



STATISTICAL YEARBOOK 2026



www.shfruit.org

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WELCOME TO THE SFA STATISTICAL YEARBOOK!

Welcome to the Southern Hemisphere Fruit Alliance (SFA) Statistical Yearbook 2026! Offering key data and unique insights into fresh fruit production and export and import market trends, the Yearbook helps professionals in the fresh fruit industry worldwide make more informed business decisions.

Drawing on official trade data and industry expertise, the information in this Yearbook supports sourcing decisions, category management and strategic planning for Southern Hemisphere producers and exporters, input and service providers, and Northern Hemisphere buyers.

The statistics in this Yearbook are presented in three ways:

- export trends and insights from **SFA producer country members**;
- export trends by **fruit type** collated from all SFA country members; and
- import trends by **key Northern Hemisphere markets** for SFA country members.

Wherever you work in the fresh fruit supply chain, this Yearbook will provide you with invaluable information on trends and new developments taking place in the Southern Hemisphere's fruit industry!

ABOUT THE SOUTHERN HEMISPHERE FRUIT ALLIANCE



The Southern Hemisphere Fruit Alliance (SFA) **is the voice of the fresh fruit industry in the Southern Hemisphere.** SFA groups the leading fresh fruit production and export associations in Argentina, Australia, Brazil, Chile, New Zealand, Peru, South Africa, Uruguay, and Zimbabwe. Together, our member countries export nearly 13 million tonnes of fresh fruits per year for a total value of over 15 billion USD, thereby accounting for roughly 15 percent of the global trade in fresh fruits. Our members are united by their joint vision to create environmentally, socially, and economically sustainable value chains for fresh fruits from the Southern Hemisphere, bringing a myriad of benefits to consumers worldwide.

SFA is a **worldwide network** where all actors with an interest in the fruit industry in the Southern Hemisphere can **discuss defining topics for the industry such as sustainability, food safety, logistics, and market access in an ever-changing trading environment.** SFA's core objective is to strengthen cooperation among growers, exporters, and industry partners, and enhance the collective voice of the Southern Hemisphere fruit industry. For over 30 years now, SFA (previously SHAFTE) has offered a platform where members can connect, and face challenges and exploit opportunities together.

SFA's membership model includes both full and supporting membership categories. As such, the Alliance brings together a wide range of industry participants, connecting companies and associations in the Southern Hemisphere with partners in the Northern Hemisphere and with global suppliers of inputs, services, and technologies. The goal is to facilitate deeper collaboration across regions and throughout the fruit value chain.

For more information about SFA, its members and its work, see www.shfruit.org.

ABOUT THE DATA

Data in this publication have been largely sourced from Trade Map (International Trade Centre) for the 12 months ending September 2025 (for exports and imports), from FAOSTAT (for production, in calendar years), and from SFA member associations and other industry sources. Some variations to alternate data sources are expected, though the analysis is focused on trends and proportions, rather than on absolute numbers at any given time. Production data may refer to an earlier year. Countries that export high proportions of their fruit production may report export volumes that are higher than recorded production volumes, due to timing differences and incompleteness of production data.

SFA members supply mostly temperate fruits, with production calendars that are largely counterseasonal to those in the Northern Hemisphere. Tropical fruits (including bananas, pineapples, mangoes, and other exotic fruits) and melons are not included in this analysis. "Fruit" includes apples, avocados, blueberries, cherries, citrus fruit, kiwifruit, pears, stone fruit, and table grapes. "Citrus fruit" includes oranges, soft citrus (soft citrus, tangerines, clementines, and other easy-peel citrus fruits), lemons and limes, and grapefruit. "Stone fruit" includes peaches, nectarines, plums, and apricots.

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“The fruit industry in the Southern Hemisphere is firmly committed to environmental and social sustainability.”



FOREWORD

Producing and exporting fresh fruits to overseas markets is a highly complex endeavour. Numerous variables can affect the final outcome of our business, but we never lose sight of our core objective: to satisfy global consumer demand for safe, healthy, and high-quality fruits while at the same time generating a fair financial return for our growers and exporters.

Our growers and exporters are efficiently managing persistent challenges such as climate change, pest and disease threats, labour issues, and logistical complexities, to supply international markets with high-quality fruits that are safe for consumption. Thousands of producers spread across South America, Africa, and Oceania are working daily to supply the most important markets for fresh fruits on all five continents.

The fruit industry in the Southern Hemisphere is firmly committed to environmental and social sustainability. Our growers abide by an intricate web of laws and regulations set by legislators in both their own countries and in countries of destination; in addition, they comply with multiple international certification standards to ensure alignment with customer expectations for social and environmental sustainability. Thus, the fresh fruit industry is fully embracing its unpostponable duty to preserve and protect the environment. We support and promote the well-being of the communities wherewith we interact, thereby contributing to the food security and prosperity of rural populations across the Southern Hemisphere.

The statistics provided in this Yearbook demonstrate the strength and dynamism of our industry, which is grounded in respect for each and every one playing a part in our unique and important supply chains. Wherever you work in the fresh fruit industry, the SFA Statistical Yearbook will prove an invaluable aid to making the best decisions and achieving your desired business results.

Jorge de Souza, Abrafrutas (Brazil)
Vice-president of SFA

SOUTHERN HEMISPHERE FRUIT



Southern Hemisphere producers of temperate fruit have one unique advantage: they produce fruit when Northern Hemisphere producers cannot. This allows consumers to enjoy their favourite fruits all year round, even when local supplies are out of season.

However, there is also one common challenge: all Southern Hemisphere fruit exporters must send their produce over long distances by sea or air to reach northern markets timely and in high-quality condition to meet customer expectations. To achieve this, Southern Hemisphere producers and exporters have invested extensively in production and post-harvest technologies that enable their fruit to reach markets efficiently while still providing optimal value to consumers. They must also navigate a complex range of market access conditions and comply with multiple quality assurance standards to enter markets.

With more than 90 percent of the world's population living in the Northern Hemisphere, our producers and exporters in the Southern Hemisphere naturally see a very strong demand for their fruit and have risen to multiple challenges to deliver their produce to markets many thousands of miles away.

According to FAOSTAT, global temperate fruit production reached 364 million tonnes in 2023, of which 13 percent was produced in the Southern Hemisphere.

Trade data shows that Southern Hemisphere Fruit Alliance members exported 12.2 million tonnes of temperate fresh fruit in 2024/25, thereby accounting for 31 percent of all temperate fresh fruit exported globally.

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SOUTHERN HEMISPHERE FRUIT MEMBER COUNTRIES



Argentina is geographically extensive with a climate that ranges from subtropical to cold temperate, which provides the country with rich and diverse ecosystems with a unique capacity to produce foodstuffs.

Of Argentina's 5 million tonnes of fresh fruit production, approximately 16 percent is exported, with around half the exported volumes destined to markets in North America and Europe, and small volumes to Asia. Pears, lemons, apples, and oranges are the leading export products. Argentina is the largest exporter of pears in the Southern Hemisphere. Stone fruit, cherries, and blueberries are smaller yet important categories.

The Argentine government is supporting infrastructure investment, alongside private/international funding, to modernise and expand its fruit sector exports.

PRODUCTION TRENDS AND WEATHER IMPACTS



Argentina's favourable climate and diverse geography support extensive fruit production. The country's varied climate zones, from Buenos Aires' temperate regions to Mendoza's arid areas, enable year-round fruit production. However, in 2025, Argentina's fruit production was impacted by adverse weather events, including severe winter frosts and unseasonably warm spring temperatures, which led to reduced yields for citrus and cherries. The country's apple and pear production remained steady.

FRUIT PRODUCTION, 2023

	Tonnes	5 yr trend	Share
Lemons & limes	1 998 273	4%	40%
Oranges	1 044 468	-1%	21%
Soft citrus	370 286	-3%	7%
Grapefruit	100 616	-3%	2%
Total citrus	3 513 643	2%	71%
Pears	653 838	2%	13%
Apples	528 749	-1%	11%
Peaches & nectarines	153 480	-6%	3%
Plums	97 118	17%	2%
Table Grapes	10 000	-31%	<1%
Cherries	7 486	0%	<1%
Avocados	4 117	0%	<1%
TOTAL	4 968 431	1%	

Source: FAOSTAT.

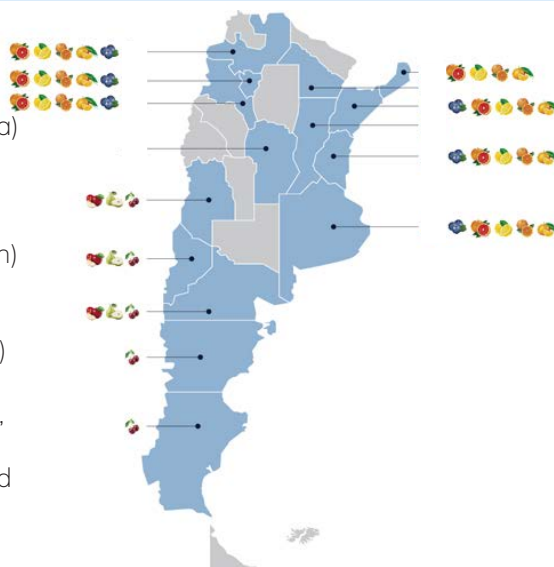
PRODUCTION AREAS

Apples and pears – Cuyo (Mendoza) and Patagonia (Rio Negro)

Blueberries – northeast (Corrientes, Entre Ríos) and northwest (Tucumán)

Cherries – Cuyo (Mendoza) and Patagonia (Neuquen and Rio Negro)

Citrus – northwest (Tucumán, Salta, Jujuy, Catamarca) and northeast (Corrientes, Entre Ríos, Misiones, and North Buenos Aires)



Fruits from Argentina	Provinces
Cherries	Mendoza Neuquén Rio Negro Chubut Santa Cruz
Blueberries	Salta Catamarca Tucumán Corrientes Entre Ríos Buenos Aires
Citrus	Salta Catamarca Tucumán Misiones Corrientes Entre Ríos Buenos Aires
Pears and Apples	Mendoza Neuquén Rio Negro

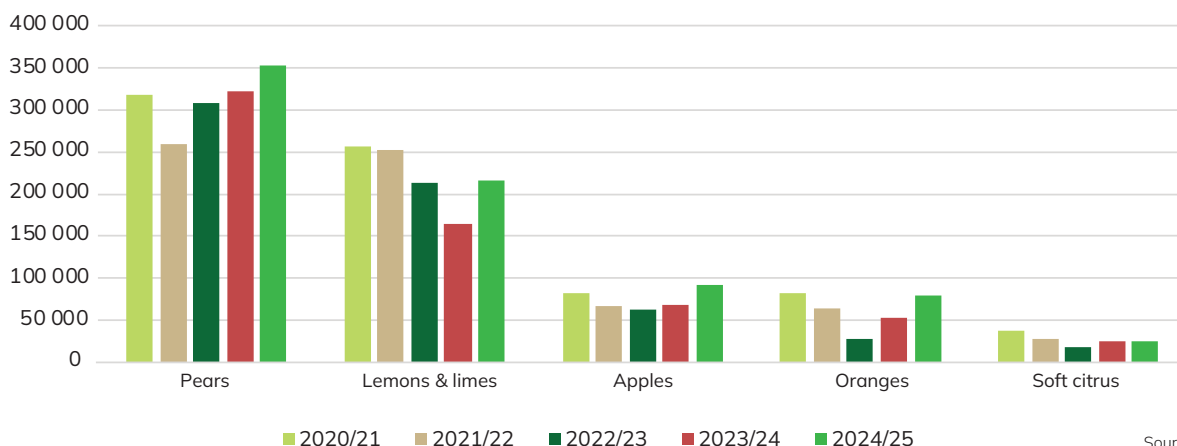
Source: Frutas de Argentina.

INDUSTRY STRUCTURES AND GOVERNMENT SUPPORT



The Argentinean fruit industry's representative body is Frutas de Argentina, a group made up in 2019 by the Argentine Blueberry Committee (ABC), Argentina Pecans, the Argentine Chamber of Integrated Fruit Growers (CAFI, apples and pears), the Integrated Producers Argentinean Cherries Association (CAPCI, cherries), and the Argentine Citrus Federation (Federcitrus).

TOP FIVE FRUIT EXPORTS, FIVE-YEAR TREND (TONNES)



DRIVERS AND CONSTRAINTS IN EXPORT PERFORMANCE

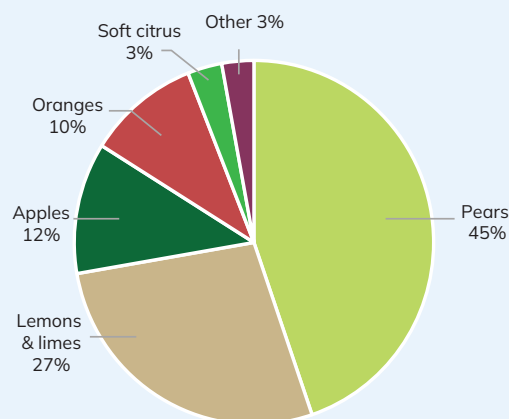
Growing domestic and export demand, diverse climates and technology adoption are driving Argentina's fruit production. However, the industry is constrained by rising costs, climate change impacts (droughts, extreme rain), an aging workforce, and infrastructure and policy challenges, leading to producer consolidation and a push for innovation and improved water management. These ongoing challenges threaten the long-term viability of the industry.

MARKET DEVELOPMENTS AND OUTLOOK

Argentina's fresh fruit exports are showing recent recovery in citrus (lemons, oranges) and stable pome fruit (apples, pears) exports, driven by good weather and global demand shifts. However, rising logistics costs, intense competition, and climate change impacts are tempering long-term growth prospects.



FRUIT EXPORTS, 2024/25

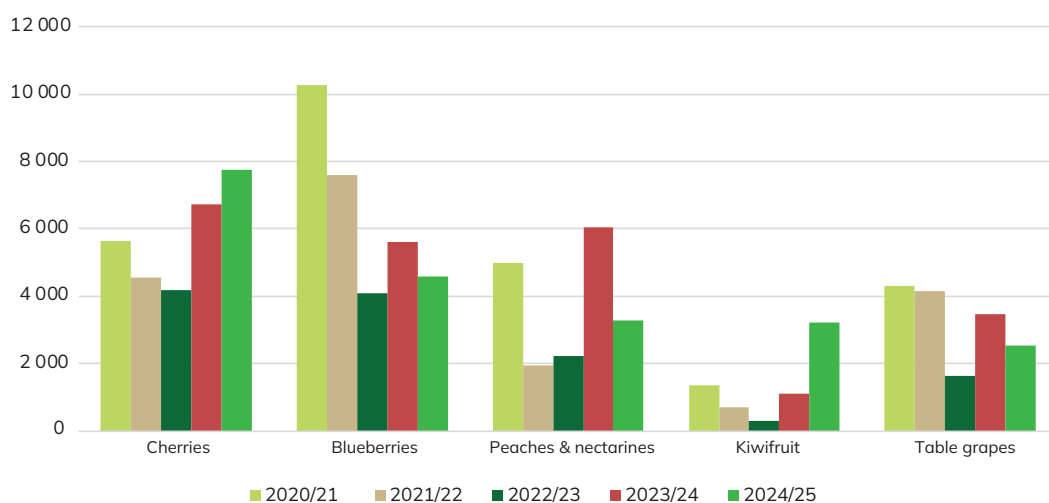


Total exports: 787 708 tonnes

	Tonnes	1 yr change	5 yr change	Share
Pears	352 360	10%	3%	45%
Lemons & limes	216 534	31%	-4%	27%
Apples	91 817	35%	3%	12%
Oranges	79 592	51%	-1%	10%
Soft citrus	24 328	-4%	-11%	3%
Cherries	7 742	15%	8%	1%
Blueberries	4 571	-19%	-18%	1%
Peaches & nectarines	3 268	-46%	-10%	<1%
Kiwifruit	3 219	189%	24%	<1%
Table grapes	2 521	-27%	-13%	<1%
Plums	1 332	-27%	8%	<1%
TOTAL	787 708	20%	-1%	

Source: Trade Map.

OTHER FRUIT EXPORTS, FIVE-YEAR TREND (TONNES)

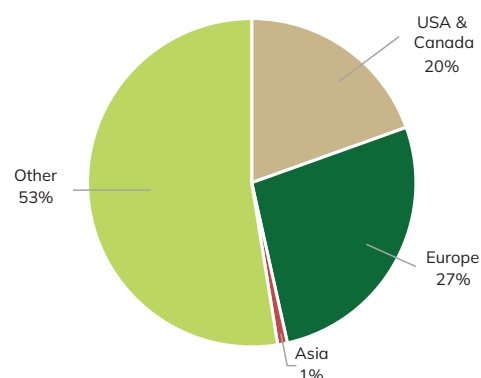


Source: Trade Map.

FRUIT EXPORTS BY DESTINATION, 2024/25

	Tonnes	1 yr change	5 yr trend	Share
USA & Canada	153 842	29%	6%	20%
Europe	212 521	1%	7%	27%
Asia	7 560	140%	14%	1%
Other	413 786	0%	0%	53%
World	787 708	20%	-1%	

Source: Trade Map.

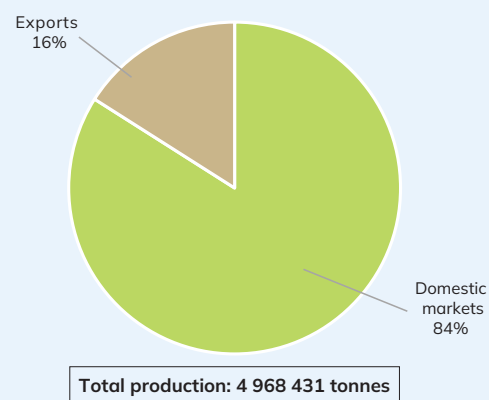


SUSTAINABILITY INITIATIVES

Argentina's fresh fruit export industry is adopting sustainability through initiatives such as improved water management (reuse/treatment), reduced pesticide use (for example by using the sterile insect technique for fruit flies), organic farming promotion, and digital technology for efficiency.



DESTINATION (EXPORT/ DOMESTIC) OF OVERALL FRUIT PRODUCTION



Source: Trade Map, FAOSTAT.

Australia produces around 2.7 million tonnes of fresh fruit including 1.7 million tonnes of temperate fruit each year across climates ranging from tropical North Queensland to the Mediterranean climate areas along the Murray River basin and cool climates in Tasmania.

Approximately 30 percent of this volume is exported, with most shipments destined for Asian markets. Citrus and table grapes dominate Australia's fruit export portfolio, together accounting for around 85 percent of total export volumes. Stone fruit, cherries and avocados complete the top five export categories.

The Australian government invests in Australia's horticulture industry through Hort Innovation and other bodies to boost innovation, sustainability, connectivity, and market access and development.

PRODUCTION TRENDS AND WEATHER IMPACTS



The 2025 growing conditions were impacted by above average rainfall along the East Coast resulting in severe flooding, while drought conditions affected fruit growing areas in Northern Victoria. With adequate water reserves there have been minimal impacts on fresh fruit growing conditions heading into 2026.

FRUIT PRODUCTION, 2023

	Tonnes	5 yr trend	Share
Oranges	535 185	12%	32%
Soft citrus	198 415	10%	12%
Lemons & limes	73 120	7%	4%
Grapefruit	9 030	5%	1%
Total citrus	815 750	11%	48%
Apples	293 731	8%	17%
Table grapes	240 000	5%	14%
Avocados	115 385	10%	7%
Pears	92 450	4%	5%
Peaches & nectarines	62 202	-8%	4%
Blueberries	30 992	12%	2%
Plums	24 045	5%	1%
Cherries	15 114	-1%	1%
Kiwifruit	3 893	9%	<1%
TOTAL	1 693 562	8%	

Source: FAOSTAT.

PRODUCTION AREAS



Avocados – Atherton Tablelands, Bundaberg, Nambour (QLD), Southwest WA, Riverland (SA)

Citrus – Murray Valley around Mildura and Renmark, and Southeast Queensland for soft citrus

Table grapes – Murray Valley around Robinvale and Mildura

Stone fruit – Murray Valley around Swan Hill and Cobram and Shepparton in Victoria

Cherries – Tasmania (Huon and Derwent Valleys, Victoria (Yarra Valley) and New South Wales (Young and Orange) and Adelaide Hills in South Australia.



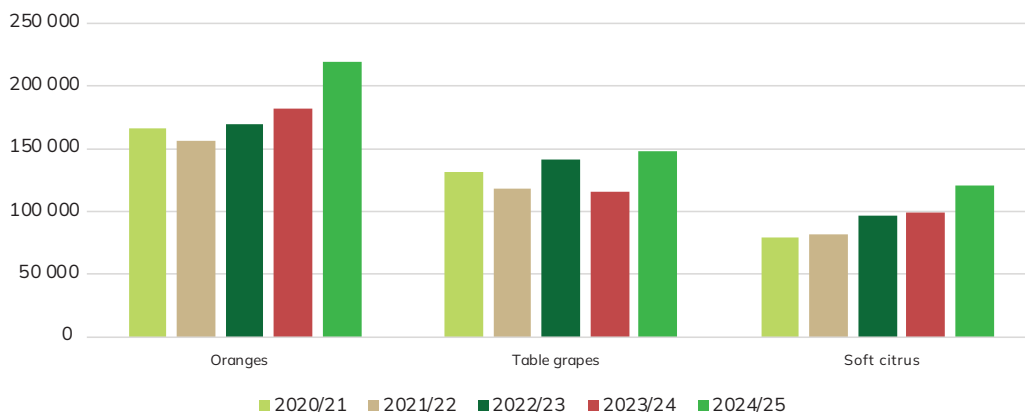
INDUSTRY STRUCTURES AND GOVERNMENT SUPPORT



Industry associations including Citrus Australia, the Australian Table Grape Association, Summerfruit Australia, and Cherry Growers Australia represent the interests of growers in each sector and advise the Australian government on industry priorities for research and development projects that deliver results for growers.

The Australian government supports and contributes to research and development priorities including sustainability, connectivity, and market access through a levy system managed by Horticulture Innovation Australia Limited.

TOP THREE FRUIT EXPORTS, FIVE-YEAR TREND (TONNES)



Source: Trade Map.

DRIVERS AND CONSTRAINTS IN EXPORT PERFORMANCE

Australian fresh fruit exports increased by 19 percent to 551 651 tonnes over the 12 months to September 2025 and have maintained a 6 percent annual growth trend over the past five years.

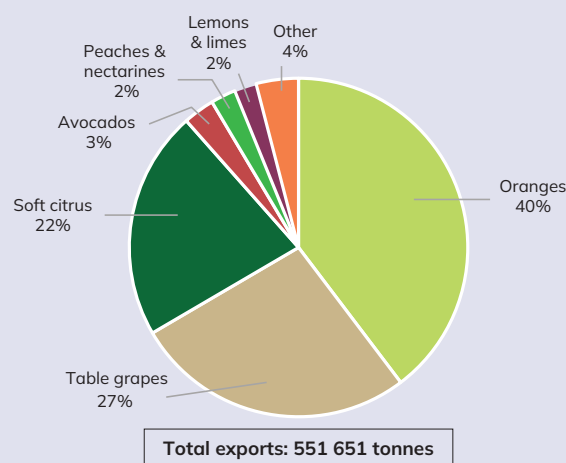
Oranges, table grapes, and soft citrus account for 87 percent of total fresh fruit exports, with China and Japan remaining the largest destinations. Table grape exports rose 28 percent in 2025, supported by improved market access conditions in Japan. Together with stone fruit, avocados, and cherries, these categories collectively represent 98 percent of the country's total export volume.

Over the past five years, exports of soft citrus have grown by an average of 11 percent per year, while avocado exports have increased by 31 percent per year, driven by expanding production in Queensland and rising demand across Asia.

Australia's proximity to the burgeoning markets in Asia is the main driver for this export growth: Australia can deliver high-quality product to these markets in under two weeks by sea or overnight by air. Counterseasonal demand for citrus, table grapes, stone fruit, and cherries is also driving export growth.

Market access constraints in many Asian markets are a challenge that is being addressed jointly by the industry and the Australian government, through publicly funded research and negotiations to open new markets.

FRUIT EXPORTS, 2024/25



	Tonnes	1 yr change	5 yr change	Share
Oranges	218 872	21%	7%	40%
Table grapes	148 339	29%	3%	27%
Soft citrus	120 736	21%	11%	22%
Avocados	16 525	-22%	31%	3%
Peaches & nectarines	13 167	-8%	-2%	2%
Lemons & limes	11 667	80%	28%	2%
Plums	7 056	-11%	-4%	1%
Cherries	4 581	8%	-2%	1%
Pears	4 495	-4%	-17%	1%
Grapefruit	2 898	7%	12%	1%
Apples	1 881	-29%	-9%	<1%
Blueberries	727	-31%	19%	<1%
Apricots	380	27%	-4%	<1%
Kiwifruit	258	48%	-20%	<1%
TOTAL	551 651	19%	6%	

Source: Trade Map.



OTHER FRUIT EXPORTS, FIVE-YEAR TREND (TONNES)

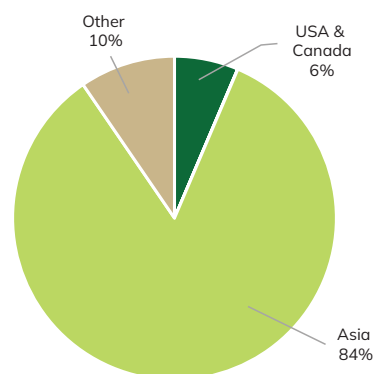


Source: Trade Map.

FRUIT EXPORTS BY DESTINATION, 2024/25

	Tonnes	1 yr chg	5 yr trend	Share
USA & Canada	35 184	33%	12%	6%
Europe	146	6%	-47%	<1%
Asia	463 585	18%	7%	84%
Other	52 737	22%	2%	10%
World	551 651	19,4%	6,4%	100%

Source: Trade Map.

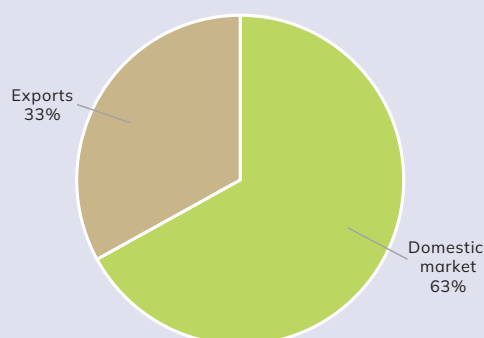


SUSTAINABILITY INITIATIVES

Australian horticulture is prioritizing sustainability through the Horticulture Sustainability Framework initiative, focusing on water and energy efficiency, reducing waste, soil health, and smart tech to meet global demand, improve resilience, and secure future food supplies with a strong emphasis on data, innovation, and environmental stewardship.



DESTINATION (EXPORT/DOMESTIC) OF OVERALL FRUIT PRODUCTION



Total production: 1 693 562 tonnes

Source: Trade Map, FAOSTAT.

SOUTHERN HEMISPHERE FRUIT ALLIANCE MEMBERS IN AUSTRALIA



Brazil is the largest producer of fresh fruits in the Southern Hemisphere. In 2024, Brazil produced 44 million tonnes of fruit, including 24 million tonnes of temperate fruit (85 percent of which were citrus fruits). Brazil is the world's third largest producer of citrus.

Around 85 percent of Brazil's citrus production is destined for the country's processing industry. Exports of (temperate) fresh fruits account for only 1.3 percent of the total production although this share has been increasing in recent years, particularly for limes, table grapes, and avocados. Together, these categories account for 95 percent of Brazil's temperate fruit export trade. Brazil is also a large producer and exporter of melons, bananas, mangoes and other tropical fruits.

Recent export seasons for Brazil's major fruit categories have been characterised by sustained global demand alongside growing complexity in international trade conditions and supply chain performance. While tropical fruits continue to enjoy strong interest in global markets, many destination countries (including those in Europe and China) are reducing their reliance on imported products as part of broader food security strategies. This tendency has resulted in narrower commercial windows and increased competition, requiring exporters to strengthen their value proposition through quality, reliability, and compliance with private standards.

PRODUCTION TRENDS AND WEATHER IMPACTS



Production volumes have generally remained stable in recent years, supported by Brazil's ability to produce fruit year-round. However, extreme weather events such as droughts, floods, and temperature shifts have created significant disruptions. The sector has been able to offset some of these impacts by taking advantage of the diversity of Brazil's production regions, which allows supply to be redistributed when necessary. Although continuity has been maintained, the rising frequency of extreme weather events continues to challenge production planning and long-term forecasting.

FRUIT PRODUCTION, 2023

	Tonnes	5 yr trend	Share
Oranges	17 615 667	1%	74%
Lemons & limes	1 724 330	3%	7%
Soft citrus	1 052 222	2%	4%
Grapefruit	84 725	0%	<1%
Total citrus	20 476 944	1%	86%
Grapes	1 450 800	-1%	6%
Apples	1 183 794	-1%	5%
Avocados	422 545	15%	2%
Peaches & nectarines	200 710	2%	1%
Pears	15 681	-2%	<1%
TOTAL	23 750 474	1%	

Source: FAOSTAT.



INDUSTRY STRUCTURES AND GOVERNMENT SUPPORT

The Brazilian government continues to prioritise negotiations for new market access and supports international promotional activities to raise the visibility and competitiveness of Brazilian fruit in global markets.

The Brazilian Association of Fruit and Derivatives Producers and Exporters (Abrafrutas) is the representative institution of Brazilian fruit farmers and exporters. Abrafrutas' mission is to represent the collective interests of the industry before the Brazilian government and other entities in areas such as research, production, logistics, promotion, and marketing of fresh fruits and derivatives, as well as advancing the interests of the national fruit industry in the international market.



PRODUCTION AREAS

Apples – Santa Catarina (south) and Rio Grande do Sul (north)

Avocados – São Paulo (southwest) and Minas Gerais (south)

Citrus – São Paulo (north), Minas Gerais (southwest), Paraná (north)

Mangoes – northeast Brazil, particularly the São Francisco Valley (Pernambuco and Bahia)

Melons – Rio Grande do Norte (northeast) and Ceará (southeast)

Papaya – Espírito Santo and Bahia

Table grapes – São Francisco River Valley (Pernambuco and Bahia)



Source: Abrafrutas

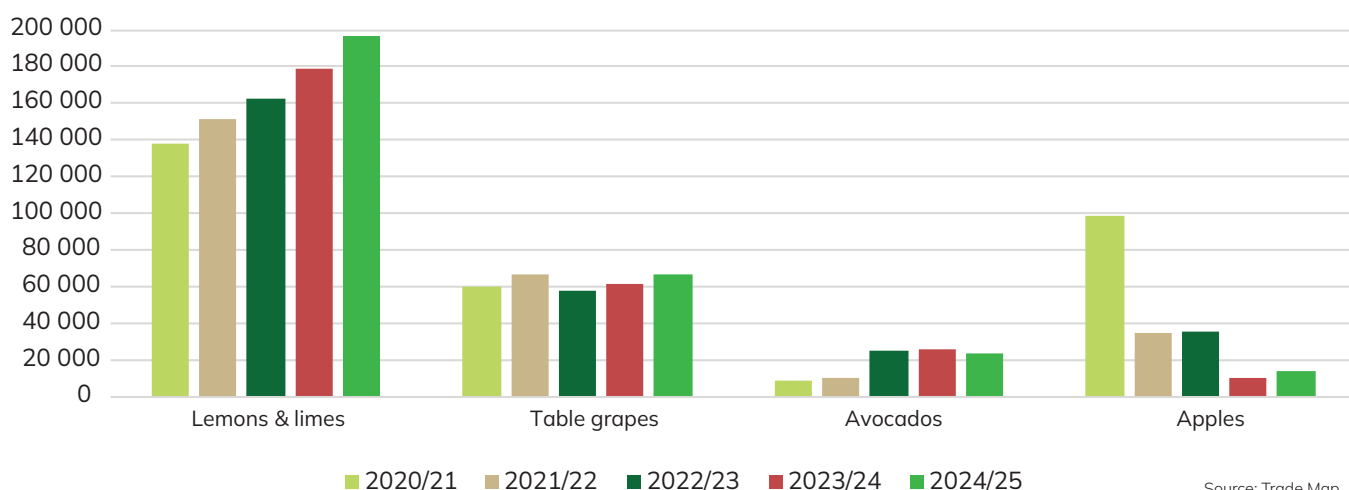
DRIVERS AND CONSTRAINTS IN EXPORT PERFORMANCE

Export growth has been supported primarily by improvements in market access and the continued refinement of logistic capabilities. Regulatory progress and acceptance of Brazilian fruit in new destinations, particularly across Asia, reflect long-term investments by Brazilian growers in phytosanitary compliance, quality systems, and industry coordination. Since 2023, the country has gained access to seven new markets (including India, Japan, Costa Rica, and China) for several types of fruits such as avocados, citrus fruit, and grapes.

Despite these advances, several constraints continue to impede a more rapid expansion of Brazil's fruit exports. Tariff barriers remain particularly challenging in the United States of America, while phytosanitary requirements create obstacles in new and emerging markets. Long-distance logistics represent one of the most difficult operational areas, with exporters facing high freight costs, limited container availability, extended transit times, and congestion at major ports. Additional pressures stem from rising input prices, labour shortages and geopolitical tensions, all of which affect cost structures and overall competitiveness. Production costs have risen consistently, with the largest increases recorded in farming inputs, labour, and logistics. These pressures are expected to have lasting effects on the sector.



