SFA

SOUTHERN HEMISPHERE FRUIT ALLIANCE

# STATISTICAL YEARBOOK

## 2026

www.shfruit.org

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Market analysis by Wayne Prowse, Fresh Intelligence
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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 SHAFFE) 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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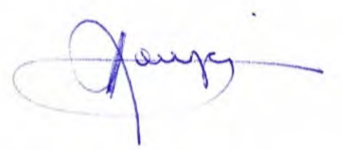
# FOREWORD

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*

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

# 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

**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.

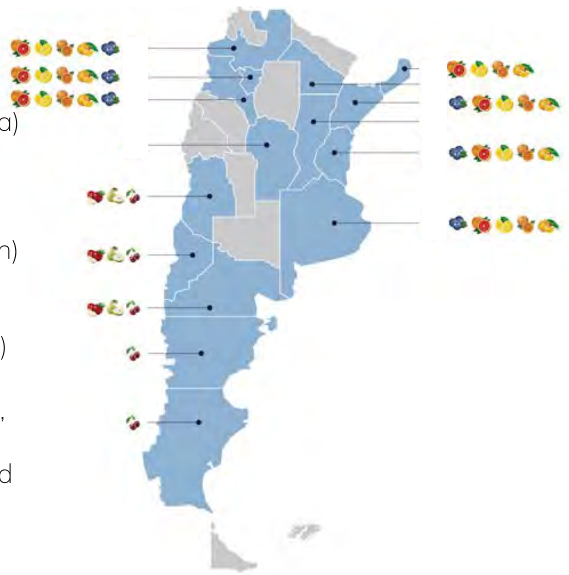
## PRODUCTION AREAS

**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<br>Neuquén<br>Río Negro<br>Chubut<br>Santa Cruz |
| Blueberries | Salta<br>Catamarca<br>Tucumán<br>Corrientes<br>Entre Ríos<br>Buenos Aires |
| Citrus | Salta<br>Catamarca<br>Tucumán<br>Misiones<br>Corrientes<br>Entre Ríos<br>Buenos Aires |
| Pears and Apples | Mendoza<br>Neuquén<br>Río Negro |

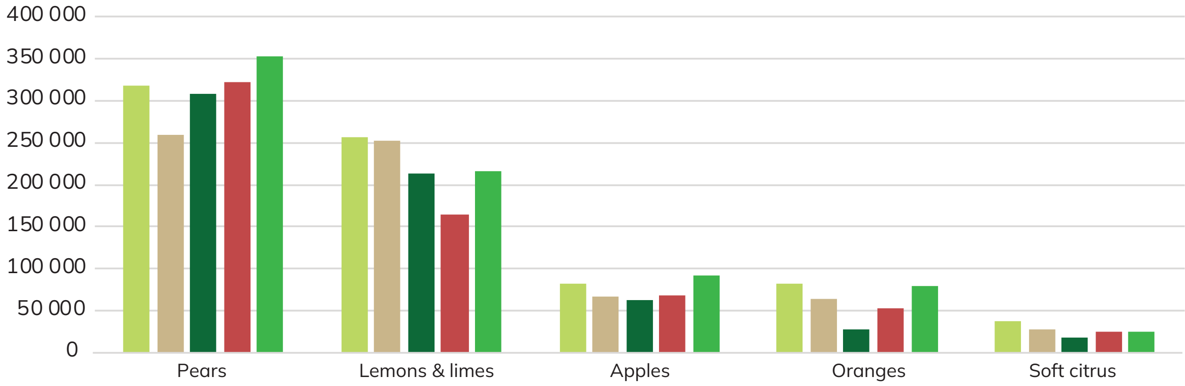
Source: Frutas de Argentina.

## INDUSTRY STRUCTURES AND GOVERNMENT SUPPORT

FRUTAS DE ARGENTINA

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)




Source: Trade Map.

