</td>
<td>-27.8%</td>
<td>11.5%</td>
</tr>
<tr>
<td>Strawberries</td>
<td>45.0%</td>
<td>61.6%</td>
<td>-2.9%</td>
</tr>
</tbody>
</table>

**Comments**

- With more than four times increase in production, avocados have also had a 73% increase in real price.
- There has been a double digit growth in the production and value of strawberries as well.
- The real price of bananas has declined by almost 40% with a decline in production. Competition from interstate could be one of the reasons for this.
- Pears also showed a decline in both production and real price.
- Share of fruits has increased by almost 5% in total fruit and vegetable production value.
Industry details on production

Production of WA fruit increased by 17% in the five-year period to 2015–16, from 110 000t to 129 000t. At the same time, the value of this production grew 62% to reach an estimated $477m. Avocados, strawberries, apples, melons, oranges and grapes are the biggest value crops and make up about 88% of the value of the state’s total fruit production. In the five-year period to 2015–16, the avocado sector experienced the strongest growth in both production and value. The value of the WA citrus industry also grew significantly across this period, with the orange crop increasing 41% and mandarins 25% between 2011–12 and 2015–16.

WA avocado production and value

The avocado sector produced 24 960t of fruit worth $193m in 2015–16, which was up 407% from about 4925t five years earlier. The size of the WA avocado crop now only marginally falls short of apple production, which is the state’s largest fruit crop by quantity. Growth in avocado production and a jump in prices in recent years have underpinned a 780% increase in the value of this sector, which is now the largest fruit industry in the state. Avocados make up about 41% of WA’s total fruit crop value.

The bulk of the value in the avocado sector is contained in the Australian domestic market, with export sales making up only 4% of WA’s total overseas fruit sales value. This is well behind strawberries at 67%, below oranges and melons, which each have a 10% share in exports, and slightly ahead of watermelons and plums at 3% each.
WA strawberry production and value

Strawberry production in WA grew by 45% between 2011–12 and 2015–16 to reach 10,510t. In the same period, strawberry prices increased by 12% and contributed to an estimated total value of $88 million for this crop. This makes strawberries the state’s second highest earning fruit crop behind avocado. Production expansion by this sector has coincided with a 196% growth in export sale quantity and 258% increase in export values to make this crop the highest-earning export crop for the five-year period, returning $25m in 2017. This represented 67% of the value of total fruit export sales from WA for that year. With an overall 62% increase in crop value in five years, WA strawberries commanded an 18.6% share of the total value of the state’s fruit sector in 2015–16.

WA apple production and value

Apple is the largest fruit industry by quantity. WA’s apple production has remained stable in the five years to 2015–16, when quantities were about 27,650t worth $58 million. Peak production during this period was 31,435t in 2013–14 and quantities have been slightly contracting since then. Apples represent 12% of the state’s total fruit crop value in 2015–16.

WA grape production and value

WA produced 4,534t of grapes in 2015–16 worth $25 million to make this the fourth biggest fruit crop earner that year. Grapes made up 5.2% of the state’s total fruit production in 2015–16 after experiencing an 11% decline in quantity in the five-year period from 2011–12, when production was about 5,090t. In that time, prices rose 8.4%. Grapes are the major imported fruit to WA, accounting for 18% of total import value. Export is starting to pick up.

WA melon production and value

WA produces a sizeable melon crop of about 20,500t annually, which was worth $24 million in 2015–16. But quantities have fallen almost 13% from 23,500t in 2011–12 and values have also come off about 10% in that time. Melons represented 5% of WA’s total fruit crop value in 2015–16.

WA orange production and value

Although WA imported about $5.3m worth of oranges in 2017, a 56% production increase was recorded in WA oranges between 2011 to 2016 from 7,580t to 11,835t. This increase was supported by rapidly growing exports maintaining good local prices creating a bright outlook for this crop.

WA banana production and value

WA banana production in 2011–12 was about 5,755t, after which time quantity fell for the next three years before starting to climb again in 2015–16 to reach 4,150t. It is worth noting that the real price of bananas contracted by almost 40% in this five-year period, despite the 28% decline in production in this state. The value of this sector dropped by 55% in the five years to be worth $8m in 2015–16. Competition from bananas coming into WA from interstate could be a key factor affecting this sector.
Fruit exports from Western Australia (2007–17)

Key points

- WA exported 9910 tonnes of fruit in 2017
- This was worth $38m
- Export values grew 115% from 2007 to 2017
- Average fruit export price in 2017 was $3.85/kg
- Export quantities grew 91 per cent from 2007 to 2017
- The United Arab Emirates (UAE) was the highest value market, worth $8.1m in 2017
- Strawberries were the highest value exported fruit crop worth $25m in 2017
- Avocados had the strongest growth in export quantity (213%) and value (313%) in 2007–17, but have a small share of total WA fruit exports (about 4%)
- Orange export values increased significantly from almost zero in 2007 to $3.9m worth in 2017

- Strong WA fruit export trends for 2007–17 highlight:
  - A continued rise in the value of strawberry exports (until a slight fall in 2017)
  - Increasing values for oranges, watermelons and avocados
  - Contracting values for plums, apples and grapes
  - Relatively static values for melons
  - Increasing value from sales to most export markets
Fruit exports from Western Australia — 2017