TOP FOUR FRUIT EXPORTS, FIVE-YEAR TREND (TONNES)



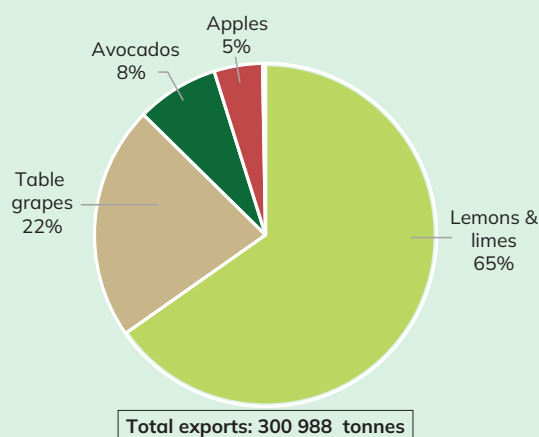
MARKET DEVELOPMENTS AND OUTLOOK

Brazil has recently opened access to several Asian markets. Although this has not yet produced a significant increase in export volumes due to logistical constraints, the long-term potential remains substantial. Asian markets offer the strongest prospects for growth due to expanding populations and rising incomes. The United States of America remains a valuable outlet, but its strict market access conditions and regulatory barriers limit growth opportunities. Europe is approaching a point of market saturation, while the Middle East, Africa, and Latin America are highly sensitive to economic conditions and consumer purchasing power.

Looking ahead, the evolution of geopolitical conditions and the global economic environment will shape trade opportunities and investment decisions. Stability remains essential for predictable commercial planning, yet current conditions marked by trade disputes and supply chain uncertainty create significant complications. Logistics will remain a central challenge in the near to mid-term as shipping lines face emissions regulations, limited infrastructure, and persistent pressures on freight capacity and pricing.



FRUIT EXPORTS, 2024/25



	Tonnes	1 yr change	5 yr change	Share
Lemons & limes	196 429	10%	9%	65%
Table grapes	66 499	7%	3%	22%
Avocados	23 430	-11%	28%	8%
Apples	13 785	35%	-39%	5%
Oranges	430	-33%	-43%	<1%
Soft citrus	122	14%	-22%	<1%
Pears	121	15%	12%	<1%
Peaches & nectarines	57	18%	-8%	<1%
Kiwifruit	56	27%	9%	<1%
Plums	33	-3%	26%	<1%
Grapefruit	15	-2%	15%	<1%
Total	300 988	8%	-1%	

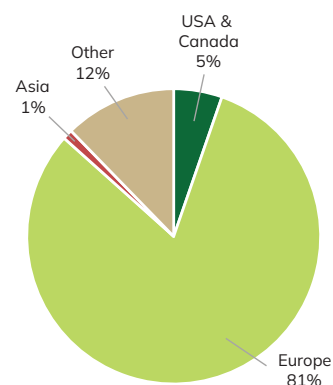
Source: Trade Map.



FRUIT EXPORTS BY DESTINATION, 2024/25

	Tonnes	1 yr change	5 yr trend	Share
USA & Canada	16 049	-23%	5%	5%
Europe	244 566	6%	5%	81%
Asia	3 282	-26%	-49%	1%
Other	37 091	0%	0%	12%
World	300 988	8%	-1%	

Source: Trade Map.



SUSTAINABILITY INITIATIVES

The Brazilian fruit industry is strengthening sustainability through regenerative agriculture, particularly through the recovery of degraded pasturelands for production expansion. The use of bio-based inputs is increasing rapidly, reducing dependence on conventional chemical inputs and aligning production systems with global environmental expectations. Adoption of international environmental, social, and governance certifications has also increased, helping to demonstrate compliance and build trust in key markets.

Clean energy sources such as wind and solar power are being used more widely to support irrigation and packing operations. Carbon footprint assessments indicate that fruit production contributes positively to carbon sequestration and environmental performance.



DESTINATION (EXPORT/DOMESTIC) OF OVERALL FRUIT PRODUCTION



Total production: 23 750 474 tonnes

Source: Trade Map, FAOSTAT.

SOUTHERN HEMISPHERE FRUIT ALLIANCE MEMBER IN BRAZIL



ABRAFRUTAS
Associação Brasileira dos Produtores e
Exportadores de Frutas e Derivados

Situated on South America's west coast, Chile is one of the most dynamic and export-oriented fruit exporters in the world, sending more than 3 million tonnes of fresh fruit annually to more than 100 countries across the globe.

Chile offers a bounty of quality fresh fruits from cherries, blueberries, grapes, and stone fruit to apples, pears, kiwifruit and citrus to markets in Europe, North America, and Asia. The industry is supported by extensive infrastructure, including modern packing, cold chain, and logistics systems, and by strong institutional capacity through grower associations.

Chile's fruit exports grew by an average 4 percent per year over the past five years. In 2025, the country's exports surged by 18 percent year-on-year, reflecting a recovery from previous weather-impacted seasons across leading export categories such as cherries, apples, and table grapes.

PRODUCTION TRENDS AND WEATHER IMPACTS



Significant production growth has been driven by increasing demand from key markets in Asia (particularly China), North America, and Europe. Cherries have experienced a surge in Chinese demand, driving widespread new plantings.

Production has been significantly challenged by weather impacts linked to climate change, including severe drought and unpredictable extreme events such as frosts and heatwaves. For example, in 2025, a late frost in the central area impacted the early cherry production areas during flowering.

PRODUCTION AREAS



Apples – O'Higgins, Maule, Biobío, Araucanía, Los Ríos, Los Lagos

Blueberries – O'Higgins, Maule, Biobío, Araucanía, Los Ríos, Los Lagos

Cherries - O'Higgins, Maule

Citrus – Coquimbo, Valparaíso, Metropolitana (Santiago), O'Higgins

Kiwifruit – O'Higgins, Maule

Table grapes – Atacama, Coquimbo, Valparaíso, Metropolitana (Santiago), O'Higgins

FRUIT PRODUCTION, 2023

	Tonnes	5 yr trend	Share
Lemons & limes	261 960	11%	6%
Soft citrus	259 804	8%	6%
Oranges	146 746	2%	3%
Grapefruit	841	-12%	<1%
Total citrus	669 351	7%	14%
Apples	1 475 950	-2%	31%
Table grapes	728 000	-3%	16%
Cherries	465 348	15%	10%
Plums	433 935	-1%	9%
Peaches & nectarines	304 036	-2%	6%
Pears	204 016	-5%	4%
Avocados	168 531	3%	4%
Blueberries	121 459	-2%	3%
Kiwifruit	116 029	-5%	2%
TOTAL	4 686 655	0%	

Source: FAOSTAT.



INDUSTRY STRUCTURES AND GOVERNMENT SUPPORT



The Chilean government supports the fruit export industry in opening new markets and maintaining a high-quality reputation. It increases global competitiveness by negotiating trade agreements, promoting exports through its export promotion agency (ProChile), and ensuring that sanitary standards are maintained.

Frutas de Chile represents Chilean fresh fruit exporters, supporting and coordinating the industry's efforts to successfully reach global markets. Founded in 1935, the organisation brings together more than 200 exporting companies, representing approximately 90 percent of the total volume of fresh fruit exported by the country.

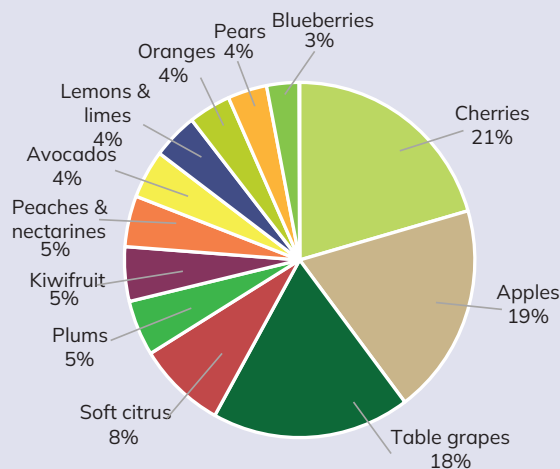
A central pillar of Frutas de Chile's work is facilitating the export process by coordinating industry actions and supporting compliance with international requirements. Of particular importance is the collaborative administration of international phytosanitary agreements, carried out in close partnership with the Chilean Agricultural and Livestock Service (SAG) and counterpart phytosanitary authorities in destination markets. These agreements help ensure the safe and efficient entry of Chilean fruit into overseas markets, enabling streamlined access to more than 100 countries worldwide. In addition, Frutas de Chile leads international export promotion programmes designed to build demand in key markets. The organisation develops and implements both consumer-focused and B2B marketing strategies for major fruit categories, strengthening the positioning, competitiveness, and recognition of Chilean fruit globally.

DRIVERS AND CONSTRAINTS IN EXPORT PERFORMANCE

Chile has expanded its trade relationships with key importing countries, including China, the United States of America, the Netherlands, Italy, and Brazil. Export growth has been supported by innovation, new variety adoption, growing new markets (particularly in Asia), and strong supply chain investment.

The country faces constraints from climate change (water scarcity, extreme weather), intense competition in mature markets in North

FRUIT EXPORTS, 2024/25



Total exports: 3 046 604 tonnes

	Tonnes	1 yr change	5 yr change	Share
Cherries	625 246	51%	15%	21%
Apples	585 210	12%	-2%	19%
Table grapes	556 968	5%	1%	18%
Soft citrus	248 047	22%	10%	8%
Plums	154 038	-10%	6%	5%
Kiwifruit	151 123	8%	1%	5%
Peaches & nectarines	141 192	23%	9%	5%
Avocados	134 190	39%	16%	4%
Lemons & limes	127 643	39%	6%	4%
Oranges	118 921	11%	5%	4%
Pears	110 287	7%	-3%	4%
Blueberries	90 893	5%	-6%	3%
Grapefruit	1 404	65%	-7%	<1%
TOTAL	3 046 604	18%	4%	

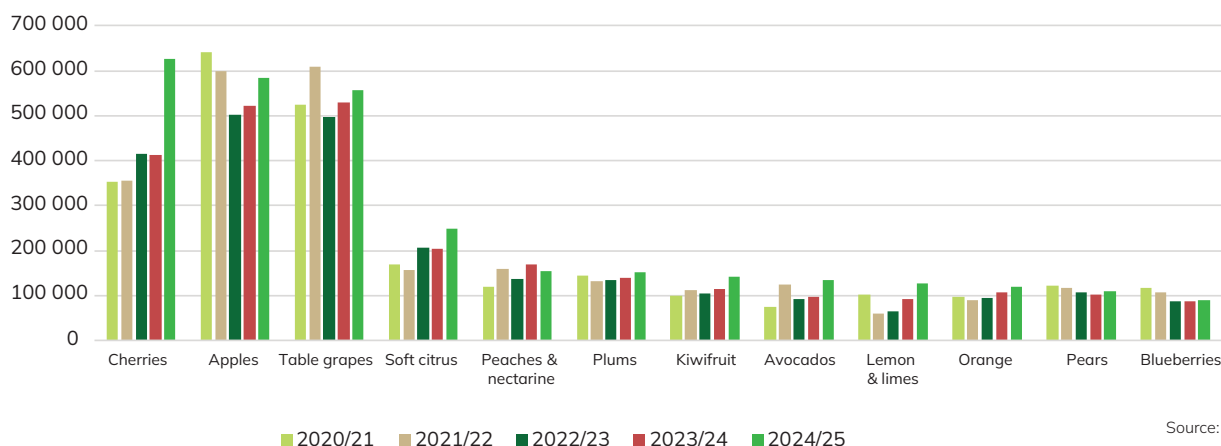
Source: Trade Map.

America and Europe, logistical disruptions with shipping vast distances, phytosanitary constraints, and the need for faster technology adoption.

MARKET DEVELOPMENTS AND OUTLOOK

Strong growth is projected for Chile's stone fruit exports in 2026. Minor increases are expected for blueberries, while export forecasts for cherries, apples, and table grapes have been revised slightly downward due to weather impacts and varietal changes. The industry is focusing heavily on quality improvement and on market diversification.

FRUIT EXPORTS, FIVE-YEAR TREND (TONNES)

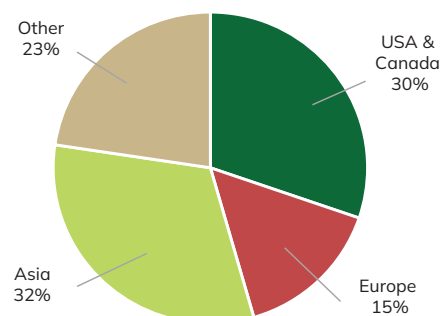


Source: Trade Map.

FRUIT EXPORTS BY DESTINATION, 2024/25

	Tonnes	1 yr change	5 yr trend	Share
USA & Canada	921 048	5%	3%	30%
Europe	466 312	20%	0%	15%
Asia	969 555	31%	7%	32%
Other	689 689	19%	6%	23%
World	3 046 604	18%	4%	

Source: Trade Map.

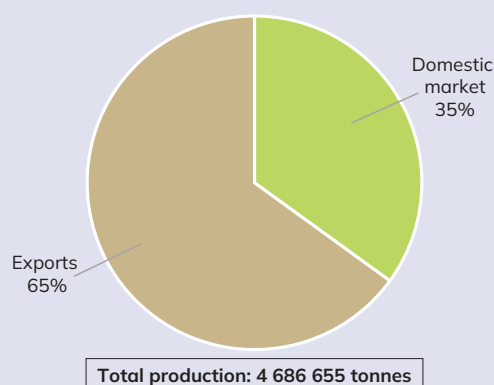


SUSTAINABILITY INITIATIVES

Advances in precision farming, greenhouse cultivation, and irrigation technology have improved yields and efficiency, while a growing focus on sustainable farming is enhancing Chile's competitiveness. Frutas de Chile embraces the challenge of leading the industry's sustainability efforts by defining key issues, building evidence, and developing a powerful and coherent narrative regarding the importance of the fruit export sector to the development of the country, its territories, and communities.



DESTINATION (EXPORT/ DOMESTIC) OF OVERALL FRUIT PRODUCTION



Source: Trade Map, FAOSTAT.

SOUTHERN HEMISPHERE FRUIT ALLIANCE MEMBER IN CHILE



New Zealand's fresh fruit export industry has seen significant growth in kiwifruit production and exports, with exports reaching a total of 915 261 tonnes in 2024/25, up 21 percent year-on-year. Exports of kiwifruit have grown by an average 6 percent yearly over the past five years. Asia and Europe are the main Northern Hemisphere markets, with strong demand for both green and gold kiwifruit. The country also exports significant volumes of apples and avocados.

Overall fresh fruit exports increased 19 percent in the 12 months to September 2025, returning to a longer-term growth trajectory of 5 percent annually over the past five years following the adverse weather conditions of 2022/23.

PRODUCTION TRENDS AND WEATHER IMPACTS



New Zealand's fruit industry is experiencing significant growth, primarily driven by record kiwifruit crops in 2024 and 2025. However, the sector remains vulnerable to extreme weather events and climate change impacts, which continue to pose substantial challenges. In February 2023, Cyclone Gabrielle severely impacted orchards and infrastructure in the Hawke's Bay and Gisborne/Tairāwhiti regions, which are key growing areas for both apples and kiwifruit. The recent high export growth rate reflects both a rapid recovery to full crop loadings after the cyclone and a longer-term growth path with increasing export volumes and values from premium varieties including JAZZ™ and Envy™ apples and gold kiwifruit.

PRODUCTION AREAS



Apples – Hawke's Bay and Tairāwhiti (North Island), Tasman and Central Otago (South Island)

Avocados – Bay of Plenty and Northland (North Island)

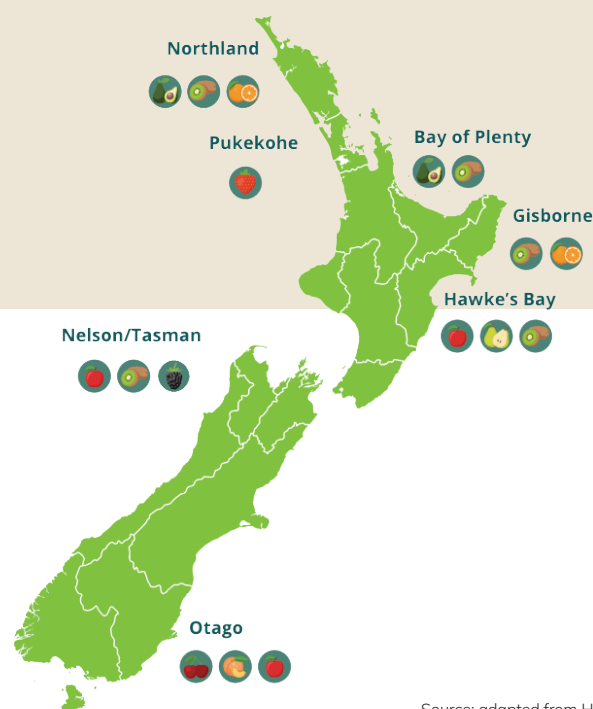
Cherries – Central Otago (South Island)

Kiwifruit – Bay of Plenty and Northland (North Island)

FRUIT PRODUCTION, 2023

	Tonnes	5 yr trend	Share
Oranges	7 935	1%	1%
Soft citrus	762	19%	<1%
Lemons & limes	6 951	2%	<1%
Grapefruit	767	1%	<1%
Citrus	16 415	2%	1%
Kiwifruit	770 000	6%	53%
Apples	586 125	1%	41%
Avocados	42 696	6%	3%
Pears	16 452	-2%	1%
Blueberries	6 097	0%	<1%
Cherries	3 589	7%	<1%
Plums	1 303	-4%	<1%
Peaches & nectarines	181	15%	<1%
TOTAL	1 442 859	4%	

Source: FAOSTAT.



Source: adapted from HortNZ

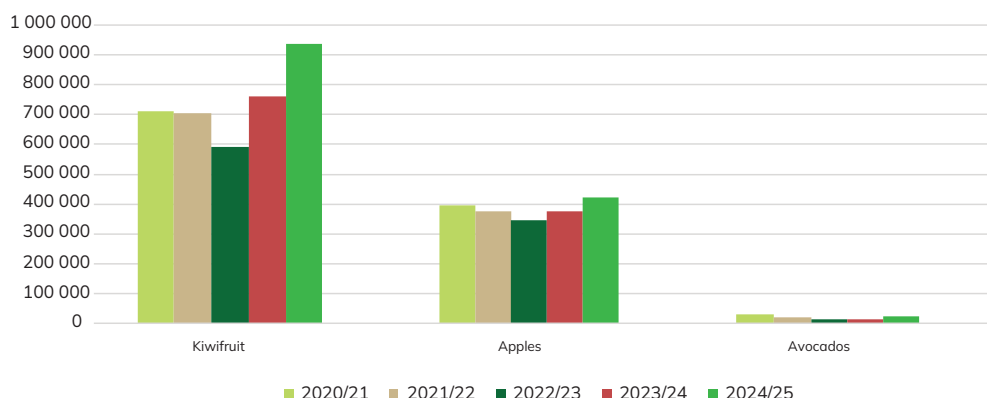
INDUSTRY STRUCTURES AND GOVERNMENT SUPPORT



The New Zealand government is supporting the fresh fruit export industry by helping exporters meet stringent international plant health standards, offering guidance on market access via its Official Assurance Programmes, and ensuring compliance with international quality programmes, including GlobalGAP and Brand Reputation Compliance Global Standards. Key support includes facilitating market entry, managing biosecurity, and providing information on specific country entry requirements.

New Zealand Apples & Pears Inc. is the representative organisation for the New Zealand apple and pear industry.

TOP THREE FRUIT EXPORTS, FIVE-YEAR TREND (TONNES)



Source: Trade Map.

DRIVERS AND CONSTRAINTS IN EXPORT PERFORMANCE

New Zealand's fresh fruit export success is driven by strong Asian demand, a reputation of high quality, the negotiation of free trade agreements, integration in supply chains involving strong relationships from growers to retailers, technology adoption including for enhanced traceability and quality monitoring, and variety innovation.

The industry faces constraints including high freight costs, capacity limitations, climate impacts, intense competition, labour issues, reliance on specific markets, and sustainability pressures, requiring a continued focus on quality and efficient logistics to maintain viable growth.

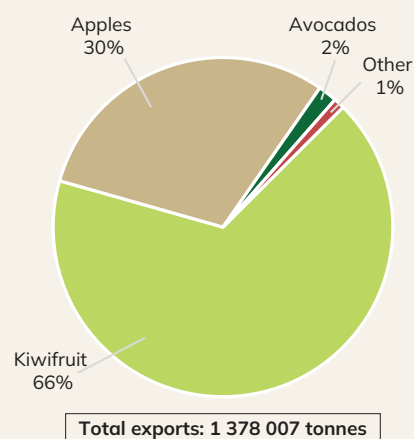
While close to Asia, New Zealand's geographic location makes it the furthest supplier from key traditional markets in Europe.

MARKET DEVELOPMENTS AND OUTLOOK

Exports growth is being driven by strong demand from Asia (China, Viet Nam, Japan, and Taiwan) and Europe for gold kiwifruit. Key challenges include targeting high-value markets, recovering from the 2023 weather impacts, and maintaining a focus on sustainability, while global trade uncertainties persist. The outlook remains positive, with ambitious goals to double the total export value over the next ten years by leveraging innovation, opening new markets, and strengthening climate resilience.



FRUIT EXPORTS, 2024/25

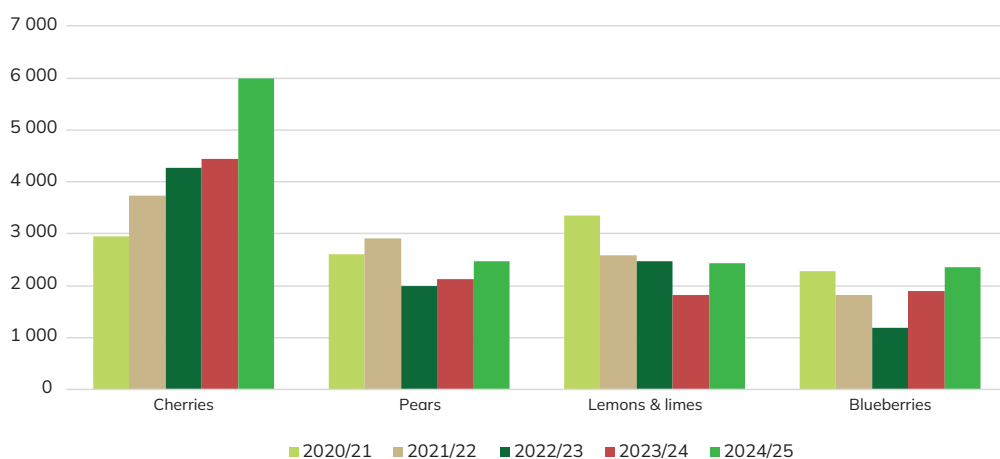


Total exports: 1 378 007 tonnes

	Tonnes	1 yr change	5 yr change	Share
Kiwifruit	915 261	21%	6%	66%
Apples	423 231	12%	2%	30%
Avocados	25 116	74%	-5%	2%
Cherries	5 995	35%	20%	<1%
Pears	2 463	16%	-1%	<1%
Lemons & limes	2 438	33%	-8%	<1%
Blueberries	2 350	25%	1%	<1%
Oranges	486	0%	2%	<1%
Table grapes	228	48%	10%	<1%
Mandarins	189	-7%	-22%	<1%
Apricots	169	-22%	0%	<1%
Peaches & nectarines	104	33%	2%	<1%
Plums	29	563%	21%	<1%
TOTAL	1 378 007	19%	5%	

Source: Trade Map.

OTHER FRUIT EXPORTS, FIVE-YEAR TREND (TONNES)

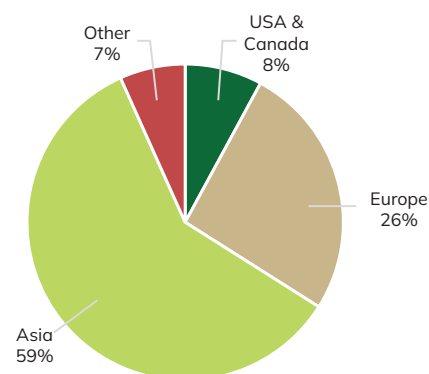


Source: Trade Map.

FRUIT EXPORTS BY DESTINATION, 2024/25

	Tonnes	1 yr change	5 yr trend	Share
USA & Canada	109 003	24%	7%	8%
Europe	359 241	10%	0%	26%
Asia	817 379	22%	8%	59%
Other	92 383	19%	-5%	7%
World	1 378 007	19%	5%	

Source: Trade Map.

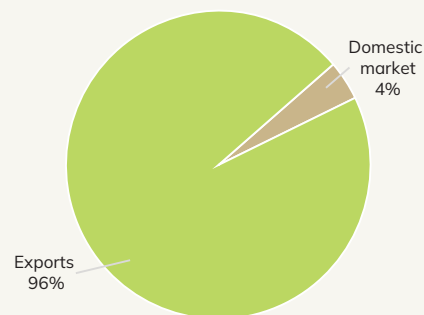


SUSTAINABILITY INITIATIVES

New Zealand's fresh fruit sector is actively pursuing sustainability through tech-driven waste reduction, the setting of industry-wide climate goals, increasing supply chain efficiency, and collaborative innovation.



DESTINATION (EXPORT/DOMESTIC) OF OVERALL FRUIT PRODUCTION



Total production: 1 442 859 tonnes

Source: Trade Map, FAOSTAT.

SOUTHERN HEMISPHERE FRUIT ALLIANCE MEMBER IN NEW ZEALAND



Peru's fruit export industry continues to grow steadily, driven by rising demand, stable climatic conditions, and improved production efficiency. In the 12 months to September 2025, exports of fresh temperate fruits from the country increased by 35 percent year-on-year to a total of 2.1 million tonnes, thus recovering from the severe weather impacts of the previous season to continue along a strong long-term growth trajectory.

While logistics costs and US tariffs pose challenges, new market access, infrastructure investments, diversification, and sustainability initiatives support positive medium-term export prospects.

PRODUCTION TRENDS AND WEATHER IMPACTS



Peru's main fruit export crops benefit from the country's stable coastal climate. In 2025, no major adverse weather events were recorded, allowing production to proceed without disruption. This climatic stability continues to underpin Peru's reliability as a year-round supplier to global markets.

Fruit production has increased steadily at around 8 percent per year over the last five years to 2.1 million tonnes.

FRUIT PRODUCTION, 2023

	Tonnes	5 yr trend	Share
Oranges	570 336	3%	14%
Soft citrus	648 577	7%	16%
Lemons & limes	339 052	3%	9%
Grapefruit	10 946	14%	<1%
Total citrus	1 568 911	4%	40%
Grapes	1 011 071	12%	25%
Avocados	982 559	14%	25%
Blueberries	229 390	12%	6%
Apples	125 537	-4%	3%
Peaches & nectarines	41 431	-2%	1%
Plums	5 146	-10%	<1%
Pears	4 765	4%	<1%
Cherries	3	-1%	<1%
TOTAL	3 968 813	8%	

Source: FAOSTAT.



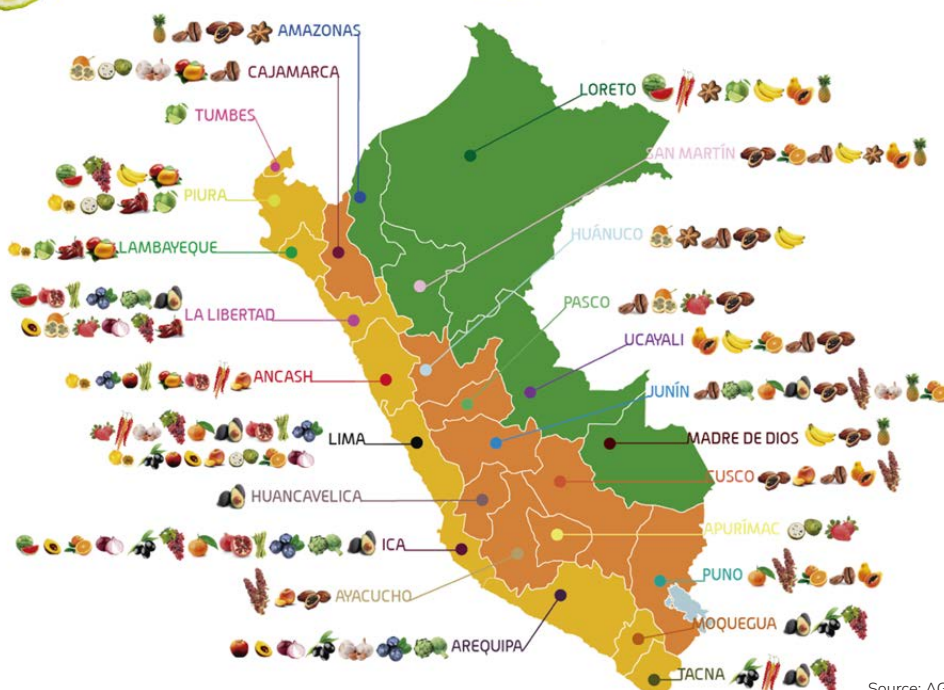
PRODUCTION AREAS

Table grapes – regions of Piura, Lambayeque, and La Libertad in the north, and the southern region of Ica

Avocados – La Libertad, Lima, Ica, and Lambayeque

Blueberries – La Libertad (especially Virú Valley), Lambayeque, Ancash, and Piura

Citrus – central coastal regions (Lima, Ica, Junín)



Source: AGAP

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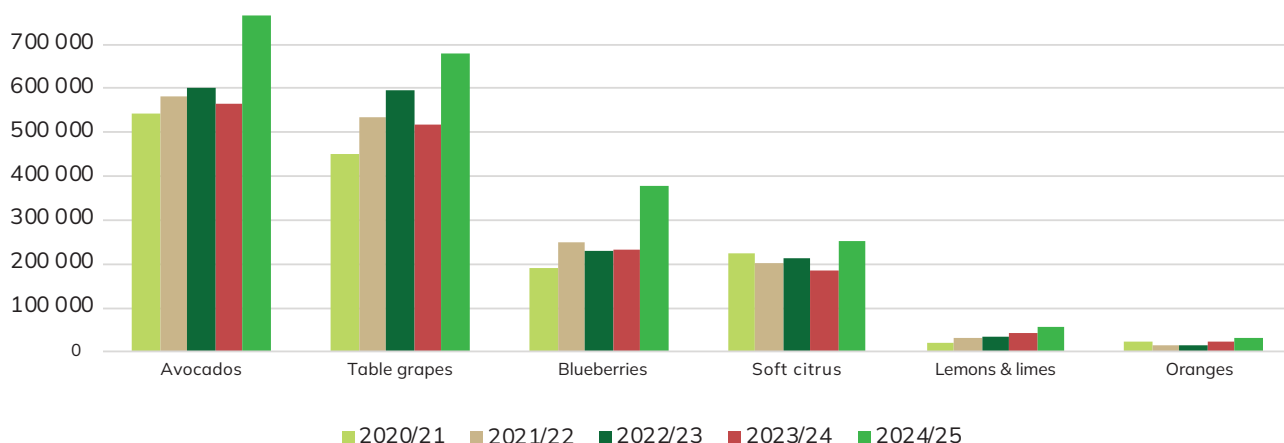
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✉ procitrus@procitrus.org

MAJOR FRUIT EXPORTS, FIVE-YEAR TREND (TONNES)



Source: Trade Map.

DRIVERS AND CONSTRAINTS IN EXPORT PERFORMANCE

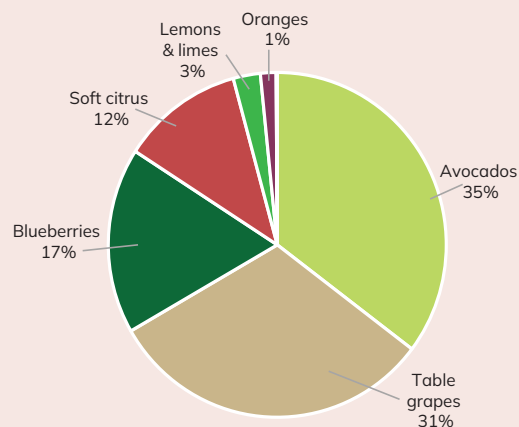
Despite periods of political instability in recent years, Peru's agricultural sector has demonstrated strong resilience, with production and export performance largely insulated from domestic political conditions. Export-oriented fruit categories, particularly blueberries and table grapes, have recorded sustained and significant growth, driven primarily by robust demand from the United States of America, Peru's largest export market.

Growth in fruit exports has been supported by a combination of rising international demand and expanding production capacity. Producers are increasingly adopting more specialised, efficient, and crop-specific production techniques aimed at export markets, contributing to improvements in yields, quality, and consistency.

However, several challenges continue to affect export competitiveness. The uncertainties around US tariff structures and rising production and trading costs along with logistical disruptions, including delays at the Panama Canal and labour strikes at selected US ports, posed additional challenges during the past year.



FRUIT EXPORTS, 2024/25



Total exports: 2 170 073 tonnes

	Tonnes	1 yr change	5 yr change	Share
Avocados	766 383	35%	9%	35%
Table grapes	679 973	32%	11%	31%
Blueberries	378 511	63%	19%	17%
Soft citrus	253 349	36%	3%	12%
Lemons & limes	56 256	33%	27%	3%
Oranges	32 317	32%	7%	1%
Grapefruit	1 999	-32%	1%	<1%
Peaches & nectarines	413	-33%	-32%	<1%
Total	2 170 073	35%	11%	

Source: Trade Map.

INDUSTRY STRUCTURES AND GOVERNMENT SUPPORT



Government support is playing a critical role in the growth of Peru's fruit industry. More than 20 irrigation projects are currently underway, alongside the introduction of the new Agrarian Promotion Law, which further strengthens the policy framework that has supported the sector's growth for more than two decades.

The Association of Agricultural Producer Guilds of Peru (AGAP) is the principal representative body of Peru's agricultural sector, dedicated to promoting its development, competitiveness, and sustainability. It operates as an association of associations, comprising seven member organisations that collectively represent 346 of the country's largest agricultural companies.

ProCitrus represents stakeholders of the main citrus producing valleys of Peru. It promotes the technical and productive improvements of its members through the provision of quality services, the provision of inputs, and transparent representation before public and private institutions to facilitate citrus export growth.

MARKET DEVELOPMENTS AND OUTLOOK

In the near to medium term, Peru's main export fruit categories are expected to continue growing, although some products are approaching a more mature phase in established markets. At the same time, the expansion of planted areas and the entry into production of new hectares are expected to support the introduction and scaling up of additional export products.

External policy developments, particularly in the United States of America, will remain a key factor influencing future export performance. To mitigate market concentration risks, the industry is actively pursuing diversification through new market access and the development of new crops for export.

