

ASIA MARKET OVERVIEW

Asiafruit Magazine 亚洲水果



Asia: fresh fruit imports by market

Asia Imports by market 2021 - 2023					
	2021	2022	2023	1 yr chg	2023 share
	Tonnes	Tonnes	Tonnes		
China	5,763,964	5,789,639	5,874,606	1%	43%
Japan	1,387,136	1,637,189	1,591,280	-3%	12%
Vietnam	1,185,782	1,223,536	1,344,189	10%	10%
India	720,655	656,219	808,193	23%	6%
South Korea	722,077	646,245	664,576	3%	5%
Indonesia	710,893	666,001	628,440	-6%	5%
Malaysia	457,699	647,900	620,406	-4%	5%
Thailand	608,091	601,459	569,836	-5%	4%
Hong Kong	521,703	349,862	544,462	56%	4%
Singapore	424,436	401,556	399,683	0%	3%
Philippines	501,607	349,862	355,705	2%	3%
Taiwan	292,791	285,785	268,891	-6%	2%
Total	13,296,834	13,557,025	13,660,375	1%	100%

Source: ITC TradeMap, India Department of Commerce; Fresh Intelligence analysis

China and Japan are the largest importers, mainly due to their demand for tropical fruits that they are unable to supply locally.

Thailand is the 8th largest importer of fresh fruit in Asia and accounts for 4 per cent of import trade.

Thailand imports mostly temperate fruit that it cannot grow and supply locally.

Asia: fresh fruit exports by market

Asia Exports by market 2021 - 2023					
	2021	2022	2023	1 yr chg	2023 share
	Tonnes	Tonnes	Tonnes		
China	3,339,049	3,075,678	3,643,192	18%	32%
Philippines	2,991,120	2,883,392	2,523,769	-12%	22%
Thailand	2,087,650	1,843,977	1,967,295	7%	17%
Vietnam	1,291,234	1,513,220	1,665,132	10%	15%
India	1,162,044	1,122,437	1,199,738	7%	11%
Malaysia	190,885	186,725	190,725	2%	2%
Indonesia	52,651	66,288	79,466	20%	1%
Japan	48,537	50,350	56,304	12%	0%
South Korea	40,946	43,704	40,449	-7%	0%
Taiwan	77,481	39,026	37,405	-4%	0%
Total	11,281,597	10,824,797	11,403,473	5%	100%

Source: ITC TradeMap; Fresh Intelligence analysis

China and Philippines are the largest exporters; China for temperate apples and mandarins to Southeast Asia, and Philippines for tropical bananas and pineapples to China and Japan.

Thailand is the 3th largest exporter of fresh fruit in Asia and accounts for 17 per cent of export trade.

Thailand exports mostly tropical fruits, dominated by durian and logan to China.

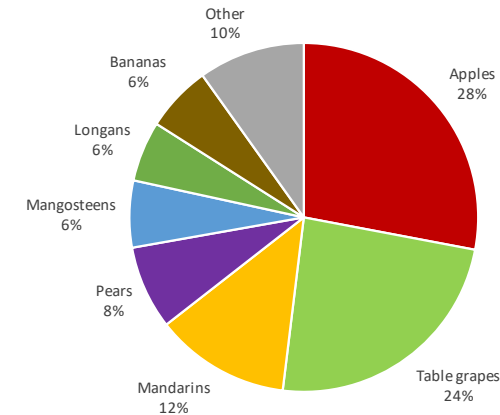
Thailand

Fresh Fruit Imports by product



Thailand Imports by product 2019 - 2023								
	2019	2020	2021	2022	2023	1 yr chg	5 yr CAGR	2023 share
	Tonnes	Tonnes	Tonnes	Tonnes	Tonnes			
Apples	151,780	188,752	188,428	182,163	159,400	-12%	1%	28%
Table grapes	139,850	138,464	102,104	130,061	136,553	5%	-1%	24%
Mandarins	57,819	103,295	101,285	82,065	71,305	-13%	5%	13%
Pears	45,895	58,283	66,692	69,472	44,210	-36%	-1%	8%
Mangosteens	28,369	37,410	34,653	35,097	35,328	1%	6%	6%
Longans	44,202	41,560	33,238	32,077	31,897	-1%	-8%	6%
Bananas	20,284	55,122	33,627	22,031	34,915	58%	15%	6%
Persimmons	19,788	27,845	10,778	16,362	21,016	28%	2%	4%
Oranges	8,409	7,543	6,970	8,024	7,480	-7%	-3%	1%
Melons	9,803	11,378	2,699	5,067	7,123	41%	-8%	1%
Kiwifruit	3,979	3,782	3,434	3,451	2,981	-14%	-7%	1%
Other	13,194	23,802	24,186	15,589	17,627	13%	8%	3%
World	543,372	697,236	608,094	601,459	569,836	-5%	1%	100%

Source: ITC TradeMap; Fresh Intelligence analysis



Source: ITC TradeMap; Fresh Intelligence analysis

Import trade has increased 1 per cent per year over 5 years (CAGR), though apples, pears and mandarins have decreased while table grapes increased.