Major fruit exports from Western Australia

- **Watermelons**: $1.11m, 539t, 2.9%
- **Avocados**: $1.69m, 241t, 4.4%
- **Melons**: $3.69m, 2275t, 9.7%
- **Oranges**: $3.92m, 2542t, 10.3%
- **Plums**: $1.08m, 483t, 2.8%
- **Strawberries**: $25.36m, 3509t, 66.6%
- **Others**: $1.25m, 3.3%

Major fruit export destinations

- **China**: $1.67m, 4.4%
- **UAE**: $8.08m, 21.2%
- **Thailand**: $4.75m, 12.5%
- **Others**: $2.64m, 6.9%
- **Hong Kong**: $3.96m, 10.4%
- **Kuwait**: $1.81m, 4.8%
- **Malaysia**: $3.88m, 10.2%
- **New Zealand**: $2.89m, 7.6%
- **Singapore**: $7.42m, 19.5%
- **Saudi Arabia**: $1.00m, 2.6%
WA exported 9910 tonnes of fruit worth $38 million in 2017. This was 115% higher than the value of the state’s fruit exports a decade earlier and was associated with a 13% increase in real prices and 91% increase in overseas sales quantities between 2007 and 2017.

The strawberry sector leads the state’s export charge, shipping 3510t overseas in 2017 worth $25m. This represented 67% of the total value of WA fruit exports. From 2007 to 2017, strawberry exports increased by 258% in real value, quantities were up by 196% and real prices rose 21%.

Other key fruit exports from WA include oranges and melons, which each have a 10% share of total fruit export value, followed by avocados at 4% and watermelons and plums, each with 3%.

The UAE is the state’s highest value export market destination, worth 21% of total 2017 fruit export value from the state at $8.1m. This was almost 100% higher than the value of this market in 2007. Singapore follows closely behind, with exports to this market topping $7.4m in sales in 2017 — or 20% of total fruit export value from WA. The state’s third highest value market is Thailand, with sales worth $4.75m in 2017 — or 13% of total export market value.

The adjusted value of WA’s trade surplus (exports-imports) across the fruit industry increased by 64% from $4.2m in 2007 to $6.9m in 2017.

In 2017 there were no export destinations that held more than a 50% share of export values. But more than 50% of total fruit export values was made up of a single category — strawberries. This strong reliance on a single product could pose future risks to the state’s fruit industry.

Snapshot of exported products and destinations as well as historical trends in value, quantity, price and destinations are given on the following pages.
Fruit exports from Western Australia — 2017
(Value in $m, quantity in tonne and share in %)

Strawberries
- $25.36m
- 3509t
- 66.6%

<table>
<thead>
<tr>
<th>Destination</th>
<th>Share in export value</th>
<th>FOB price</th>
</tr>
</thead>
<tbody>
<tr>
<td>UAE</td>
<td>23%</td>
<td>$7.10/kg</td>
</tr>
<tr>
<td>Thailand</td>
<td>19%</td>
<td>$8.16/kg</td>
</tr>
<tr>
<td>Singapore</td>
<td>17%</td>
<td>$5.88/kg</td>
</tr>
<tr>
<td>New Zealand</td>
<td>11%</td>
<td>$9.93/kg</td>
</tr>
<tr>
<td>Malaysia</td>
<td>9%</td>
<td>$7.27/kg</td>
</tr>
<tr>
<td>Kuwait</td>
<td>7%</td>
<td>$8.37/kg</td>
</tr>
<tr>
<td>Hong Kong</td>
<td>6%</td>
<td>$5.55/kg</td>
</tr>
<tr>
<td>Saudi Arabia</td>
<td>4%</td>
<td>$7.28/kg</td>
</tr>
</tbody>
</table>

Share of different destinations in the value of strawberry exports

Comments
- WA exported $38m worth of fruits in 2017.
- Value of fruit export grew by 115% between 2007 and 2017 in real terms.
- Export value of strawberries grew by 258%, melons by 87% and avocados by 313%.
- High percentage increase is observed in export value of oranges.
- There has been a 70% decline in the export value of plums.

Oranges
- $3.92m
- 2542t
- 10.3%

<table>
<thead>
<tr>
<th>Country</th>
<th>Share in export value</th>
<th>FOB price</th>
</tr>
</thead>
<tbody>
<tr>
<td>China</td>
<td>43%</td>
<td>($1.91/kg)</td>
</tr>
<tr>
<td>Hong Kong</td>
<td>34%</td>
<td>($1.24/kg)</td>
</tr>
<tr>
<td>Indonesia</td>
<td>10%</td>
<td>($1.58/kg)</td>
</tr>
<tr>
<td>Malaysia</td>
<td>7%</td>
<td>($1.64/kg)</td>
</tr>
<tr>
<td>Singapore</td>
<td>5%</td>
<td>($1.55/kg)</td>
</tr>
<tr>
<td>Others</td>
<td>1%</td>
<td></td>
</tr>
</tbody>
</table>

Melons
- $3.69m
- 2275t
- 9.7%

<table>
<thead>
<tr>
<th>Country</th>
<th>Share in export value</th>
<th>FOB price</th>
</tr>
</thead>
<tbody>
<tr>
<td>Singapore</td>
<td>45%</td>
<td>($1.05/kg)</td>
</tr>
<tr>
<td>UAE</td>
<td>31%</td>
<td>($1.62/kg)</td>
</tr>
<tr>
<td>Japan</td>
<td>12%</td>
<td>($2.07/kg)</td>
</tr>
<tr>
<td>Hong Kong</td>
<td>10%</td>
<td>($1.67/kg)</td>
</tr>
<tr>
<td>Others</td>
<td>2%</td>
<td></td>
</tr>
</tbody>
</table>