Asia is viewed as the most promising growth region over the medium term, supported by improving trade logistics and the development of the Chancay mega-port. However, the United States of America and Europe remain the largest, strategically most important, and most stable destinations for Peruvian fruit exports in the long term.

Ongoing investments in logistics, including the promotion of coastal shipping (cabotage) and the development of rail connectivity, are expected to significantly improve logistics performance and reduce structural bottlenecks over time.

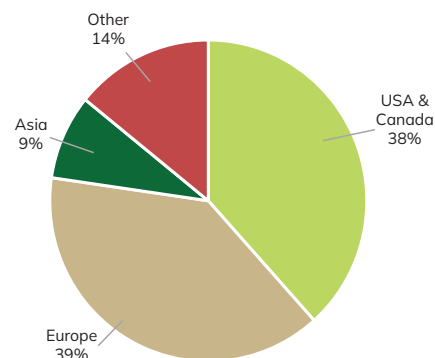




FRUIT EXPORTS BY DESTINATION, 2024/25

	Tonnes	1 yr change	5 yr trend	Share
USA & Canada	832 426	35%	13%	38%
Europe	845 009	39%	10%	39%
Asia	185 317	23%	2%	9%
Other	307 321	30%	12%	14%
World	2 170 073	35%	11%	

Source: Trade Map.



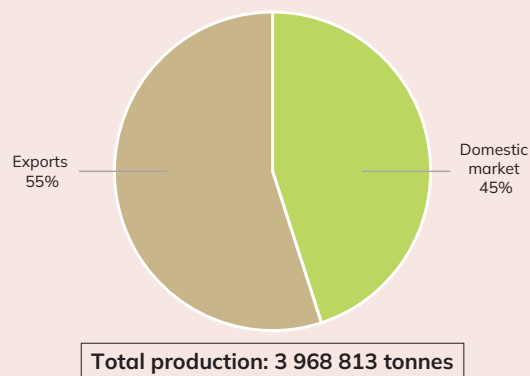
SUSTAINABILITY INITIATIVES

Peru's fruit industry continues to strengthen its focus on sustainability and resilience. Member companies of AGAP are implementing a wide range of initiatives aligned with AGAP's Sustainability Model, which is structured around six strategic pillars: Works for Taxes, Community Relations, Agriculture for Development, Education, Environmental Sustainability, and Responsible Business Conduct.

These initiatives address improvements in productivity and quality, environmental stewardship, social responsibility, food safety, and market access, as well as strengthening consumer perception and brand awareness in overseas markets.



DESTINATION (EXPORT/ DOMESTIC) OF OVERALL FRUIT PRODUCTION



Source: Trade Map, FAOSTAT.

SOUTHERN HEMISPHERE FRUIT ALLIANCE MEMBERS IN PERU



South Africa is often seen as Europe's "fruit bowl of the south". The country provides large, reliable volumes of citrus fruit, table grapes, avocados, pome, stone and other fruits during the Northern Hemisphere off-season.

In the 12 months to September 2025, South Africa exported 4.8 million tonnes of fresh temperate and subtropical fruits, with European destinations accounting for 43 percent of total exports. Over 60 percent of South Africa's fresh fruit production is exported.

The country has established long-term trade relationships with buyers in the European Union and the United Kingdom as well as North America and Asia. Sophisticated export and cold chain infrastructure, and high compliance with European quality and sustainability standards are strong advantages.

PRODUCTION TRENDS AND WEATHER IMPACTS



Citrus production and exports increased considerably in 2025, supported by favourable growing conditions and higher output from young orchards entering production. Improved varietal performance and increased use of protective netting contributed to better pack-outs and higher export volumes. The 2025 table grape season benefitted from favourable weather conditions, leading to increased production and export volumes. Additional hectares entering production, together with new varieties and improved fruit quality, supported higher shipments. Similarly, the stone and pome fruit production saw increased pack outs assisted by favourable weather and investments into new and replaced orchards resulting

FRUIT PRODUCTION, 2023

	Tonnes	5 yr trend	Share
Oranges	1 596 859	3%	27%
Soft citrus	790 308	14%	13%
Lemons & limes	726 950	4%	12%
Grapefruit	419 221	5%	7%
Total citrus	3 533 338	6%	60%
Apples	1 198 897	8%	20%
Pears	481 358	4%	8%
Grapes	341 305	3%	6%
Peaches & nectarines	188 048	4%	3%
Plums	94 288	11%	2%
Avocados	81 021	8%	1%
Blueberries	5 489	14%	<1%
Cherries	1 797	36%	<1%
TOTAL	5 925 541	6%	

Source: FAOSTAT.

in improved quality, along with new market access. Avocado production was impacted by localised frost, hail, and wind damage in some growing regions, causing exports to decline around 10 percent in 2025. Nevertheless, the sector continues to benefit from sustained orchard expansion supporting longer-term growth.

PRODUCTION AREAS



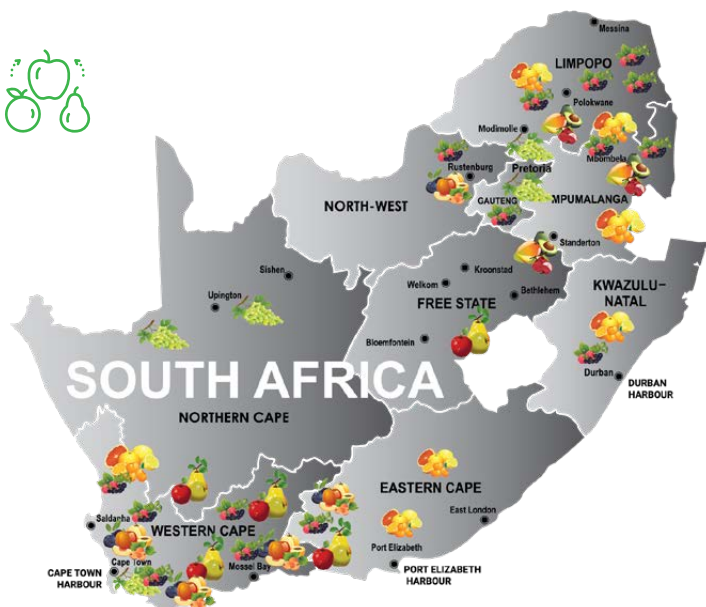
Citrus – Limpopo, Eastern Cape, Western Cape, Northern Cape, Mpumalanga, North West, and KwaZulu-Natal

Table grapes – Hex River, Berg River, and Olifants River in the Western Cape, the Orange River in the Northern Cape, and Limpopo and Mpumalanga in the north

Apples and pears – Western Cape, Eastern Cape, Free State, Mpumalanga, Northern Provinces

Stone fruit – Western Cape, Eastern Cape, Limpopo, Free State, Mpumalanga, North West, Gauteng, KwaZulu-Natal

Avocados – Limpopo, Mpumalanga, KwaZulu-Natal, Eastern Cape, and Western Cape



Source:
Fruit South Africa



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INDUSTRY STRUCTURES AND GOVERNMENT SUPPORT

South Africa's fruit sectors are represented by established commodity organisations, with Fruit South Africa acting as the industry's umbrella organisation. These organisations support growers through research, market access, logistics coordination, sustainability initiatives, and engagement with government and international stakeholders.

Government engagement has focused primarily on improving port efficiency and supporting trade diversification including co-funding the development of small-scale farmers and ultimately committing to the implementation of the Agriculture Agroprocessing Master Plan.



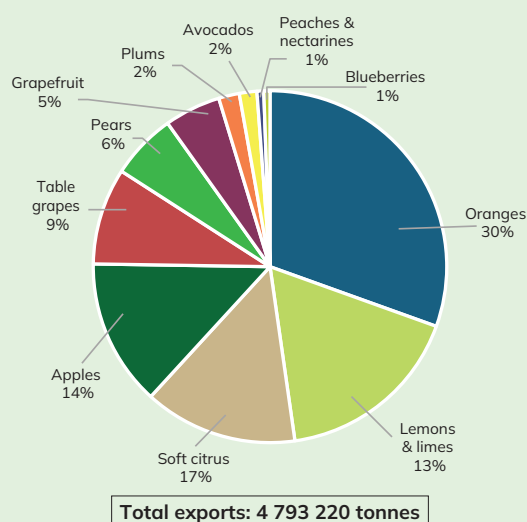
DRIVERS AND CONSTRAINTS IN EXPORT PERFORMANCE

Port inefficiencies and tariff barriers remain common challenges across South Africa's major fruit export categories. Export performance, particularly for citrus and plums, has been constrained by higher tariffs in the United States of America and evolving maximum residue level requirements in Europe, alongside short-term container availability issues that temporarily disrupted supply chains. Across categories, margins continue to be influenced by tariff barriers, rising production costs, and consumer price sensitivity in destination markets. Logistics performance improved materially in 2025, providing a more stable platform for future export growth. Investments in port infrastructure and operational reforms resulted in fewer bottlenecks and improved service reliability, although capacity constraints remain a consideration during peak periods.

MARKET DEVELOPMENTS AND OUTLOOK

Europe and the United Kingdom remain core markets to most South African fruit exports, alongside targeted development in some Asian and North American markets. Further growth is expected as new plantings mature. Citrus expansion will be led by soft citrus types and Valencia oranges, with India emerging as a growth market. Table grape growth is expected to be modest and quality focused. Avocado exports are expected to increase steadily, driven by increasing demand and supported by maturing orchards, category promotion, and improving logistics. South Africa is increasing its presence in Asian markets and is now the second largest supplier of apples to China, gained new market access for stone fruit to China, and regained access for apples to Thailand. The in-transit cold treatment of apple exports to India has resulted in growth in that market. Overall, apples and pears are increasing production by 2–3 percent per year.

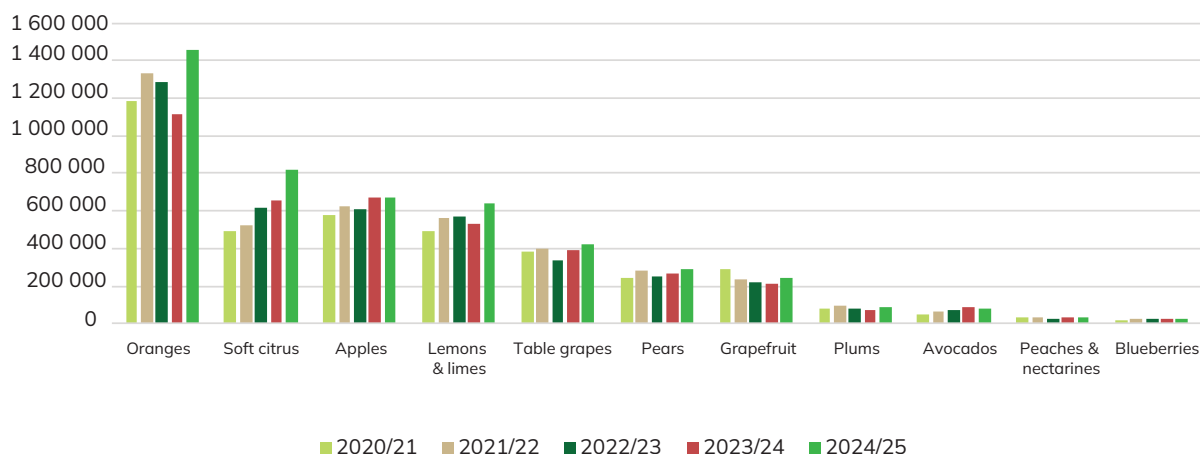
FRUIT EXPORTS, 2024/25



	Tonnes	1 yr change	5 yr change	Share
Oranges	1 455 822	31%	5%	30%
Soft citrus	822 794	25%	14%	17%
Apples	669 971	0%	4%	14%
Lemons & limes	642 749	21%	7%	13%
Table grapes	423 601	9%	2%	9%
Pears	288 417	9%	5%	6%
Grapefruit	245 748	16%	-4%	5%
Plums	90 340	26%	2%	2%
Avocados	76 506	-10%	10%	2%
Peaches & nectarines	29 640	2%	-2%	1%
Blueberries	26 846	-5%	9%	1%
Total	4 793 220	18%	6%	

Source: Trade Map.

OTHER FRUIT EXPORTS, FIVE-YEAR TREND (TONNES)

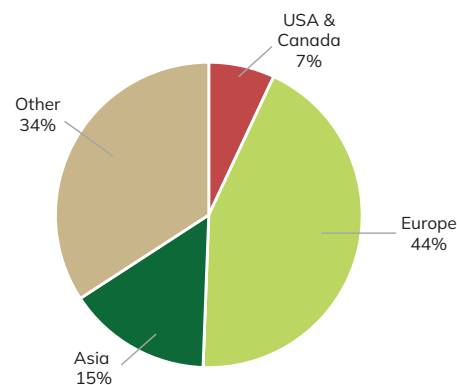


Source: Trade Map.

FRUIT EXPORTS BY DESTINATION, 2024/25

	Tonnes	1 yr chg	5 yr trend	Share
USA & Canada	333 342	29%	11%	7%
Europe	2 091 924	18%	5%	44%
Asia	728 722	8%	0%	15%
Other	1 639 232	19%	8%	34%
World	4 793 220	18%	6%	

Source: Trade Map.

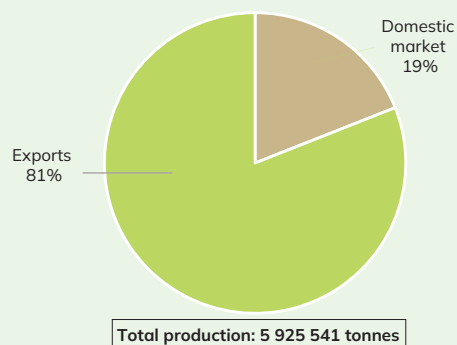


SUSTAINABILITY INITIATIVES

Across all fruit categories, South Africa maintains a strong commitment to environmental sustainability and social responsibility. Industry-wide initiatives such as SIZA (the Sustainability Initiative of South Africa, <https://siza.co.za>), commodity-specific research programmes, and coordinated food safety forums underpin market access and compliance with international standards.



DESTINATION (EXPORT/ DOMESTIC) OF OVERALL FRUIT PRODUCTION



Total production: 5 925 541 tonnes

Source: Trade Map, FAOSTAT.

SOUTHERN HEMISPHERE FRUIT ALLIANCE MEMBERS IN SOUTH AFRICA



Uruguay is a reliable, high-quality supplier of fresh fruit (and especially citrus fruit), differentiating itself through timing, quality control, and adherence to strict international protocols. Uruguay's fresh fruit industry is a significant exporter, leveraging its Southern Hemisphere counterseason position for citrus (oranges, soft citrus, lemons) to Europe and North America alongside other fruits, including blueberries and apples. The industry emphasizes technology, sustainability, and traceability for food safety and premium market access.

PRODUCTION TRENDS AND WEATHER IMPACTS



Uruguay's 2025 citrus season produced high-quality fruit despite challenging weather conditions. However, two frost episodes during the production cycle affected the expected export volumes for citrus. As a result, citrus exports fell by 11 percent to 55 500 tonnes in the 12 months to September 2025, with a reduction of almost 30 percent in shipments to Europe.

FRUIT PRODUCTION, 2023

	Tonnes	5 yr trend	Share
Oranges	107 240	-2%	26%
Soft citrus	77 869	0%	19%
Lemons & limes	49 349	1%	12%
Grapefruit	740	-2%	<1%
Total citrus	235 197	-1%	58%
Grapes	98 349	3%	24%
Apples	48 023	3%	12%
Peaches & nectarines	12 286	-1%	3%
Pears	10 928	0%	3%
Plums	2 164	-4%	1%
TOTAL	406 948	1%	

Source: FAOSTAT.

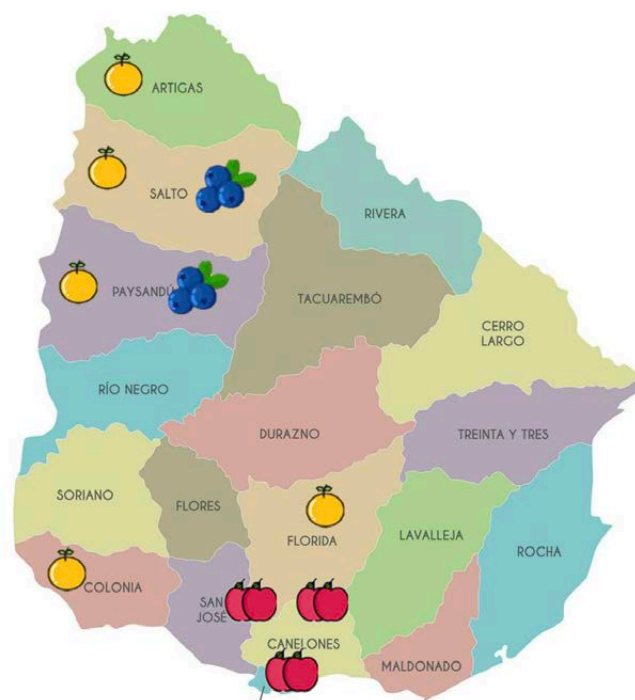
PRODUCTION AREAS



Citrus – Artigas, Colonia, Florida, Paysandú, Salto

Blueberries – Paysandú, Salto

Apples – southern regions around Montevideo, Canelones, San José

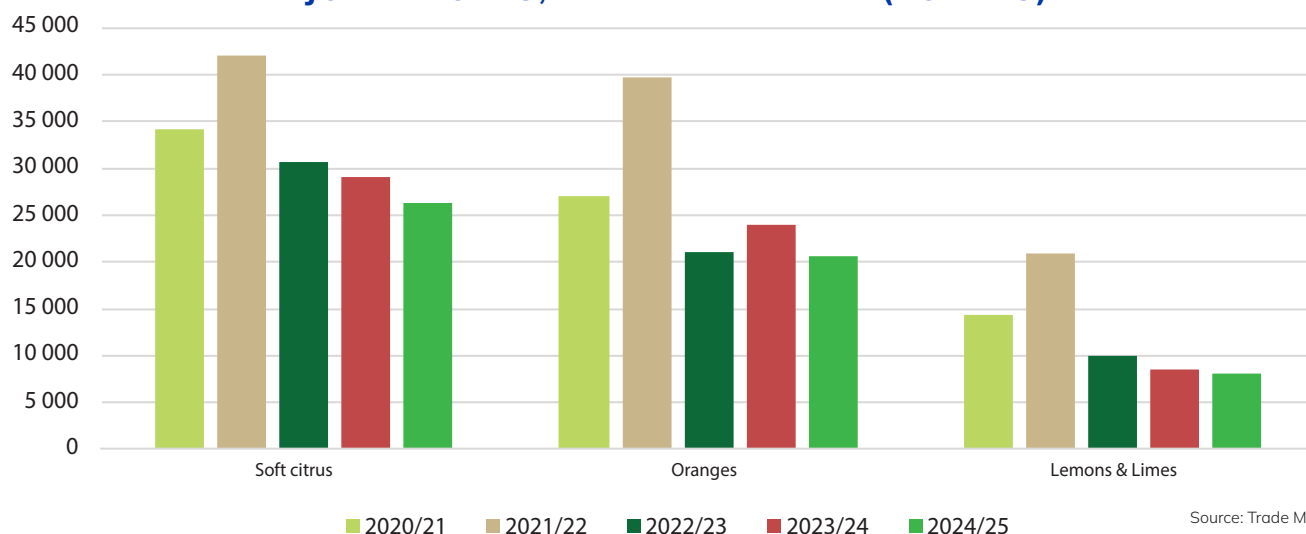


INDUSTRY STRUCTURES AND GOVERNMENT SUPPORT

Uruguay's fruit sector is represented by the Union of Fruit Producers and Exporters of Uruguay (UPEFRUY).



MAJOR EXPORTS, FIVE-YEAR TREND (TONNES)



DRIVERS AND CONSTRAINTS IN EXPORT PERFORMANCE

Uruguay's fresh fruit export performance is driven by its favourable climate, fertile land, and government support for technology and sustainable practices, enhancing quality particularly for its main markets in Europe and the United States of America.

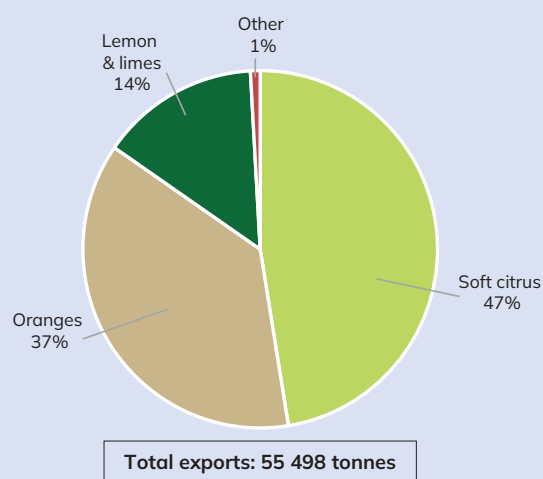
Global logistics difficulties, notably the Panama Canal and Red Sea issues, increasing climate change risks affecting water availability, and depressed commodity prices are constraints affecting growers. Success hinges on quality, branding, and adapting logistics to face tight margins and global supply chain disruptions.

MARKET DEVELOPMENTS AND OUTLOOK

Although facing challenges Uruguay's fresh fruit export market is expected to grow over the next 5 years, driven by strong citrus (oranges, soft citrus) and growing potential for high value blueberries. The growth is fuelled by new plantings, favourable weather, and increasing global demand for healthy produce in Europe and North America.



FRUIT EXPORTS, 2024/25



	Tonnes	1 yr change	5 yr change	Share
Soft citrus	26 330	-9%	-6%	47%
Oranges	20 630	-14%	-7%	37%
Lemons & limes	8 034	-6%	-14%	14%
Blueberries	248	-13%	-28%	<1%
Apples	243	0%	-46%	<1%
Total	55 498	-11%	-9%	

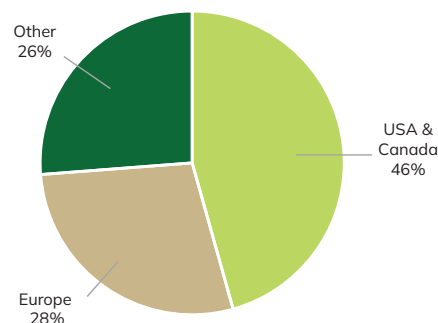
Source: Trade Map.



FRUIT EXPORTS BY DESTINATION, 2024/25

	Tonnes	1 yr chg	5 yr trend	Share
USA & Canada	25 339	-7%	-4%	46%
Europe	15 606	-30%	-18%	28%
Other	14 553	14%	-3%	26%
World	55 498	-11%	-9%	

Source: Trade Map.

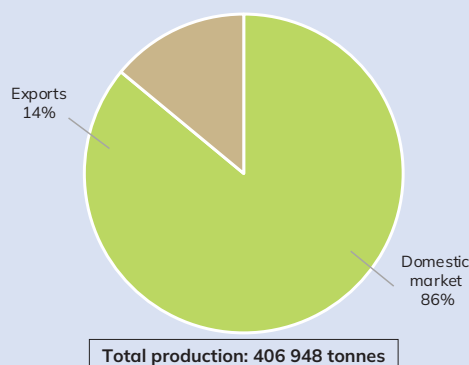


SUSTAINABILITY INITIATIVES

Uruguay's fresh fruit industry focuses on sustainability through smart agriculture, climate adaptation, resource efficiency (water, energy), and robust quality standards (HACCP, certifications). Key initiatives include promoting organic farming, reducing chemical use, enhancing traceability, and aligning with global demands for eco-friendly produce.



DESTINATION (EXPORT/ DOMESTIC) OF OVERALL FRUIT PRODUCTION



Source: Trade Map, FAOSTAT.

SOUTHERN HEMISPHERE FRUIT ALLIANCE MEMBER IN URUGUAY



Unión de Productores y Exportadores Frutihortícolas del Uruguay

The Republic of Zimbabwe is a landlocked country in Southeast Africa, bordered by South Africa to the south.

Agriculture is vitally important to the Zimbabwean economy, and the country has a rapidly growing, high-value horticulture segment traditionally led by citrus, but increasingly diversifying into premium berries and avocados. The growth in fresh fruit production is largely driven by export market development, government-led policy frameworks, and a strategic shift toward irrigated, high-value crops. Challenges remain with logistics, power supply, and consistent investments for sustainable growth.

Eighty percent of Zimbabwe's fresh fruit exports are destined to European markets. Fresh fruit exports account for around 18 percent of overall fruit production, with plans to expand.

PRODUCTION TRENDS AND WEATHER IMPACTS



Zimbabwe's fresh fruit export industry has benefitted from generally favourable weather conditions and the continued expansion of irrigated farming systems, supporting stable production levels and a positive market outlook. While drought and other extreme weather events remain key risks, the sector is increasingly adopting climate-smart production systems to mitigate these impacts.

PRODUCTION AREAS

Avocados – Manicaland and Mashonaland Central

Blueberries – Mashonaland Central and East

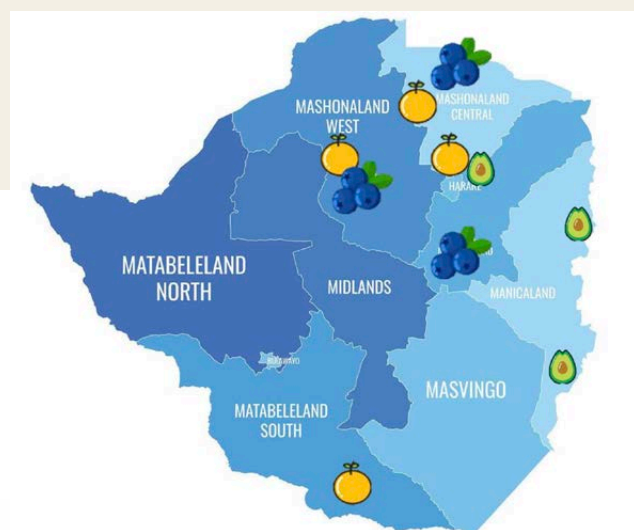
Citrus – Beit Bridge, Chegutu and Mvurwi areas



FRUIT PRODUCTION, 2023

	Tonnes	5 yr trend	Share
Oranges	177 424	7%	46%
Soft citrus	13 467	0%	4%
Lemons & limes	68 341	5%	18%
Grapefruit	9 449	1%	2%
Total citrus	268 681	6%	70%
Avocados	91 017	11%	24%
Peaches & nectarines	8 949	3%	2%
Apples	4 964	6%	1%
Grapes	3 572	0%	1%
Pears	3 244	2%	1%
Blueberries	2 841	188%	1%
Plums	270	0%	<1%
TOTAL	383 540	7%	

Source: FAOSTAT.



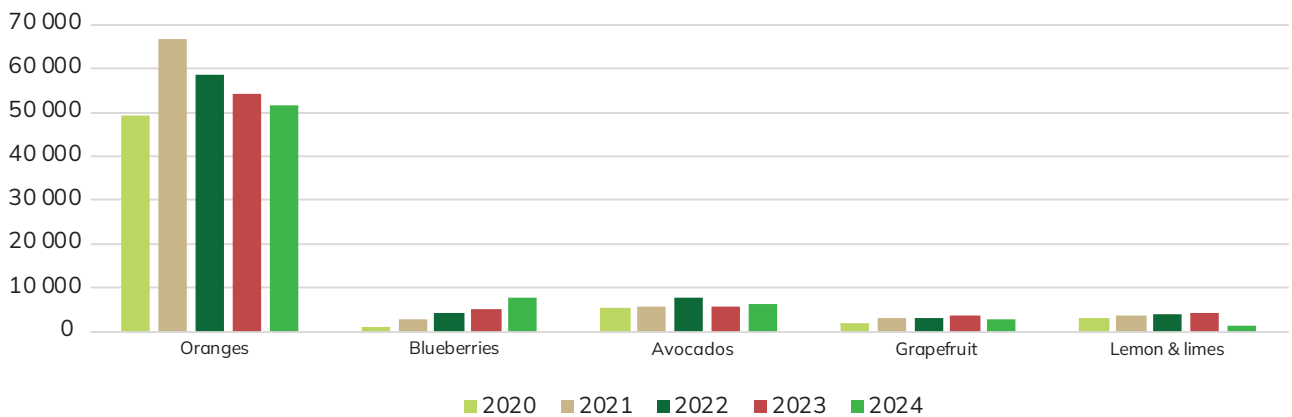
Source: Horticultural Development Council

INDUSTRY STRUCTURES AND GOVERNMENT SUPPORT

The Zimbabwean horticulture industry is represented by the Horticultural Development Council (HDC). The HDC is a non-profit, membership-driven organisation that plays a vital role in improving horticultural business efficiency and competitiveness in Zimbabwe.



MAJOR FRUIT EXPORTS, FIVE-YEAR TREND (TONNES)



Source: Trade Map.

DRIVERS AND CONSTRAINTS IN EXPORT PERFORMANCE

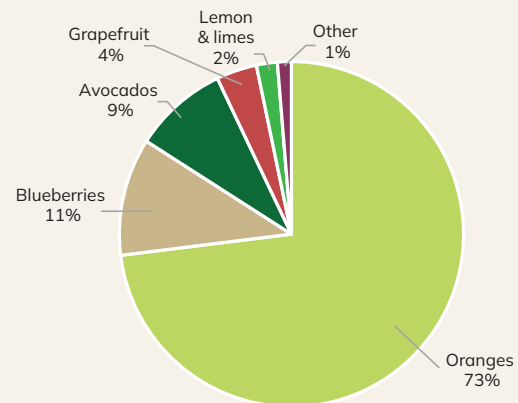
Zimbabwe's temperate fruit production, estimated at around 400 000 tonnes, continues to expand on the back of steady domestic demand and growing export opportunities. Productivity gains are being driven by the uptake of climate-smart irrigation systems, government-supported schemes, and solar-powered water systems, enabling smallholder growers to lift year-round output and meet premium market specifications. Production is increasingly shifting toward higher-value crops such as blueberries and avocados. Supported by favourable climatic conditions, rising agricultural investment, and strong consumer demand for healthy foods, Zimbabwe's blueberry industry is scaling rapidly, with recent market access to China expected to further accelerate production growth.

MARKET DEVELOPMENTS AND OUTLOOK

Zimbabwe's fruit export sector is forecast to grow at a compound annual growth rate of 5 percent through to 2030. High-value export crops, including blueberries and avocados, generate farm-gate prices three times higher than traditional crops. Growers are increasingly adopting GLOBALG.A.P. and organic certifications to access premium European retail markets.



FRUIT EXPORTS, 2024/25



Total exports: 70 941 tonnes

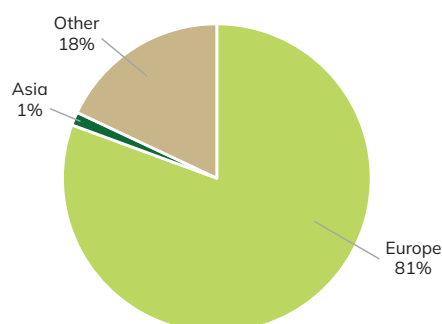
	Tonnes	1 yr change	5 yr change	Share
Oranges	51 511	-5%	1%	73%
Blueberries	7 767	54%	69%	11%
Avocados	6 253	9%	4%	9%
Grapefruit	2 689	-26%	8%	4%
Lemons & limes	1 384	-69%	-18%	2%
Soft citrus	663	254%	3%	1%
Peaches & nectarines	259	173%	2%	<1%
Total	70 941	-3%	4%	

Source: Trade Map.

FRUIT EXPORTS BY DESTINATION, 2024/25

	Tonnes	1 yr chg	5 yr trend	Share
USA & Canada	158	-68%	-36%	<1%
Europe	57 052	9%	6%	80%
Asia	989	-61%	31%	1%
Other	12 742	-29%	-5%	18%
World	70 941	-3%	4%	

Source: Trade Map.



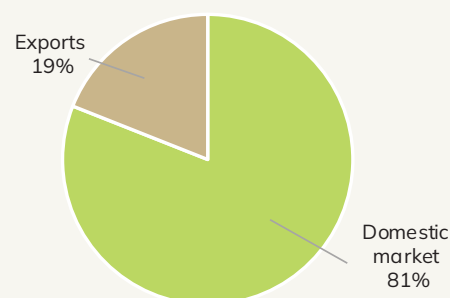
SUSTAINABILITY INITIATIVES

Zimbabwe's horticulture development strategy focuses on expanding and diversifying production while promoting inclusive growth through smallholder participation and structured out-grower schemes. Strengthening the production base will be supported by continued advocacy for an enabling policy and regulatory environment, improved infrastructure and logistics, and increased access to finance and investment across the value chain. These measures are intended to improve efficiency, reduce post-harvest losses, and enhance Zimbabwe's competitiveness in regional and international export markets.

Sustainability is a core priority, with emphasis on climate-smart production practices, efficient use of water and energy, and long-term environmental stewardship. Delivering these outcomes will require a strong coordinating institution, with the Horticulture Development Council (HDC) playing a central role in aligning stakeholders, implementing strategy, and ensuring the sector achieves inclusive, sustainable growth.

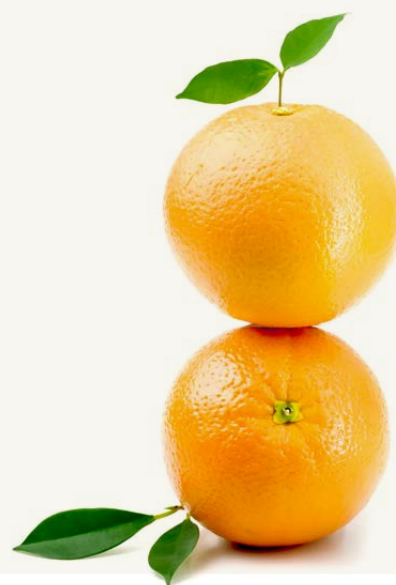


DESTINATION (EXPORT/ DOMESTIC) OF OVERALL FRUIT PRODUCTION



Total production: 383 540 tonnes

Source: Trade Map, FAOSTAT.



