

ASEAN fresh produce trade: a statistical snapshot



THAILAND MEET UP
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Roadmap of presentation

- South-East Asia markets in context of Asia's total fruit imports and exports
- Market-by-market spotlights:
Thailand, Singapore, Indonesia, Vietnam, Malaysia and Philippines
- Top-line trade numbers/trends: balance of trade
- Closer look at import and export trade – top suppliers/markets, leading products and fast-emerging products
- Wrap-up of broader trends in South-East Asia trade



Asia's fresh fruit imports by market

| IMPORTS | 2020 Tonnes | 2021 Tonnes | 2022 Tonnes | 2023 Tonnes | 2024 Tonnes | 1 yr change | 5 yr trend | 2024 share |
|-----------------|-------------------|-------------------|-------------------|-------------------|-------------------|--------------|-------------|---------------|
| China | 5,354,944 | 5,756,906 | 5,789,640 | 5,874,607 | 6,349,431 | 8.1% | 4.4% | 41.8% |
| Viet Nam | 1,398,768 | 1,196,338 | 1,221,945 | 1,400,578 | 1,929,255 | 37.7% | 8.4% | 12.7% |
| Japan | 1,734,104 | 1,771,321 | 1,637,242 | 1,592,409 | 1,598,420 | 0.4% | -2.0% | 10.5% |
| India | 352,096 | 720,658 | 656,220 | 808,205 | 863,690 | 6.9% | 25.1% | 5.7% |
| South Korea | 721,556 | 722,079 | 646,246 | 664,576 | 789,776 | 18.8% | 2.3% | 5.2% |
| Indonesia | 572,374 | 710,868 | 666,001 | 611,435 | 699,305 | 14.4% | 5.1% | 4.6% |
| Thailand | 697,236 | 608,094 | 601,459 | 569,836 | 657,483 | 15.4% | -1.5% | 4.3% |
| Malaysia | 531,576 | 622,125 | 641,121 | 597,772 | 640,323 | 7.1% | 4.8% | 4.2% |
| Hong Kong (net) | 616,405 | 669,578 | 576,033 | 552,263 | 535,743 | -3.0% | -3.4% | 3.5% |
| Singapore | 422,783 | 424,541 | 402,153 | 399,937 | 413,311 | 3.3% | -0.6% | 2.7% |
| Philippines | 451,421 | 501,607 | 349,860 | 355,421 | 403,919 | 13.6% | -2.7% | 2.7% |
| Taiwan | 278,204 | 292,823 | 285,826 | 268,892 | 298,278 | 10.9% | 1.8% | 2.0% |
| Total | 13,131,467 | 13,996,938 | 13,473,746 | 13,695,931 | 15,178,934 | 10.8% | 3.7% | 100.0% |

Source: ITC TradeMap; Fresh Intelligence analysis

Note: Hong Kong (net) excludes volumes that are re-exported



Asia's fresh fruit exports by supplying country

| EXPORTS | 2020 Tonnes | 2021 Tonnes | 2022 Tonnes | 2023 Tonnes | 2024 Tonnes | 1 yr change | 5 yr trend | 2024 share |
|--------------|-------------------|-------------------|-------------------|-------------------|-------------------|--------------|-------------|---------------|
| China | 3,657,248 | 3,339,050 | 3,075,678 | 3,643,190 | 4,739,906 | 30.1% | 6.7% | 33.9% |
| Philippines | 4,334,186 | 2,991,118 | 2,883,394 | 2,983,404 | 3,052,764 | 2.3% | -8.4% | 21.8% |
| Viet Nam | 1,192,391 | 1,226,009 | 1,257,180 | 1,563,592 | 2,316,176 | 48.1% | 18.1% | 16.6% |
| Thailand | 1,650,571 | 2,087,652 | 1,843,978 | 1,967,293 | 1,959,686 | -0.4% | 4.4% | 14.0% |
| India | 856,088 | 1,138,470 | 1,122,438 | 1,162,683 | 1,461,471 | 25.7% | 14.3% | 10.5% |
| Malaysia | 171,046 | 190,884 | 186,725 | 191,697 | 195,013 | 1.7% | 3.3% | 1.4% |
| Indonesia | 73,160 | 52,665 | 66,288 | 85,418 | 107,496 | 25.8% | 10.1% | 0.8% |
| Japan | 35,678 | 48,539 | 50,350 | 46,210 | 46,137 | -0.2% | 6.6% | 0.3% |
| Taiwan | 100,923 | 77,480 | 39,026 | 35,229 | 40,288 | 14.4% | -20.5% | 0.3% |
| South Korea | 46,197 | 40,945 | 43,701 | 40,435 | 34,701 | -14.2% | -6.9% | 0.2% |
| Singapore | 16,370 | 17,024 | 23,460 | 21,576 | 22,219 | 3.0% | 7.9% | 0.2% |
| Total | 12,133,858 | 11,209,836 | 10,592,218 | 11,740,727 | 13,975,857 | 19.0% | 3.6% | 100.0% |

Source: ITC TradeMap; Fresh Intelligence analysis

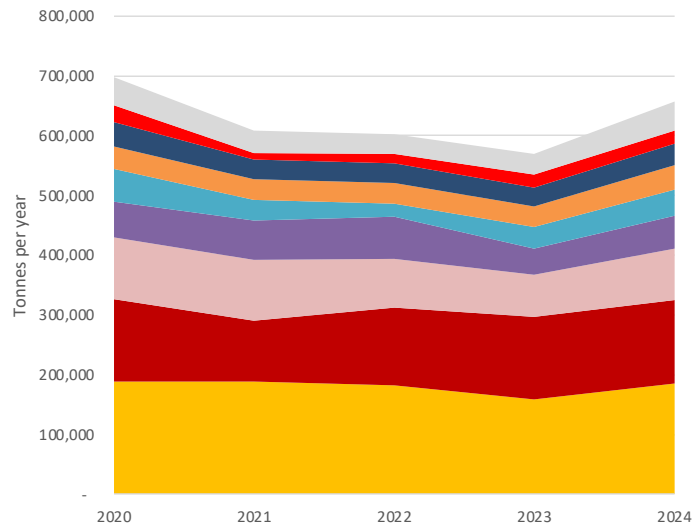


Thailand

- Net exporter of fresh fruit
- Exports are increasing 4 % per year over 5 years led by durians and longans
- Imports are steady over 5 years
- China is the largest trading partner