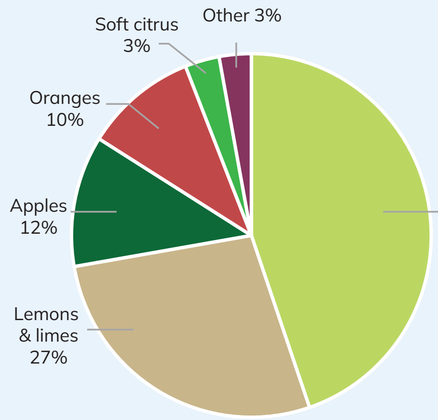
## DRIVERS AND CONSTRAINTS IN EXPORT PERFORMANCE

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

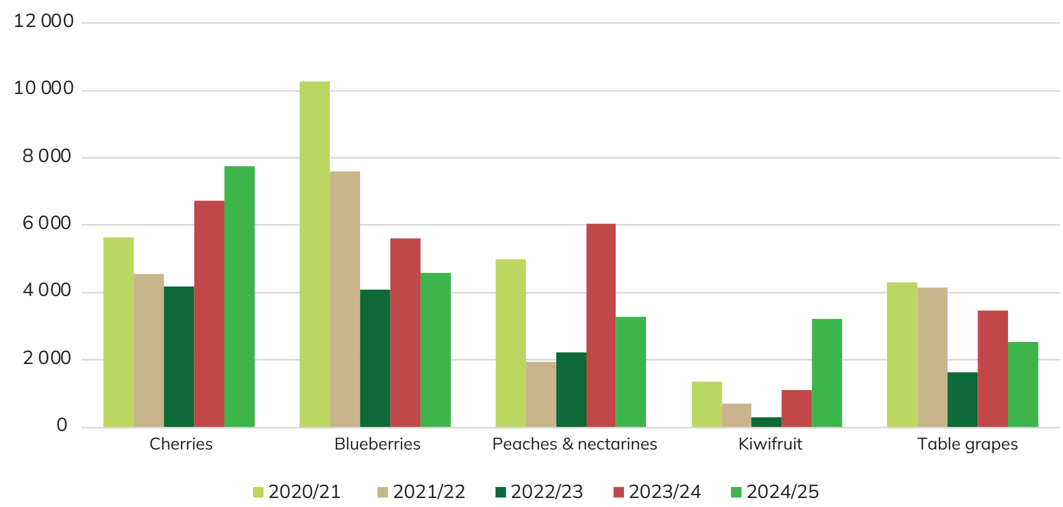



Total exports: 787 708 tonnes

| | 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)

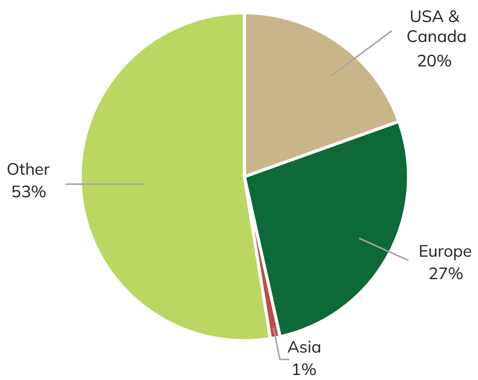



Source: Trade Map.

## 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%** | |

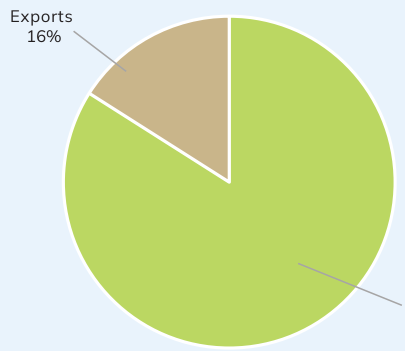
Source: Trade Map.




## 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




**Total production: 4 968 431 tonnes**

Source: Trade Map, FAOSTAT.

# AUSTRALIA

**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 though 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

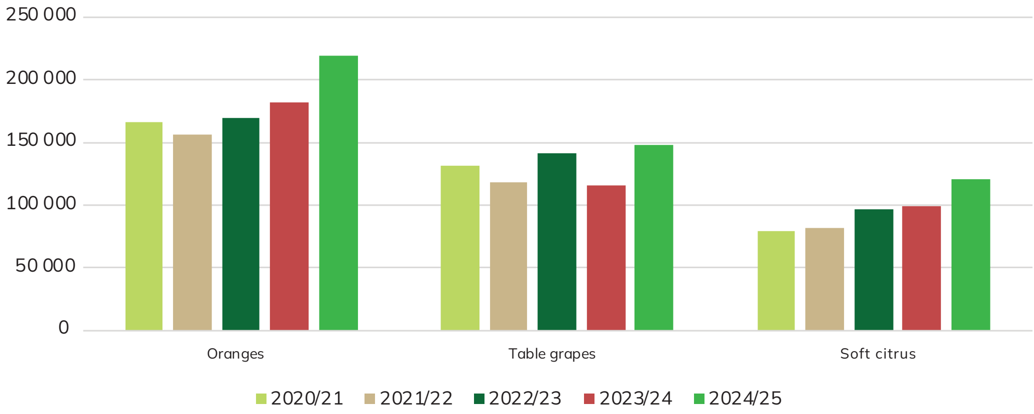
**Cherries** – Tasmania (Huon and Derwent Valleys, Victoria (Yarra Valley) and New South Wales (Young and Orange) and Adelaide Hills in South Australia.


## 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 though 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.

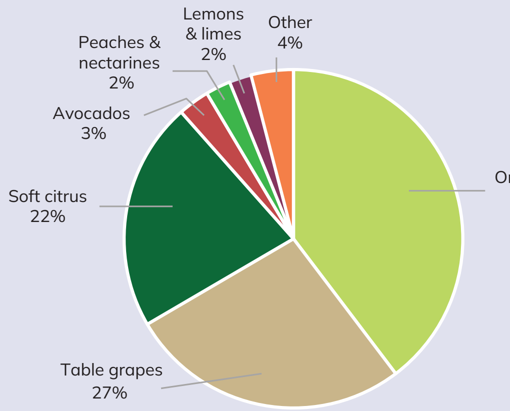
Oranges, table grapes, and soft citrus account for 87 percent of total fresh fruit exports, with China and Japan remaining the largest destinations. Table grape exports rose 28 percent in 2025, supported by improved market access conditions in Japan. Together with stone fruit, avocados, and cherries,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