SOUTHERN HEMISPHERE FRUIT ALLIANCE MEMBER IN ZIMBABWE





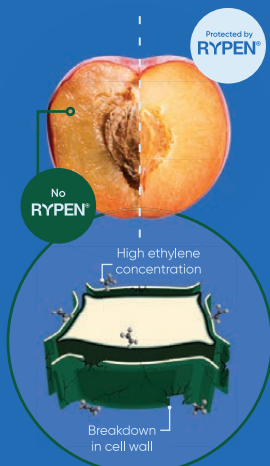
Moderating, rather than blocking or oxidising ethylene, can deliver better outcomes through the entire fresh produce supply chain.

Smart Fresh Produce Packaging



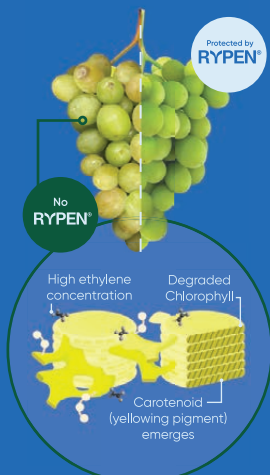
Firmer fresh produce

Slows ethylene activity, preserving cell walls and reducing shrivelling.



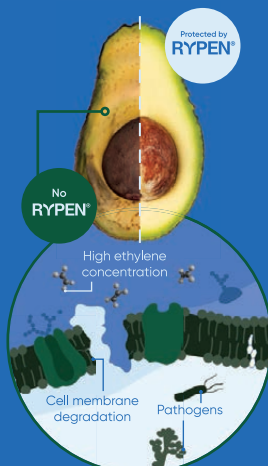
More vibrant colours

Delays chlorophyll breakdown, maintaining greenness and fresh appearance.



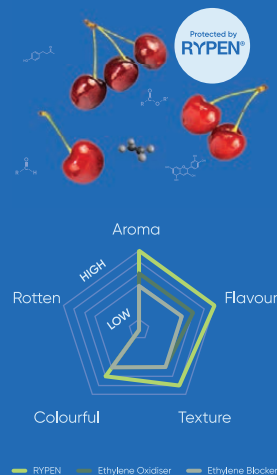
Reduced rot, decay & mould

Protects membranes, limiting pathogen entry and slowing browning.

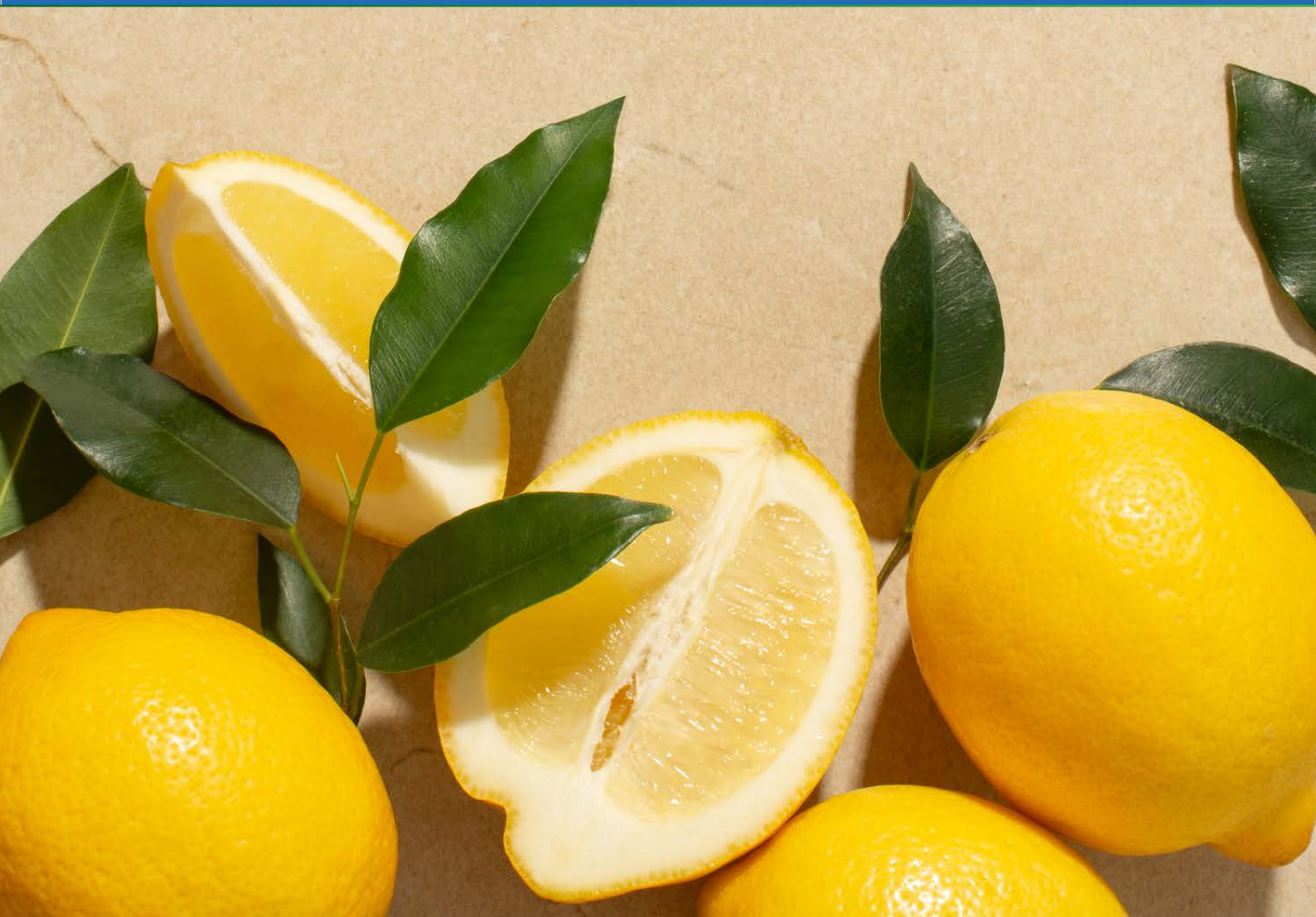


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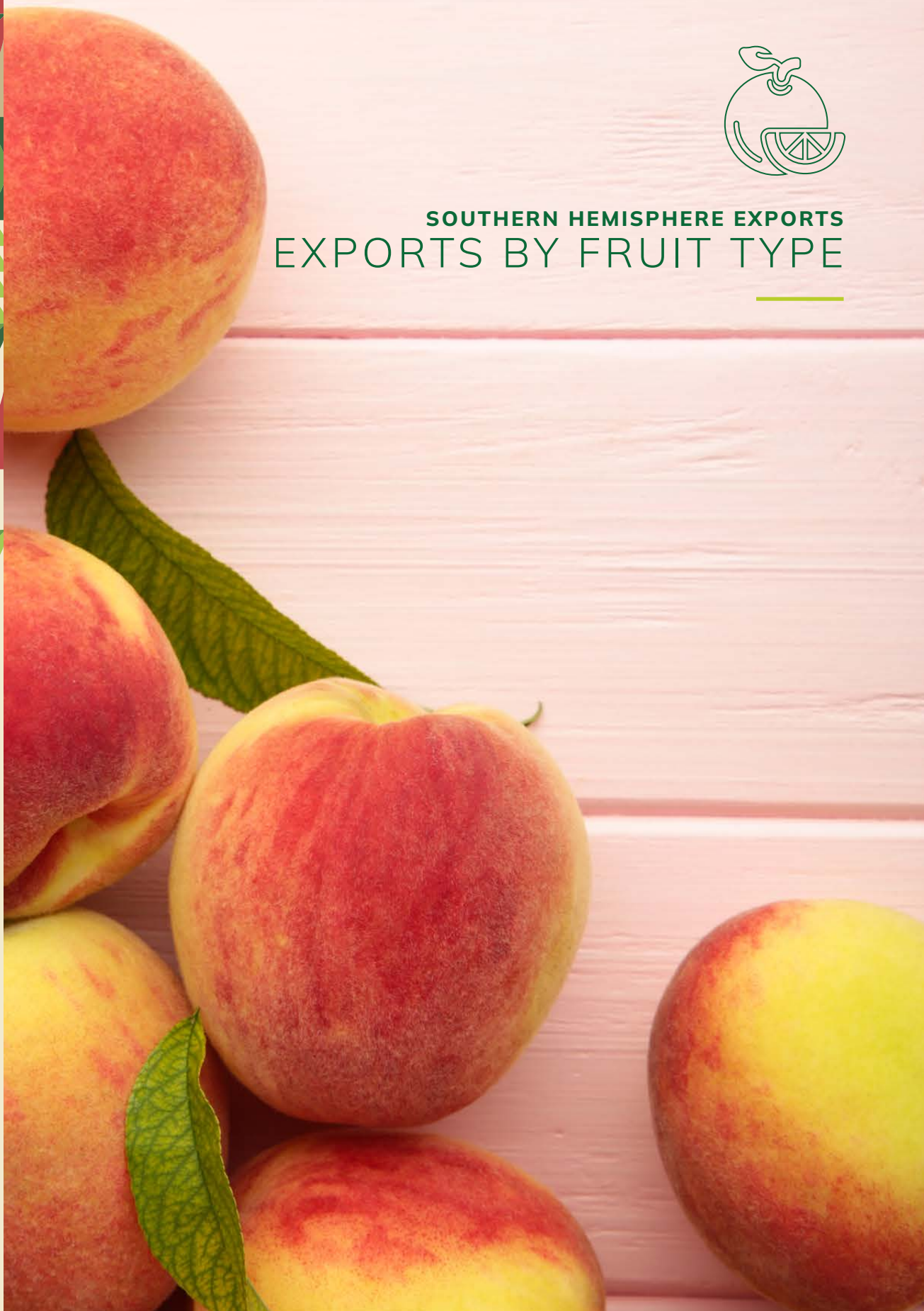


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SOUTHERN HEMISPHERE EXPORTS
EXPORTS BY FRUIT TYPE



APPLES

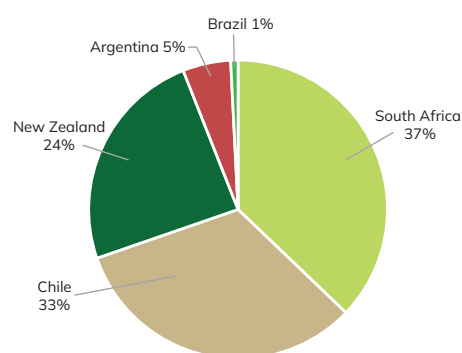
Overall apple exports from the Southern Hemisphere increased 11 percent year-on-year in 2024/25 to 1.8 million tonnes, although the five-year trend is steady. Europe is the main destination for Southern Hemisphere apples.

South Africa is the largest exporter of apples in the Southern Hemisphere, with over 30 percent of the country's export volume sent to African markets.

Since apples can be cold-stored, exports are influenced by climate events in both hemispheres. A large harvest in the North can reduce the demand for Southern apples, and vice versa.

EXPORTS OF APPLES FROM THE SOUTHERN HEMISPHERE, 2024/25

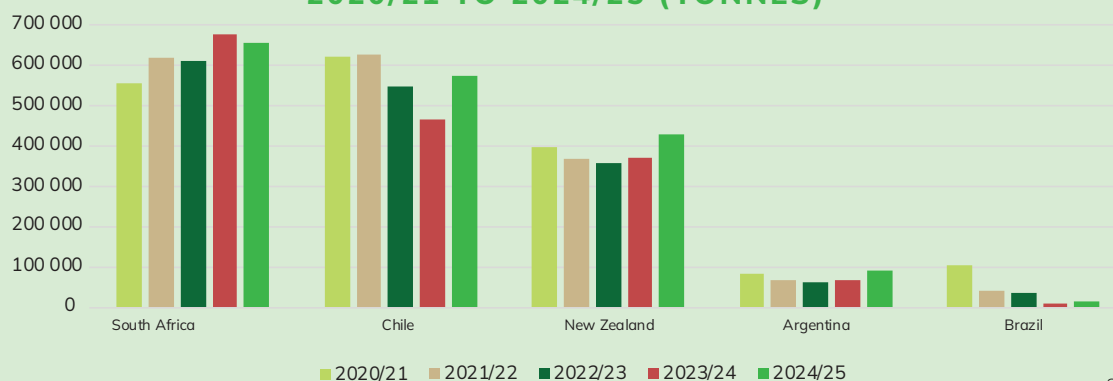
	Tonnes	1 yr change	5 yr change	Share
South Africa	656 430	-3%	4%	37%
Chile	575 190	23%	-2%	33%
New Zealand	429 389	16%	2%	24%
Argentina	91 817	35%	3%	5%
Brazil	13 997	35%	-39%	1%
Australia	1 862	-32%	-5%	<1%
Southern Hemisphere	1 768 686	11%	0%	



Total exports: 1 768 686 tonnes

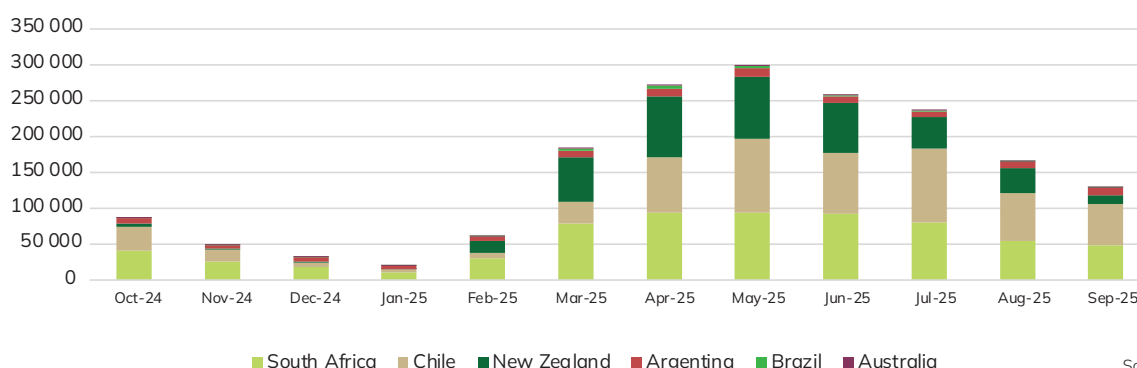
Source: Trade Map.

EXPORTS OF APPLES FROM THE SOUTHERN HEMISPHERE, 2020/21 TO 2024/25 (TONNES)



Source: Trade Map.

EXPORTS OF APPLES BY MONTH, OCTOBER 2024 TO SEPTEMBER 2025 (TONNES)



Source: Trade Map.

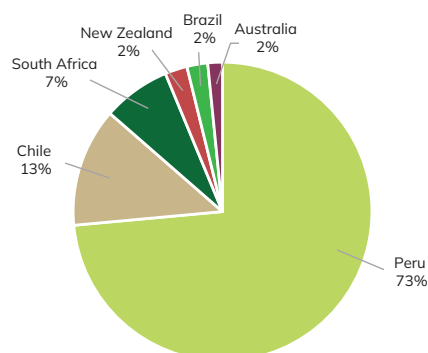
AVOCADOS

Exports of avocados are increasing rapidly, driven by the growing popularity of the fruit.

Peru is the Southern Hemisphere's largest exporter of avocados by a large margin. The country supplies mostly to Europe, although export volumes to Asia (China and Japan) are increasing. Chile is able to supply avocados in the counterseason to Peru, even though both countries are in the Southern Hemisphere.

EXPORTS OF AVOCADOS FROM THE SOUTHERN HEMISPHERE, 2024/25

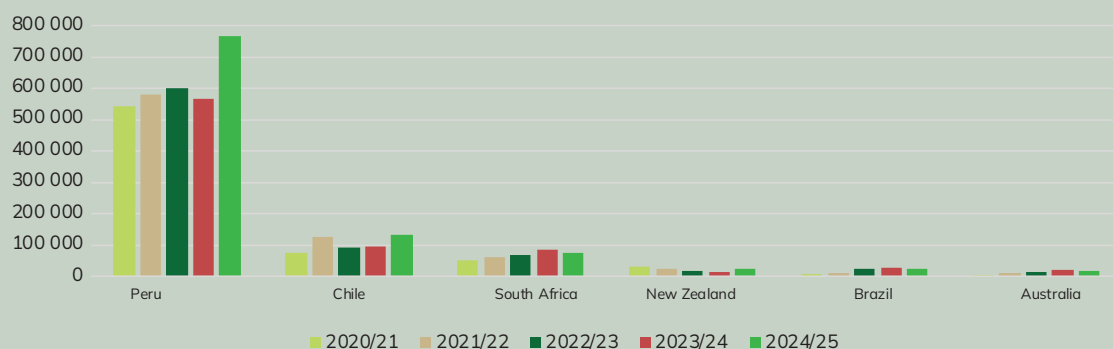
	Tonnes	1 yr change	5 yr change	Share
Peru	766 383	35%	9%	73%
Chile	134 190	39%	16%	13%
South Africa	76 506	-10%	10%	7%
New Zealand	25 116	74%	-5%	2%
Brazil	23 430	-11%	28%	2%
Australia	16 525	-22%	31%	2%
Zimbabwe	2 509	-60%	-19%	<1%
Southern Hemisphere	1 044 659	28%	10%	



Total exports: 1 044 659 tonnes

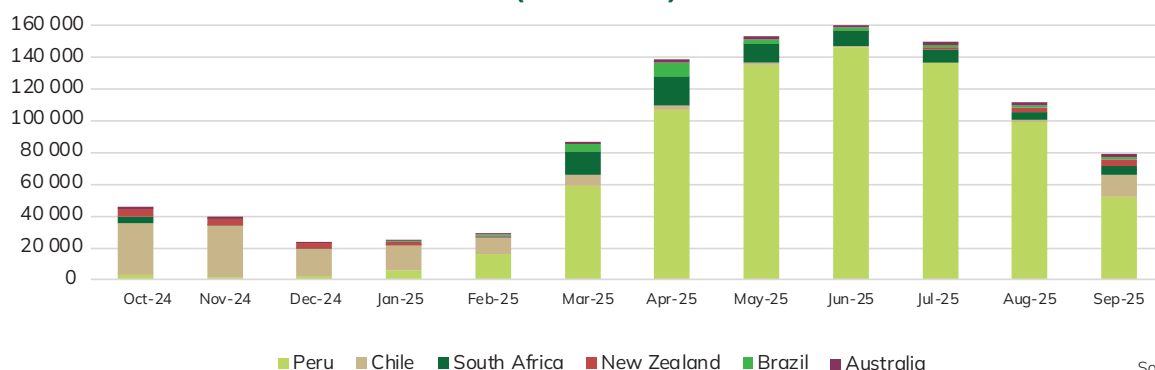
Source: Trade Map.

EXPORTS OF AVOCADOS FROM THE SOUTHERN HEMISPHERE, 2020/21 TO 2024/25 (TONNES)



Source: Trade Map.

EXPORTS OF AVOCADOS BY MONTH, OCTOBER 2024 TO SEPTEMBER 2025 (TONNES)



Source: Trade Map.

BLUEBERRIES

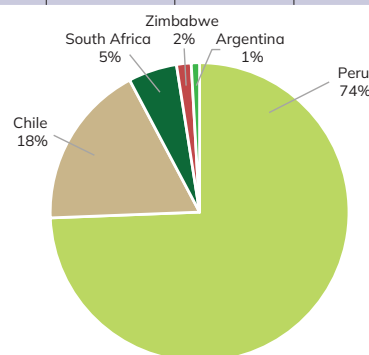
Over half a million tonnes of blueberries were exported from the Southern Hemisphere in 2024/25, with Peru being the leading exporter followed by Chile, South Africa, and emerging Zimbabwe. Peru is the world's leading blueberry exporter, accounting for 74 percent of total exports from the Southern Hemisphere in 2024/25. Exports from Peru grew by an average 19 percent annually over the past five years. In 2025, the country's blueberry exports surged by 63 percent, following a devastating weather impact during the previous season. Overall blueberry exports from the Southern Hemisphere grew by an average 11 percent per year over the past five years.

The main export destinations of blueberry exports from the Southern Hemisphere remain North America and Europe, with other markets such as the Far East attracting a growing share of shipments. The main supply period is from July to February. Supplies from Chile extend the Southern Hemisphere's supply season.



EXPORTS OF BLUEBERRIES FROM THE SOUTHERN HEMISPHERE, 2024/25

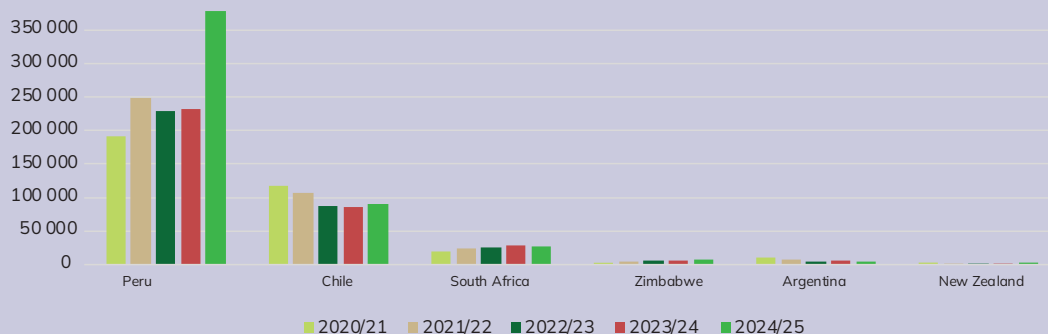
	Tonnes	1 yr change	5 yr change	Share
Peru	378 511	63%	19%	74%
Chile	90 893	5%	-6%	18%
South Africa	26 846	-5%	9%	5%
Zimbabwe	8 047	36%	40%	2%
Argentina	4 571	-19%	-18%	1%
New Zealand	2 350	25%	1%	<1%
Australia	727	-31%	19%	<1%
Uruguay	248	29%	-27%	<1%
Southern Hemisphere	512 193	42%	11%	



Total exports: 512 193 tonnes

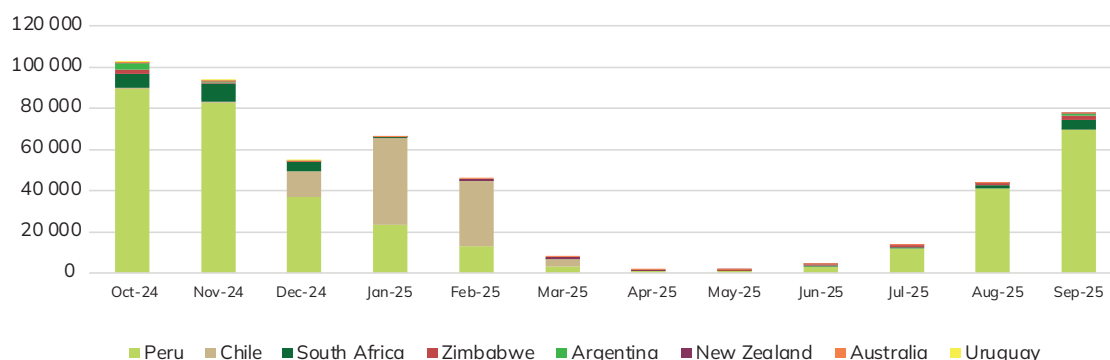
Source: Trade Map.

EXPORTS OF BLUEBERRIES FROM THE SOUTHERN HEMISPHERE, 2020/21 TO 2024/25 (TONNES)



Source: Trade Map.

EXPORTS OF BLUEBERRIES BY MONTH, OCTOBER 2024 TO SEPTEMBER 2025 (TONNES)



Source: Trade Map.

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CHERRIES

CHERRIES

Chile dominates Southern Hemisphere cherry exports, accounting for around 97 percent of overall export volumes and serving as the world’s leading exporter of fresh cherries.

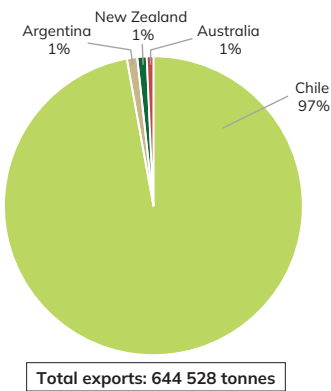
Most of these exports are shipped to China, the largest global importer of cherries. The country absorbs most of Chile’s shipments during peak demand periods in the lead-up to the Lunar New Year.

Other Southern Hemisphere producers include Argentina, Australia, New Zealand, and South Africa. While these countries contribute much smaller volumes, they target markets in Asia, Europe, and North America, thus complementing Chile’s exports.



EXPORTS OF CHERRIES FROM THE SOUTHERN HEMISPHERE, 2024/25

	Tonnes	1 yr change	5 yr change	Share
Chile	625 246	51%	15%	97%
Argentina	7 742	15%	8%	1%
New Zealand	5 995	35%	20%	1%
Australia	4 606	9%	-2%	1%
South Africa	939	-22%	12%	<1%
Southern Hemisphere	644 528	50%	15%	



Total exports: 644 528 tonnes

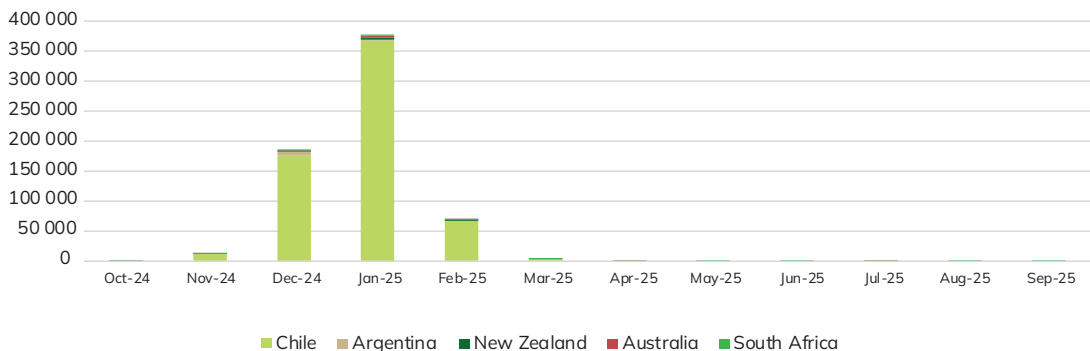
Source: Trade Map.

EXPORTS OF CHERRIES FROM THE SOUTHERN HEMISPHERE, 2020/21 TO 2024/25 (TONNES)



Source: Trade Map.

EXPORTS OF CHERRIES BY MONTH, OCTOBER 2024 TO SEPTEMBER 2025 (TONNES)



Source: Trade Map.

CITRUS FRUIT

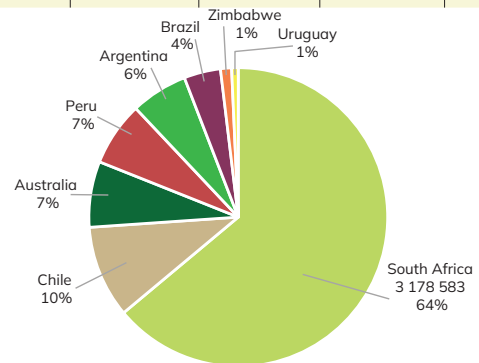
Overall citrus exports from the Southern Hemisphere increased by 23 percent year-on-year in 2024/25 to 5 million tonnes. The five-year trend is an average growth of 5 percent per year.

South Africa is the largest exporter of citrus in the Southern Hemisphere by a large margin, leading in all citrus categories. Europe is the main destination of the country's citrus exports.

The peak supply period is May to October for all suppliers, landing in spring and summer in the Northern Hemisphere and before the Northern production season commences.

EXPORTS OF CITRUS FRUIT OF FROM THE SOUTHERN HEMISPHERE, 2024/25

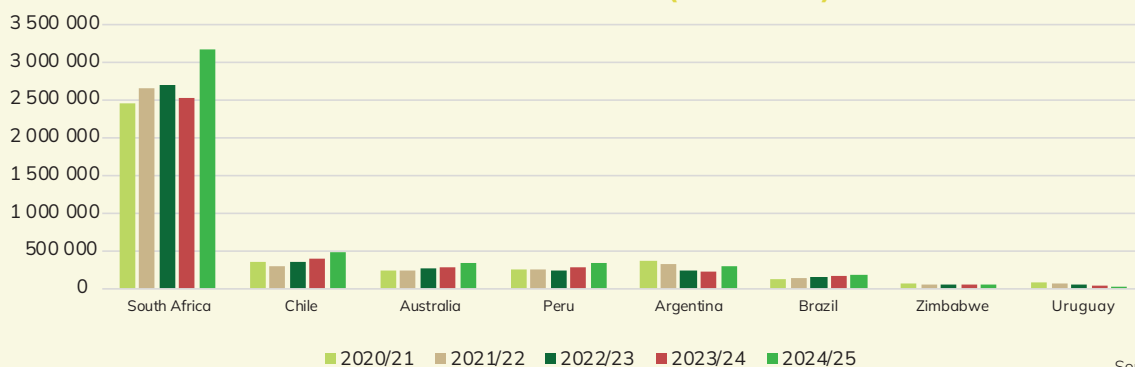
	Tonnes	1 yr change	5 yr change	Share
South Africa	3 178 583	26%	7%	64%
Chile	496 054	23%	8%	10%
Australia	354 217	22%	9%	7%
Peru	344 751	16%	7%	7%
Argentina	306 291	34%	-5%	6%
Brazil	197 003	10%	8%	4%
Zimbabwe	59 411	0%	-5%	1%
Uruguay	35 574	-34%	-20%	1%
Southern Hemisphere	4 971 884	23%	5%	



Total exports: 4 971 884 tonnes

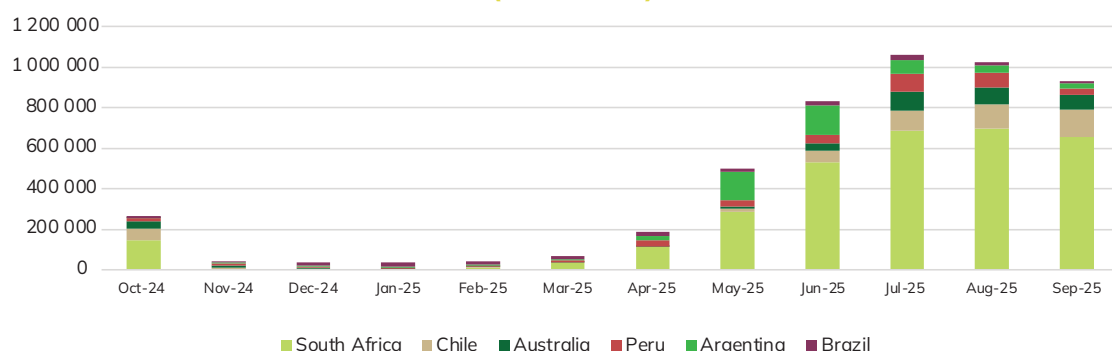
Source: Trade Map.

EXPORTS OF CITRUS FRUIT FROM THE SOUTHERN HEMISPHERE, 2020/21 TO 2024/25 (TONNES)



Source: Trade Map.

EXPORTS OF CITRUS FRUIT BY MONTH, OCTOBER 2024 TO SEPTEMBER 2025 (TONNES)



Source: Trade Map.

ORANGES

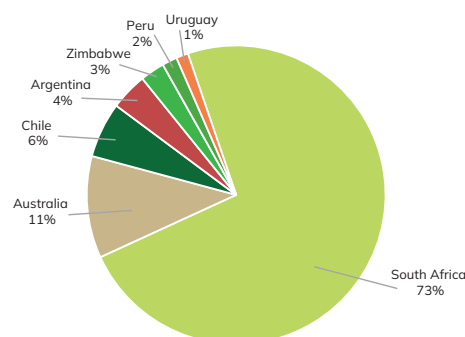
South Africa is the largest exporter of oranges in the Southern Hemisphere, followed by Australia and Chile. Europe is the main destination for South African oranges, while Asia is the main destination for oranges from Australia and the United States of America is the main destination for oranges from Chile.

Orange exports increased 28 percent year-on-year in 2024/25 to 2 million tonnes. The five-year trend is an average growth of 5 percent per year. All Southern Hemisphere suppliers recorded strong growth year-on-year in 2024/25.



EXPORTS OF ORANGES FROM THE SOUTHERN HEMISPHERE, 2024/25

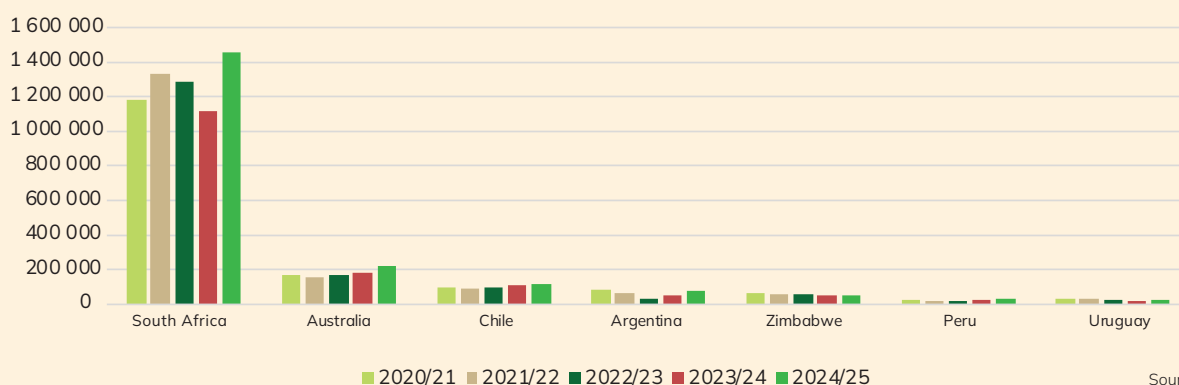
	Tonnes	1 yr change	5 yr change	Share
South Africa	1 455 822	31%	5%	73%
Australia	218 872	21%	7%	11%
Chile	118 921	11%	5%	6%
Argentina	79 592	51%	-1%	4%
Zimbabwe	52 414	2%	-6%	3%
Peru	32 317	32%	7%	2%
Uruguay	25 651	27%	-5%	1%
New Zealand	486	0%	2%	<1%
Southern Hemisphere	1 984 074	28%	5%	



Total exports: 1 984 074 tonnes

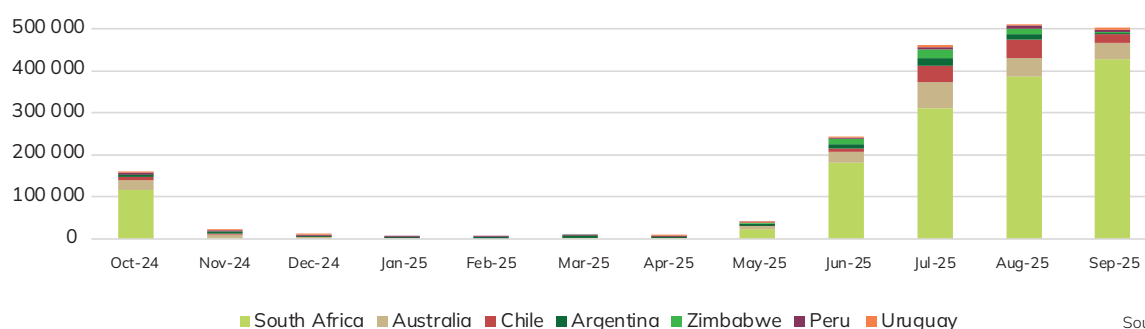
Source: Trade Map.