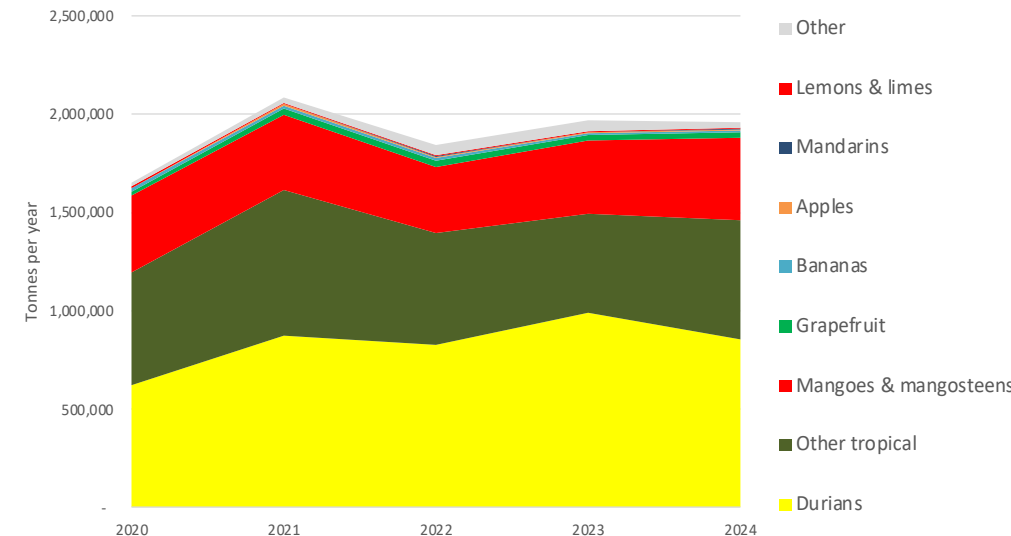
657,483
tonnes



Other
Persimmons
Other tropical
Mangoes & mangosteens
Bananas
Pears
Mandarins
Grapes
Apples



1,959,686
tonnes



Other
Lemons & limes
Mandarins
Apples
Bananas
Grapefruit
Mangoes & mangosteens
Other tropical
Durians

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Imports

| Suppliers | Tonnes | 1 yr change | 5 yr trend | share |
|--------------|----------------|-------------|------------|-------------|
| China | 471,687 | 19% | -1% | 72% |
| Laos | 44,138 | 30% | -9% | 7% |
| Cambodia | 41,028 | 17% | 0% | 6% |
| New Zealand | 27,443 | 9% | 0% | 4% |
| Australia | 22,730 | -22% | 6% | 3% |
| Other | 50,457 | | | 8% |
| Total | 657,483 | 15% | -1% | 100% |

| Leading Products | Tonnes | 1 yr change | 5 yr trend | share |
|------------------|---------|-------------|------------|-------|
| Apples | 186,159 | 17% | -0.3% | 28% |
| Grapes | 139,353 | 2% | 0.2% | 21% |
| Mandarins | 86,125 | 21% | -4.4% | 13% |
| Pears | 54,704 | 24% | -1.6% | 8% |
| Bananas | 43,091 | 23% | -6.0% | 7% |

Emerging import products

showing greatest 5 year growth trends over 1,000 tonnes

| Emerging Products | Tonnes | 1 yr change | 5 yr trend | share |
|-------------------|--------|-------------|------------|-------|
| Oranges | 12,398 | 66% | 13% | 1.9% |
| Strawberries | 3,129 | 12% | 12% | 0.5% |
| Blueberries | 1,436 | 25% | 28% | 0.2% |

Thailand

Exports



| Markets | Tonnes | 1 yr change | 5 yr trend | share |
|--------------|------------------|--------------|------------|-------------|
| China | 1,490,666 | -4.7% | 8% | 76% |
| Malaysia | 134,712 | -19.4% | 14% | 7% |
| Viet Nam | 133,341 | 110.6% | -13% | 7% |
| Indonesia | 63,033 | 27.7% | 15% | 3% |
| South Korea | 28,091 | 61.9% | 30% | 1% |
| Other | 109,843 | | | 6% |
| Total | 1,959,686 | -0.4% | 4% | 100% |

| Products | Tonnes | 1 yr change | 5 yr trend | share |
|----------------|---------|-------------|------------|-------|
| Durians | 857,427 | -14% | 8% | 44% |
| Other tropical | 604,141 | 21% | 1% | 31% |
| Mangoes & mar | 418,156 | 11% | 2% | 21% |
| Grapefruit | 28,582 | 13% | 8% | 1.5% |
| Bananas | 8,730 | -2% | -14% | 0.4% |

Emerging export products

showing greatest 5 year growth trends over 1,000 tonnes

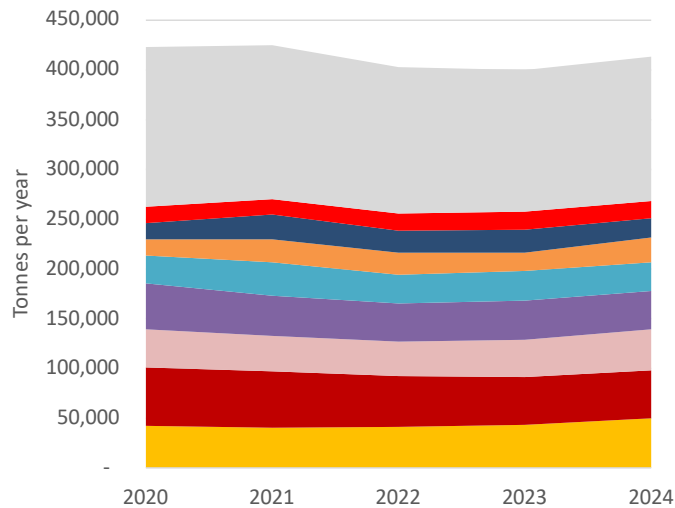
| Emerging Products | Tonnes | 1 yr change | 5 yr trend | share |
|-------------------|--------|-------------|------------|-------|
| Mandarins | 5,165 | 81% | 51% | 0.3% |
| Papaya | 4,429 | 28% | 38% | 0.2% |
| Watermelons | 4,322 | 36% | 25% | 0.2% |

Singapore



413,314

tonnes

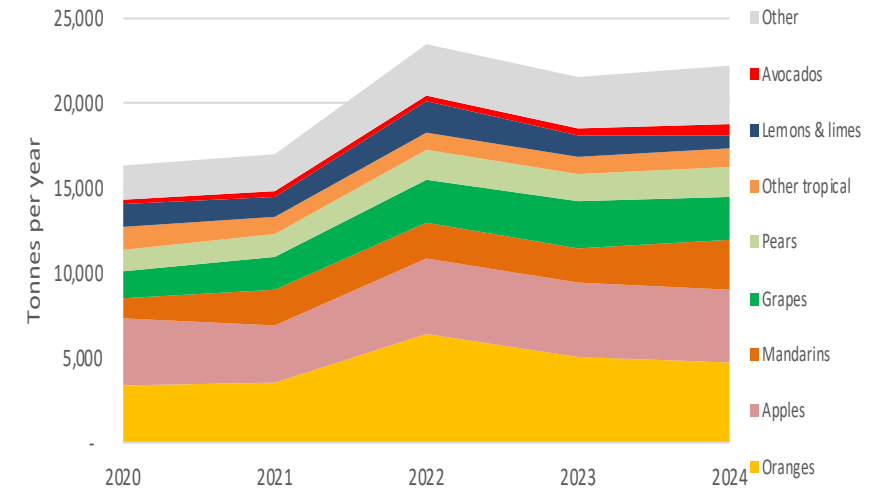


- Net importer of fresh fruit
- Imports are steady over 5 years. Though oranges are showing greatest increase
- Malaysia the largest trading partner
- Re-exports are increasing 8 % per year over 5 years to Malaysia and Indonesia