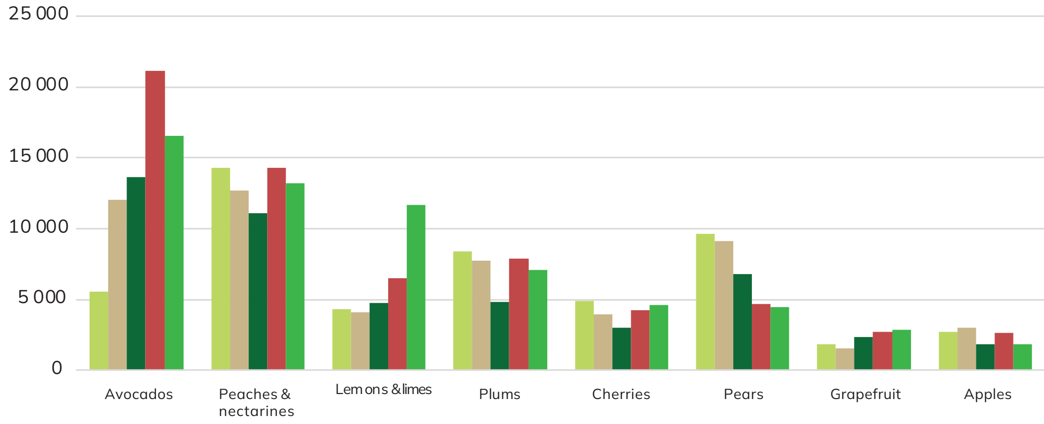



Total exports: 551 651 tonnes

| | 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)

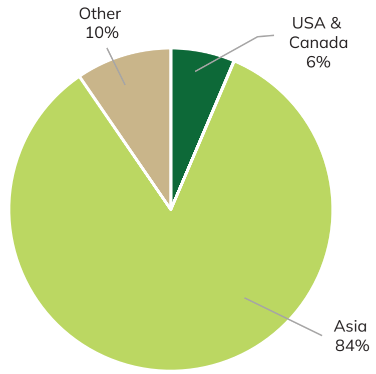



Source: Trade Map.

## 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%** |

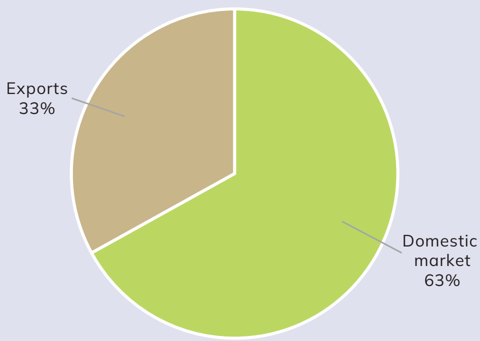
Source: Trade Map.




## 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

Australian Mangoes · ATGA Australian Table Grape Association Inc · Avocados Australia · Citrus Australia · Summerfruit Australia