Avocados
- $1.69m
- 241t
- 4.4%

<table>
<thead>
<tr>
<th>Country</th>
<th>Share in export value</th>
<th>FOB price</th>
</tr>
</thead>
<tbody>
<tr>
<td>Malaysia</td>
<td>66%</td>
<td>($8.26/kg)</td>
</tr>
<tr>
<td>Singapore</td>
<td>28%</td>
<td>($5.13/kg)</td>
</tr>
<tr>
<td>Hong Kong</td>
<td>5%</td>
<td>($7.31/kg)</td>
</tr>
</tbody>
</table>

Watermelons
- $1.11m
- 539t
- 2.9%

<table>
<thead>
<tr>
<th>Country</th>
<th>Share in export value</th>
<th>FOB price</th>
</tr>
</thead>
<tbody>
<tr>
<td>UAE</td>
<td>95%</td>
<td>($2.04/kg)</td>
</tr>
</tbody>
</table>

Plums
- $1.08m
- 483t
- 2.8%

<table>
<thead>
<tr>
<th>Country</th>
<th>Share in export value</th>
<th>FOB price</th>
</tr>
</thead>
<tbody>
<tr>
<td>Singapore</td>
<td>59%</td>
<td>($2.21/kg)</td>
</tr>
<tr>
<td>Indonesia</td>
<td>18%</td>
<td>($3.11/kg)</td>
</tr>
<tr>
<td>Hong Kong</td>
<td>16%</td>
<td>($2.00/kg)</td>
</tr>
</tbody>
</table>
### Fruit export destinations — 2017
(Value in $m and share in %)

<table>
<thead>
<tr>
<th>Country</th>
<th>Value (in $m)</th>
<th>Share (%)</th>
</tr>
</thead>
<tbody>
<tr>
<td>UAE</td>
<td>$8.08</td>
<td>21.2%</td>
</tr>
<tr>
<td>Thailand</td>
<td>$4.75</td>
<td>12.5%</td>
</tr>
<tr>
<td>New Zealand</td>
<td>$2.89</td>
<td>7.6%</td>
</tr>
<tr>
<td>Others</td>
<td>$2.64</td>
<td>6.9%</td>
</tr>
<tr>
<td>Singapore</td>
<td>$7.42</td>
<td>19.5%</td>
</tr>
<tr>
<td>Hong Kong</td>
<td>$3.96</td>
<td>10.4%</td>
</tr>
<tr>
<td>Kuwait</td>
<td>$1.81</td>
<td>4.8%</td>
</tr>
<tr>
<td>Saudi Arabia</td>
<td>$1.00</td>
<td>2.6%</td>
</tr>
<tr>
<td>China</td>
<td>$1.67</td>
<td>4.4%</td>
</tr>
</tbody>
</table>

#### Fruit Share in Export Value

<table>
<thead>
<tr>
<th>Fruit</th>
<th>Share in Export Value</th>
</tr>
</thead>
<tbody>
<tr>
<td>Strawberries</td>
<td>73%</td>
</tr>
<tr>
<td>Melons</td>
<td>14%</td>
</tr>
<tr>
<td>Water melons</td>
<td>13%</td>
</tr>
<tr>
<td>Strawberries</td>
<td>100%</td>
</tr>
<tr>
<td>Oranges</td>
<td>34%</td>
</tr>
<tr>
<td>Melons</td>
<td>9%</td>
</tr>
<tr>
<td>Mangoes</td>
<td>5%</td>
</tr>
<tr>
<td>Plums</td>
<td>4%</td>
</tr>
<tr>
<td>Others</td>
<td>11%</td>
</tr>
<tr>
<td>Strawberries</td>
<td>95%</td>
</tr>
<tr>
<td>Melons</td>
<td>3%</td>
</tr>
<tr>
<td>Others</td>
<td>2%</td>
</tr>
<tr>
<td>Oranges</td>
<td>100%</td>
</tr>
<tr>
<td>Strawberries</td>
<td>61%</td>
</tr>
<tr>
<td>Avocados</td>
<td>29%</td>
</tr>
<tr>
<td>Oranges</td>
<td>7%</td>
</tr>
<tr>
<td>Others</td>
<td>3%</td>
</tr>
<tr>
<td>Oranges</td>
<td>100%</td>
</tr>
</tbody>
</table>

#### Comments
- UAE is the major fruit destination (21%) followed by Singapore (20%), Thailand (13%) and Hong Kong (10%).
- Fruit exports have grown by 115% between 2007 and 2017 in real terms. Major markets such as UAE, Singapore and Thailand have grown by 99%, 146% and 234% respectively and higher growth is observed in low share markets such as New Zealand, Kuwait and Saudi Arabia. Exports to China has started with oranges.
Export of fruits from Western Australia — real value trends (2007–17)

Real value trends in all WA fruit exports

Real value trend by fruit type exported from WA

**Growth in %**
- Avocados: 313%
- Melons: 87%
- Oranges: NA
- Others: -73%
- Plums: -70%
- Strawberries: 258%
- Watermelons: NA

*% growth is not given for those industries where exports in 2007 are almost zero*
Export of fruits from Western Australia — quantity trends (2007–17)

Trends in quantity of fruit exports

Details on quantity of fruit export

*% growth is not given for those industries where exports in 2007 are almost zero
Export of fruits from Western Australia – real price trend (2007–17)

Growth in %*

- Avocados: 32%
- Melons: -14%
- Oranges: 20%
- Others: NA
- Plums: -17%
- Strawberries: 21%
- Watermelons: 245%

*% growth is not given for those industries where exports in 2007 are almost zero
Export of fruits from Western Australia — real price trends (2007–17)

*% growth is not given for those countries where exports in 2007 are almost zero
Snapshot and trends in the production and overseas trade of fruits from Western Australia
Industry details on exports

Details on major fruit exports are given below.