22,219

tonnes





Imports

Singapore



Exports

| Suppliers | Tonnes | 1 yr change | 5 yr trend | share |
|--------------|---------|-------------|------------|-------|
| Malaysia | 149,725 | 2% | -1% | 36% |
| China | 84,670 | 47% | 9% | 20% |
| South Africa | 32,564 | -11% | 0% | 8% |
| Australia | 24,897 | -11% | -1% | 6% |
| Philippines | 24,042 | -9% | -6% | 6% |
| Other | 97,416 | | | 24% |
| Total | 413,314 | 3% | -1% | 100% |

| Leading Products | Tonnes | 1 yr change | 5 yr trend | share |
|-----------------------|--------|-------------|------------|-------|
| Oranges | 50,391 | 16% | 4.3% | 12% |
| Bananas | 47,746 | -1% | -5.1% | 12% |
| Watermelons | 41,226 | 9% | 1.9% | 10% |
| Apples | 38,945 | 1% | -4.2% | 9% |
| Mangoes & mangosteens | 28,142 | -7% | 0.9% | 7% |

Emerging import products
showing greatest 5 year growth trends over 1,000 tonnes

| Emerging Products | Tonnes | 1 yr change | 5 yr trend | share |
|-------------------|--------|-------------|------------|-------|
| Mandarins | 25,599 | 42% | 12% | 6.2% |
| Grapes | 17,905 | -1% | 3% | 4.3% |
| Avocados | 6,008 | 4% | 2% | 1.5% |

| Markets | Tonnes | 1 yr change | 5 yr trend | share |
|-------------------|--------|-------------|------------|-------|
| Malaysia | 9,553 | 27.8% | 19% | 43% |
| Indonesia | 7,650 | 1.5% | 10% | 34% |
| Brunei Darussalam | 3,053 | -15.4% | -8% | 14% |
| Timor-Leste | 889 | -2.2% | 42% | 4% |
| Hong Kong | 705 | -29.9% | 27% | 3% |
| Other | 369 | | | 2% |
| Total | 22,219 | 3.0% | 8% | 100% |

| Products | Tonnes | 1 yr change | 5 yr trend | share |
|-----------|--------|-------------|------------|-------|
| Oranges | 4,756 | -6% | 9% | 21% |
| Apples | 4,283 | -1% | 2% | 19% |
| Mandarins | 2,903 | 43% | 24% | 13% |
| Grapes | 2,552 | -7% | 13% | 11.5% |
| Pears | 1,730 | 6% | 9% | 7.8% |

Emerging export products (re exported)
showing greatest 5 year growth trends

| Emerging Products | Tonnes | 1 yr change | 5 yr trend | share |
|-------------------|--------|-------------|------------|-------|
| Mandarins | 2,903 | 43% | 24% | 13.1% |
| Grapes | 2,552 | -7% | 13% | 11.5% |
| Avocados | 699 | 61% | 24% | 3.1% |

Indonesia

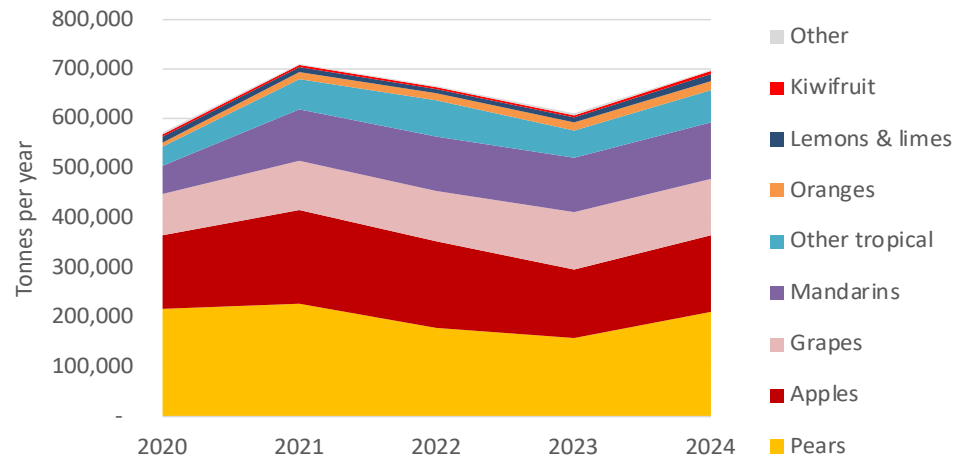


- Net importer of fresh fruit
- Imports increase 5% per year over 5 years.
- Exports are increasing 10 % per year over 5 years led by mangosteens
- China is the largest trading partner



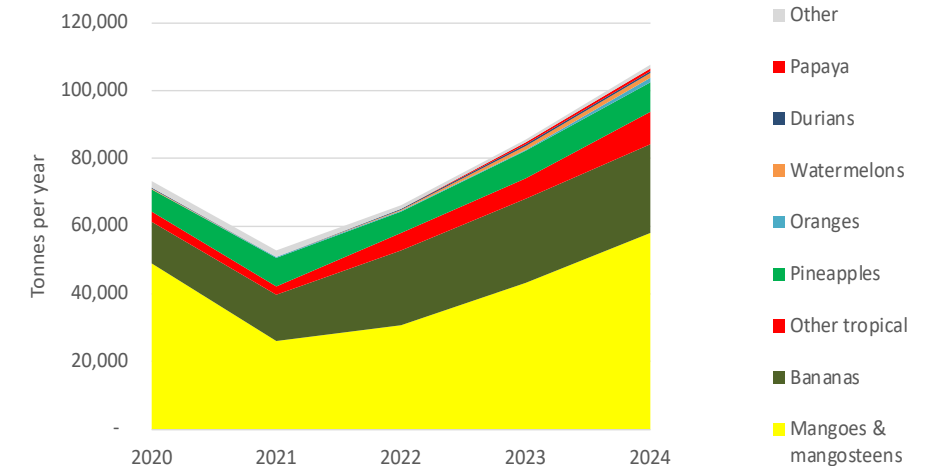
699,305

tonnes



107,496

tonnes



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Imports

| Suppliers | Tonnes | 1 yr change | 5 yr trend | share |
|--------------|----------------|-------------|------------|-------------|
| China | 536,954 | 18% | 5% | 77% |
| Thailand | 60,537 | 20% | 15% | 9% |
| Australia | 41,271 | 6% | 13% | 6% |
| South Africa | 14,080 | -11% | 15% | 2% |
| Pakistan | 11,515 | 15% | -9% | 2% |
| Other | 34,948 | | | 5% |
| Total | 699,305 | 14% | 5% | 100% |

| Leading Products | Tonnes | 1 yr change | 5 yr trend | share |
|------------------|---------|-------------|------------|-------|
| Pears | 211,665 | 33% | -0.6% | 30% |
| Apples | 154,327 | 13% | 0.9% | 22% |
| Grapes | 114,199 | -2% | 8.3% | 16% |
| Mandarins | 113,011 | 4% | 18.6% | 16% |
| Other tropical | 64,117 | 13% | 14.1% | 9% |

Emerging import products

showing greatest 5 year growth trends over 1,000 tonnes

| Emerging Products | Tonnes | 1 yr change | 5 yr trend | share |
|-------------------|--------|-------------|------------|-------|
| Durians | 459 | -30% | 77% | 0.1% |
| Strawberries | 417 | 23% | 21% | 0.1% |
| Blueberries | 363 | 163% | 93% | 0.1% |