EXPORTS OF ORANGES FROM THE SOUTHERN HEMISPHERE, 2020/21 TO 2024/25 (TONNES)



Source: Trade Map.

EXPORTS OF ORANGES BY MONTH, OCTOBER 2024 TO SEPTEMBER 2025 (TONNES)



Source: Trade Map.

SOFT CITRUS

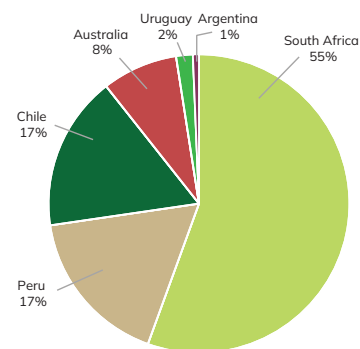
South Africa is the leading exporter of soft citrus in the Southern Hemisphere, followed by Peru and Chile. Europe is the main destination for South African soft citrus.

Overall soft citrus exports from the Southern Hemisphere increased 21 percent year-on-year in 2025 to 1.5 million tonnes. The category's average yearly growth rate 10 percent makes it the fastest trending citrus product over the past five years.



EXPORTS OF SOFT CITRUS FROM THE SOUTHERN HEMISPHERE, 2024/25

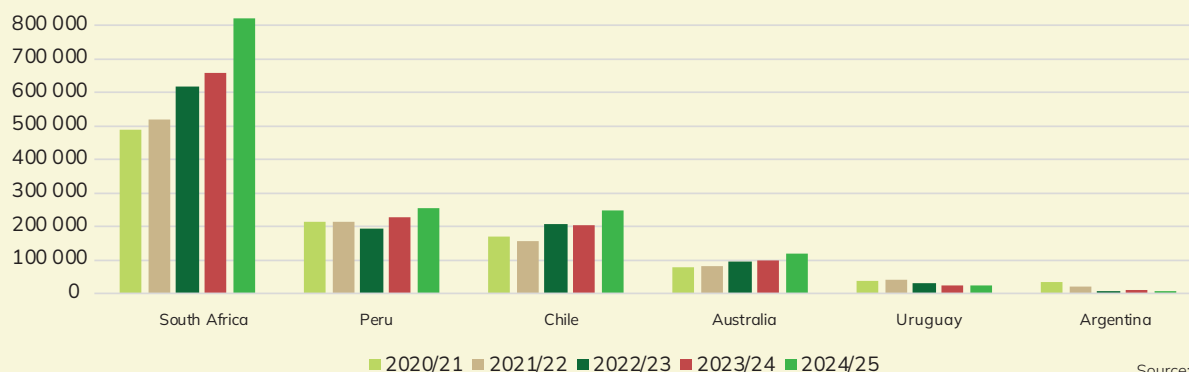
	Tonnes	1 yr change	5 yr change	Share
South Africa	822 794	25%	14%	55%
Peru	254 179	12%	4%	17%
Chile	248 047	22%	10%	17%
Australia	120 736	21%	11%	8%
Uruguay	26 594	4%	-8%	2%
Argentina	9 648	-6%	-28%	1%
Zimbabwe	1 079	63%	34%	<1%
New Zealand	189	-7%	-22%	<1%
Southern Hemisphere	1 483 267	21%	10%	



Total exports: 1 483 267 tonnes

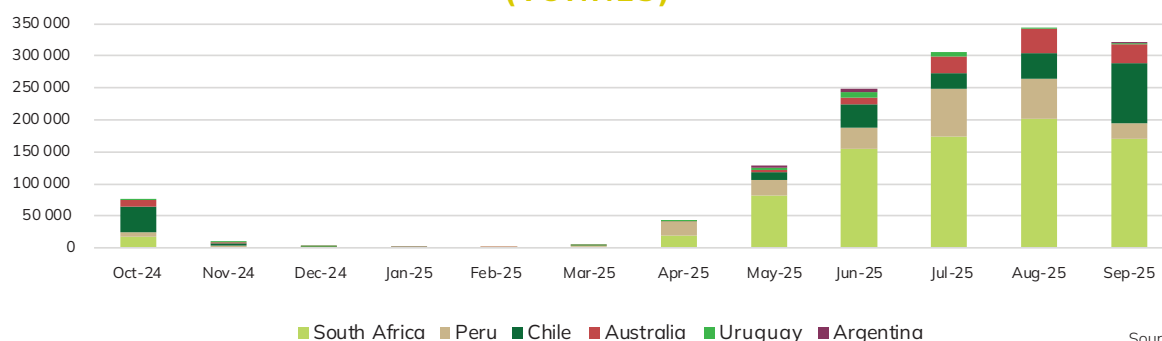
Source: Trade Map.

EXPORTS OF SOFT CITRUS FROM THE SOUTHERN HEMISPHERE, 2020/21 TO 2024/25 (TONNES)



Source: Trade Map.

EXPORTS OF SOFT CITRUS BY MONTH, OCTOBER 2024 TO SEPTEMBER 2025 (TONNES)



Source: Trade Map.

LEMONS AND LIMES

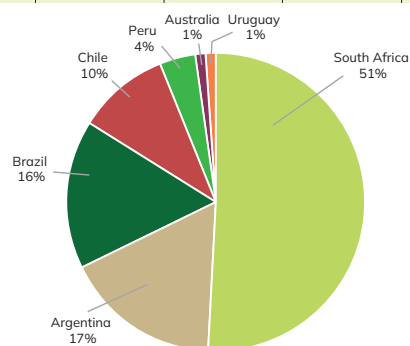
South Africa is the largest exporter of lemons in the Southern Hemisphere, followed by Argentina. Although lemons and limes are combined in the statistics, Brazil is by far the largest supplier of limes to Europe.

Overall lemon and lime exports from the Southern Hemisphere increased 23 percent year-on-year in 2025 to 1.3 million tonnes. The five-year trend is an average growth of 5 percent per year.



EXPORTS OF LEMONS AND LIMES FROM THE SOUTHERN HEMISPHERE, 2024/25

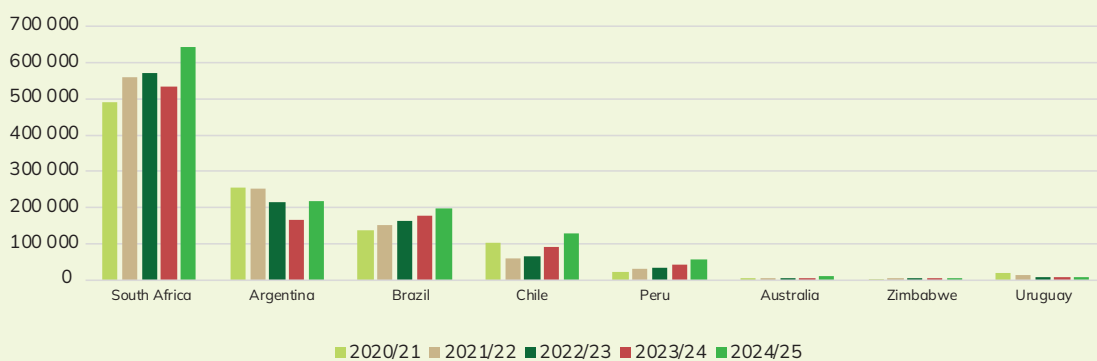
	Tonnes	1 yr change	5 yr change	Share
South Africa	642 749	21%	7%	51%
Argentina	216 534	31%	-4%	17%
Brazil	196 429	10%	9%	16%
Chile	127 643	39%	6%	10%
Peru	56 256	33%	27%	4%
Australia	11 667	80%	28%	1%
Uruguay	7 942	-2%	-19%	1%
Zimbabwe	5 441	44%	12%	<1%
Southern Hemisphere	1 264 660	23%	5%	



Total exports: 1 264 660 tonnes

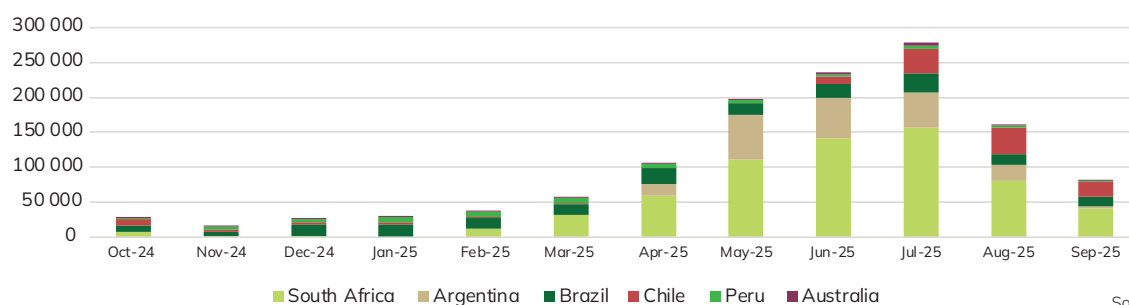
Source: Trade Map.

EXPORTS LEMONS AND LIMES FROM THE SOUTHERN HEMISPHERE, 2020/21 TO 2024/25 (TONNES)



Source: Trade Map.

EXPORTS LEMONS AND LIMES BY MONTH, OCTOBER 2024 TO SEPTEMBER 2025 (TONNES)



Source: Trade Map.

GRAPEFRUIT

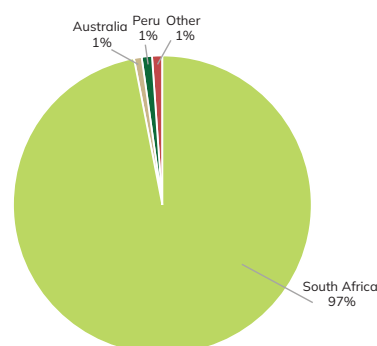
South Africa is the dominant exporter of grapefruit in the Southern Hemisphere, accounting for 97 percent of total exports from the region. Europe and Asia are the main destinations, with smaller volumes destined to the United States of America and other countries.

Overall grapefruit exports increased 14 percent year-on-year in 2025 to 253 857 tonnes. However, the five-year trend is an average decline of 4 percent per year.



EXPORTS OF GRAPEFRUIT FROM THE SOUTHERN HEMISPHERE, 2024/25

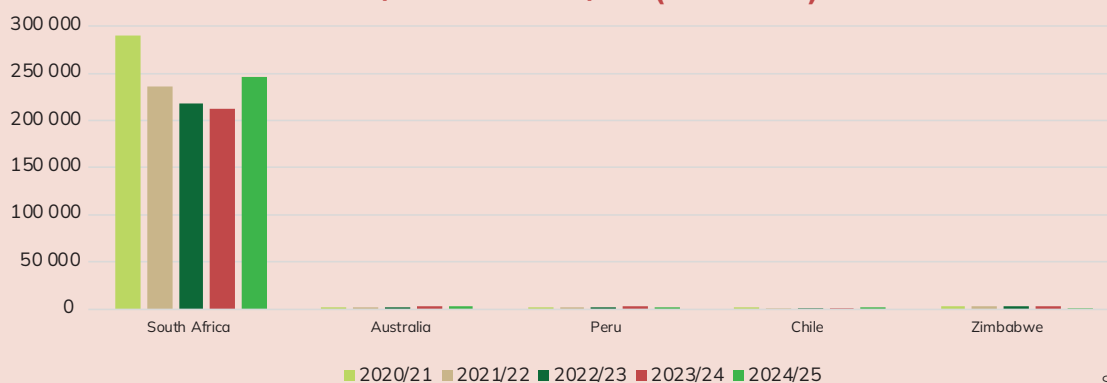
	Tonnes	1 yr change	5 yr change	Share
South Africa	245 748	16%	-4%	97%
Australia	2 898	7%	12%	1%
Peru	1 999	-32%	1%	1%
Chile	1 404	65%	-7%	1%
Zimbabwe	1 260	-58%	-20%	<1%
Argentina	517	-32%	-9%	<1%
New Zealand	16	-12%	-13%	<1%
Brazil	15	-2%	15%	<1%
Southern Hemisphere	253 857	14%	-4%	



Total exports: 253 857 tonnes

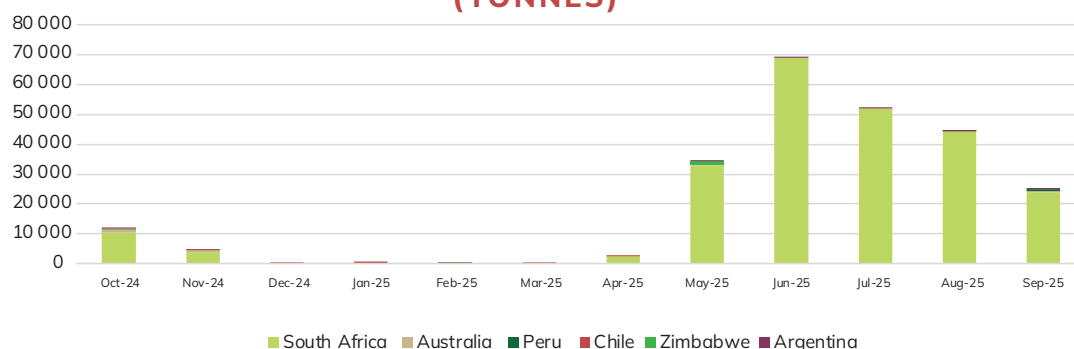
Source: Trade Map.

EXPORTS OF GRAPEFRUIT FROM THE SOUTHERN HEMISPHERE, 2020/21 TO 2024/25 (TONNES)



Source: Trade Map.

EXPORTS OF GRAPEFRUIT BY MONTH, OCTOBER 2024 TO SEPTEMBER 2025 (TONNES)



Source: Trade Map.

KIWIFRUIT

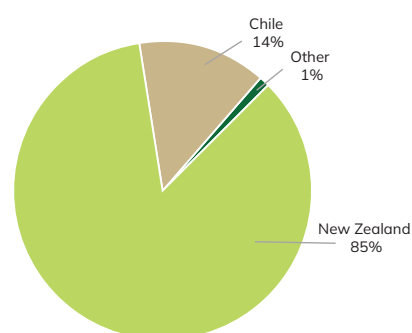
Overall kiwifruit exports from the Southern Hemisphere increased by 19 percent year-on-year in 2024/25 to a total 1 million tonnes; the five-year trend is an average 6 percent growth per year.

New Zealand is the largest exporter of kiwifruit in the Southern Hemisphere by a large margin, followed by Chile. Europe is the main destination of Southern Hemisphere kiwifruit exports.

The peak supply period is March to September for all suppliers, landing in spring and summer in the Northern Hemisphere and before the Northern production season commences.

EXPORTS OF KIWIFRUIT FROM THE SOUTHERN HEMISPHERE, 2024/25

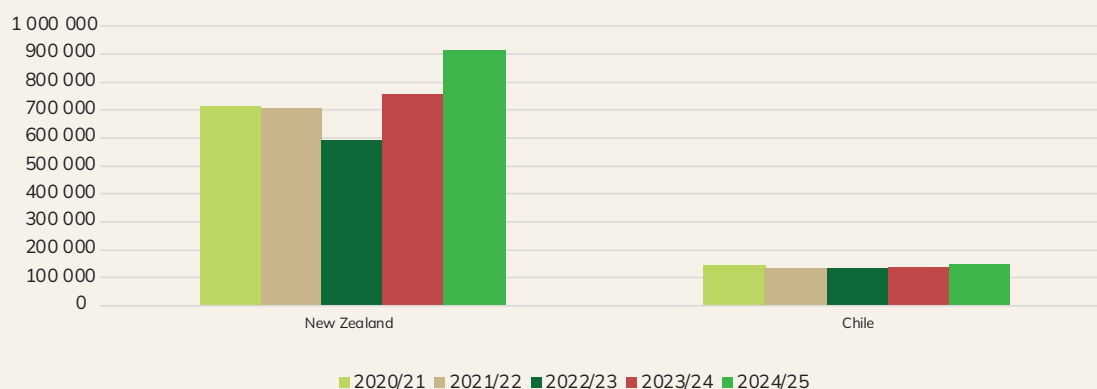
	Tonnes	1 yr change	5 yr change	Share
New Zealand	915 261	21%	6%	85%
Chile	151 123	8%	1%	14%
Argentina	3 219	189%	24%	<1%
South Africa	3 016	44%	31%	<1%
Australia	258	48%	-20%	<1%
Brazil	56	27%	9%	<1%
Southern Hemisphere	1 072 934	19%	6%	



Total exports: 1 072 934 tonnes

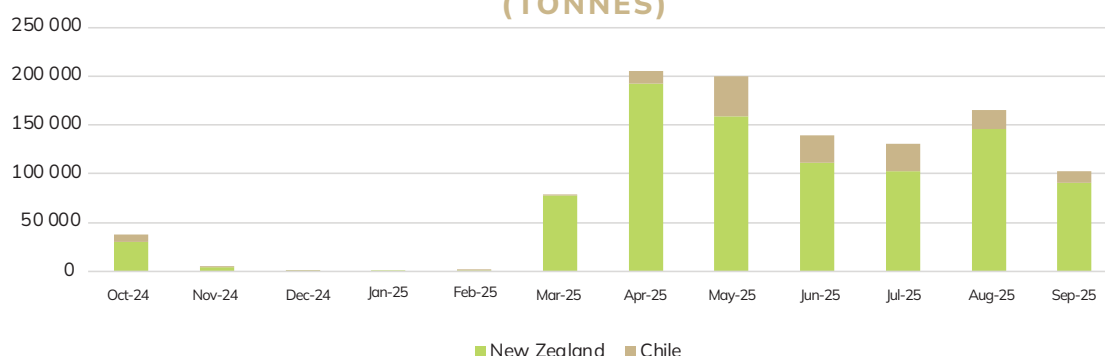
Source: Trade Map.

EXPORTS OF KIWIFRUIT FROM THE SOUTHERN HEMISPHERE, 2020/21 TO 2024/25 (TONNES)



Source: Trade Map.

EXPORTS OF KIWIFRUIT BY MONTH, OCTOBER 2024 TO SEPTEMBER 2025 (TONNES)



Source: Trade Map.

PEARS

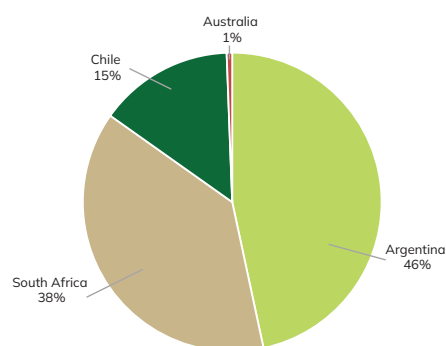
Total exports of pears from the Southern Hemisphere increased by 9 percent in 2024/25 to 758 000 tonnes; over the past five years, exports grew by an average of 2 percent annually.

Argentina is the largest exporter of pears in the Southern Hemisphere, followed by South Africa and Chile. Europe is the main destination of Southern Hemisphere pear exports.

The peak supply period is February to June for all suppliers, landing mid-winter to spring in the Northern Hemisphere, before the Northern production season commences.

EXPORTS OF PEARS FROM THE SOUTHERN HEMISPHERE, 2024/25

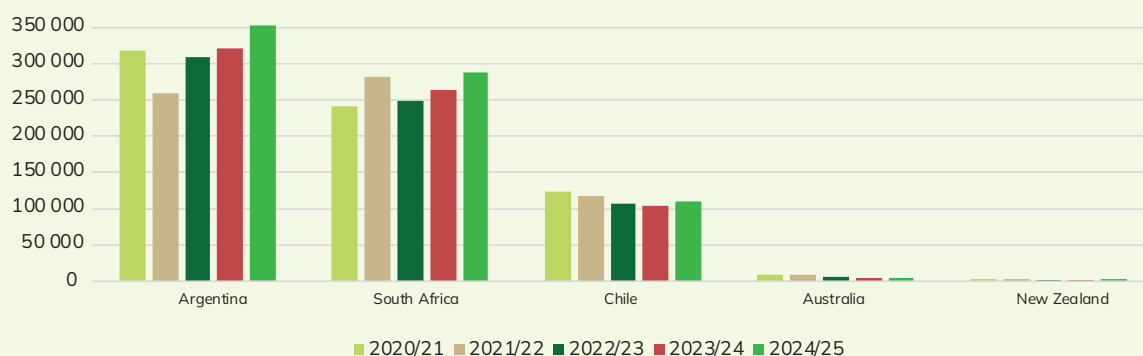
	Tonnes	1 yr change	5 yr change	Share
Argentina	352 360	10%	3%	46%
South Africa	288 417	9%	5%	38%
Chile	110 287	7%	-3%	15%
Australia	4 495	-4%	-17%	1%
New Zealand	2 463	16%	-1%	<1%
Brazil	121	15%	12%	<1%
Southern Hemisphere	758 143	9%	2%	



Total exports: 758 143 tonnes

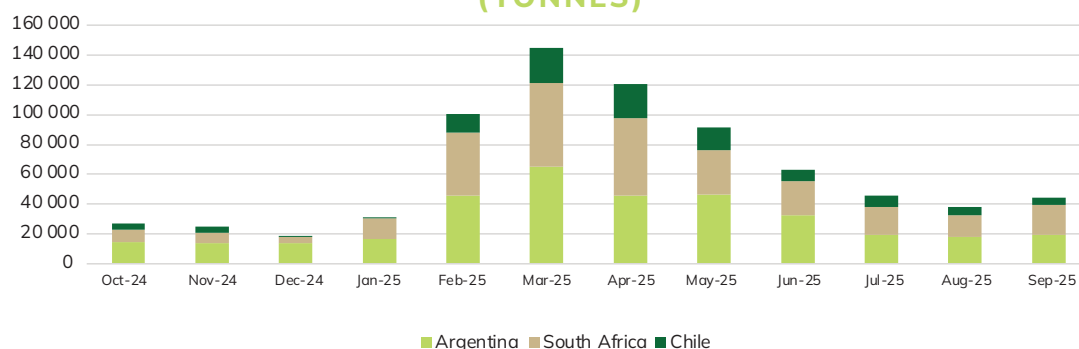
Source: Trade Map.

EXPORTS OF PEARS FROM THE SOUTHERN HEMISPHERE, 2020/21 TO 2024/25 (TONNES)



Source: Trade Map.

EXPORTS OF PEARS BY MONTH, OCTOBER 2024 TO SEPTEMBER 2025 (TONNES)



Source: Trade Map.

STONE FRUIT- PEACHES AND NECTARINES

Overall peach and nectarine exports from the Southern Hemisphere increased 14 percent year-on-year in 2024/25, to 188 000 tonnes; the average annual growth rate over the past five years stands at 5 percent.

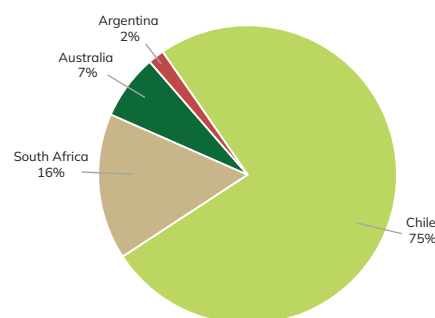
Chile is the largest exporter of peaches and nectarines in the Southern Hemisphere by a large margin, followed by South Africa and Australia. Europe is the main destination of exports of peaches and nectarines from the Southern Hemisphere.

The peak supply period for peaches and nectarines is January to March for all suppliers, landing mid-winter in the Northern Hemisphere.



EXPORTS OF PEACHES AND NECTARINES FROM THE SOUTHERN HEMISPHERE, 2024/25

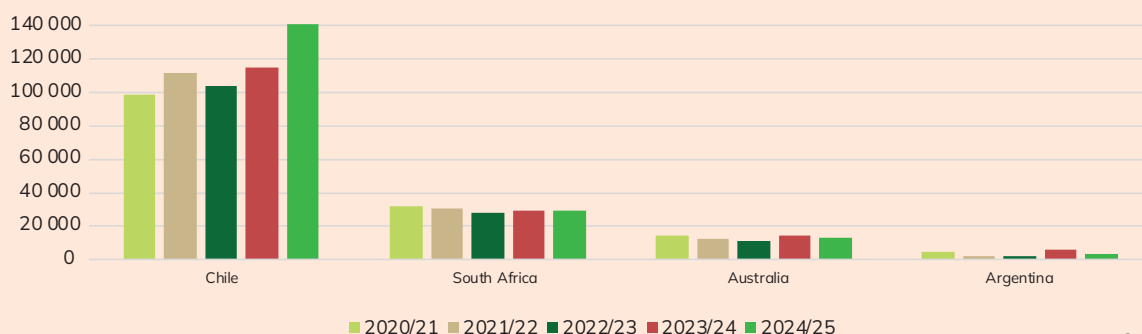
	Tonnes	1 yr change	5 yr change	Share
Chile	141 192	23%	9%	75%
South Africa	29 640	2%	-2%	16%
Australia	13 167	-8%	-2%	7%
Argentina	3 268	-46%	-10%	2%
Peru	413	-33%	-32%	<1%
Zimbabwe	189	15%	-6%	<1%
New Zealand	104	33%	2%	<1%
Brazil	57	18%	-8%	<1%
Southern Hemisphere	188 029	14%	5%	



Total exports: 188 029 tonnes

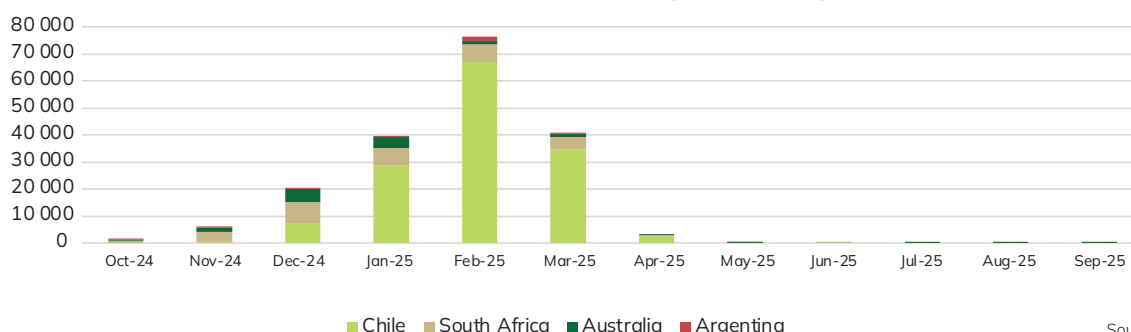
Source: Trade Map.

EXPORTS PEACHES AND NECTARINES FROM THE SOUTHERN HEMISPHERE, 2020/21 TO 2024/25 (TONNES)



Source: Trade Map.

EXPORTS OF PEACHES AND NECTARINES BY MONTH, OCTOBER 2024 TO SEPTEMBER 2025 (TONNES)



Source: Trade Map.

STONE FRUIT - PLUMS

Overall plum exports from the Southern Hemisphere were steady in 2025 at 252 700 tonnes, while the average annual growth rate over the past five years stands at 4 percent.

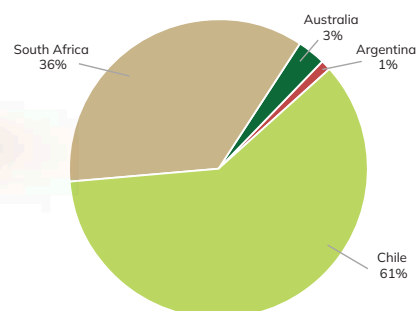
Chile is also by far the largest exporter of plums in the Southern Hemisphere, followed by South Africa and Australia.

The peak supply period for plums is January to April for all suppliers, landing mid-winter in the Northern Hemisphere.



EXPORTS OF PLUMS FROM THE SOUTHERN HEMISPHERE, 2024/25

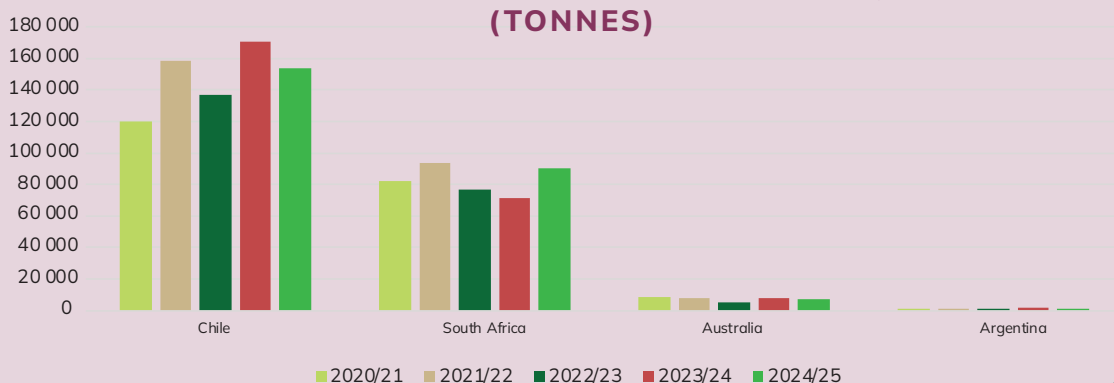
	Tonnes	1 yr change	5 yr change	Share
Chile	154 052	-10%	6%	61%
South Africa	90 169	26%	2%	36%
Australia	7 054	-11%	-4%	3%
Argentina	1 332	-27%	8%	1%
Peru	40			<1%
Brazil	32			<1%
New Zealand	28			<1%
Uruguay	2			<1%
Southern Hemisphere	252 709	0%	4%	



Total exports: 252 709 tonnes

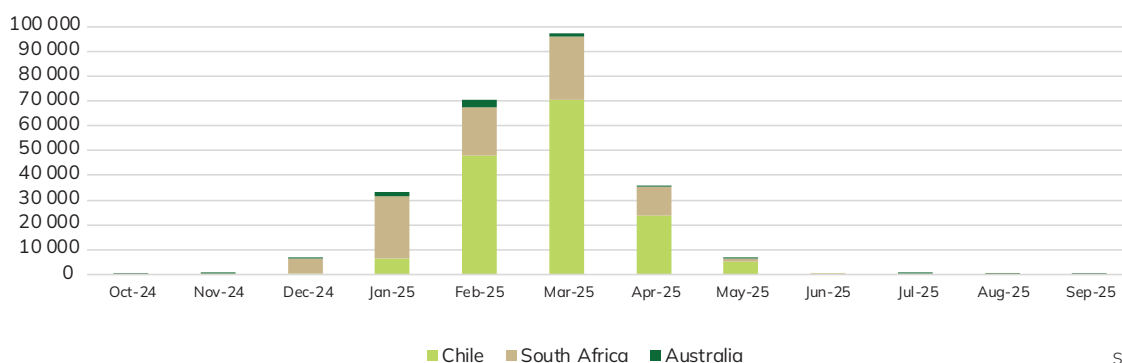
Source: Trade Map.

EXPORTS OF PLUMS FROM THE SOUTHERN HEMISPHERE, 2020/21 TO 2024/25 (TONNES)



Source: Trade Map.

EXPORTS OF PLUMS BY MONTH, OCTOBER 2024 TO SEPTEMBER 2025 (TONNES)



Source: Trade Map.

TABLE GRAPES

Overall table grape exports from the Southern Hemisphere increased 6 percent year-on-year in 2024/25 to 1.9 million tonnes; the average annual growth rate over the past five years stands at 0.5 percent.

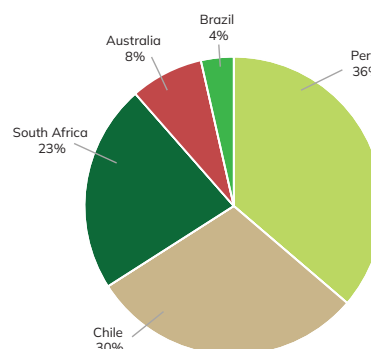
Peru and Chile are the largest exporters of table grapes in the Southern Hemisphere, followed by South Africa. Europe is the main destination of table grape exports from the Southern Hemisphere, with Australia serving as the largest supplier of table grapes to Asia.

The peak supply period is October to May for all suppliers, landing mid-winter to spring in the Northern Hemisphere. Peru and South Africa supply earlier than Chile and Australia.