**WA strawberry exports**

- With exports of just over 3500t worth $25m in 2017, strawberries made up 67% of the total value of global fruit exports from WA. This sector experienced a 196% growth in export quantity and a 258% increase in values from 2007 to 2017. This was second only to avocados with a 313% rise in values. Between 2007 and 2017, strawberry export prices rose by 21% and averaged $7.20/kg. Prices increased from an average of $5.99/kg in 2007 to reach a peak of $9.14/kg on average in 2015, before contracting in the past two years.

- Strawberries are the predominant fruit exported to all of WA’s biggest overseas markets, except China, where there is no market access for local strawberries and oranges dominate sales. Sales to the UAE made up 23% of the total value of the state’s strawberry exports in 2017 and average prices were $7.10/kg.

- Other key markets by value included:
  - Thailand at 19%, with an average price paid of $8.16/kg;
  - Singapore at 17% and average price of $5.88/kg;
  - New Zealand at 11% and the highest average price of $9.93/kg; and
  - Malaysia at 9% and average price of $7.27/kg.

- Strong reliance on the strawberry sector to generate export income could be a potential future risk for fruit industry.

**WA orange exports**

- Oranges are the second highest earning WA fruit in export markets, worth $3.9m from a sale quantity of 2542t in 2017. This represented a 10% share of the total value of WA fruit exports and was mainly driven by increased sales to China in recent years, and a 20% increase in average prices across the decade to $1.50/kg.

- China is a premium market and takes 43% of WA orange exports, paying an average price of $1.91/kg in 2017. Hong Kong is the next highest value market for WA oranges, worth 34% of total sales and paying an average price of $1.24/kg in 2017. Other key destinations include Indonesia, Malaysia and Singapore, where average 2017 prices ranged from $1.55/kg to $1.64/kg.
WA melon exports

- A reduction of 14% in melon export price from 2007 to 2017 was outweighed by a 118% growth in export quantity. This resulted in an 87% increase in overall export value for this sector to $3.7m in 2017.
- Melons consistently represented about 10% of total WA fruit export value share between 2007 and 2017.
- The highest value market for WA melons is Singapore, accounting for 45% of total melon sale and paying an average price of $1.05/kg in 2017.
- Sales of melons to the UAE made up 31% of total export value for this sector, followed by Japan and Hong Kong. Average prices in 2017 in these markets were $1.62/kg, $2.07/kg and $1.67/kg respectively.

WA avocado exports

- Reflecting strong consumer demand across the globe for this fruit, WA avocados experienced the biggest growth in export value between 2007 and 2017, climbing 313% to $1.7m. Quantities of avocados exported also increased significantly in this period — by 213% — and real price gains of 32% were made between 2007 and 2017, to reach an average $7.20/kg.
- The avocado sector now makes up about 4.5% of the total value of WA fruit exports.
- Malaysia is the highest value overseas market for WA avocados, with a 66% share of the total value of all export sales of this fruit and paying the highest average price in 2017 of $8.26/kg. It is followed by Singapore, worth 28% of total export fruit value, and Hong Kong, worth 5%.

WA plum exports

- Exports of plums make up only 3% of WA’s global fruit sales by value. Plum export quantity fell 65% between 2007 and 2017 and, coupled with a 17% fall in average prices to just over $2/kg, the export market value for this sector declined by 70% in the five-year period.
- Plum exports in 2017 were estimated to be worth $1.08m, from 483t sold. Share of plums in total WA fruit export value has dropped from 21% in 2007 to 3% in 2017.
- Singapore was the biggest market for WA plums in 2017, taking 59% of exports at an average price of $2.21/kg, followed by Indonesia and Hong Kong, which took 18% and 16%, with average prices of $3.11/kg and $2/kg respectively.

Export trends in key destination markets are given on the following pages.
Comments

- Fruit exports from WA has increased over the years, however WA forms only 3.6% of the Australian fruit exports by value ($38m of $1058m). Fruit exports were dominated by strawberries in 2007, the same trend continued in 2017 as well. Strawberries’ value share of fruit exports increased from 40% to 67%, while plums fell from 21% to 3%, apples from 12% to 0% and grapes from 8% to 1%.
- Melon’s share of exports was almost unchanged reducing from 11% to 10%, while oranges’ share of fruit export value increased from 0 to 10% in the same period.
- The value of export to most export destinations has grown between 2007 and 2017. New Zealand, Kuwait and China all increased their share of WA exports, while share of Hong Kong declined from 22% to 10% mainly because of the decline in plum exports and the share of UK declined from 10% to 0% because of the decline in apple exports. Share of other countries analysed remained the same.
Snapshot and trends in the production and overseas trade of fruits from Western Australia

Comments

• The value of WA fruit sales to the UAE market almost doubled between 2007 and 2017, reaching $8.1 million. This represented more than 20 per cent of the state’s total fruit export value. Export of all fruits declined in 2012, may be in response to the high exchange rate. Exports of strawberries and watermelons are growing, melons are stagnant and plums and avocados declined.