Indonesia

Exports



| Markets | Tonnes | 1 yr change | 5 yr trend | share |
|----------------------|----------------|--------------|------------|-------------|
| China | 53,716 | 106.1% | 44% | 50% |
| Malaysia | 28,871 | 21.7% | 12% | 27% |
| Hong Kong | 5,396 | -71.7% | -32% | 5% |
| United Arab Emirates | 4,832 | 25.1% | 6% | 4% |
| Singapore | 4,485 | 25.2% | 26% | 4% |
| Other | 10,196 | | | 9% |
| Total | 107,496 | 25.8% | 10% | 100% |

| Products | Tonnes | 1 yr change | 5 yr trend | share |
|--------------------|--------|-------------|------------|-------|
| Mangoes & mangoste | 57,928 | 34% | 4% | 54% |
| Bananas | 26,249 | 6% | 21% | 24% |
| Other tropical | 9,491 | 56% | 33% | 9% |
| Pineapples | 8,722 | 4% | 8% | 8.1% |
| Oranges | 1,471 | 699% | 107% | 1.4% |

Emerging export products

showing greatest 5 year growth trends over 1,000 tonnes

| Emerging Products | Tonnes | 1 yr change | 5 yr trend | share |
|-------------------|--------|-------------|------------|-------|
| Watermelons | 1,399 | 38% | 46% | 1.3% |
| Papaya | 586 | 27% | 73% | 0.5% |
| Avocados | 379 | -1% | 5% | 0.4% |



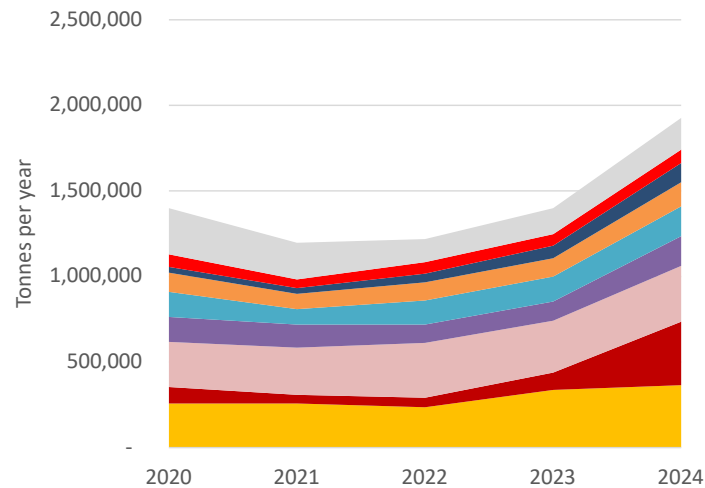
Vietnam



- Imports are increasing 8 per cent per year over 5 years led by mangoes and apples
- Exports are increasing 18 % per year over 5 years led by durians and dragon fruit
- China is the largest trading partner

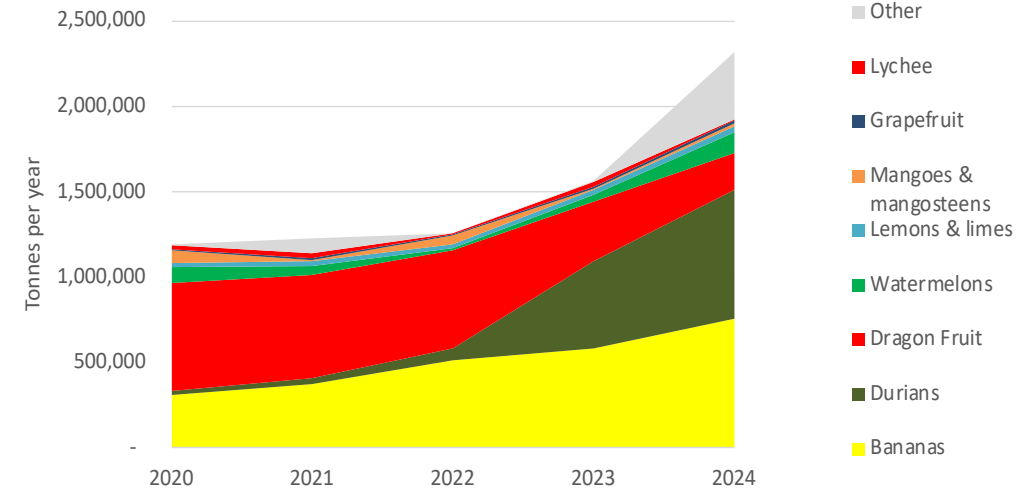
1,929,255

tonnes



2,316,176

tonnes



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Imports

Vietnam



Exports

| Suppliers | Tonnes | 1 yr change | 5 yr trend | share |
|---------------|-----------|-------------|------------|-------|
| China | 1,306,201 | 24% | 8% | 68% |
| Cambodia | 280,647 | 414% | 84% | 15% |
| Thailand | 133,341 | 111% | -13% | 7% |
| United States | 64,120 | 18% | -1% | 3% |
| New Zealand | 50,867 | -9% | 5% | 3% |
| Other | 94,079 | | | 5% |
| Total | 1,929,255 | 38% | 8% | 100% |

| Leading Products | Tonnes | 1 yr change | 5 yr trend | share |
|-----------------------|---------|-------------|------------|-------|
| Mangoes & mangosteens | 373,212 | 266% | 41.4% | 19% |
| Mandarins | 364,171 | 8% | 8.7% | 19% |
| Apples | 326,699 | 9% | 5.3% | 17% |
| Other tropical | 174,118 | 49% | 4.2% | 9% |
| Grapes | 172,027 | 21% | 4.7% | 9% |
| Pears | 143,426 | 31% | 6.7% | 7% |

Emerging import products
showing greatest 5 year growth trends over 1,000 tonnes

| Emerging Products | Tonnes | 1 yr change | 5 yr trend | share |
|-------------------|--------|-------------|------------|-------|
| Watermelons | 27,471 | 129% | 62% | 29.2% |
| Strawberries | 11,498 | 50% | 23% | 12.2% |
| Cherries | 6,095 | 7% | 10% | 6.5% |

| Markets | Tonnes | 1 yr change | 5 yr trend | share |
|-------------|-----------|-------------|------------|-------|
| China | 1,990,799 | 35.6% | 15% | 86% |
| South Korea | 84,385 | 84.2% | 69% | 4% |
| India | 45,828 | 13.7% | 57% | 2% |
| Malaysia | 39,036 | 9.9% | 24% | 2% |
| Japan | 36,929 | 91.2% | 54% | 2% |
| Other | 119,199 | | | 5% |
| Total | 2,316,176 | 48.1% | 18% | 100% |

| Products | Tonnes | 1 yr change | 5 yr trend | share |
|-----------------------|---------|-------------|------------|-------|
| Bananas | 759,215 | 30% | 25% | 33% |
| Durians | 749,873 | 48% | 136% | 32% |
| Dragon Fruit | 214,437 | -39% | -24% | 9% |
| Watermelons | 126,742 | 195% | 7% | 5% |
| Lemons & limes | 31,483 | 19% | 8% | 1.4% |
| Mangoes & mangosteens | 20,689 | 112% | -28% | 0.9% |