EXPORTS OF TABLE GRAPES FROM THE SOUTHERN HEMISPHERE, 2024/25

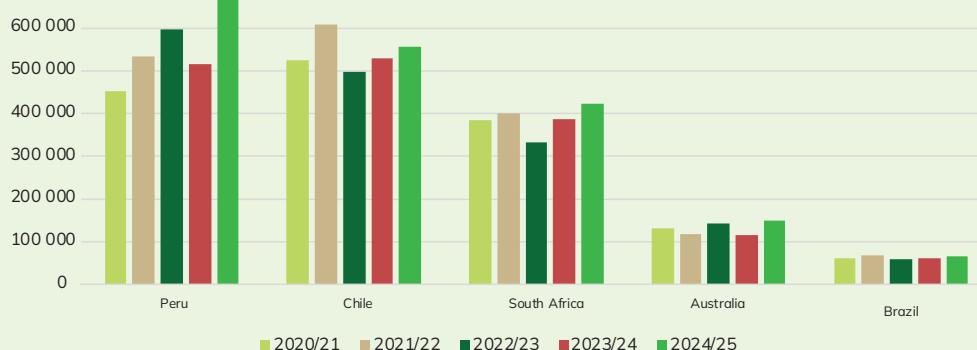
	Tonnes	1 yr change	5 yr change	Share
Peru	679 973	32%	11%	36%
Chile	556 968	5%	1%	30%
South Africa	423 601	9%	2%	23%
Australia	148 339	29%	3%	8%
Brazil	66 499	7%	3%	4%
Argentina	2 521	-27%	-13%	<1%
New Zealand	228	48%	10%	<1%
Uruguay	2	-19%	-2%	<1%
Southern Hemisphere	1 878 132	16%	5%	



Total exports: 1 878 132 tonnes

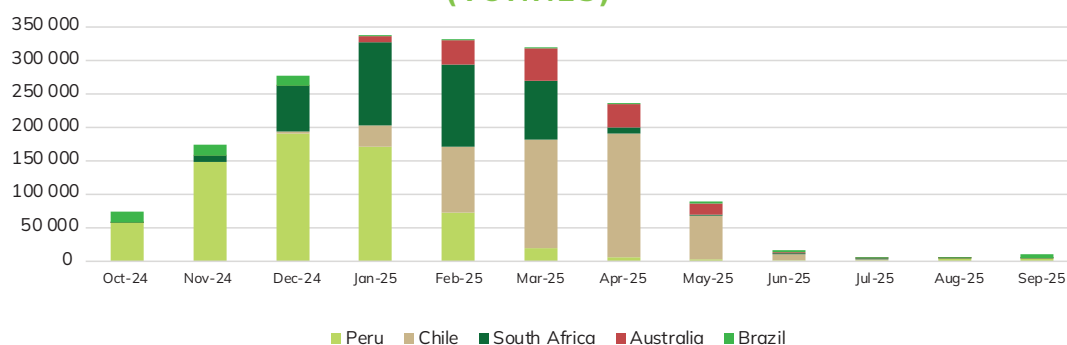
Source: Trade Map.

EXPORTS OF TABLE GRAPES FROM THE SOUTHERN HEMISPHERE, 2020/21 TO 2024/25 (TONNES)



Source: Trade Map.

EXPORTS OF TABLE GRAPES BY MONTH, OCTOBER 2024 TO SEPTEMBER 2025 (TONNES)



Source: Trade Map.

SOUTH AFRICAN TABLE GRAPES

Trusted
Quality

Avant-Garde S.A. 0718633165_JT816

CREATING A **PROGRESSIVE, EQUITABLE** AND **SUSTAINABLE** TABLE GRAPE INDUSTRY



TABLE GRAPES OF OUTSTANDING QUALITY AND TASTE, WHICH ARE RESPONSIBLY GROWN IN SOUTH AFRICA TO MEET THE HIGHEST GLOBAL STANDARDS, START THE JOURNEY FROM THE FOOT OF TABLE MOUNTAIN TO REACH MARKETS AND TABLES AROUND THE WORLD.

Assisting producers to retain, grow and optimise markets is the most important function of the South African Table Grape Industry (SATI), an enabling grower association. SATI represents growers on key government and industry initiatives aimed at creating more opportunities from ownership to accessing new markets in a sustainable way.

SATI assists growers with industry information, transformation, research, technology and technical transfer, as well as training and education with the objective to establish South Africa as the Preferred Country of Origin for the world's best tasting grapes.

SOUTH AFRICAN TABLE GRAPES – FRESH, RELIABLE, CONSISTENT

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KEY DESTINATION MARKETS



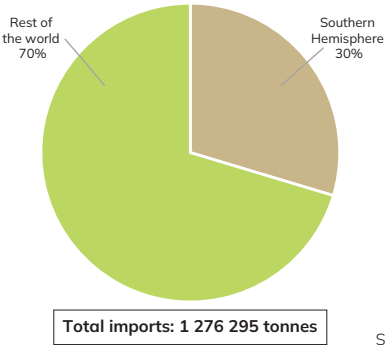
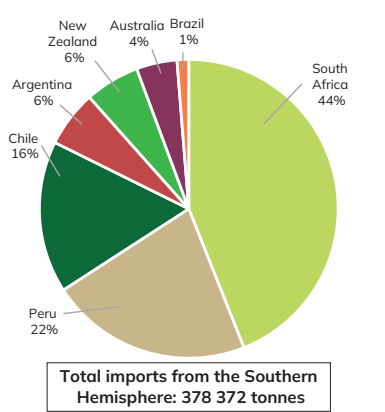
CANADA

Canada imported 378 372 tonnes of fresh temperate fruit from the Southern Hemisphere in 2024/25, accounting for 30 percent of the country’s total temperate fruit imports. Imports from the Southern Hemisphere increased by 18 percent year-on-year in 2024/25 and by an average 7 percent per year over the past five years, with table grapes, citrus and blueberries as the leading products. Other temperate fruit imports were mostly from the United States of America, during the northern harvest season. Almost all fruit imported into Canada is consumed domestically.

IMPORTS INTO CANADA OF TEMPERATE FRUITS BY ORIGIN, 2024/25

	Tonnes	1 yr change	5 yr change	Share
South Africa	165 571	10%	10%	44%
Peru	82 362	42%	13%	22%
Chile	61 959	11%	-3%	16%
Argentina	22 974	14%	-6%	6%
New Zealand	22 272	36%	11%	6%
Australia	16 578	26%	15%	4%
Brazil	4 749	-4%	23%	1%
Uruguay	1 555	12%	-15%	<1%
Zimbabwe	352	-30%	-22%	<1%
Southern Hemisphere	378 372	18%	7%	
Rest of the world	897 923			
TOTAL	1 276 295	5%	1%	

Source: Trade Map.



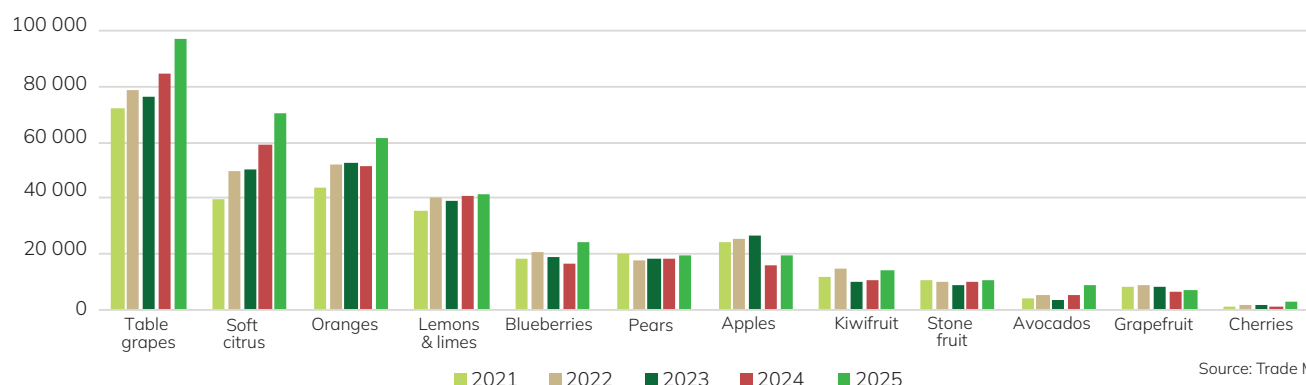
Source: Trade Map.

IMPORTS INTO CANADA OF TEMPERATE FRUITS FROM THE SOUTHERN HEMISPHERE BY FRUIT TYPE, 2024/25

	Tonnes	1 yr change	5 yr change	Share
Table grapes	97 159	15%	8%	26%
Soft citrus	70 536	20%	15%	19%
Oranges	61 568	19%	9%	16%
Lemons & limes	41 274	0%	4%	11%
Blueberries	24 398	50%	7%	6%
Pears	19 717	7%	-1%	5%
Apples	19 509	23%	-6%	5%
Kiwifruit	14 261	31%	4%	4%
Stone fruit	10 746	9%	0%	3%
Avocados	8 958	72%	19%	2%
Grapefruit	7 317	8%	-3%	2%
Cherries	2 772	155%	22%	1%
Southern Hemisphere	378 372	18%	7%	

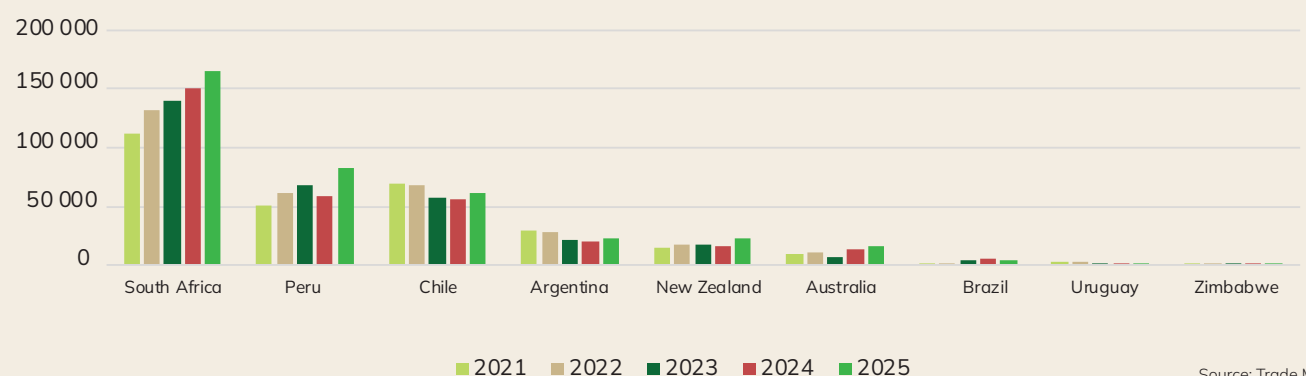
Source: Trade Map.

IMPORTS INTO CANADA OF TEMPERATE FRUITS FROM THE SOUTHERN HEMISPHERE BY FRUIT TYPE, 2020/21 TO 2024/25 (TONNES)



Source: Trade Map.

IMPORTS INTO CANADA OF TEMPERATE FRUITS FROM THE SOUTHERN HEMISPHERE, 2020/21 TO 2024/25 (TONNES)



Source: Trade Map.



UNITED STATES OF AMERICA

The United States of America is the world's largest importer of fresh fruit, with total imports reaching almost 14 million tonnes in 2025/24 (including tropical and temperate fruit) from all sources. The country imported 2 million tonnes of fresh temperate fruits from Southern Hemisphere countries in 2024/25, representing 44 percent of the country's total temperate fruit imports.

Imports of temperate fruit from the Southern Hemisphere have increased by an average 8 percent per year over the past five years, compared to an average 4 percent growth for all sources combined over the same period.

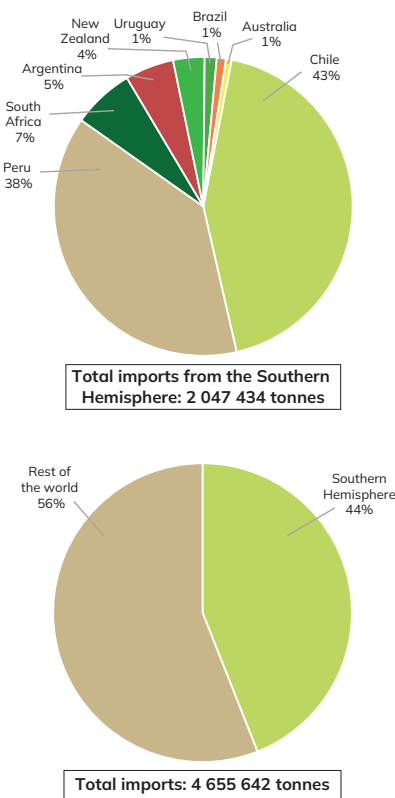
Table grapes are the largest import category for the Southern Hemisphere, taking advantage of counterseasonal supply opportunities, followed by soft citrus and blueberries (mostly from Chile and Peru). Overall, Chile is the largest Southern Hemisphere supplier to the United States of America, mostly with table grapes, followed by Peru.

During the northern export season, the country largest suppliers of temperate fruit are Canada and Mexico.

IMPORTS INTO THE USA OF TEMPERATE FRUITS BY ORIGIN, 2024/25

	Tonnes	1 year change	5 year change	2024/25 Share
Chile	887 783	6%	4%	43%
Peru	785 697	35%	15%	38%
South Africa	136 675	26%	9%	7%
Argentina	108 310	-25%	-4%	5%
New Zealand	69 596	22%	5%	3%
Uruguay	26 645	-10%	0%	1%
Australia	20 191	19%	27%	1%
Brazil	12 538	-28%	2%	1%
Southern Hemisphere	2 047 434	14%	8%	
Rest of the world	2 608 207			
TOTAL	4 655 642	7%	4%	

Source: Trade Map.



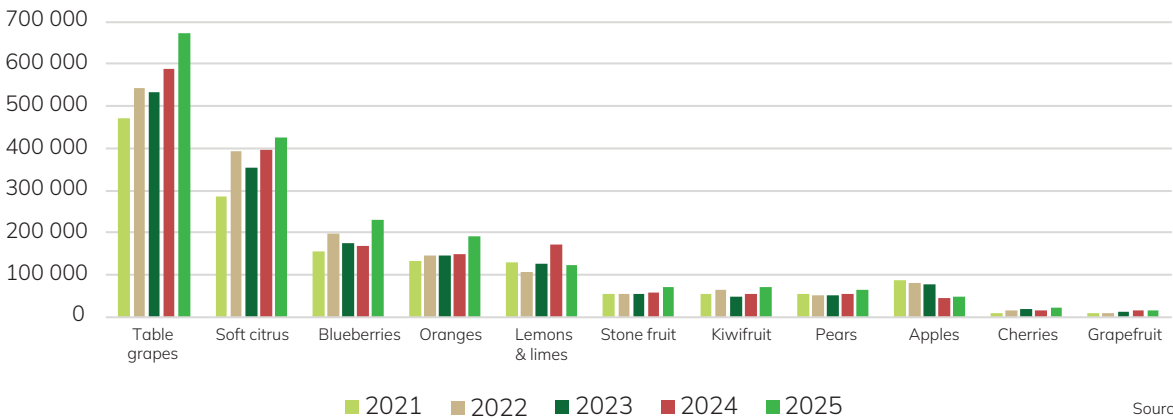
Source: Trade Map.

IMPORTS INTO THE USA OF TEMPERATE FRUITS FROM THE SOUTHERN HEMISPHERE BY FRUIT TYPE, 2024/25

	Tonnes	1 yr change	5 yr change	Share
Table grapes	674 586	15%	9%	33%
Soft citrus	425 604	7%	11%	21%
Blueberries	230 865	36%	10%	11%
Oranges	193 046	28%	10%	9%
Lemons & limes	123 418	-28%	-1%	6%
Stone fruit	69 663	20%	7%	3%
Kiwifruit	69 648	25%	6%	3%
Pears	63 280	16%	3%	3%
Apples	49 411	7%	-13%	2%
Cherries	23 576	41%	28%	1%
Grapefruit	14 862	1%	11%	1%
Southern Hemisphere	2 047 434	14%	8%	

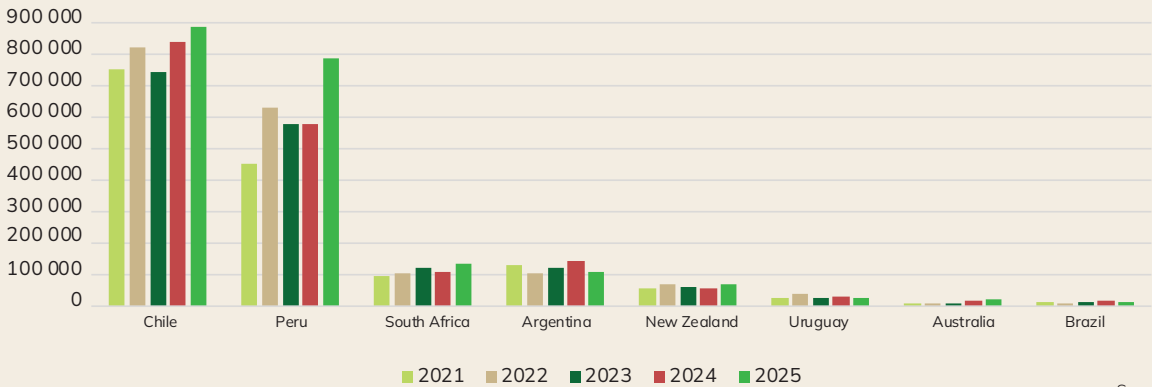
Source: Trade Map.

IMPORTS INTO THE USA OF TEMPERATE FRUITS FROM THE SOUTHERN HEMISPHERE BY FRUIT TYPE, 2020/21 TO 2024/25 (TONNES)



Source: Trade Map.

IMPORTS INTO THE USA OF TEMPERATE FRUITS FROM THE SOUTHERN HEMISPHERE, 2020/21 TO 2024/25 (TONNES)



Source: Trade Map.



BELGIUM

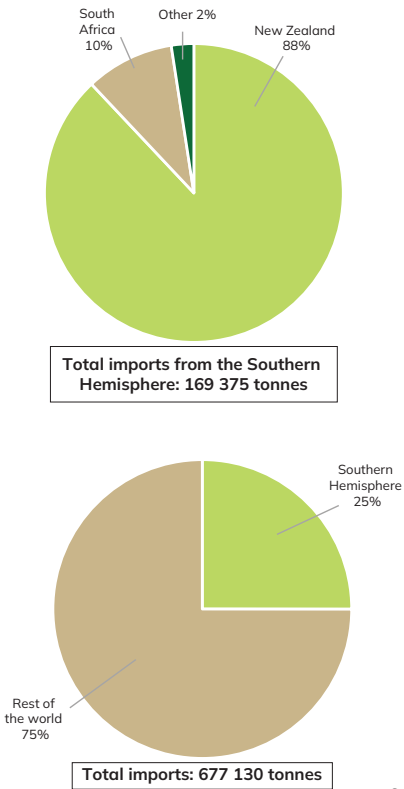
Belgium imported 169 000 tonnes of fresh temperate fruit from the Southern Hemisphere in 2024/25, representing 25 percent of the country’s overall temperate fruit imports. Fruit imports are dominated by kiwifruit, with almost all kiwifruit being sourced from New Zealand since Belgium hosts the distribution centre for kiwifruit from New Zealand to supply other European markets.

Imports of temperature fruit from the Southern Hemisphere into Belgium surged 30 percent year-on-year in 2024/25, driven by the recovery of New Zealand kiwifruit from an adverse season. On average, imports declined by 4 percent per year over the past five years.

IMPORTS INTO BELGIUM OF TEMPERATE FRUITS BY ORIGIN, 2024/25

	Tonnes	1 yr change	5 yr change	Share
New Zealand	149 020	31%	-1%	88%
South Africa	16 239	32%	3%	10%
Argentina	1 194	117%	-42%	<1%
Peru	1 105	126%	-37%	<1%
Chile	1 065	-40%	-35%	<1%
Brazil	649	21%	40%	<1%
Uruguay	75	-62%	-39%	<1%
Zimbabwe	29	0%	-48%	<1%
Southern Hemisphere	169 375	30%	-4%	
Rest of the world	507 756			
TOTAL	677 130	9%	-2%	

Source: Trade Map.



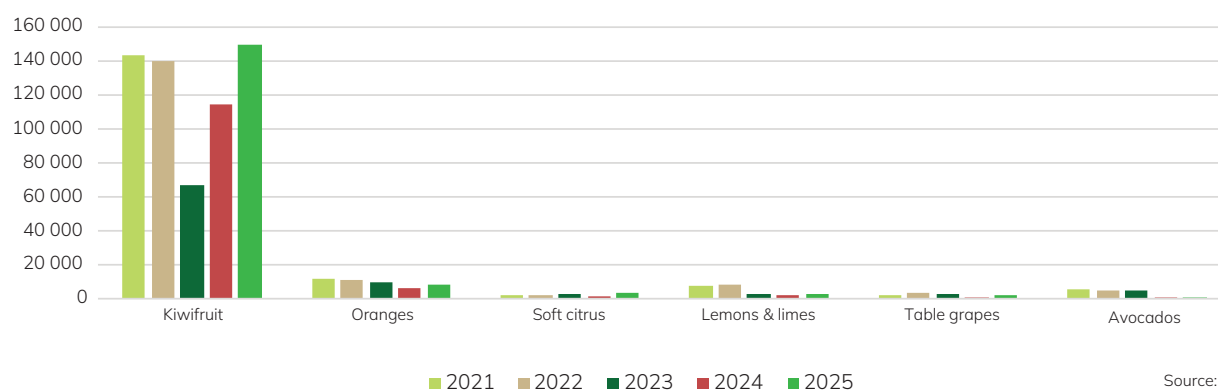
Source: Trade Map.

IMPORTS INTO BELGIUM OF TEMPERATE FRUITS FROM THE SOUTHERN HEMISPHERE BY FRUIT TYPE, 2024/25

	Tonnes	1 yr change	5 yr change	Share
Kiwifruit	149 332	30%	1%	88%
Oranges	8 334	27%	-9%	5%
Soft citrus	3 648	85%	11%	2%
Lemons & limes	2 926	25%	-22%	2%
Table grapes	2 460	88%	2%	1%
Avocados	1 109	-15%	-33%	1%
Grapefruit	698	-22%	-7%	<1%
Apples	411	-12%	-62%	<1%
Blueberries	217	-54%	-46%	<1%
Pears	207	221%	3%	<1%
Stone fruit	30	6150%	14%	<1%
Cherries	0	-100%	-100%	<1%
Southern Hemisphere	169 375	30%	-4%	

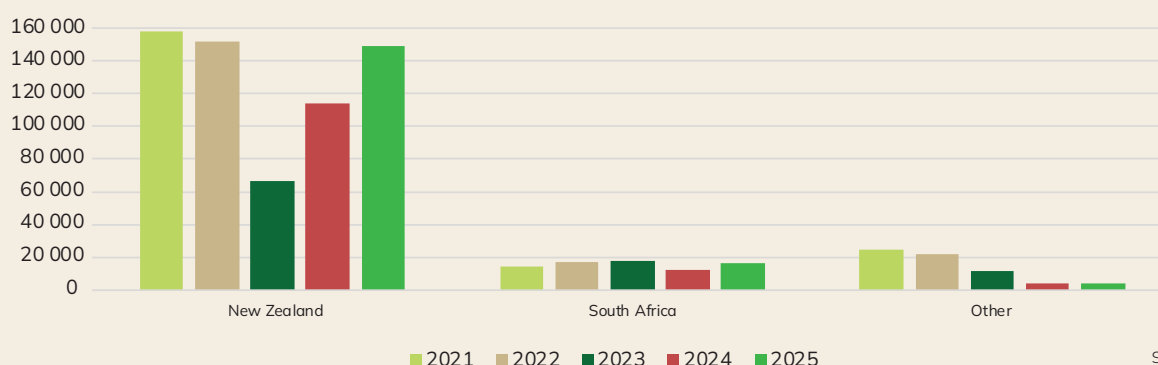
Source: Trade Map.

IMPORTS INTO BELGIUM OF TEMPERATE FRUITS FROM THE SOUTHERN HEMISPHERE BY FRUIT TYPE, 2020/21 TO 2024/25 (TONNES)



Source: Trade Map.

IMPORTS INTO BELGIUM OF TEMPERATE FRUITS FROM THE SOUTHERN HEMISPHERE, 2020/21 TO 2024/25 (TONNES)



Source: Trade Map.

FRANCE

FRANCE

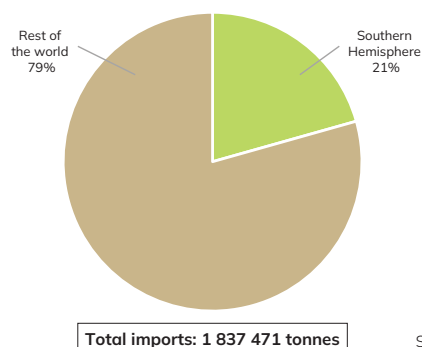
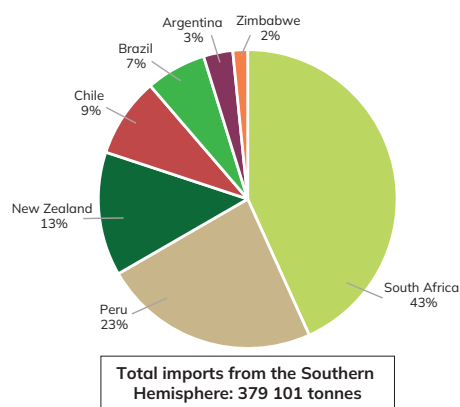
France imported 373 000 tonnes of fresh temperate fruit from the Southern Hemisphere in 2024/25, representing 21 percent of the country's total temperate fruit imports. Imports from the Southern Hemisphere increased by 27 percent year-on-year in 2024/25 and 6 percent annually over the past five years, led by avocados, oranges, and kiwifruit. On average, imports declined by 2 percent per year over the past five years.

France is both a major fruit producer and exporter to other countries in Europe, particularly of apples.

IMPORTS INTO FRANCE OF TEMPERATE FRUITS BY ORIGIN, 2024/25

	Tonnes	1 yr change	5 yr change	Share
South Africa	163 560	32%	7%	43%
Peru	88 603	21%	13%	23%
New Zealand	50 725	53%	7%	13%
Chile	32 608	17%	-4%	9%
Brazil	24 718	-7%	1%	7%
Argentina	11 990	64%	-5%	3%
Zimbabwe	6 053	20%	31%	2%
Uruguay	840	52%	-19%	<1%
Southern Hemisphere	379 101	27%	6%	
Rest of the world	1 458 370			
TOTAL	1 837 471	2%	-2%	

Source: Trade Map.



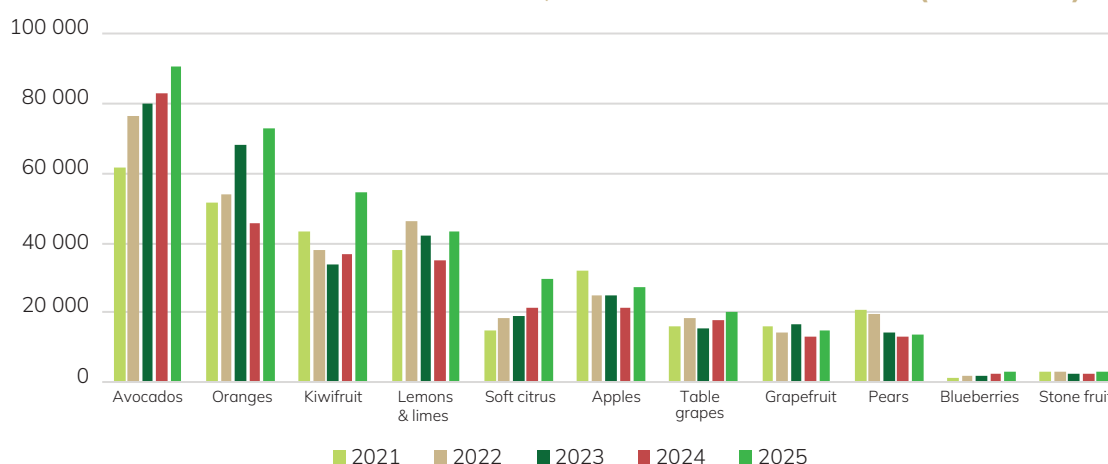
Source: Trade Map.

IMPORTS INTO FRANCE OF TEMPERATE FRUITS FROM THE SOUTHERN HEMISPHERE BY FRUIT TYPE, 2024/25

	Tonnes	1 yr change	5 yr change	Share
Avocados	90 631	9%	10%	24%
Oranges	72 484	59%	9%	19%
Kiwifruit	54 226	48%	6%	14%
Lemons & limes	43 025	22%	3%	11%
Soft citrus	29 633	40%	19%	8%
Apples	27 125	28%	-4%	7%
Table grapes	20 424	16%	6%	5%
Grapefruit	14 686	14%	-2%	4%
Pears	13 608	4%	-10%	4%
Blueberries	3 317	20%	20%	1%
Stone fruit	2 912	6%	-3%	1%
Cherries	237	43%	-7%	<1%
Southern Hemisphere	379 101	27%	6%	

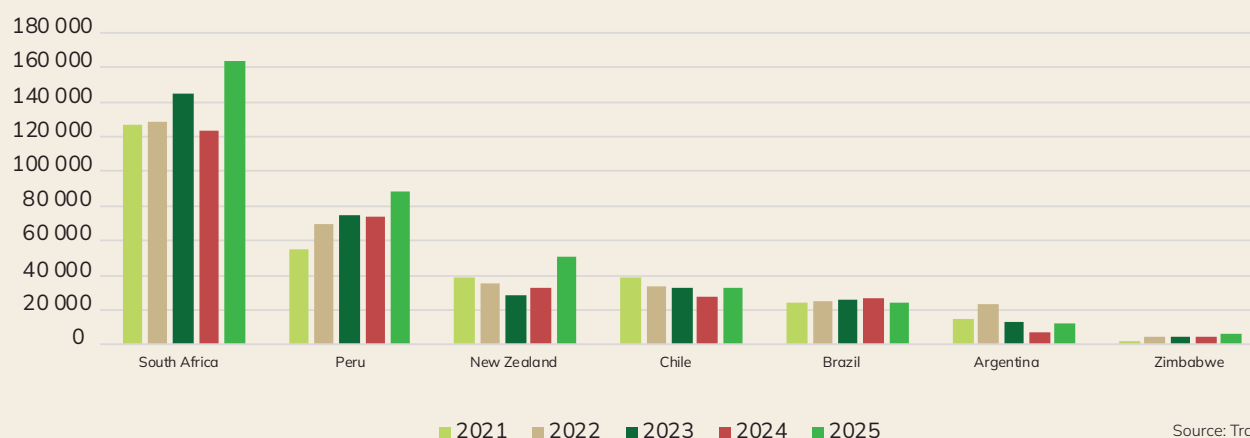
Source: Trade Map.

IMPORTS INTO FRANCE OF TEMPERATE FRUITS FROM THE SOUTHERN HEMISPHERE BY FRUIT TYPE, 2020/21 TO 2024/25 (TONNES)

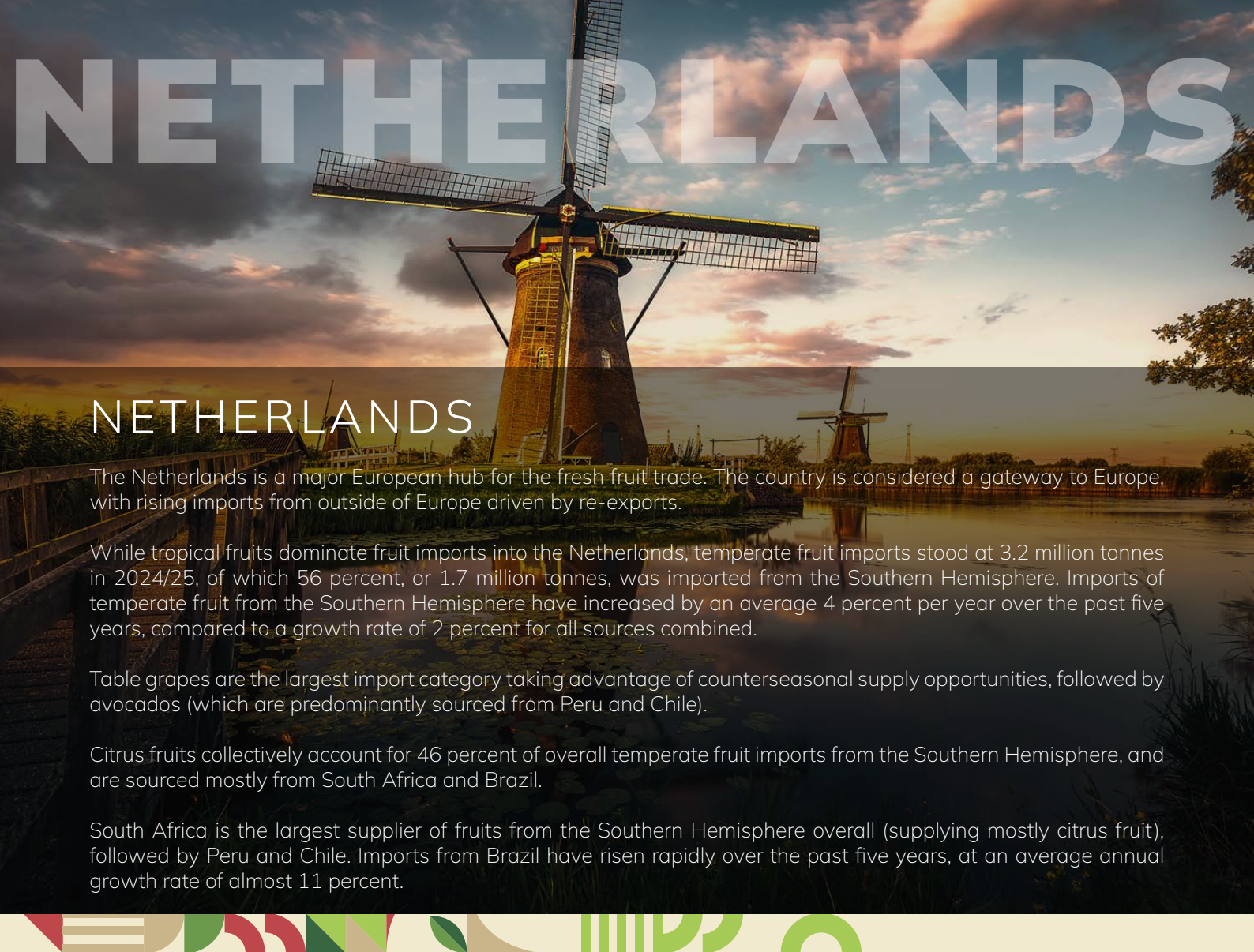


Source: Trade Map.