# BRAZIL

**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)

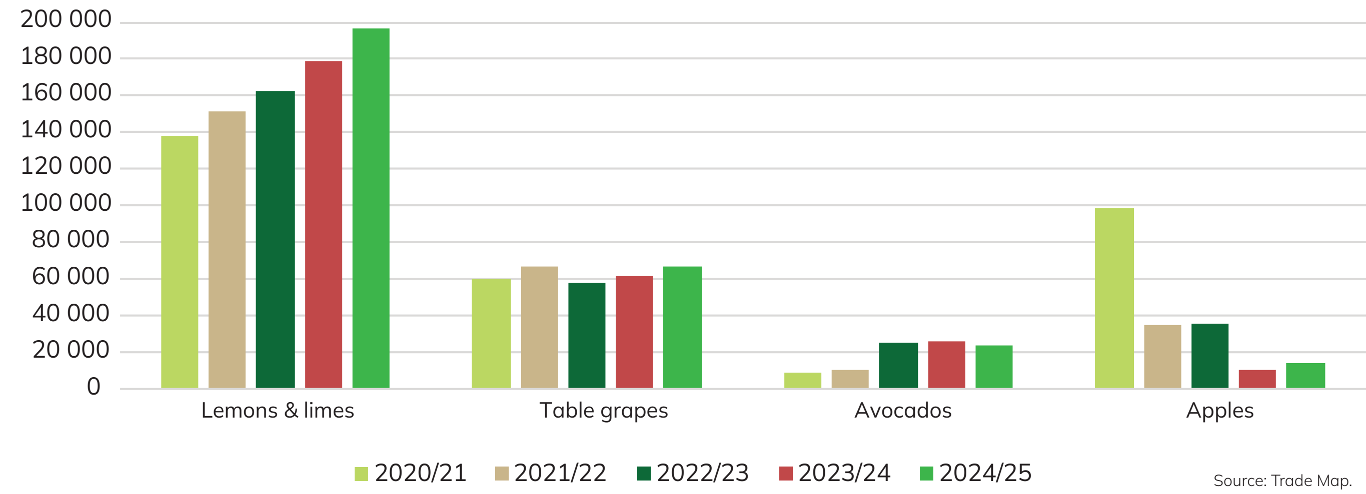

Source: Abrafrutas

## 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)



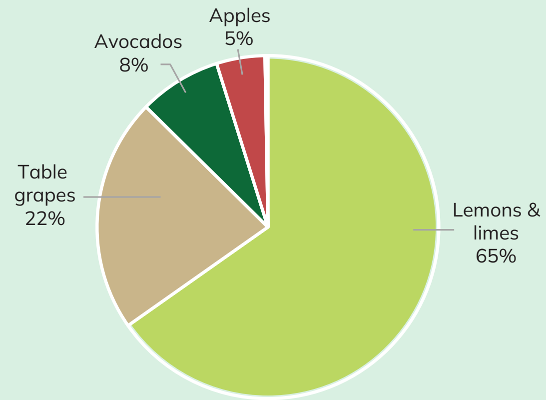

Source: Trade Map.

## 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



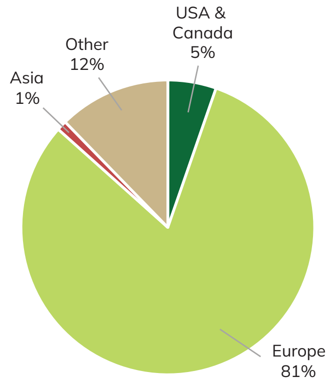

Total exports: 300 988 tonnes

| | 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

# CHILE

**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

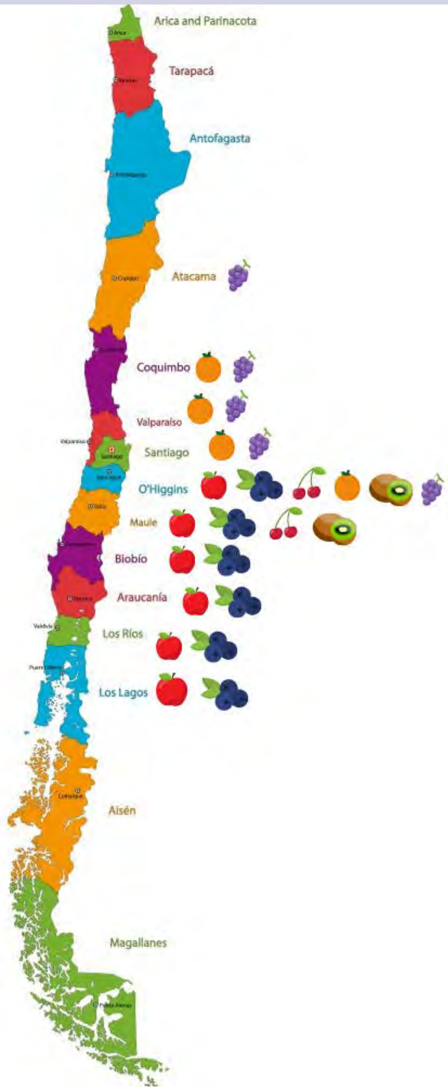
**Kiwifruit** – O'Higgins, Maule

**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.



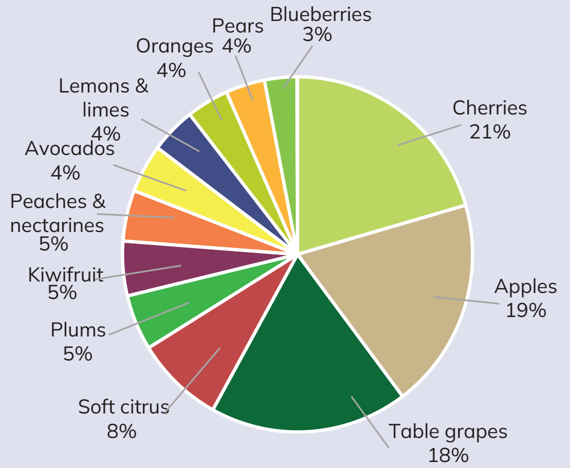
## INDUSTRY STRUCTURES AND GOVERNMENT SUPPORT

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.