Emerging export products (re exported)
showing greatest 5 year growth trends

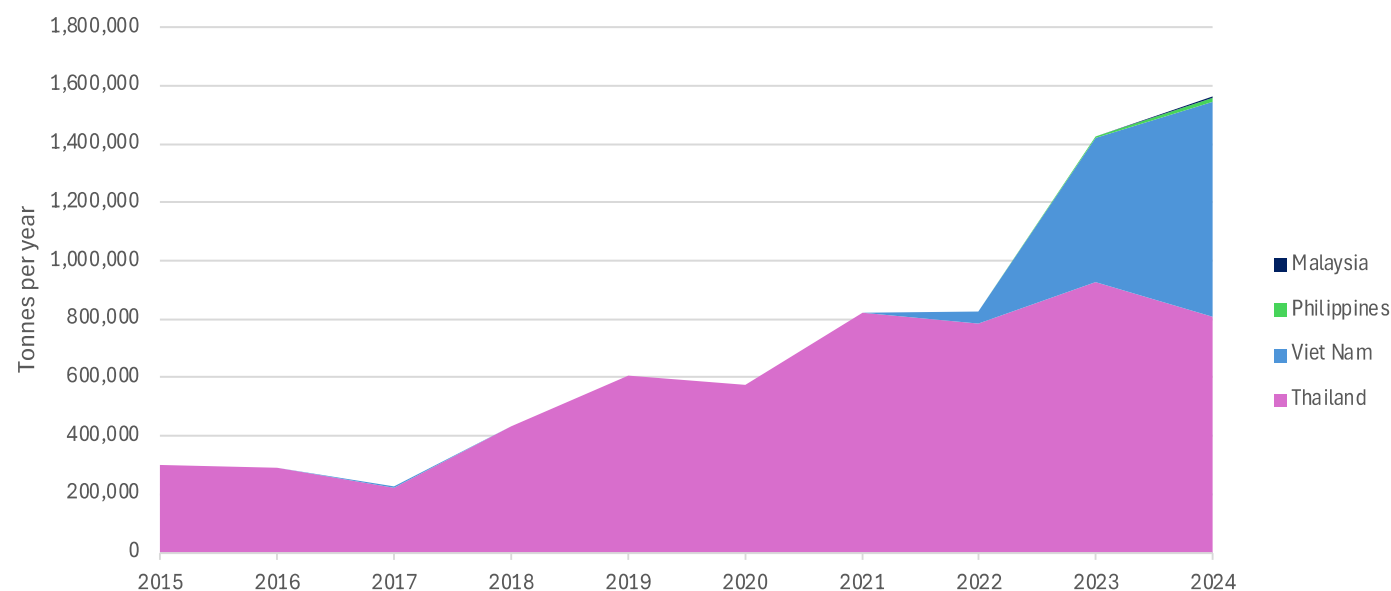
| Emerging Products | Tonnes | 1 yr change | 5 yr trend | share |
|-------------------|--------|-------------|------------|-------|
| Grapefruit | 13,058 | 53% | 43% | 11.0% |
| Avocados | 1,808 | 399% | 131% | 1.5% |
| Oranges | 673 | -29% | 34% | 0.6% |



China’s imports of durian exceed 1.5 million tonnes since Vietnam and Philippines access



China - Durian Imports by supplier 2015 - 2024



Source: ITC Trademap; Fresh Intelligence analysis

Durians imported by China by supplier

| | 2024 | 1 yr chg | 2024 share |
|-------------|-----------|----------|------------|
| | Tonnes | | |
| Thailand | 809,827 | -13% | 51.9% |
| Viet Nam | 736,753 | 49% | 47.2% |
| Philippines | 13,457 | 257% | 0.9% |
| Malaysia | 351 | | |
| Other | | | |
| World | 1,560,389 | 9% | 100.0% |

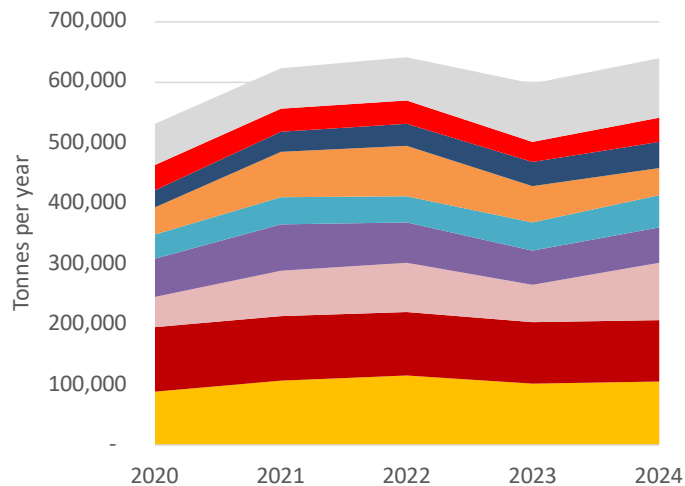
Source: ITC Trademap; Fresh Intelligence analysis

Malaysia



640,323

tonnes

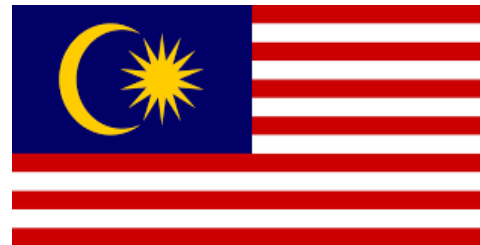
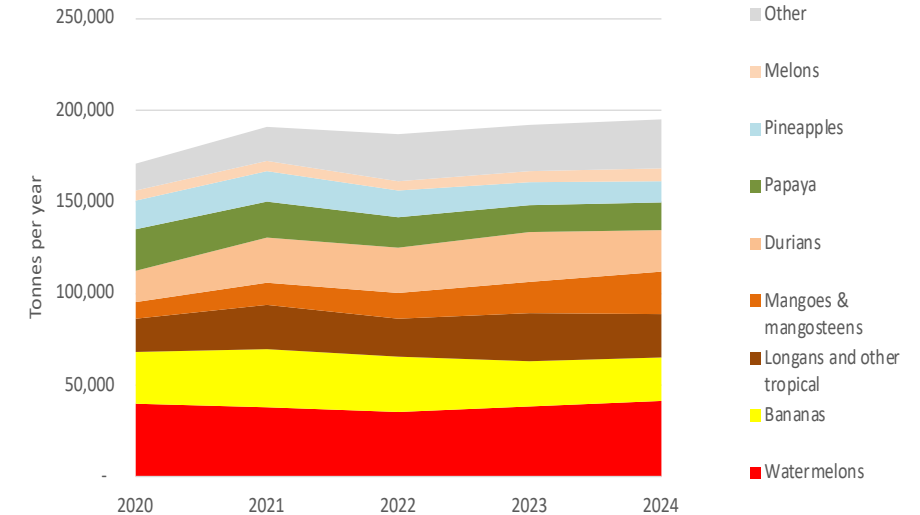


- Net Importer of fresh fruit
- Imports are increasing 5 % per year over 5 years led by oranges.
- Exports are increasing 34 % per year over 5 years led by melons
- China is the largest trading partner