Thailand imports peaked in 2020 and has eased in last 3 years.

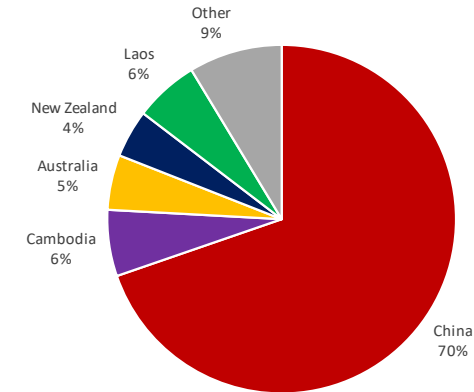
Imports of tropical fruits from regional suppliers supplement local production.

Thailand

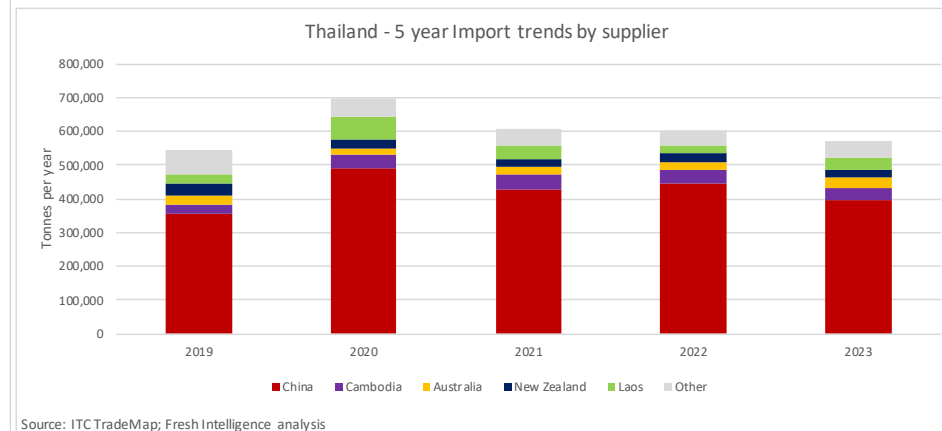
Fresh Fruit Imports by supplier



Thailand Imports by supplier 2019 - 2023								
	2019	2020	2021	2022	2023	1 yr chg	5 yr CAGR	2023 share
	Tonnes	Tonnes	Tonnes	Tonnes	Tonnes			
China	354,499	490,401	428,896	447,726	397,251	-11%	3%	70%
Cambodia	28,222	40,392	42,064	36,714	35,031	-5%	6%	6%
Australia	24,653	18,179	22,524	25,914	29,055	12%	4%	5%
New Zealand	37,568	27,713	25,185	25,817	25,257	-2%	-9%	4%
Laos	25,987	64,342	40,715	23,308	33,932	46%	7%	6%
United States	25,547	18,406	12,999	10,918	12,409	14%	-17%	2%
Viet Nam	14,640	12,592	11,566	6,932	8,700	26%	-12%	2%
Myanmar	2,943	3,622	4,625	6,254	6,636	6%	23%	1%
France	6,572	5,408	2,679	3,986	3,609	-9%	-14%	1%
Chile	3,973	3,202	4,015	2,921	3,673	26%	-2%	1%
Peru	8632	4695	3634	2775	3,575	29%	-20%	1%
Other	10,136	8,284	9,192	8,194	10,708			
World	543,372	697,236	608,094	601,459	569,836	-5%	1%	100%



Source: ITC TradeMap; Fresh Intelligence analysis



Source: ITC TradeMap; Fresh Intelligence analysis

China accounts for 70 per cent of all fresh fruit imports and supplies mostly temperate fruit - apples, pears, grapes and mandarins to Thailand.

Australia and New Zealand are the main suppliers of southern season temperate fruit including grapes, mandarins, oranges, and pears.

Thailand imports mangoes and mangosteens from Cambodia.