## 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.

## DRIVERS AND CONSTRAINTS IN EXPORT PERFORMANCE

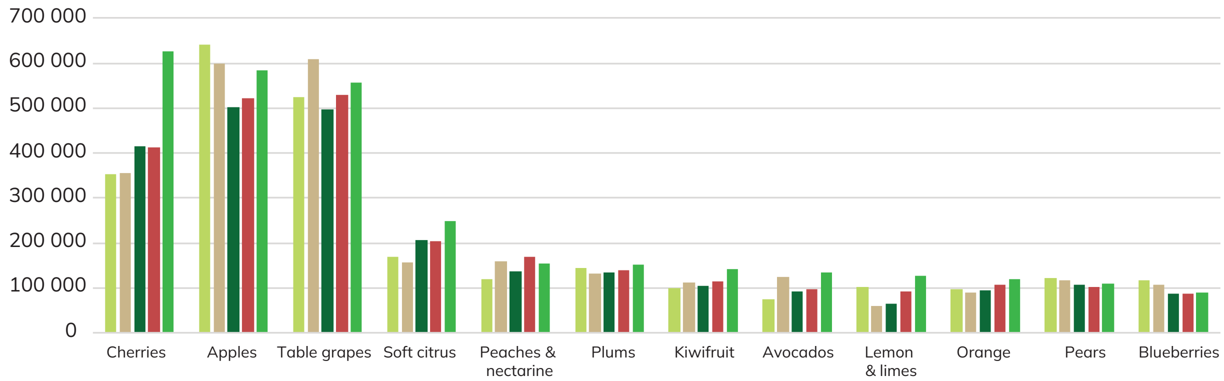
Chile has expanded its trade relationships with key importing countries, including China, the United States of America, the Netherlands, Italy, and Brazil. Export growth has been supported by innovation, new variety adoption, growing new markets (particularly in Asia), and strong supply chain investment.

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

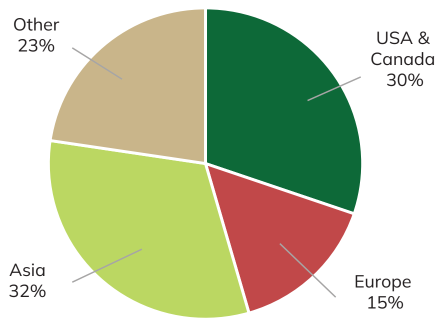
## FRUIT EXPORTS, FIVE-YEAR TREND (TONNES)




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%** | |

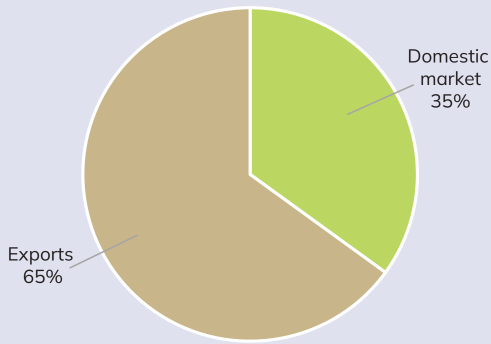



Source: Trade Map.

## 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




Total production: 4 686 655 tonnes

Source: Trade Map, FAOSTAT.

## SOUTHERN HEMISPHERE FRUIT ALLIANCE MEMBER IN CHILE

Frutas de Chile

# NEW ZEALAND

**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.

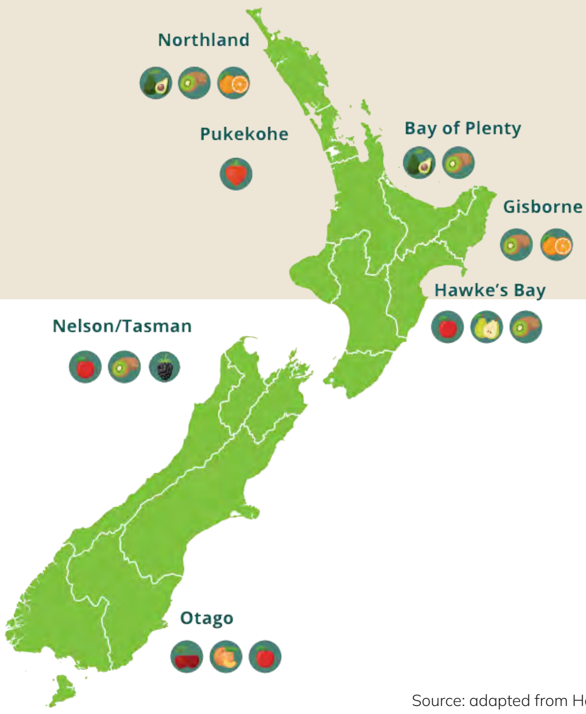
## PRODUCTION TRENDS AND WEATHER IMPACTS

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.

## 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

## 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)

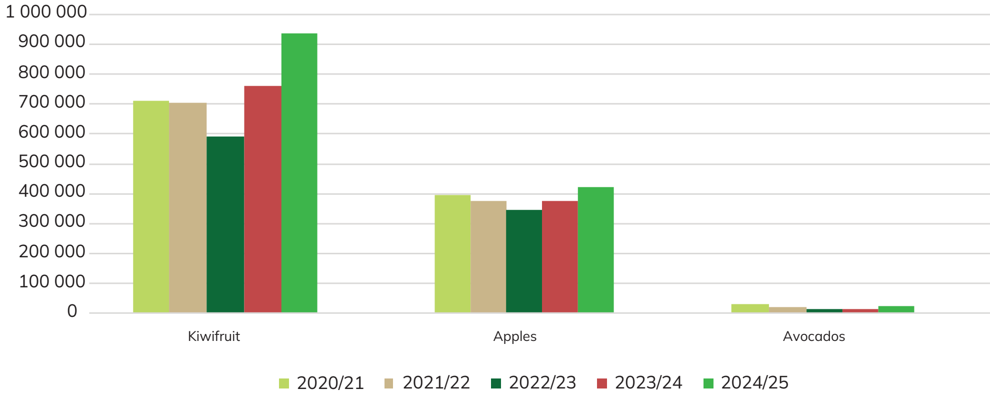
**Kiwifruit** – Bay of Plenty and Northland (North Island)