195,013

tonnes





Imports

Malaysia

Exports



| Suppliers | Tonnes | 1 yr change | 5 yr trend | share |
|--------------|---------|-------------|------------|-------|
| China | 251,011 | 58% | 12% | 39% |
| Thailand | 115,022 | -16% | 1% | 18% |
| South Africa | 107,293 | -13% | 2% | 17% |
| Egypt | 47,754 | -21% | 4% | 7% |
| Viet Nam | 39,036 | 10% | 24% | 6% |
| Other | 80,207 | | | 13% |
| Total | 640,323 | 7% | 5% | 100% |

| Leading Products | Tonnes | 1 yr change | 5 yr trend | share |
|------------------|---------|-------------|------------|-------|
| Oranges | 105,967 | 5% | 4.3% | 17% |
| Apples | 101,623 | -1% | -1.1% | 16% |
| Mandarins | 94,655 | 56% | 17.6% | 15% |
| Mangoes & m | 58,081 | 2% | -2.0% | 9% |
| Grapes | 52,315 | 11% | 6.4% | 8% |

Emerging import products
showing greatest 5 year growth trends over 1,000 tonnes

| Emerging Products | Tonnes | 1 yr change | 5 yr trend | share |
|-------------------|--------|-------------|------------|-------|
| Durians | 10,563 | -44% | 21% | 1.6% |
| Watermelons | 6,177 | 73% | 90% | 1.0% |
| Avocados | 5,125 | 2% | 11% | 0.8% |

| Markets | Tonnes | 1 yr change | 5 yr trend | share |
|-------------------|---------|-------------|------------|-------|
| Singapore | 163,544 | 1.5% | 2% | 84% |
| Indonesia | 13,506 | 10.4% | 68% | 7% |
| Thailand | 7,556 | -19.0% | 16% | 4% |
| Hong Kong | 2,896 | -9.1% | -7% | 1% |
| Brunei Darussalam | 1,276 | -3.8% | -8% | 1% |
| Other | 6,235 | | | 3% |
| Total | 195,013 | 1.7% | 3% | 100% |

| Products | Tonnes | 1 yr change | 5 yr trend | share |
|-------------------|--------|-------------|------------|-------|
| Watermelons | 41,567 | 8% | 1% | 21% |
| Bananas | 23,708 | -3% | -4% | 12% |
| Longans and other | 23,601 | -10% | 7% | 12% |
| Mangoes & mangc | 23,264 | 35% | 26% | 11.9% |
| Durians | 22,365 | -19% | 7% | 11.5% |

Emerging export products
showing greatest 5 year growth trends over 1,000 tonnes

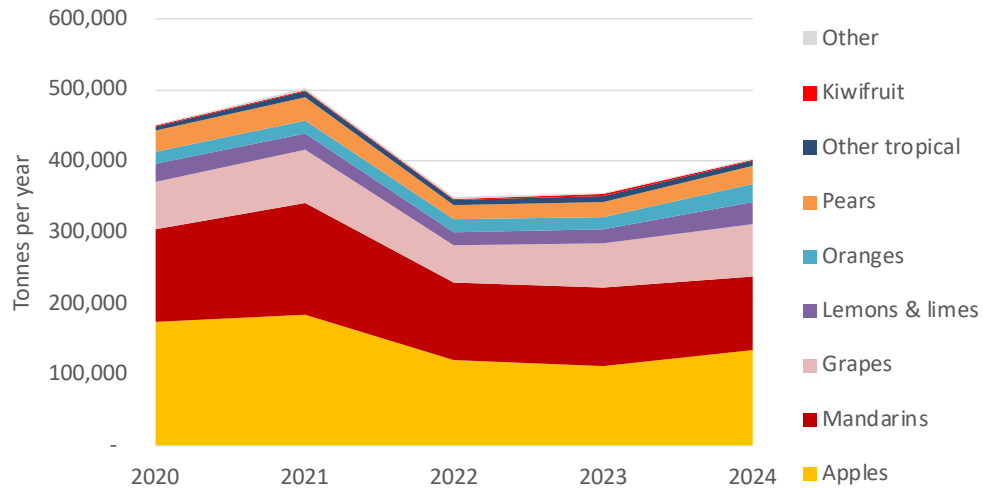
| Emerging Products | Tonnes | 1 yr change | 5 yr trend | share |
|-------------------|--------|-------------|------------|-------|
| Mandarins | 7,356 | 110% | 51% | 3.8% |
| Apples | 4,192 | 15% | 19% | 2.1% |
| Avocados | 805 | 12% | 47% | 0.4% |

Philippines



403,919

tonnes

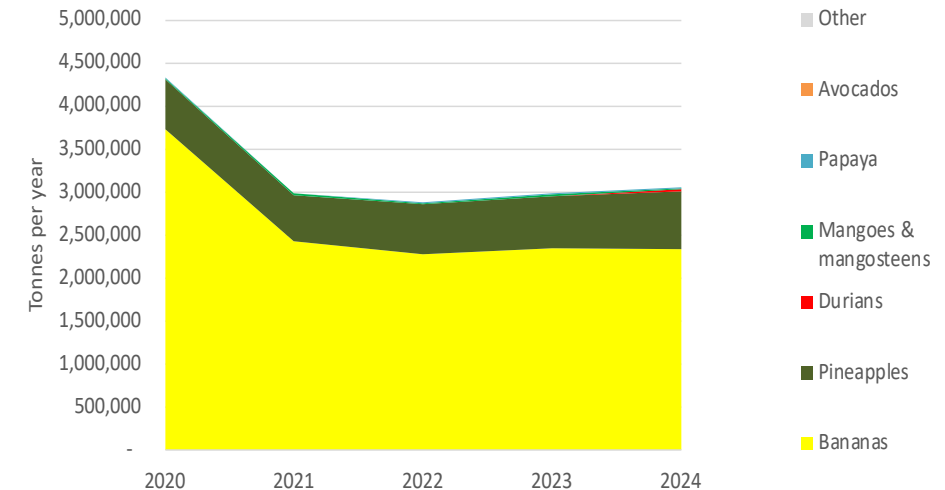


- Net exporter of fresh fruit
- Imports are 3 % lower per year over 5 years, but steady, led by apples.
- Exports are decreasing 8 % per year over 5 years led by bananas and pineapples
- Japan is the largest trading partner



3,052,764

tonnes





Imports

Philippines

Exports



| Suppliers | Tonnes | 1 yr change | 5 yr trend | share |
|---------------|---------|-------------|------------|-------|
| China | 345,777 | 17% | -2% | 86% |
| Australia | 23,438 | 9% | 7% | 6% |
| Pakistan | 15,333 | -6% | -18% | 4% |
| United States | 5,665 | -15% | -21% | 1% |
| Argentina | 5,609 | -15% | -12% | 1% |
| Other | 8,097 | | | 2% |
| Total | 403,919 | 14% | -3% | 100% |

| Leading Products | Tonnes | 1 yr change | 5 yr trend | share |
|------------------|---------|-------------|------------|-------|
| Apples | 135,058 | 21% | -6.2% | 33% |
| Mandarins | 102,829 | -7% | -5.6% | 25% |
| Grapes | 74,254 | 19% | 2.9% | 18% |
| Lemons & limes | 29,744 | 51% | 3.4% | 7% |
| Oranges | 26,065 | 50% | 12.5% | 6% |