• Strawberries’ share in total fruit exports increased from 56% to 73%, however slightly declined in 2017. The UAE had a five-year annual growth rate (measured in CAGR) of 55% in the value of its WA fruit purchases between 2012 and 2017. This fell to 3% for the two-year annual growth rate between 2015 and 2017.
Comments

- WA exported $7.4m worth of fruit to Singapore in 2017, a 146% increase in value from 2007 levels.
- Although 2017 values were down by about $3m from the previous year, this market remained WA’s second most important world destination for fruit behind the UAE. Strawberries are the dominant high-value sector, comprising 57% of the value of total fruit exports from WA, followed by melons at 22%, plums at 9% and avocados at 6%.
- Singapore has a positive growth trend in most of the years, however export declined by almost $3m in 2017, mainly because of the decline in export of strawberries (both price and quantity of strawberry exports declined leading to a value decline). Export of melons increased from 2007 to 2017, and plum exports declined during the same period. Growth rate is negative in the past two year period.
Snapshot and trends in the production and overseas trade of fruits from Western Australia

Comments

- Strawberries were the only fruit exported from WA to Thailand in 2017, with sales worth $4.75m. This market has had significant growth rates in export values, of more than 50% per annum in 2016 and 2017. In 2017, Thailand represented 12.5% of the total value of fruit exports from this state. This was an increase of 234% from its value share in 2007. Exports of WA grapes, plums and avocados to this market have fallen over the years.

- The value of WA fruit exports to Hong Kong has been relatively stagnant in recent years, with orange sales up and plum sales down, and this market was worth almost $4m in 2017. Between 2007 and 2017, the value of Hong Kong as a WA fruit destination fell from 22% of the total market share to 10%. Strawberries again dominate sales to this market, making up 37% of total WA fruit export value at $1.5m in 2017. Orange exports to Hong Kong have picked up in recent years to be worth $1.3m in 2017. This represented 34% of the value of WA’s total fruit exports to this market. The value of plum exports to Hong Kong from WA has fallen by 89% and strawberries by 7% between 2007–17. It should be noted that total fruit imports by Hong Kong from 2007 to 2017 (from all countries) increased in nominal value from about $900m to $3.5 billion. The WA fruit industry may benefit from further investigation into exploring opportunities for expanding sales of fruit to this market.

- Positive growth rate in exports to both of these destinations during the past two year and five year periods.
Comments

- Malaysia had an 88% growth in value for WA fruit exports from 2007 to 2017 and now accounts for 10% of the total export value of this market to the state’s fruit industry. Export value in Malaysia for WA fruit was almost $4m in 2017, driven predominantly by increased sales of strawberries, avocados and oranges. However exports of plums and grapes declined during the same period. Malaysia mainly takes WA strawberries, which made up 61% of the state’s fruit sale value to this market worth $2.4m in 2017. This was followed by avocados, which made up 29% at $1.1m, and oranges, which made up 7% at $0.3m in 2017. Malaysia has a positive annual growth rate in exports for the past two and five years.

- Strawberries are the only major fruit exported to New Zealand from WA and sales were worth almost $3m in 2017. Table grapes were also identified as being occasionally exported to New Zealand. Fruit exports to New Zealand from WA had a compound average annual growth rate of 46% between 2012 and 2017 and 33% between 2015 and 2017.
Comments

- While Kuwait is currently a small export market, worth 1.8m in 2017, strawberries dominate exports accounting for 95% of total value in this market.
- China is viewed by industry as an expanding market for WA fruit exports and, in 2017, it accounted for 4.5% of the total value of the state’s fruit exports. Sales were mainly in oranges.
- Saudi Arabia is a small market for WA fruit, with sales worth $1m in 2017. This was a 2.6% share of the value of total fruit exports out of this state. Strawberries are the major exports.
- Decline in exports of ‘other’ category is mainly from the decline in export to UK.
Fruit imports* in to Western Australia (2007–17)*

Key points

- Fruit imports to WA were worth $31.4m in 2017.
- Import value increased 133% from 2007 to 2017.
- Major countries of origin were the USA and New Zealand.
- Highest value imported fruits in 2017 were grapes at $5.6m and oranges at $5.3m.
- Oranges were the biggest imported fruit crop by quantity at 3834t in 2017.
- WA has a trade surplus (exports minus imports) for total fruit value of $7m.
- Quantity of imports increased by 86% and value by 133% during the past decade.
- Higher increase in the value of import compared to the quantity of import could be due to the growth in imports of high value fruits such as cranberries and blueberries, cherries and grapes during recent years.
- There is a deficit (imports outweigh exports) for all specific categories of imported fruits to WA. That is WA imports more than it exports in specific products, such as oranges, grapes, kiwifruit, mandarins, lemons and limes, peaches and nectarines and cranberries and blueberries.
- WA exports more fruits than it imports by value, but WA imports more fruits than it exports by quantity.
- Growth in import value (133%) is more than that in quantity (86%). That means average price of imports increased during the past decade. This could be due to the import of relatively high value fruits such as cranberries and blueberries, peaches and nectarines, cherries and grapes. USA achieved market access to WA for these high value fruits around 2013.