IMPORTS INTO FRANCE OF TEMPERATE FRUITS FROM THE SOUTHERN HEMISPHERE, 2020/21 TO 2024/25 (TONNES)



Source: Trade Map.



NETHERLANDS

The Netherlands is a major European hub for the fresh fruit trade. The country is considered a gateway to Europe, with rising imports from outside of Europe driven by re-exports.

While tropical fruits dominate fruit imports into the Netherlands, temperate fruit imports stood at 3.2 million tonnes in 2024/25, of which 56 percent, or 1.7 million tonnes, was imported from the Southern Hemisphere. Imports of temperate fruit from the Southern Hemisphere have increased by an average 4 percent per year over the past five years, compared to a growth rate of 2 percent for all sources combined.

Table grapes are the largest import category taking advantage of counterseasonal supply opportunities, followed by avocados (which are predominantly sourced from Peru and Chile).

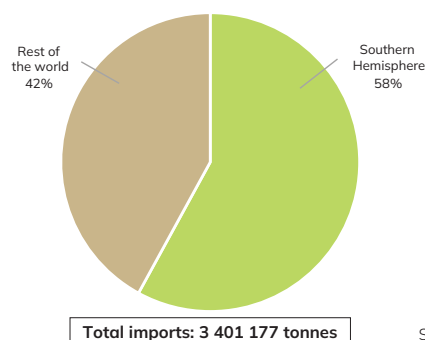
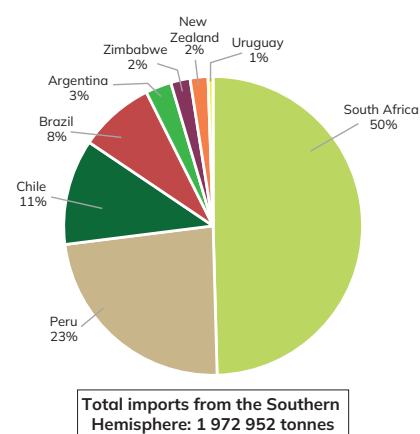
Citrus fruits collectively account for 46 percent of overall temperate fruit imports from the Southern Hemisphere, and are sourced mostly from South Africa and Brazil.

South Africa is the largest supplier of fruits from the Southern Hemisphere overall (supplying mostly citrus fruit), followed by Peru and Chile. Imports from Brazil have risen rapidly over the past five years, at an average annual growth rate of almost 11 percent.

IMPORTS INTO THE NETHERLANDS OF TEMPERATE FRUITS BY ORIGIN, 2024/25

	Tonnes	1 yr change	5 yr change	Share
South Africa	977 507	19%	6%	50%
Peru	462 137	45%	10%	23%
Chile	225 470	28%	1%	11%
Brazil	161 412	13%	9%	8%
Argentina	55 287	56%	-13%	3%
Zimbabwe	41 284	13%	9%	2%
New Zealand	38 084	167%	13%	2%
Uruguay	10 767	0%	-15%	1%
Southern Hemisphere	1 971 952	27%	6%	
Rest of the world	1 429 225			
TOTAL	3 401 177	17%	3%	

Source: Trade Map.



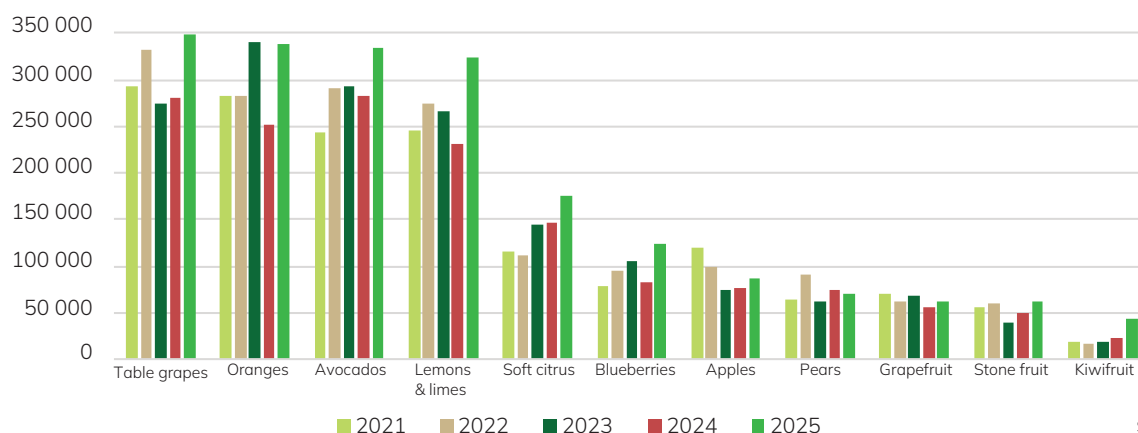
Source: Trade Map.

IMPORTS INTO THE NETHERLANDS OF TEMPERATE FRUITS FROM THE SOUTHERN HEMISPHERE BY FRUIT TYPE, 2024/25

	Tonnes	1 yr change	5 yr change	Share
Table grapes	347 664	24%	4%	18%
Oranges	338 477	34%	5%	17%
Avocados	334 362	18%	8%	17%
Lemons & limes	324 299	40%	7%	16%
Soft citrus	174 454	18%	11%	9%
Blueberries	124 729	52%	13%	6%
Apples	87 245	13%	-8%	4%
Pears	70 673	-5%	2%	4%
Grapefruit	62 910	15%	-3%	3%
Stone fruit	61 022	22%	2%	3%
Kiwifruit	43 806	85%	26%	2%
Cherries	2 045	149%	21%	<1%
Southern Hemisphere	1 971 952	27%	6%	

Source: Trade Map.

IMPORTS INTO THE NETHERLANDS OF TEMPERATE FRUITS FROM THE SOUTHERN HEMISPHERE BY FRUIT TYPE, 2020/21 TO 2024/25 (TONNES)



Source: Trade Map.

IMPORTS INTO THE NETHERLANDS OF TEMPERATE FRUITS FROM THE SOUTHERN HEMISPHERE, 2020/21 TO 2024/25 (TONNES)



Source: Trade Map.

SPAIN

SPAIN

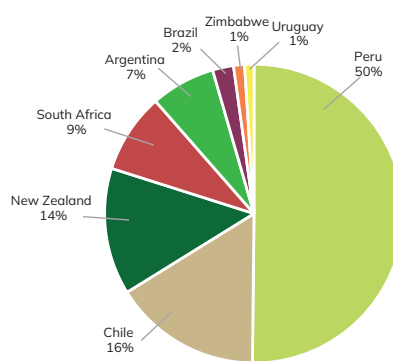
Spain imported 364 000 tonnes of fresh temperate fruit from the Southern Hemisphere in 2024/25, representing 29 percent of the country's total temperate fruit imports. Imports from the Southern Hemisphere increased by 26 percent year-on-year in 2024/25 and 11 percent annually over the past five years, led by avocados, kiwifruit, and table grapes.

Spain is both a major fruit producer and exporter to other countries in Europe. It is also a significant re-exporter, particularly for avocados and kiwifruit, with local suppliers importing Southern Hemisphere fruit to maintain a year-round supply to customers in Northern Europe.

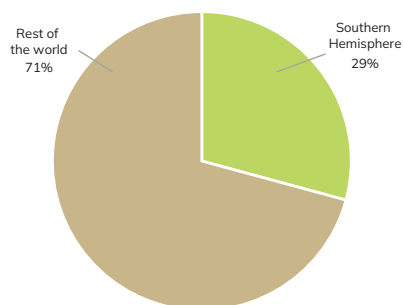
IMPORTS INTO SPAIN OF TEMPERATE FRUITS BY ORIGIN, 2024/25

	Tonnes	1 yr change	5 yr change	Share
Peru	182 549	26%	15%	50%
Chile	58 235	31%	12%	16%
New Zealand	49 929	6%	4%	14%
South Africa	31 506	49%	6%	9%
Argentina	25 404	72%	72%	7%
Brazil	8 262	-27%	-13%	2%
Zimbabwe	4 328	53%	3%	1%
Uruguay	3 669	11%	-15%	1%
Southern Hemisphere	363 883	26%	11%	
Rest of the world	881 754			
TOTAL	1 245 637	10%	5%	

Source: Trade Map.



Total imports from the Southern Hemisphere: 363 883 tonnes



Total imports: 1 245 637 tonnes

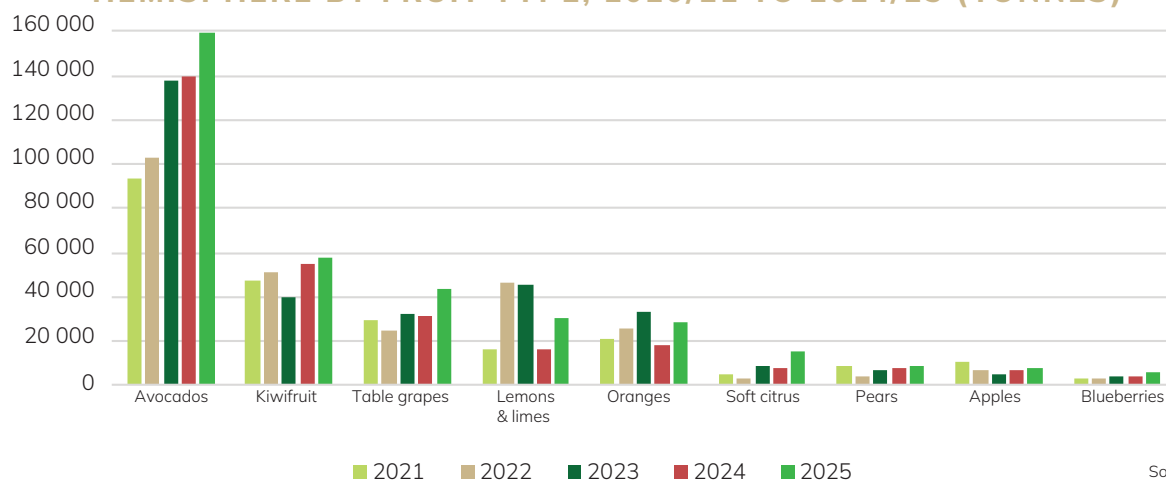
Source: Trade Map.

IMPORTS INTO SPAIN OF TEMPERATE FRUITS FROM THE SOUTHERN HEMISPHERE BY FRUIT TYPE, 2024/25

	Tonnes	1 yr change	5 yr change	Share
Avocados	159 709	14%	14%	44%
Kiwifruit	58 228	6%	5%	16%
Table grapes	43 214	39%	10%	12%
Lemons & limes	30 185	83%	17%	8%
Oranges	28 572	60%	8%	8%
Soft citrus	15 702	99%	33%	4%
Pears	9 297	22%	1%	3%
Apples	7 864	13%	-7%	2%
Blueberries	6 309	67%	17%	2%
Cherries	2 486	51%	25%	1%
Stone fruit	1 925	10%	6%	1%
Grapefruit	392	278%	-23%	<1%
Southern Hemisphere	363 883	26%	11%	

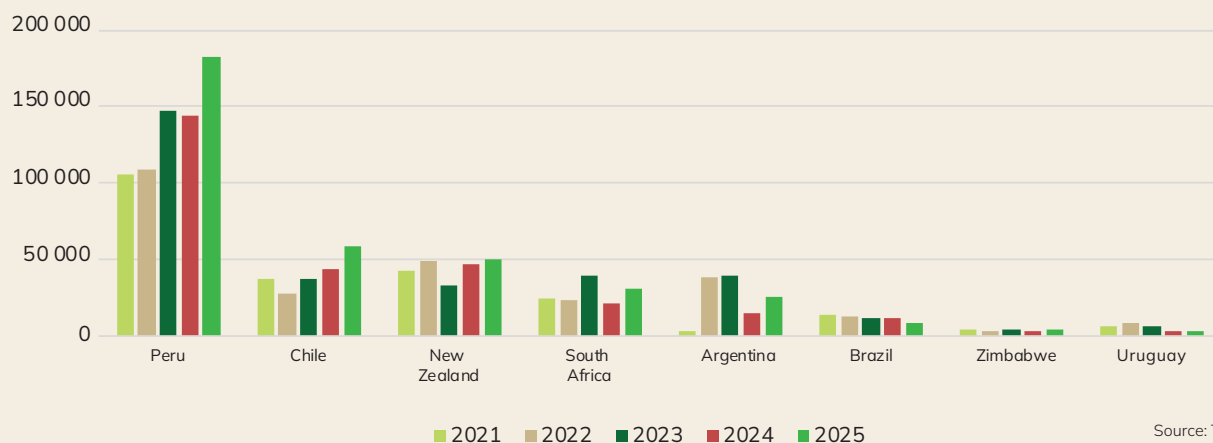
Source: Trade Map.

IMPORTS INTO SPAIN OF TEMPERATE FRUITS FROM THE SOUTHERN HEMISPHERE BY FRUIT TYPE, 2020/21 TO 2024/25 (TONNES)



Source: Trade Map.

IMPORTS INTO SPAIN OF TEMPERATE FRUITS FROM THE SOUTHERN HEMISPHERE, 2020/21 TO 2024/25 (TONNES)



Source: Trade Map.

UNITED KINGDOM



UNITED KINGDOM

The United Kingdom imported 777 000 tonnes of fresh temperate fruits from Southern Hemisphere countries in 2024/25, representing 43 percent of the country's total temperate fruit imports. Other temperate fruit imports were sourced predominantly from the European Union, during the Northern Hemisphere export season.

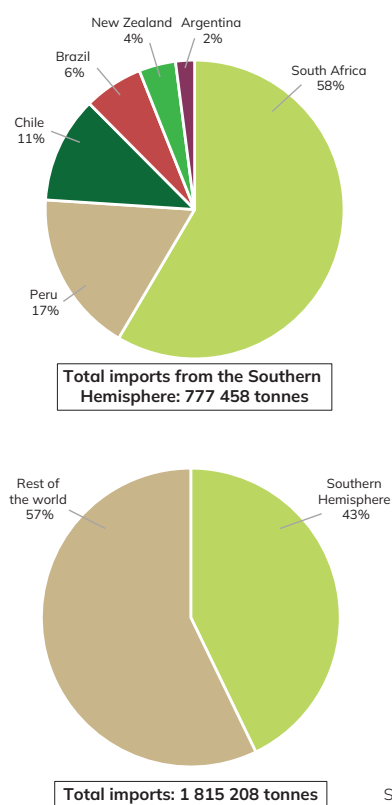
Imports from the Southern Hemisphere increased by 15 percent year-on-year in 2024/25 and 4 percent annually over the past five years, with table grapes, soft citrus, and apples as the leading products.

Most of the fruit imported into the United Kingdom is for domestic consumption, with small volumes being re-exported to Ireland.

IMPORTS INTO THE UNITED KINGDOM OF TEMPERATE FRUITS BY ORIGIN, 2024/25

	Tonnes	1 yr change	5 yr change	Share
South Africa	452 658	12%	4%	58%
Peru	135 731	28%	6%	17%
Chile	89 173	18%	0%	11%
Brazil	49 706	5%	5%	6%
New Zealand	30 798	-5%	0%	4%
Argentina	15 877	74%	6%	2%
Uruguay	1 764	-9%	70%	<1%
Zimbabwe	1 752	-2%	-3%	<1%
Southern Hemisphere	777 458	14%	4%	
Rest of the world	1 037 750			
TOTAL	1 815 208	3%	1%	

Source: Trade Map.



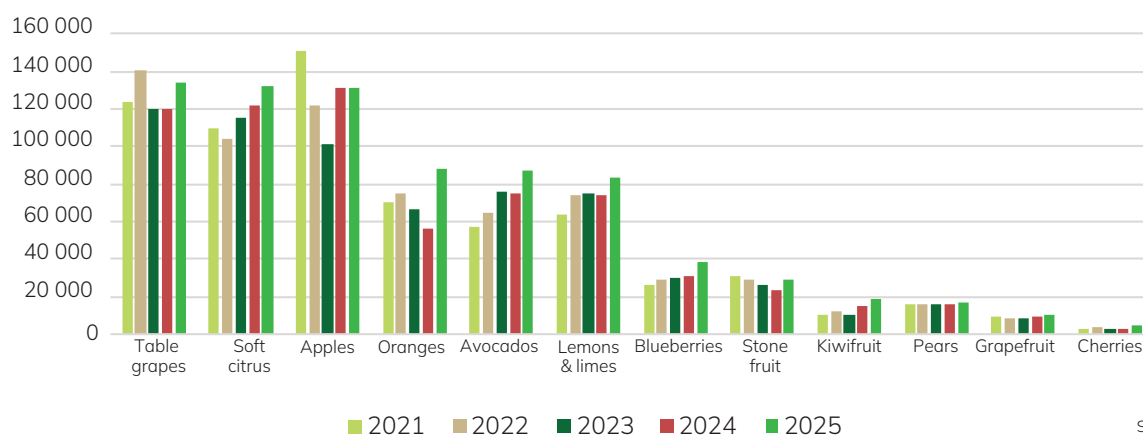
Source: Trade Map.

IMPORTS INTO THE UNITED KINGDOM OF TEMPERATE FRUITS FROM THE SOUTHERN HEMISPHERE BY FRUIT TYPE, 2024/25

	Tonnes	1 yr change	5 yr change	Share
Table grapes	134 361	12%	2%	17%
Soft citrus	131 990	8%	5%	17%
Apples	131 416	0%	-3%	17%
Oranges	87 972	56%	6%	11%
Avocados	87 433	16%	11%	11%
Lemons & limes	83 702	13%	7%	11%
Blueberries	38 756	23%	10%	5%
Stone fruit	29 066	24%	-2%	4%
Kiwifruit	19 209	29%	16%	2%
Pears	16 582	6%	1%	2%
Grapefruit	10 415	11%	2%	1%
Cherries	4 757	38%	10%	1%
Southern Hemisphere	777 458	14%	4%	

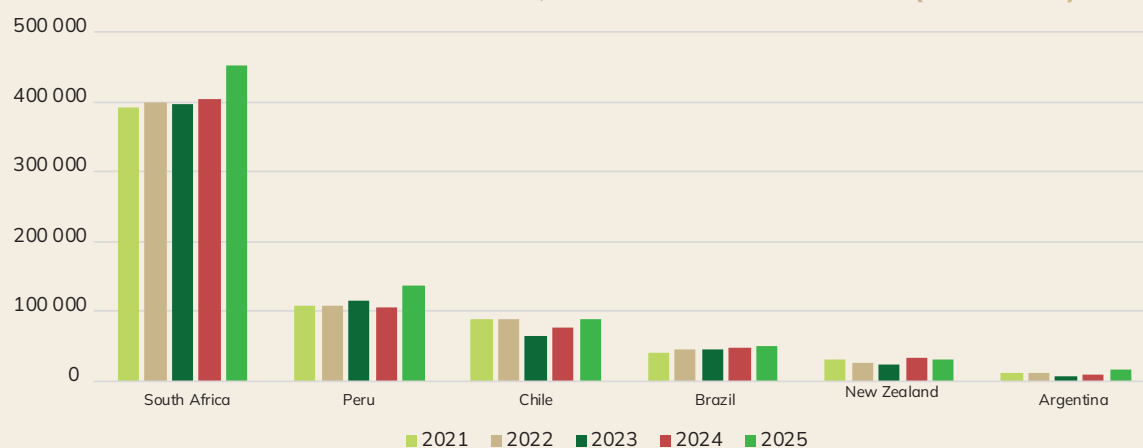
Source: Trade Map.

IMPORTS INTO THE UNITED KINGDOM OF TEMPERATE FRUITS FROM THE SOUTHERN HEMISPHERE BY FRUIT TYPE, 2020/21 TO 2024/25 (TONNES)



Source: Trade Map.

IMPORTS INTO THE UNITED KINGDOM OF TEMPERATE FRUITS FROM THE SOUTHERN HEMISPHERE, 2020/21 TO 2024/25 (TONNES)



Source: Trade Map.

CHINA

CHINA

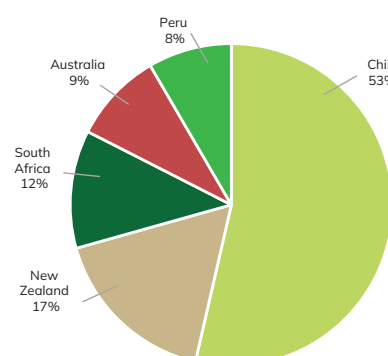
China is the world's largest producer of fresh fruit and the second-largest importer of fruits after the United States of America, with total imports reaching 6.3 million tonnes in 2024/25. While tropical fruits dominate the country's fruit import structure, China imports 1.5 million tonnes of temperate fruit, of which 90 percent is supplied by Southern Hemisphere countries.

Recent growth in temperate fruit imports was driven primarily by cherry imports, which rose 44 percent year-on-year in 2024/25 to a total 544 000 tonnes, sourced predominantly from Chile. The second largest category is kiwifruit with 150 000 tonnes (up 8 percent year-on-year), sourced mostly from New Zealand. Other important import categories, with 100 000 to 150 000 tonnes imported in 2024/25, are stone fruit, oranges, apples, and table grapes, sourced from South Africa, Australia, Chile, Peru, and New Zealand.

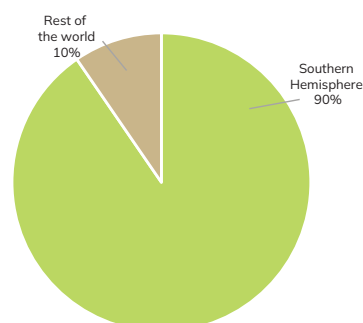
IMPORTS INTO CHINA OF TEMPERATE FRUITS BY ORIGIN, 2024/25

	Tonnes	1 yr change	5 yr change	Share
Chile	740 361	28%	9%	53%
New Zealand	235 644	13%	13%	17%
South Africa	163 766	-1%	-8%	12%
Australia	125 789	32%	4%	9%
Peru	115 991	17%	1%	8%
Argentina	4 405	35%	-14%	<1%
Zimbabwe	25	-96%		<1%
Southern Hemisphere	1 385 982	21%	6%	
Rest of the world	146 923			
TOTAL	1 532 905	18%	4%	

Source: Trade Map.



Total imports from the Southern Hemisphere: 1 385 982 tonnes



Total imports: 1 532 905 tonnes

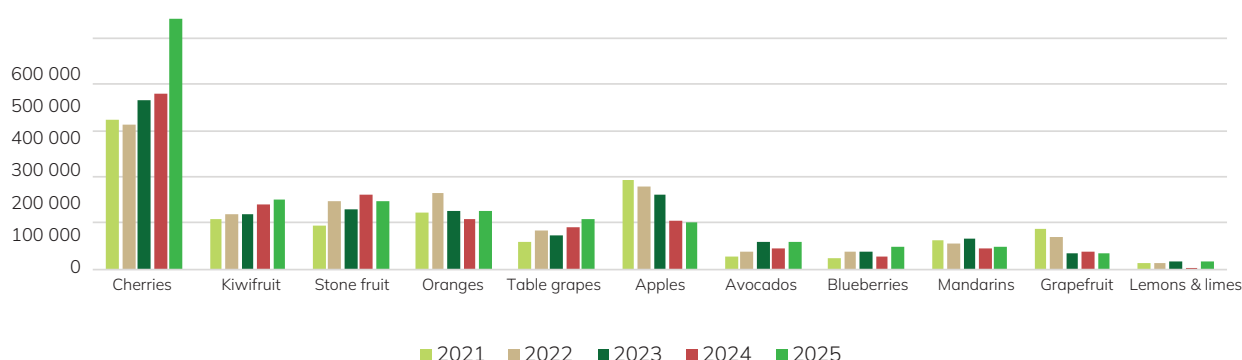
Source: Trade Map.

IMPORTS INTO CHINA OF TEMPERATE FRUITS FROM THE SOUTHERN HEMISPHERE BY FRUIT TYPE, 2024/25

	Tonnes	1 yr change	5 yr change	Share
Cherries	544 181	44%	14%	39%
Kiwifruit	150 569	7%	9%	11%
Stone fruit	147 822	-8%	12%	11%
Oranges	125 128	17%	1%	9%
Apples	107 467	18%	16%	8%
Table grapes	101 172	-5%	-15%	7%
Avocados	58 037	29%	20%	4%
Blueberries	49 619	79%	23%	4%
Soft citrus	47 356	9%	-7%	3%
Grapefruit	33 330	-8%	-21%	2%
Lemons & limes	16 677	419%	9%	1%
Pears	4 597	-33%	4%	<1%
Southern Hemisphere	1 385 982	21%	6%	

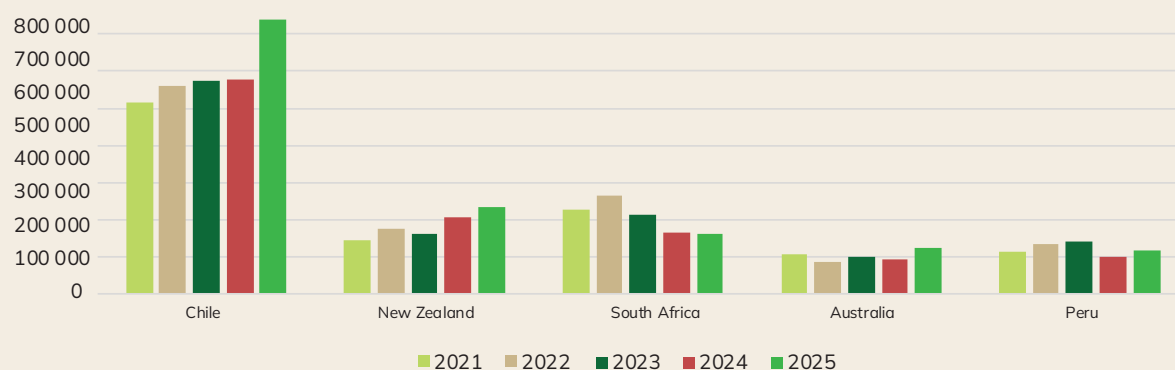
Source: Trade Map.

IMPORTS INTO CHINA OF TEMPERATE FRUITS FROM THE SOUTHERN HEMISPHERE BY FRUIT TYPE, 2020/21 TO 2024/25 (TONNES)



Source: Trade Map.

IMPORTS INTO CHINA OF TEMPERATE FRUITS FROM THE SOUTHERN HEMISPHERE, 2020/21 TO 2024/25 (TONNES)



Source: Trade Map.

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INDIA

INDIA

India is a major producer of fresh fruit and vegetables and remains largely self-sufficient, with imports making up less than 1 percent of total consumption. Almost all of India's fresh fruit imports are temperate, with 28 percent supplied from the Southern Hemisphere.

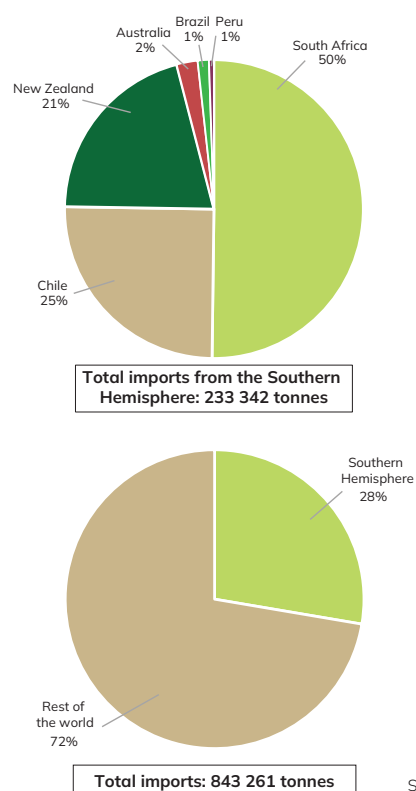
South Africa is the largest supplier of fruit from the Southern Hemisphere, increasing its exports to the country by an average 25 percent per year over the past five years. Chile and New Zealand are also significant suppliers.

India is a challenging market to supply due to logistical difficulties, high tariffs, and a lack of internal cool chain infrastructure; however, the country presents large growth opportunities to those that invest in supply chain infrastructure due to the size of its market.

IMPORTS INTO INDIA OF TEMPERATE FRUITS BY ORIGIN, 2024/25

	Tonnes	1 yr change	5 yr change	Share
South Africa	116 755	15%	25%	50%
Chile	58 277	43%	-6%	25%
New Zealand	48 178	32%	7%	21%
Australia	5 298	25%	5%	2%
Brazil	2 815	-31%	-41%	1%
Peru	1 250	195%	32%	1%
Argentina	753	43%	-22%	<1%
Zimbabwe	15	70%		
Southern Hemisphere	233 342	24%	6%	
Rest of the world	609 919			
TOTAL	843 261	2%	6%	

Source: Trade Map.



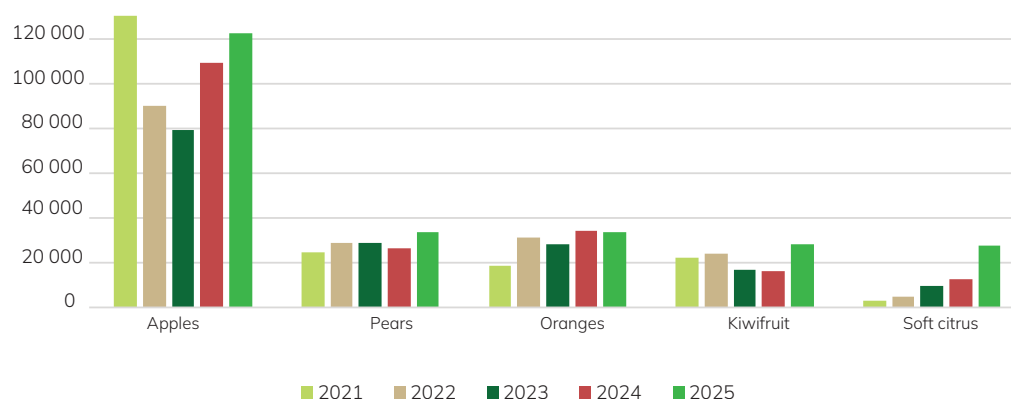
Source: Trade Map.

IMPORTS INTO INDIA OF TEMPERATE FRUITS FROM THE SOUTHERN HEMISPHERE BY FRUIT TYPE, 2024/25

	Tonnes	1 yr change	5 yr change	Share
Apples	113 847	12%	-2%	49%
Pears	31 110	26%	8%	13%
Oranges	30 953	-3%	16%	13%
Kiwifruit	25 895	72%	6%	11%
Soft citrus	25 352	114%	72%	11%
Stone fruit	1 883	104%	5%	1%
Blueberries	1 365	194%	98%	1%
Table grapes	1 245	222%	10%	1%
Cherries	788	64%	39%	<1%
Grapefruit	483	-19%	37%	<1%
Lemons & limes	223	7%	179%	<1%
Avocados	197	-74%	-16%	<1%
Southern Hemisphere	233 342	24%	6%	

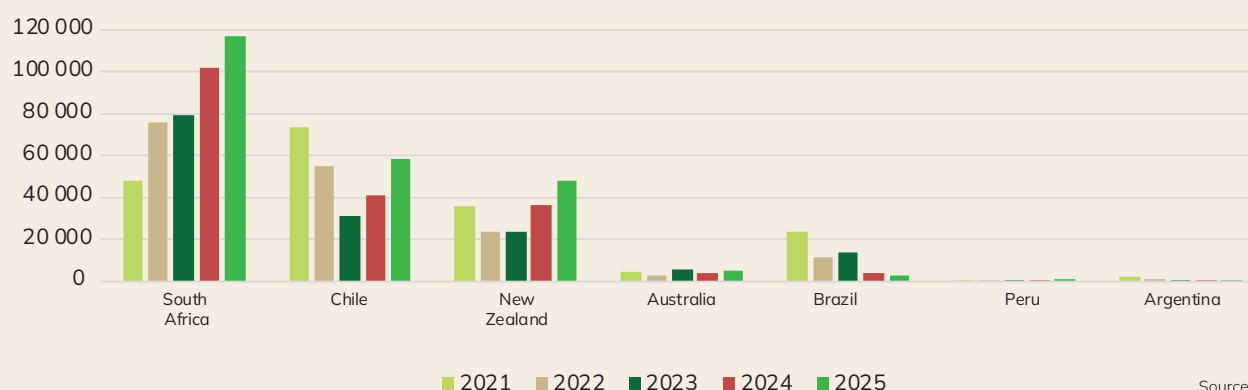
Source: Trade Map.

IMPORTS INTO INDIA OF TEMPERATE FRUITS FROM THE SOUTHERN HEMISPHERE BY FRUIT TYPE, 2020/21 TO 2024/25 (TONNES)



Source: Trade Map.

IMPORTS INTO INDIA OF TEMPERATE FRUITS FROM THE SOUTHERN HEMISPHERE, 2020/21 TO 2024/25 (TONNES)



Source: Trade Map.

JAPAN

JAPAN

Japan relies heavily on imports to meet its demand for tropical fresh fruit, complementing its domestic temperate fruit production. Counterseasonal imports of temperate fruits supplement local fruit production, enabling a year-round supply.

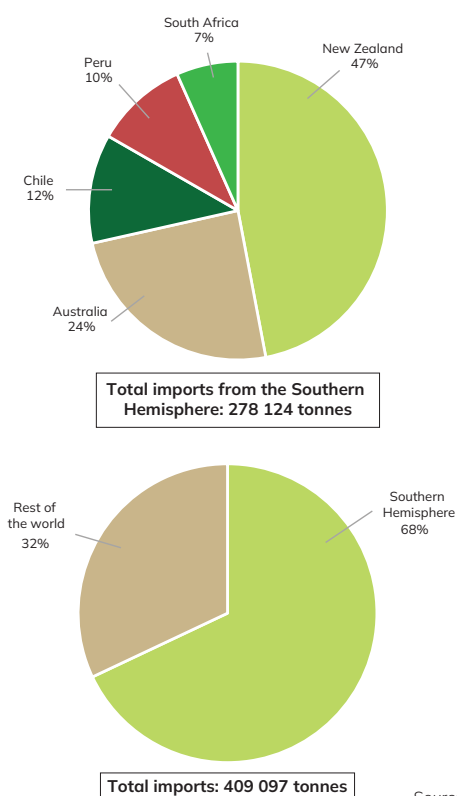
In 2024/25, the country imported more than 1.5 million tonnes of fruit, of which 409 000 tonnes were temperate fruits. Sixty-eight percent of temperate fruit imports were sourced from the Southern Hemisphere.