## 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

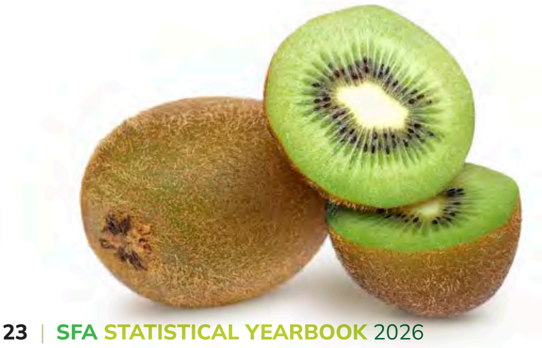
New Zealand's fresh fruit export success is driven by strong Asian demand, a reputation of high quality, the negotiation of free trade agreements, integration in supply chains involving strong relationships from growers to retailers, technology adoption including for enhanced traceability and quality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

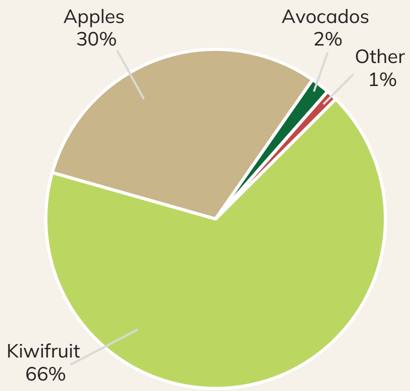
While close to Asia, New Zealand's geographic location makes it the furthest supplier from key traditional markets in Europe.

## 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

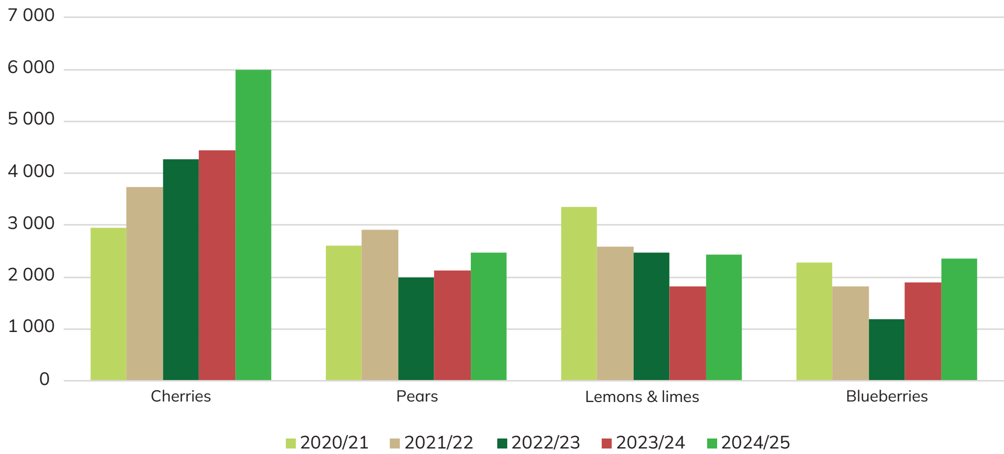



Total exports: 1 378 007 tonnes

| | 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)

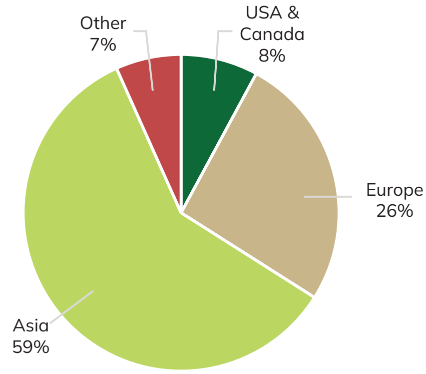



Source: Trade Map.

## 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%** | |

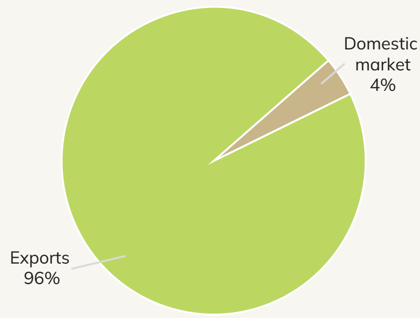
Source: Trade Map.