*Import value figures are in customs value. Customs value is explained in page 6.
Fruit imports to Western Australia (by value) — 2017

Major fruits imported in to Western Australia

- **Oranges**
  - $5.27m
  - 16.8%
  - 1383t

- **Peaches and nectarines**
  - $1.64m
  - 5.2%
  - 375t

- **Lemons and limes**
  - $2.17m
  - 6.9%
  - 899t

- **Mandarins**
  - $2.95m
  - 9.4%
  - 1350t

- **Cherries**
  - $1.47m
  - 4.7%
  - 203t

- **Cranberries, blueberries**
  - $3.72m
  - 11.8%
  - 166t

- **Kiwifruit**
  - $4.29m
  - 13.7%
  - 1906t

- **Grapes**
  - $5.56m
  - 17.7%
  - 1279t

- **Others**
  - $4.32m
  - 13.8%
  - 375t

- **Oranges**
  - $5.27m
  - 16.8%
  - 1383t

- **Mandarins**
  - $2.95m
  - 9.4%
  - 1350t

- **Cherries**
  - $1.47m
  - 4.7%
  - 203t

- **Cranberries, blueberries**
  - $3.72m
  - 11.8%
  - 166t

- **Kiwifruit**
  - $4.29m
  - 13.7%
  - 1906t

- **Grapes**
  - $5.56m
  - 17.7%
  - 1279t

- **Others**
  - $4.32m
  - 13.8%
  - 375t

Major fruit import sources

- **USA**
  - $12.03m
  - 38.3%
  - 3834t

- **Israel**
  - $2.29m
  - 7.3%
  - 203t

- **Italy**
  - $1.52m
  - 4.8%
  - 1350t

- **New Zealand**
  - $7.75m
  - 24.7%
  - 1906t

- **Others**
  - $1.61m
  - 5.1%
  - 899t
Imports of fruit into WA have grown 86% from about 6000t in 2007 to about 11,215t in 2017. The value of fruit imports has risen 133% in the same period, from $13.5m to $31.4m. This has mainly been driven by an increase in the value of grapes, berries and stone fruit coming into the state from the USA. Higher increase in the value of import compared to the quantity of import could be due to the growth in imports of high value fruits such as cranberries and blueberries, cherries and grapes.

WA has a trade surplus, in that the value of its total fruit exports exceeds the value of total fruit imports by $7m. But, for individual fruit items, WA has a trade deficit. This means the value of imports is more than the value of exports for specific product lines, such as grapes, cherries, oranges, cranberries and blueberries, kiwifruit, lemons and limes, mandarins, peaches and nectarines. In quantity terms, WA imports more fruit than is exported. In 2017, WA imported about 11,200t and exported only about 9900t.

Fruit is mostly imported when WA production is out-of-season and grapes were the major fruit import category by value at $5.6m. Oranges were the biggest fruit category by quantity and the second biggest by value to enter the local market, at about 3835t worth $5.3m in 2017.

Grapes are the highest-earning fruit import to WA and mostly come in from the USA.

The USA is the overall largest country of origin for fruit entering the state, with its sales of grapes, stone fruit, cherries and citrus worth $12m worth of imports in 2017. This represented 38% of total fruit import values for WA in 2017 and was a 269% increase since 2007. Imports from the USA have underpinned the overall rise in the state’s fruit import quantities in the past decade.

Both quantity and real price of import of mandarins increased over the years, resulting in a real value growth of 474%. Israel was the major supplier of mandarins up until 2015, imports from Egypt started in 2016, and now Egypt has a share of 64% of the import market by value.

There has been high growth in the real price of peaches and nectarines. However, this could be due to the change in source and seasonality of supply. New Zealand was the supply source till 2009, where supply was mainly in the first quarter, which is not counter seasonal to WA production. Imports ceased in 2009 and re-started in 2013 when the USA achieved market access. Imports are now in the second and third quarter, counter seasonal to WA production.

Other countries of significance that import fruit to WA include:
- New Zealand, with 25% of value market share worth $7.75 in 2017;
- Egypt, with almost 20% of value market share worth $6.2m;
- Israel, with 7% of value market share worth $2.3m.

Snapshot of imported fruits, destination and historical trends in import value, quantity, price and destinations are given on the following pages.
Snapshot and trends in the production and overseas trade of fruits from Western Australia
<table>
<thead>
<tr>
<th>Fruit</th>
<th>Value (Value in $m), Quantity (tonne), Share in %</th>
</tr>
</thead>
<tbody>
<tr>
<td>Grapes</td>
<td>• $5.56m, 1279t, 17.7%</td>
</tr>
<tr>
<td>Others</td>
<td>• $4.32m, 13.8%</td>
</tr>
<tr>
<td>Mandarins</td>
<td>• $2.95m, 1350t, 9.4%</td>
</tr>
<tr>
<td>Kiwifruit</td>
<td>• $4.29m, 1906t, 13.7%</td>
</tr>
<tr>
<td>Mandarins (Country)</td>
<td>USA 100% – Import during 3rd and 4th quarter ($4350/t)</td>
</tr>
<tr>
<td>Lemons and limes</td>
<td>• $2.17m, 899t, 6.9%</td>
</tr>
<tr>
<td>Peaches and nectarines</td>
<td>• $1.64m, 375t, 5.2%</td>
</tr>
<tr>
<td>Cherries</td>
<td>• $1.47m, 203t, 4.7%</td>
</tr>
</tbody>
</table>