Kiwifruit is the largest import category, sourced nearly totally from New Zealand, while oranges are sourced mostly from Australia. Table grapes arrive mainly from Chile and increasingly Australia, while Peru is the main supplier of avocados from the Southern Hemisphere.

IMPORTS INTO JAPAN OF TEMPERATE FRUITS BY ORIGIN, 2024/25

	Tonnes	1 yr change	5 yr change	Share
New Zealand	130 740	13%	1%	47%
Australia	68 076	36%	5%	24%
Chile	32 847	2%	2%	12%
Peru	27 890	84%	17%	10%
South Africa	18 570	-9%	-11%	7%
Southern Hemisphere	278 124	19%	2%	
Rest of the world	130 973			
TOTAL	409 097	13%	-3%	

Source: Trade Map.



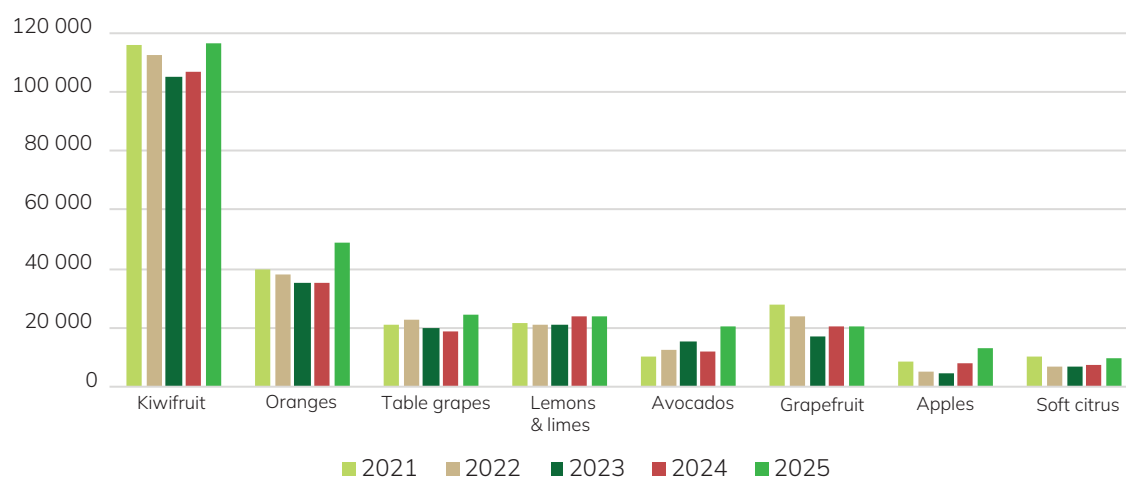
Source: Trade Map.

IMPORTS INTO JAPAN OF TEMPERATE FRUITS FROM THE SOUTHERN HEMISPHERE BY FRUIT TYPE, 2024/25

	Tonnes	1 yr change	5 yr change	Share
Kiwifruit	116 388	9%	0%	42%
Oranges	48 617	37%	5%	17%
Table grapes	24 704	33%	4%	9%
Lemons & limes	23 957	0%	3%	9%
Avocados	20 554	70%	19%	7%
Grapefruit	20 251	0%	-8%	7%
Apples	13 245	64%	12%	5%
Soft citrus	9 890	36%	-1%	4%
Cherries	352	21%	10%	<1%
Blueberries	162	-63%	-22%	<1%
Southern Hemisphere	278 124	19%	2%	

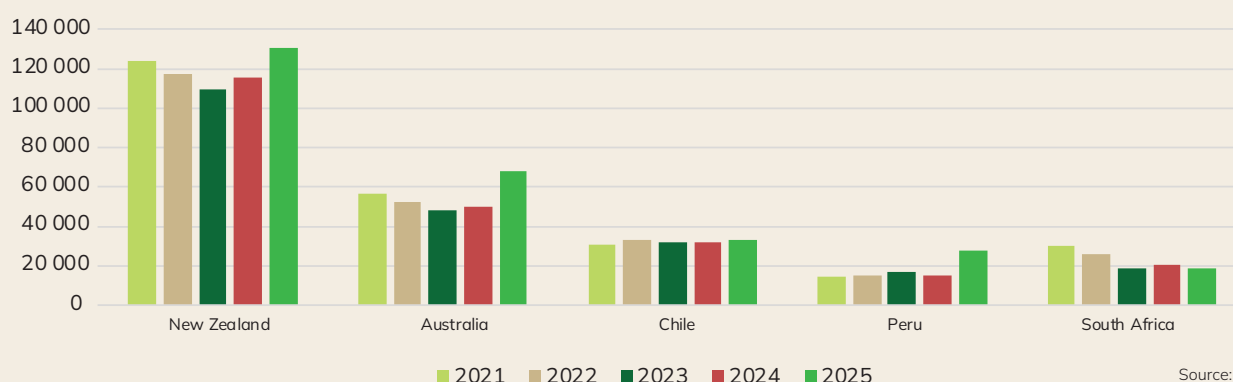
Source: Trade Map.

IMPORTS INTO JAPAN OF TEMPERATE FRUITS FROM THE SOUTHERN HEMISPHERE BY FRUIT TYPE, 2020/21 TO 2024/25 (TONNES)



Source: Trade Map.

IMPORTS INTO JAPAN OF TEMPERATE FRUITS FROM THE SOUTHERN HEMISPHERE, 2020/21 TO 2024/25 (TONNES)



Source: Trade Map.

SOUTH KOREA



SOUTH KOREA

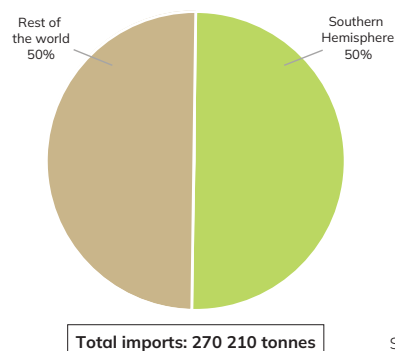
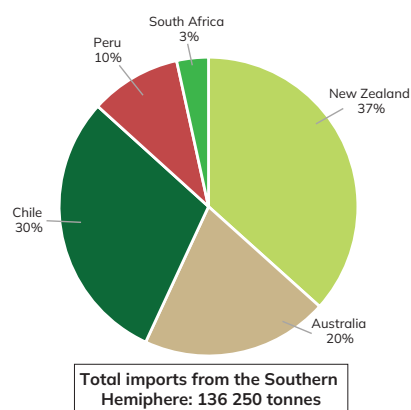
South Korea imports significant volumes of fresh fruit to supplement its domestic temperate fruit production. However, the country does not allow any imports of apples, pears, stone fruit, or soft citrus from any origin. Southern Hemisphere suppliers account for 50 percent of South Korea's fresh temperate fruit imports, with imports from the region having increased by an average 6 percent per year over the past five years.

Kiwifruit from New Zealand, table grapes from Chile, and oranges from Australia lead the country's Southern Hemisphere fruit imports.

IMPORTS INTO SOUTH KOREA OF TEMPERATE FRUITS BY ORIGIN, 2024/25

	Tonnes	1 yr change	5 yr change	Share
New Zealand	49 942	11%	6%	37%
Australia	27 601	9%	24%	20%
Chile	40 604	50%	2%	30%
Peru	13 431	21%	-3%	10%
South Africa	4 672	-35%	-2%	3%
Southern Hemisphere	136 250	18%	6%	
Rest of the world	133 960			
TOTAL	270 210	9%	0%	

Source: Trade Map.



Source: Trade Map.

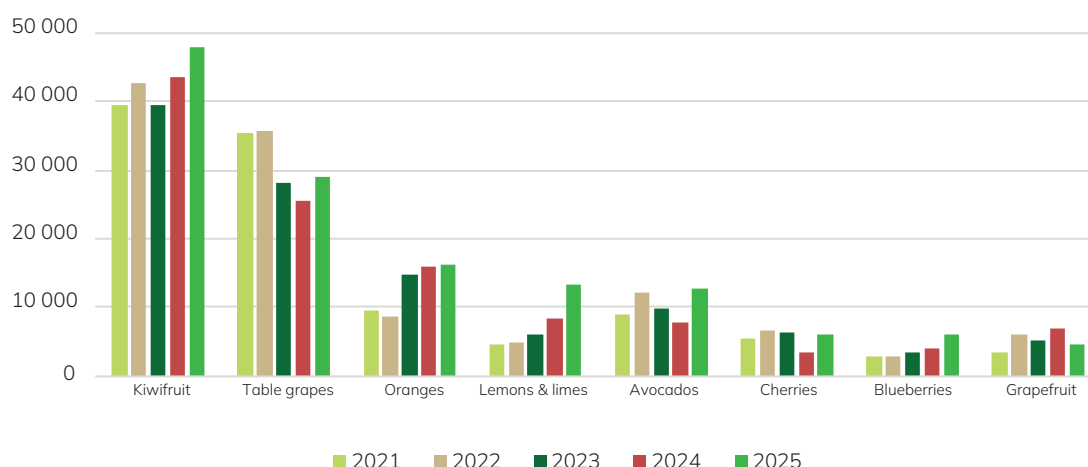
SOUTH KOREA

IMPORTS INTO SOUTH KOREA OF TEMPERATE FRUITS FROM THE SOUTHERN HEMISPHERE BY FRUIT TYPE, 2024/25

	Tonnes	1 yr change	5 yr change	Share
Kiwifruit	47 917	10%	5%	35%
Table grapes	29 135	14%	-5%	21%
Oranges	16 363	3%	14%	12%
Lemons & limes	13 379	59%	30%	10%
Avocados	12 628	61%	9%	9%
Cherries	6 217	73%	3%	5%
Blueberries	5 932	52%	20%	4%
Grapefruit	4 665	-32%	7%	3%
Southern Hemisphere	136 250	18%	6%	

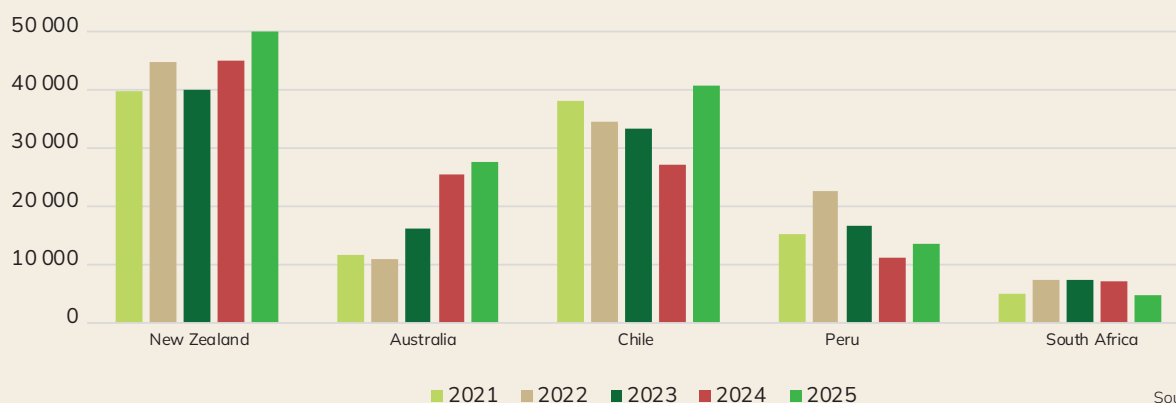
Source: Trade Map.

IMPORTS INTO SOUTH KOREA OF TEMPERATE FRUITS FROM THE SOUTHERN HEMISPHERE BY FRUIT TYPE, 2020/21 TO 2024/25 (TONNES)



Source: Trade Map.

IMPORTS INTO SOUTH KOREA OF TEMPERATE FRUITS FROM THE SOUTHERN HEMISPHERE, 2020/21 TO 2024/25 (TONNES)



Source: Trade Map.

TAIWAN



TAIWAN

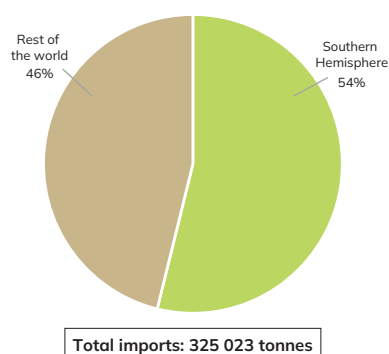
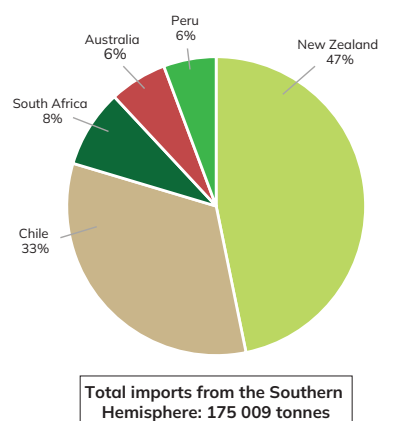
Taiwan is a producer of tropical fruits, and the demand for imported fruits focuses mainly on temperate fruit types. In 2024/25, fresh fruit imports rose 11 percent year-on-year to nearly 300 000 tonnes. Southern Hemisphere countries supplied 49 percent of these imports, while the United States of America accounted for 35 percent.

Apples are the leading imported fruit category, increasing 14 percent year-on-year in 2024/25. Kiwifruit and grapes rebounded following declines the previous year. Imports of peaches and nectarines rose 21 percent to 13 055 tonnes, again driven by a recovery in U.S. supply.

IMPORTS INTO TAIWAN OF TEMPERATE FRUITS BY ORIGIN, 2024/25

	Tonnes	1 yr change	5 yr change	Share
New Zealand	81 894	41%	8%	47%
Chile	57 451	26%	6%	33%
South Africa	14 778	19%	-10%	8%
Australia	10 914	71%	25%	6%
Peru	9 973	3%	14%	6%
Southern Hemisphere	175 009	32%	6%	
Rest of the world	150 014			
TOTAL	325 023	20%	5%	

Source: Trade Map.



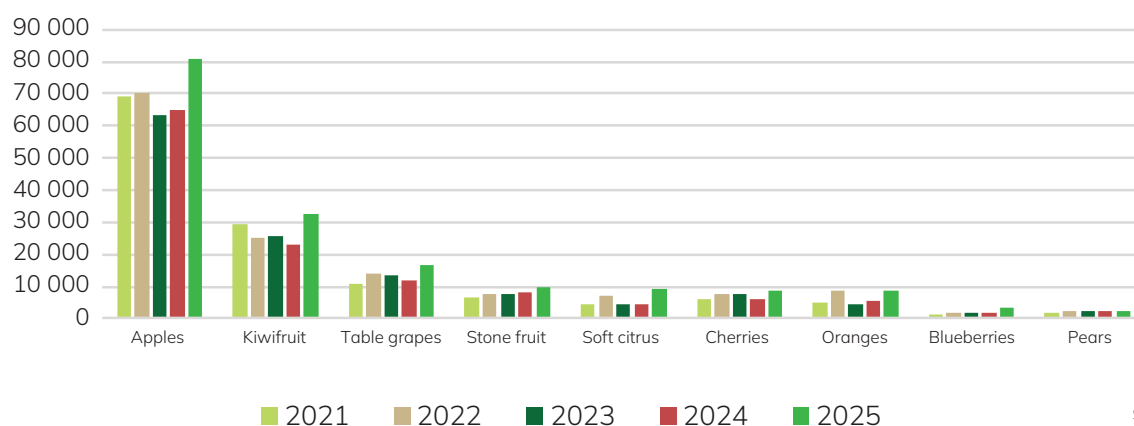
Source: Trade Map.

IMPORTS INTO TAIWAN OF TEMPERATE FRUITS FROM THE SOUTHERN HEMISPHERE BY FRUIT TYPE, 2024/25

	Tonnes	1 yr change	5 yr change	Share
Apples	80 892	24%	4%	46%
Kiwifruit	32 590	40%	3%	19%
Table grapes	16 878	42%	12%	10%
Stone fruit	9 510	15%	11%	5%
Soft citrus	9 237	111%	18%	5%
Cherries	8 728	41%	10%	5%
Oranges	8 573	50%	13%	5%
Blueberries	3 576	94%	32%	2%
Pears	2 297	-6%	10%	1%
Grapefruit	1 667	-32%	-15%	1%
Avocados	1 062	33%	12%	1%
Southern Hemisphere	175 009	32%	6%	

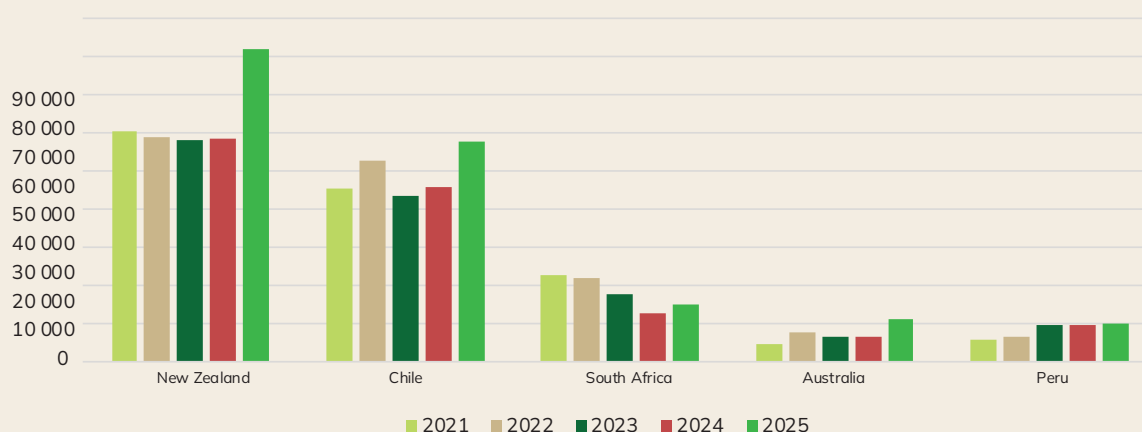
Source: Trade Map.

IMPORTS INTO TAIWAN OF TEMPERATE FRUITS FROM THE SOUTHERN HEMISPHERE BY FRUIT TYPE, 2020/21 TO 2024/25 (TONNES)

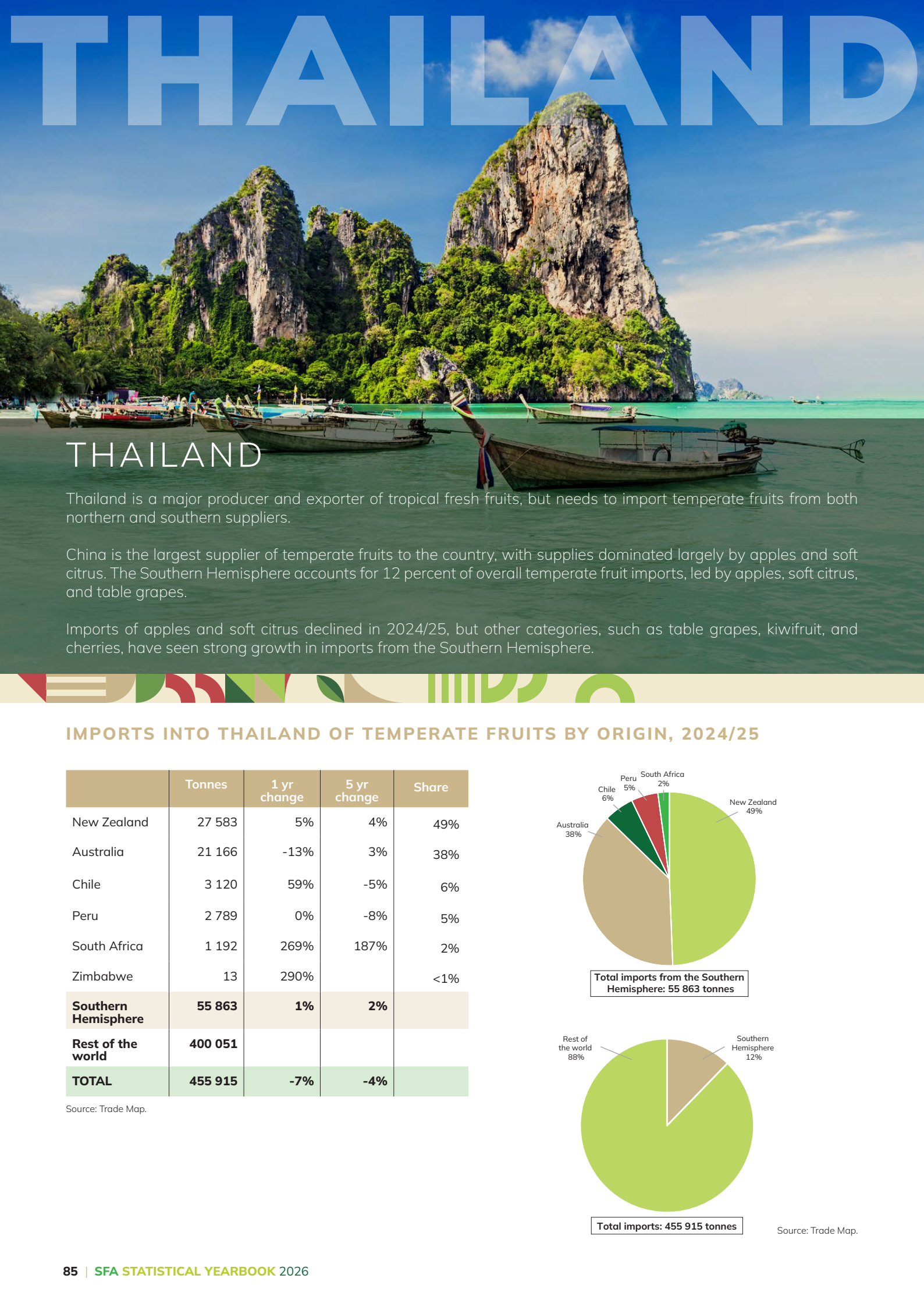


Source: Trade Map.

IMPORTS INTO TAIWAN OF TEMPERATE FRUITS FROM THE SOUTHERN HEMISPHERE, 2020/21 TO 2024/25 (TONNES)



Source: Trade Map.



THAILAND

THAILAND

Thailand is a major producer and exporter of tropical fresh fruits, but needs to import temperate fruits from both northern and southern suppliers.

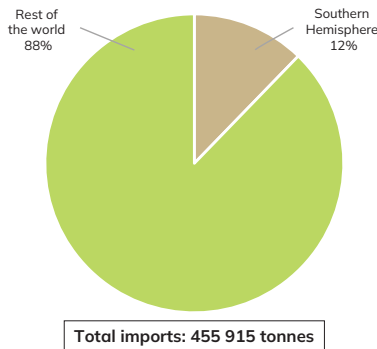
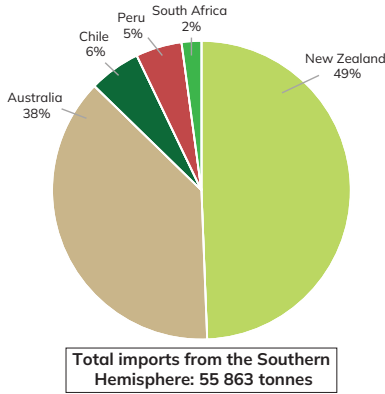
China is the largest supplier of temperate fruits to the country, with supplies dominated largely by apples and soft citrus. The Southern Hemisphere accounts for 12 percent of overall temperate fruit imports, led by apples, soft citrus, and table grapes.

Imports of apples and soft citrus declined in 2024/25, but other categories, such as table grapes, kiwifruit, and cherries, have seen strong growth in imports from the Southern Hemisphere.

IMPORTS INTO THAILAND OF TEMPERATE FRUITS BY ORIGIN, 2024/25

	Tonnes	1 yr change	5 yr change	Share
New Zealand	27 583	5%	4%	49%
Australia	21 166	-13%	3%	38%
Chile	3 120	59%	-5%	6%
Peru	2 789	0%	-8%	5%
South Africa	1 192	269%	187%	2%
Zimbabwe	13	290%		<1%
Southern Hemisphere	55 863	1%	2%	
Rest of the world	400 051			
TOTAL	455 915	-7%	-4%	

Source: Trade Map.



Source: Trade Map.

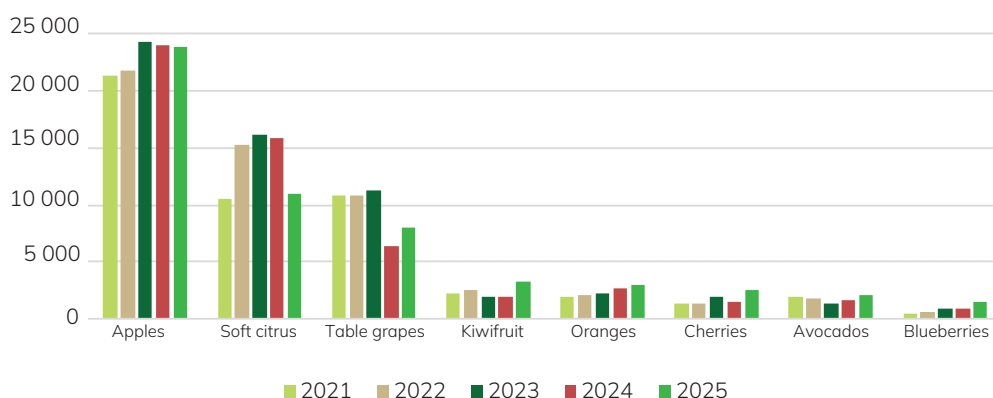
THAILAND

IMPORTS INTO THAILAND OF TEMPERATE FRUITS FROM THE SOUTHERN HEMISPHERE BY FRUIT TYPE, 2024/25

	Tonnes	1 yr change	5 yr change	Share
Apples	23 881	-1%	3%	43%
Soft citrus	11 028	-31%	1%	20%
Table grapes	8 093	25%	-7%	14%
Kiwifruit	3 282	68%	9%	6%
Oranges	2 975	12%	11%	5%
Cherries	2 589	66%	18%	5%
Avocados	2 107	29%	1%	4%
Blueberries	1 463	52%	29%	3%
Pears	176	175%	7%	<1%
Lemons & limes	134	20%	94%	<1%
Stone fruit	99	284%	71%	<1%
Grapefruit	23	-49%		<1%
Southern Hemisphere	55 863	1%	2%	

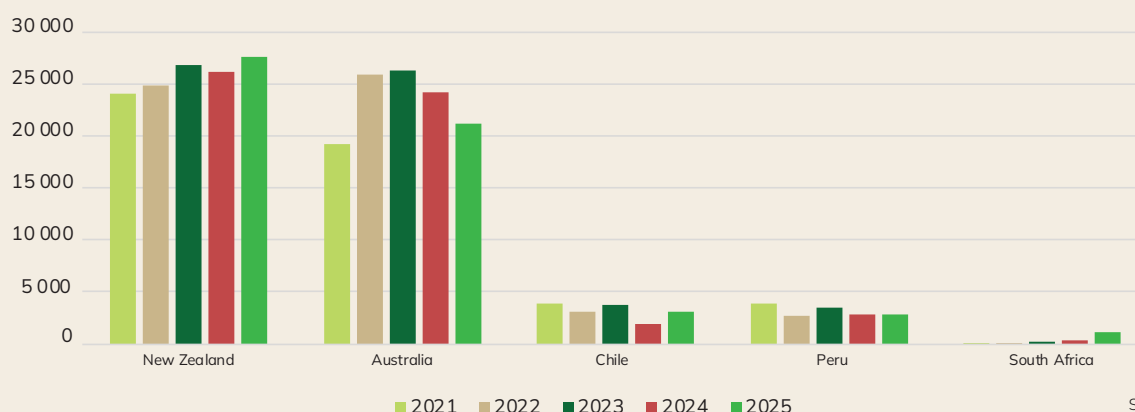
Source: Trade Map.

IMPORTS INTO THAILAND OF TEMPERATE FRUITS FROM THE SOUTHERN HEMISPHERE BY FRUIT TYPE, 2020/21 TO 2024/25 (TONNES)



Source: Trade Map.

IMPORTS INTO THAILAND OF TEMPERATE FRUITS FROM THE SOUTHERN HEMISPHERE, 2020/21 TO 2024/25 (TONNES)



Source: Trade Map.

VIET NAM

VIET NAM

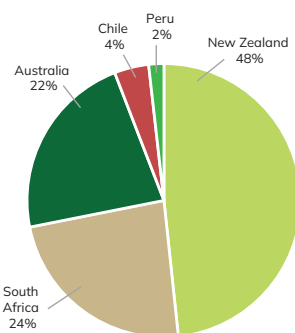
Viet Nam is a large tropical fresh fruit producer with a rapidly expanding production base. Given its tropical climate, Viet Nam imports over 1.1 million tonnes of fresh temperate fruits, mostly from China.

The Southern Hemisphere accounts for 10 percent of Viet Nam's fresh temperate fruit imports, with supplies from the region growing by an average 6 percent annually over the past five years. Apples are the main product, followed by oranges, soft citrus and table grapes. New Zealand, South Africa, and Australia are the country's main Southern Hemisphere suppliers.

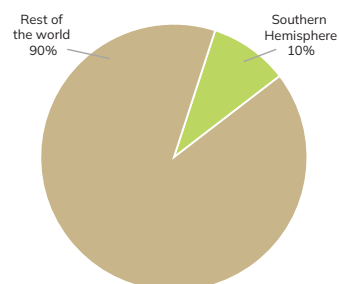
IMPORTS INTO VIET NAM OF TEMPERATE FRUITS BY ORIGIN, 2024/25

	Tonnes	1 yr change	5 yr change	Share
New Zealand	52 044	2%	4%	48%
South Africa	25 377	-22%	4%	24%
Australia	23 987	4%	8%	22%
Chile	4 379	117%	26%	4%
Peru	1 928	-38%	3%	2%
Southern Hemisphere	107 715	-3%	6%	
Rest of the world	1 018 661			
TOTAL	1 126 376	0%	4%	

Source: Trade Map.



Total imports from the Southern Hemisphere: 107 715 tonnes



Total imports: 1 126 376 tonnes

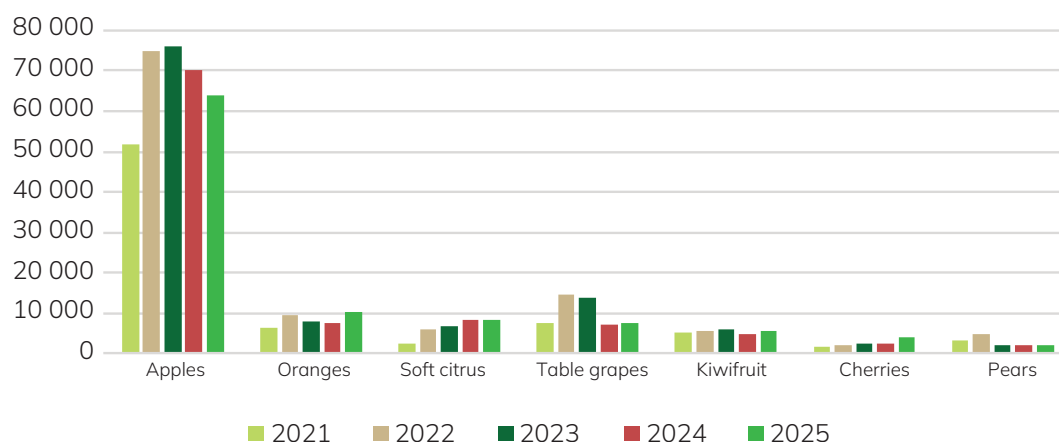
Source: Trade Map.

IMPORTS INTO VIET NAM OF TEMPERATE FRUITS FROM THE SOUTHERN HEMISPHERE BY FRUIT TYPE, 2024/25

	Tonnes	1 yr change	5 yr change	Share
Apples	63 778	-9%	5%	62%
Oranges	10 394	34%	13%	10%
Soft citrus	8 328	0%	35%	8%
Table grapes	7 773	7%	0%	8%
Kiwifruit	5 759	17%	2%	6%
Cherries	4 242	74%	28%	4%
Pears	2 118	-5%	-11%	2%
Stone fruit	262	79%	119%	<1%
Blueberries	106	18%	-6%	<1%
Southern Hemisphere	102 655	0%	7%	

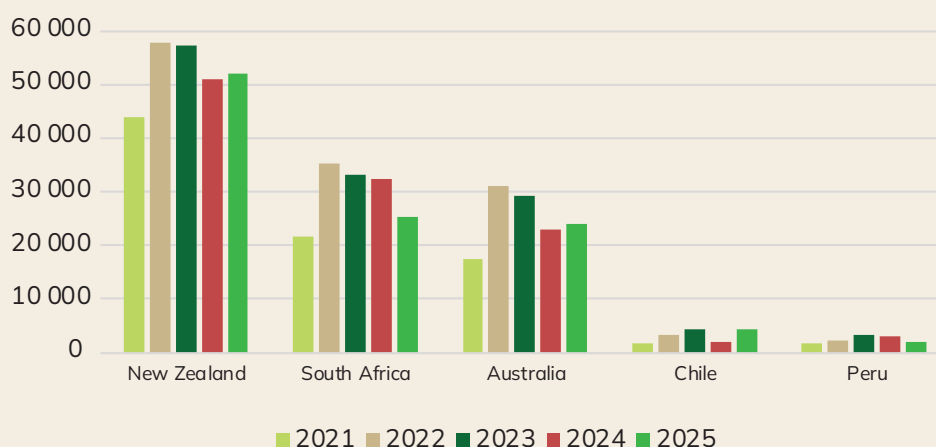
Source: Trade Map.

IMPORTS INTO VIET NAM OF TEMPERATE FRUITS FROM THE SOUTHERN HEMISPHERE BY FRUIT TYPE, 2020/21 TO 2024/25 (TONNES)



Source: Trade Map.

IMPORTS INTO VIET NAM OF TEMPERATE FRUITS FROM THE SOUTHERN HEMISPHERE, 2020/21 TO 2024/25 (TONNES)



Source: Trade Map.