Emerging import products
showing greatest 5 year growth trends over 1,000 tonnes

| Emerging Products | Tonnes | 1 yr change | 5 yr trend | share |
|-------------------|--------|-------------|------------|-------|
| Oranges | 26,065 | 50% | 13% | 6.5% |
| Kiwifruit | 1,886 | -2% | 4% | 0.5% |
| Persimmons | 1,464 | 86% | 6% | 0.4% |

| Markets | Tonnes | 1 yr change | 5 yr trend | share |
|--------------|-----------|-------------|------------|-------|
| Japan | 1,328,618 | 13.1% | -5% | 44% |
| China | 845,256 | -20.9% | -12% | 28% |
| South Korea | 413,744 | 17.1% | -5% | 14% |
| Iran | 180,209 | 48.6% | -4% | 6% |
| Saudi Arabia | 73,977 | 7.9% | -18% | 2% |
| Other | 210,960 | | | 7% |
| Total | 3,052,764 | 2.3% | -8% | 100% |

| Products | Tonnes | 1 yr change | 5 yr trend | share |
|-----------------------|-----------|-------------|------------|-------|
| Bananas | 2,333,225 | -1% | -11% | 76% |
| Pineapples | 682,067 | 14% | 4% | 22% |
| Durians | 16,073 | 224% | 114% | 1% |
| Mangoes & mangosteens | 13,360 | -8% | -6% | 0.4% |
| Papaya | 7,150 | -28% | 3% | 0.2% |

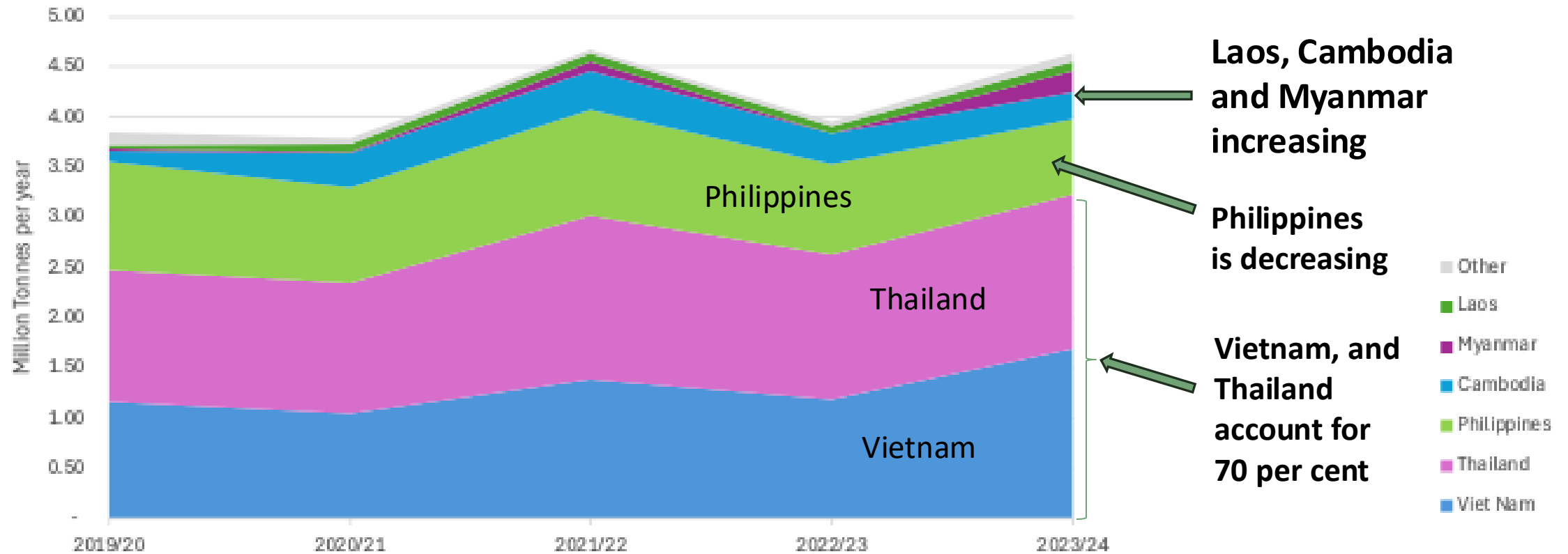
Emerging export products (re exported)
showing greatest 5 year growth trends

| Emerging Products | Tonnes | 1 yr change | 5 yr trend | share |
|-------------------|--------|-------------|------------|-------|
| Durians | 16,073 | 224% | 114% | 0.5% |
| Papaya | 7,150 | -28% | 3% | 0.2% |
| Avocados | 737 | -29% | -14% | 0.0% |

Macro trends: growth in intra-Asia trade

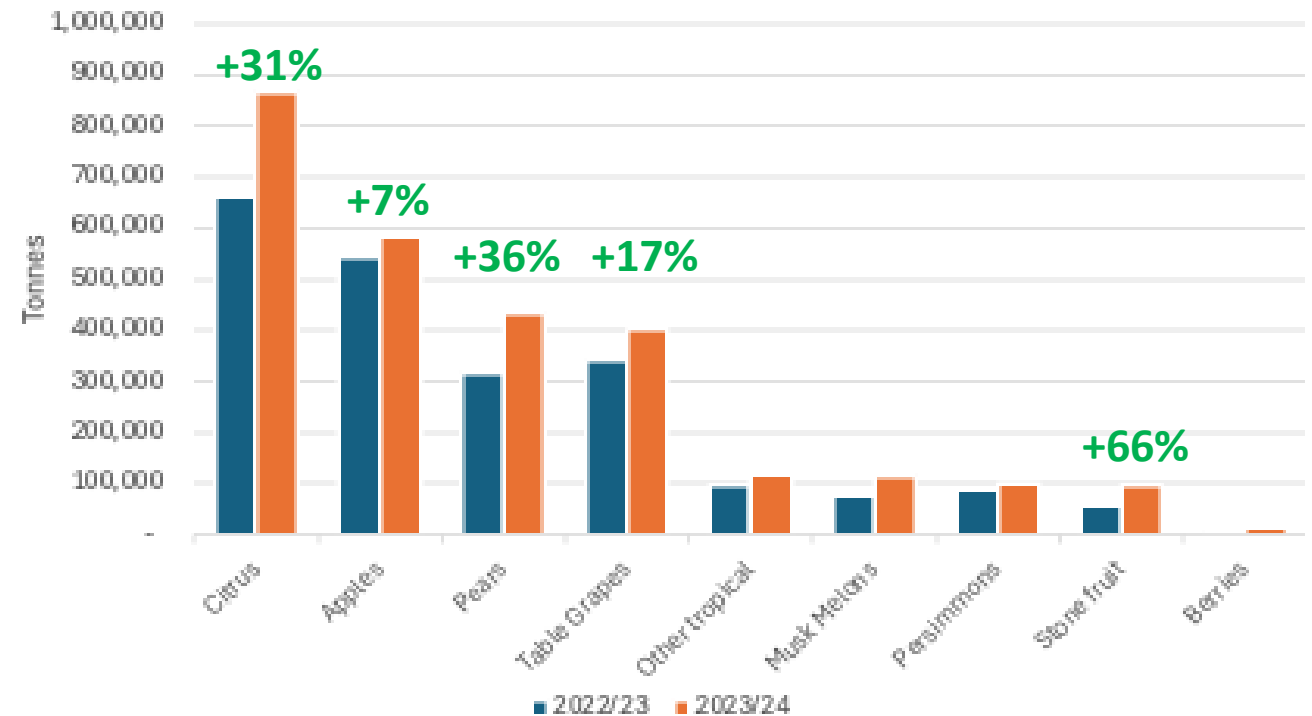
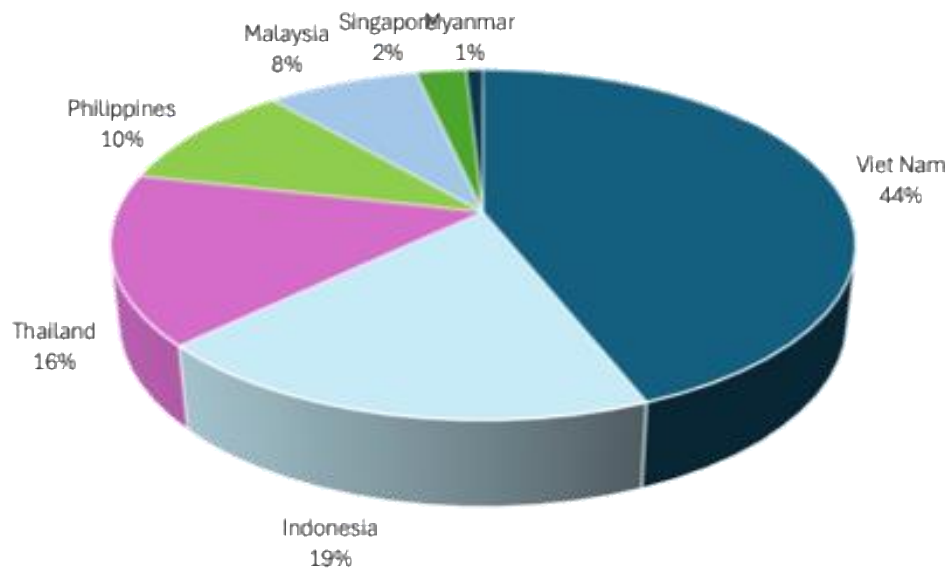
- **Tropical fruits from South-East Asia** into China, **temperate fruits from China** into South-East Asia
- **Durian** driving growth in tropical fruit exports, but Vietnam emerging strongly with **bananas** and other fruits
- **China** increasing production and trade in **temperate fruits** (inc citrus and grapes)
- Implications for global suppliers with same season as China