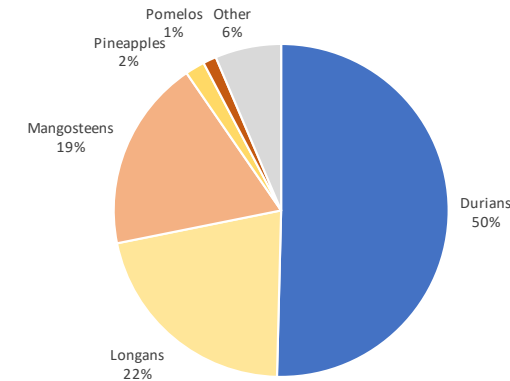
Thailand

Fresh Fruit Exports by product



Thailand Exports by product 2019 - 2023								
	2019	2020	2021	2022	2023	1 yr chg	5 yr CAGR	2023 share
	Tonnes	Tonnes	Tonnes	Tonnes	Tonnes			
Durians	655,346	620,889	875,082	827,293	991,588	20%	11%	50%
Longans	583,297	464,824	633,131	470,539	421,592	-10%	-8%	21%
Mangosteens	470,630	383,948	375,634	329,898	366,072	11%	-6%	19%
Pineapples	14,614	9,319	11,604	33,849	37,148	10%	26%	2%
Pomelos	23,922	20,288	30,526	33,532	25,269	-25%	1%	1%
Tamarinds	10,717	8,011	7,827	9,581	14,532	52%	8%	1%
Jackfruit	45,319	49,006	35,850	22,898	13,270	-42%	-26%	1%
Guavas	8,986	7,332	6,459	7,365	11,112	51%	5%	1%
Rambutan	15,912	11,796	11,828	21,600	9,008	-58%	-13%	0%
Bananas	23,856	15,619	15,928	10,165	8,897	-12%	-22%	0%
Longkong	1,408	1,711	1,452	3,987	5,990	50%	44%	0%
Other	118,526	57,828	82,328	73,272	62,818	-14%		3%
World	1,972,535	1,650,571	2,087,650	1,843,978	1,967,294	7%	0%	100%

Source: ITC TradeMap; Fresh Intelligence analysis



Thailand exports consist of tropical fruits including durian, longans and mangosteens. China and Malaysia are the main destinations. Exports increased 7 per cent in 2023 and recovered to pre covid levels ~ 1.97 million tonnes. An increase in durian exports have offset a decrease in logan and mangosteens. Pineapple exports are increasing.

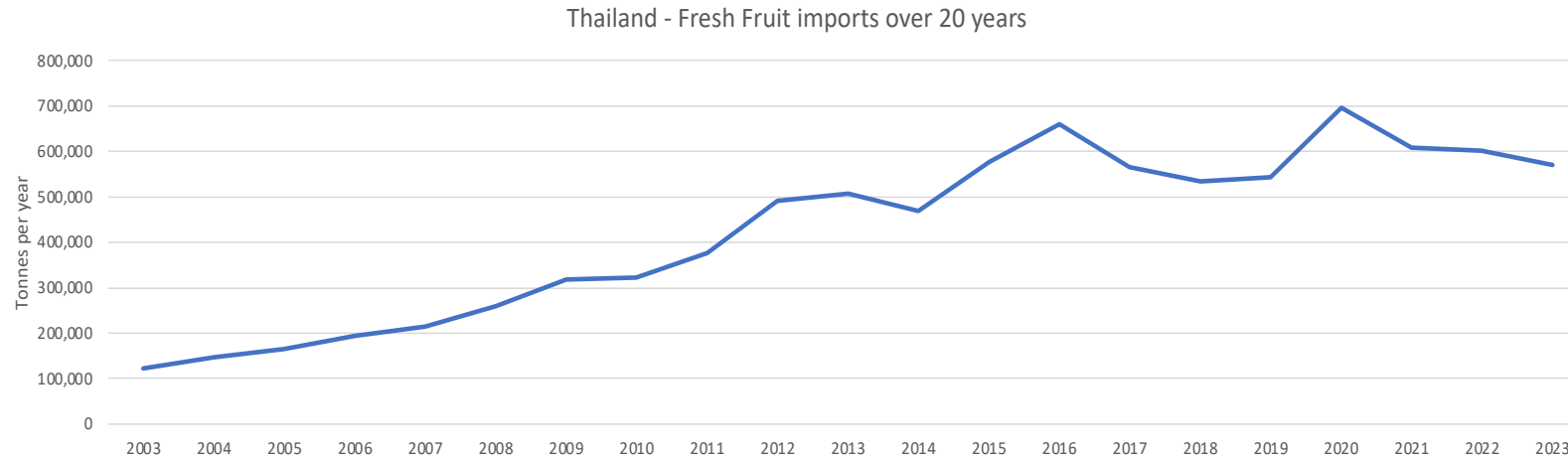
2 way trade

	2019	2020	2021	2022	2023	1 yr chg	5 yr CAGR	2023 share
Import	543,372	697,236	608,094	601,459	569,836	23%	7%	22%
Export	1,972,535	1,650,571	2,087,650	1,843,978	1,967,294	62%	30%	78%

Thailand is a net exporter of fresh fruit, and exports account for just 78 per cent of 2-way trade.

Thailand

Fresh Fruit Imports over 20 years



Source: ITC TradeMap; Fresh Intelligence analysis

Thailand has recorded strong import growth since the market liberalized in early 2000s, driven by China, Thailand changed to a regulated phytosanitary market in 2012 requiring new import conditions for all fresh produce suppliers. Trade dipped as it moved to a regulated phytosanitary market.

Political instability from 2016 – 2019 impacted on import growth. After some recovery by 2020 the impact of Covid19 further impacted on import trade.