**Country** Share in import value

- **Grapes**
  - USA 100% – Import during 3rd and 4th quarter ($4350/t)

- **Oranges**
  - USA 100% – Import during 1st, 2nd and 4th quarter ($7250/t)

- **Mandarins**
  - Egypt 67% – 1st and 4th quarter ($2280/t)
  - Israel 30% – 1st and 2nd quarter ($1960/t)
  - USA 3% – 1st quarter ($2790/t)

- **Kiwifruit**
  - New Zealand 65% – 2nd, 3rd and 4th quarter ($2340/t)
  - Italy 35% – 1st and 4th quarter ($2110/t)

- **Lemons and limes**
  - New Zealand 62% – 1st and 4th quarter ($3230/t)
  - Egypt 30% – 1st and 4th quarter ($1570/t)

- **Peaches and nectarines**
  - USA 100% – 2nd and 3rd quarter ($4380/t)
  - USA 100% – 2nd and 3rd quarter ($4380/t)
## Sources of fruit imports into Western Australia – 2017
(Value in $m and share in %)

### USA
- **$12.03m**
- **38.3%**

<table>
<thead>
<tr>
<th>Fruit</th>
<th>Share in import value</th>
</tr>
</thead>
<tbody>
<tr>
<td>Grapes</td>
<td>46%</td>
</tr>
<tr>
<td>Peaches and nectarines</td>
<td>14%</td>
</tr>
<tr>
<td>Cherries</td>
<td>12%</td>
</tr>
<tr>
<td>Lemons and limes</td>
<td>11%</td>
</tr>
<tr>
<td>Oranges</td>
<td>11%</td>
</tr>
<tr>
<td>Others</td>
<td>6%</td>
</tr>
</tbody>
</table>

### Egypt
- **$6.20m**
- **19.8%**

<table>
<thead>
<tr>
<th>Fruit</th>
<th>Share in import value</th>
</tr>
</thead>
<tbody>
<tr>
<td>Oranges</td>
<td>55%</td>
</tr>
<tr>
<td>Mandarins</td>
<td>30%</td>
</tr>
<tr>
<td>Lemons and limes</td>
<td>13%</td>
</tr>
<tr>
<td>Others</td>
<td>2%</td>
</tr>
</tbody>
</table>

### New Zealand
- **$7.75m**
- **24.7%**

<table>
<thead>
<tr>
<th>Fruit</th>
<th>Share in import value</th>
</tr>
</thead>
<tbody>
<tr>
<td>Cranberries, blueberries</td>
<td>48%</td>
</tr>
<tr>
<td>Kiwifruit</td>
<td>36%</td>
</tr>
<tr>
<td>Apricot</td>
<td>6%</td>
</tr>
<tr>
<td>Avocados</td>
<td>5%</td>
</tr>
<tr>
<td>Others</td>
<td>5%</td>
</tr>
</tbody>
</table>

### Israel
- **$2.29m**
- **7.3%**

<table>
<thead>
<tr>
<th>Fruit</th>
<th>Share in import value</th>
</tr>
</thead>
<tbody>
<tr>
<td>Mandarins</td>
<td>43%</td>
</tr>
<tr>
<td>Grapefruit</td>
<td>22%</td>
</tr>
<tr>
<td>Oranges</td>
<td>20%</td>
</tr>
<tr>
<td>Dates</td>
<td>15%</td>
</tr>
</tbody>
</table>

### Italy
- **$1.52m**
- **4.8%**

<table>
<thead>
<tr>
<th>Fruit</th>
</tr>
</thead>
<tbody>
<tr>
<td>Kiwifruit 100%</td>
</tr>
</tbody>
</table>

### Others
- **$1.61m**
- **5.1%**

<table>
<thead>
<tr>
<th>Fruit</th>
</tr>
</thead>
<tbody>
<tr>
<td>Other fruits</td>
</tr>
</tbody>
</table>
Import of fruits into Western Australia — real value trends (2007–17)

Real value trends in the import of fruits

Details on real value trends in the import of fruits

Growth in %*

<table>
<thead>
<tr>
<th>Fruit Type</th>
<th>Growth 2007–17</th>
<th>Growth 2007–18</th>
</tr>
</thead>
<tbody>
<tr>
<td>Cranberries, blueberries</td>
<td>2417%</td>
<td>NA</td>
</tr>
<tr>
<td>Mandarins</td>
<td>447%</td>
<td>NA</td>
</tr>
<tr>
<td>Oranges</td>
<td>25%</td>
<td>NA</td>
</tr>
<tr>
<td>Kiwifruit</td>
<td>5%</td>
<td>NA</td>
</tr>
<tr>
<td>Lemons and limes</td>
<td>-0.1%</td>
<td>NA</td>
</tr>
</tbody>
</table>

*% growth is not given for those industries where imports in 2007 are almost zero
Snapshot and trends in the production and overseas trade of fruits from Western Australia

Import of fruits into Western Australia — trends in quantity (2007–17)

Quantity trends in the import of fruits

Details of quantity trends in the import of fruits

Growth in %*

- Cherries
- Cranberries, blueberries
- Grapes
- Kiwifruit
- Lemons and limes
- Mandarins 331%
- Oranges 90%
- Others NA
- Peaches and nectarines NA

*% growth is not given for those industries where imports in 2007 are almost zero

86%
Import of fruits into Western Australia — trends in real price (2007–17)