## 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

New Zealand Apples & Pears

# PERU

**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

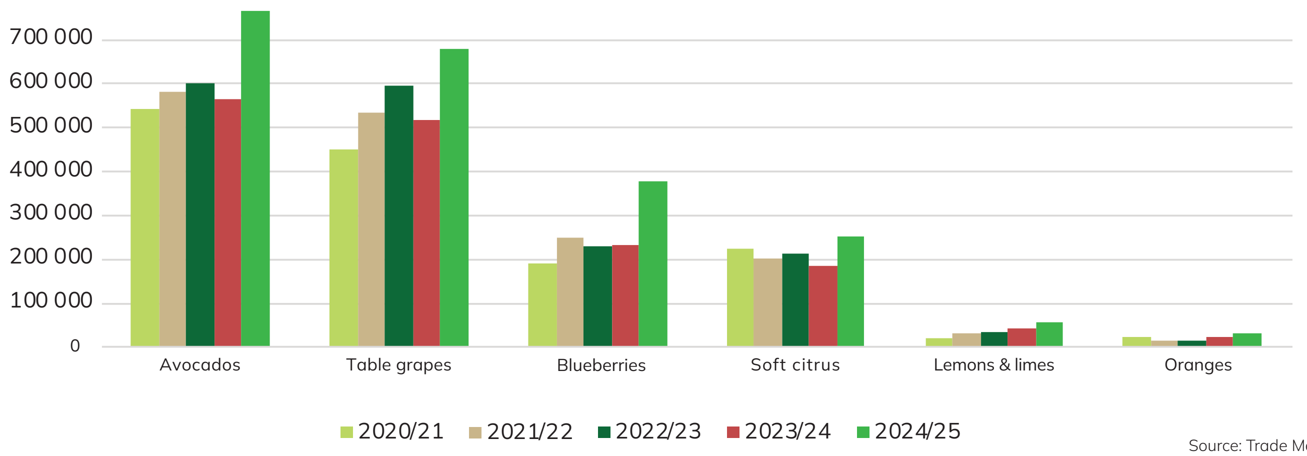
peru citrus®

the very **best of Peru**

**www.perucitrus.org**

procitrus@procitrus.org

## MAJOR FRUIT EXPORTS, FIVE-YEAR TREND (TONNES)




Source: Trade Map.

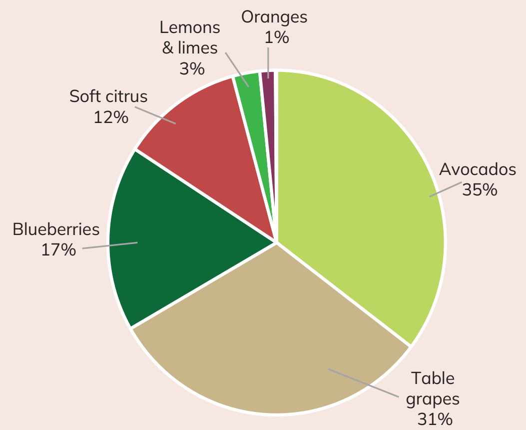
## DRIVERS AND CONSTRAINTS IN EXPORT PERFORMANCE

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 Perus' 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.

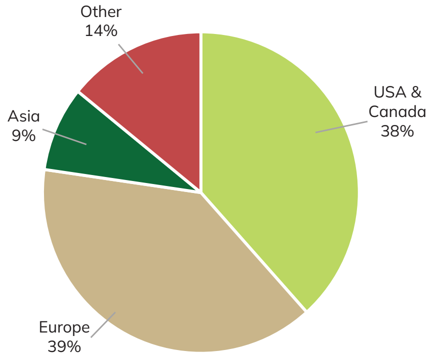
External policy developments, particularly in the United States of America, will remain a key factor influencing future export performance. To mitigate market concentration risks, the industry is actively pursuing diversification through new market access and the development of new crops for export.

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%** | |



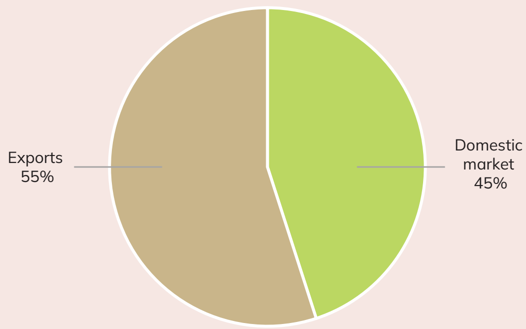

Source: Trade Map.

## 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




Total production: 3 968 813 tonnes

Source: Trade Map, FAOSTAT.