China's imports from SE Asia up 17 per cent last year and average 5 per cent per year over 5 years



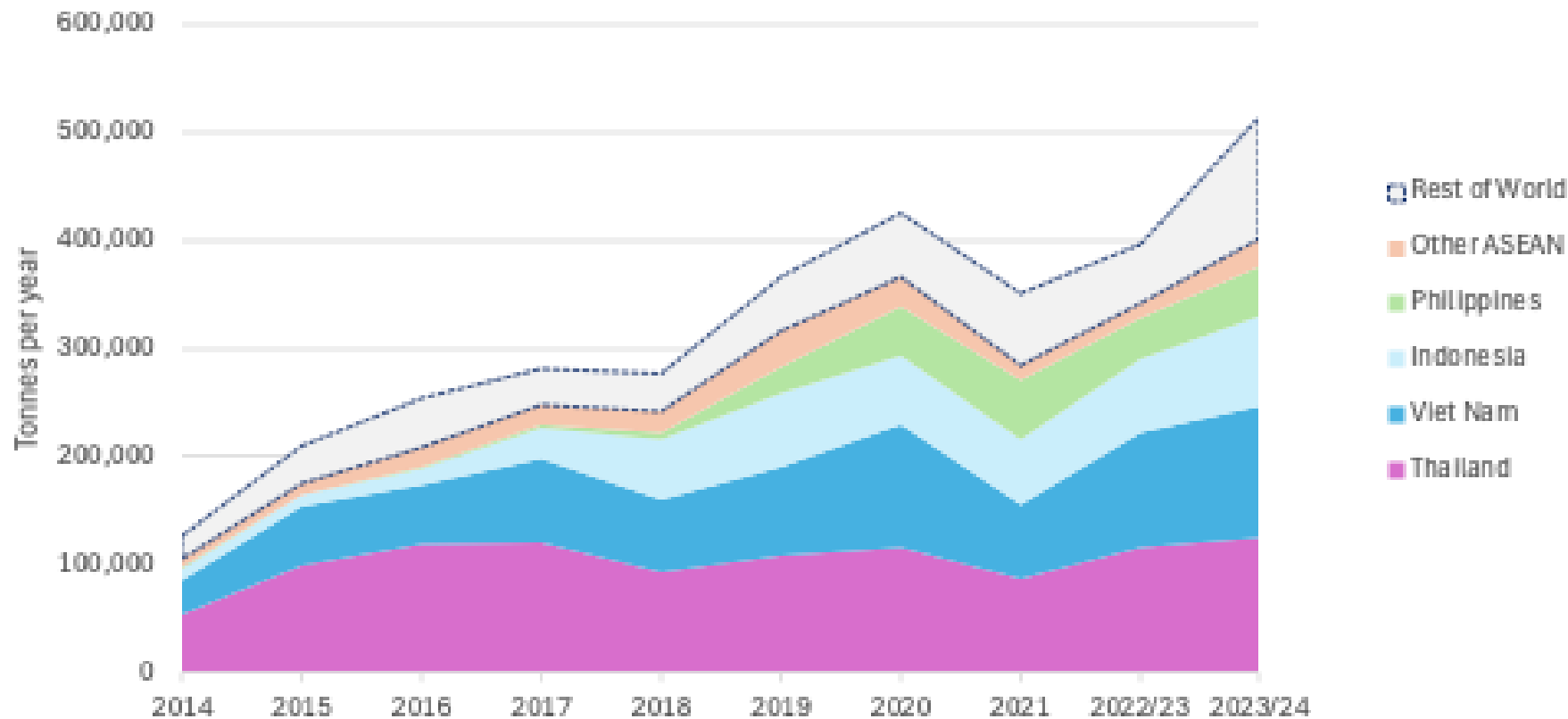
Source: ITC TradeMap; Fresh Intelligence analysis

China's exports of temperate fruits into South-East Asia see rapid growth



Source: ITC TradeMap; Fresh Intelligence analysis

China's grape exports have increased 5 x fold in 10 years – with 80 per cent to ASEAN markets



Rest of world included Bangladesh and Kyrgyzstan.

ASEAN is up 6 per cent per year over 5 years and 17 per cent in 12 months to June 24

Source: ITC TradeMap, Fresh Intelligence analysis

Growth of intra-Asia trade but global opportunities

- **Vietnam** leading growth market for imported fruits
- **Indonesia, Thailand, Malaysia** display growth potential
- **Apples, pears, grapes, citrus** dominate imports to SE Asia
- Great opportunities for higher-value, branded offerings
- Emerging categories such as **berries, avocados, cherries** show exciting potential



Thank you!

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STATISTICS HANDBOOK

A collection of key import and export information, market trends, and patterns of trade for Asia's fresh fruit and vegetable business.

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