Growth in %*

<table>
<thead>
<tr>
<th>Fruit</th>
<th>Growth</th>
</tr>
</thead>
<tbody>
<tr>
<td>Cherries</td>
<td>NA</td>
</tr>
<tr>
<td>Cranberries and blueberries</td>
<td>-7%</td>
</tr>
<tr>
<td>Grapes</td>
<td>NA</td>
</tr>
<tr>
<td>Kiwifruit</td>
<td>13%</td>
</tr>
<tr>
<td>Lemons and limes</td>
<td>-5%</td>
</tr>
<tr>
<td>Mandarins</td>
<td>33%</td>
</tr>
<tr>
<td>Oranges</td>
<td>-34%</td>
</tr>
<tr>
<td>Others</td>
<td>NA</td>
</tr>
<tr>
<td>Peaches and nectarines</td>
<td>684%</td>
</tr>
</tbody>
</table>

*% growth is not given for those countries where imports in 2007 are almost zero.
Import of fruits in to Western Australia — trends in sources (2007–17)

*% growth is not given for those countries where imports in 2007 are almost zero
Industry details on imports

Details on fruit import sources are given below.

**Fruit imports in to WA from USA**

The value of fruit imports from the USA to WA increased 269% between 2007–2017 to reach $12m, mainly driven by grape sales (after gaining market access in 2013).

It is now WA’s highest value import country of origin, commanding a 38% share of the total value of fruit imports in 2017. The USA has led the surge in total fruit imports to this state in the past decade.

Almost half of USA fruit imports to WA by value are grapes and it also sells peaches, nectarines, lemons, limes and cherries into the local market. The USA received market access for grapes, peaches and nectarines in 2013 and typically provides these counter-seasonal to WA production. Cranberries, blueberries and cherries are also fast growing import categories from the USA.

**Fruit imports to WA from New Zealand**

Imports of fruit from New Zealand to WA now make up about 25% of the value of all fruit imports to this state and were worth an estimated $7.75m in 2017.

The bulk of fruit sold into the local market from New Zealand comprises cranberries and blueberries, which made up 48% of that country’s total fruit import value in WA in 2017, and sales are growing.

New Zealand also exports kiwi fruit, apricots and avocados to WA. It has almost two thirds of the share of imported kiwifruit to WA, with the remainder supplied by Italy. Prices of kiwi fruit imports from both of these destinations have grown in recent years and 60–70% of imports are during the third and fourth quarters.
Fruit imports to WA from Egypt

Egypt has a 20% share of the total value of fruit imports to WA, worth $6.2m in 2017.

It is the biggest source of oranges and mandarins, which make up 85% of its total imported product to this state, followed by lemons, limes and some other categories at a combined 15%. WA has seen strong growth in fruit import value from Egypt, from a low base of almost zero in 2013.

For mandarins, Egypt has eclipsed WA’s traditional supplier of Israel since 2015 and now has a 67% share of this category by value.

Fruit imports to WA from Israel

Israel accounts for 7% of the total value of WA fruit imports, predominantly exporting mandarins, grapefruit and oranges into the local market. Its sales to WA reached $2.3m in 2017.

Fruit imports to WA from Italy

Italy supplies WA mainly with kiwi fruit, which was worth $1.5m in 2017. This country accounts for almost 5% of the total value of fruit imports to WA.
Conclusions

Fruit production and exports experienced a strong growth during the past few years. Overall production growth is mainly from the fast growth in avocados, strawberries and oranges and export growth is predominantly from strawberries and oranges. Fruit imports also grew during the past decade.

Trade in fruits has increased at both export and import ends. Exports have increased by 115% and imports have increased by 133%. Opportunity exists to export during our production season and imports replace WA produce when it is out of season. This is an opportunity to explore expanded production windows within WA for some fruits.

Even though export trends looks generally good, WA fruit exports form only 3.6% of Australian fruit export by value ($38m of $1058m). Of concern is the plum industry where both quantity and real price of exports have declined. From the report ‘Market opportunities for WA fruits’ (DPIRD 2017), plums have good export opportunities especially to China. Strawberry exports grew from a strong base. However, the real price of strawberries declined for the past two consecutive years, which is a concern even though the quantity of export increased. The increase in quantity was not enough to offset the effect of decline in the real price, resulting in a reduction in total value of strawberry exports in 2017 compared to 2016.

Exports to Hong Kong is almost stagnant. Even though orange exports picked up recently, plum exports declined leaving the total value almost unchanged. During the same period, total fruit imports to Hong Kong from the world increased from about $900m to $3.5 billion (nominal value), where import is dominated by Chile. Further opportunities for WA fruits to Hong Kong needs to be explored.

Western Australia imports more fruit by quantity than we export. By value, WA has a trade surplus of $7m. The real value of trade surplus has grown over the past ten years, by 64%. However when it comes to individual product lines, such as oranges, grapes, kiwifruit, mandarin etc, WA has a trade deficit both in terms of quantity and value. Opportunities for import replacement may be explored especially on these product lines.

Growth in import value (133%) is more than that in quantity (86%). That means the average price of imports increased during the past decade. This could be due to the import of relatively high value fruits such as cranberries and blueberries, peaches and nectarines, cherries and grapes. USA got market access to WA for these high value fruits around 2013.

The general trend is seen as more growth in the real value of production, exports and imports compared to quantity. This could be a sign of a general shift towards premium products.
References

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2. Global Trade Atlas
3. Fresh Logic
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