## SOUTHERN HEMISPHERE FRUIT ALLIANCE MEMBERS IN PERU

agap Asociación de Gremios Productores Agrarios del Perú

ProCitrus Asociación de Productores de Cítricos del Perú

# SOUTH AFRICA

**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 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.

## 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.

## PRODUCTION AREAS

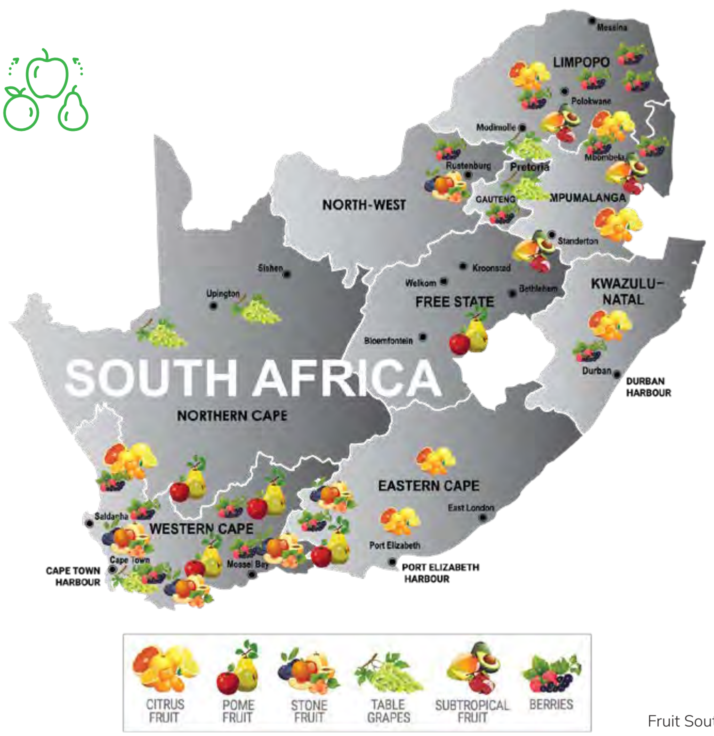
**Citrus** – Limpopo, Eastern Cape, Western Cape, Northern Cape, Mpumalanga, North West, and KwaZulu-Natal

**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

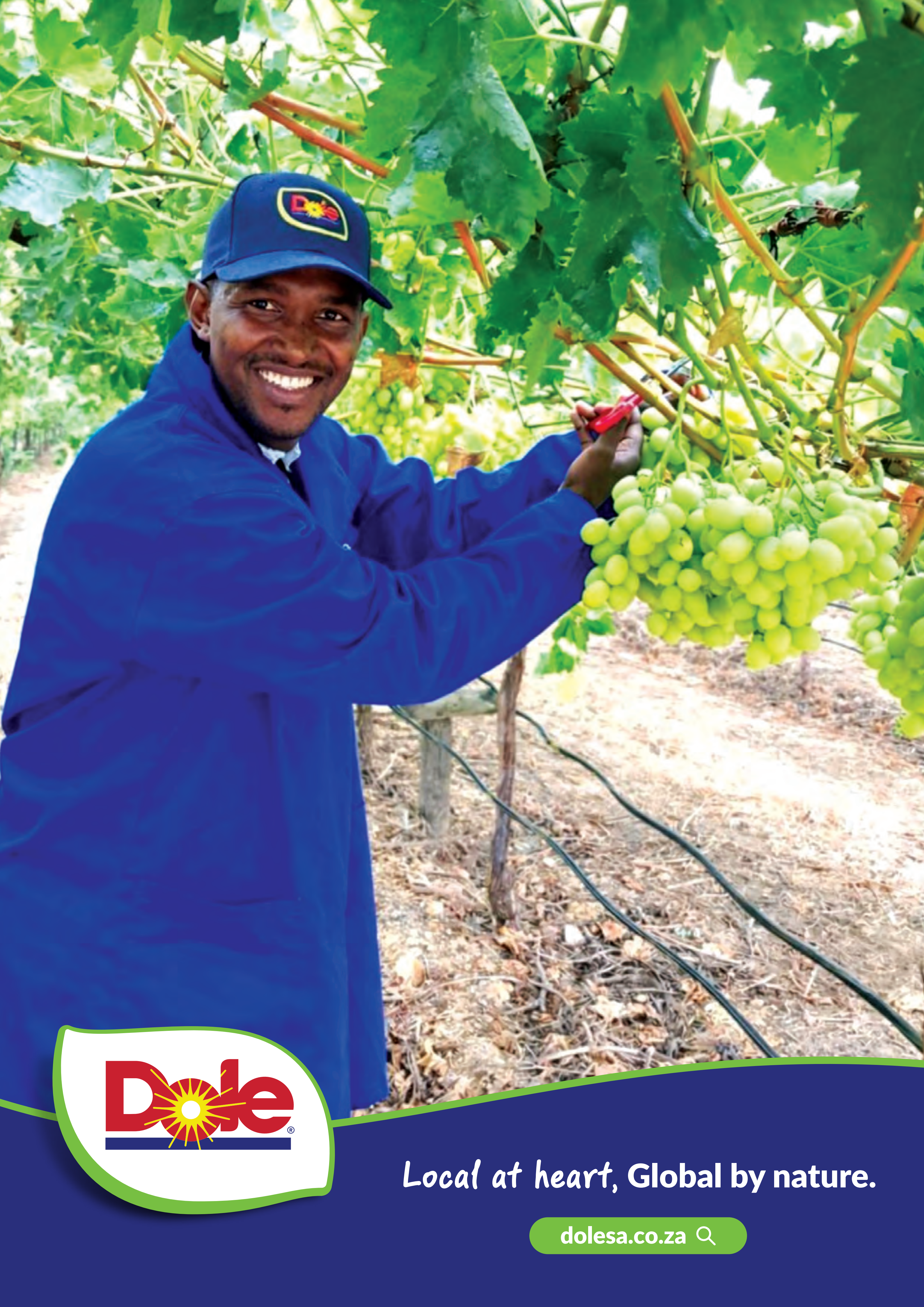
**Apples and pears** – Western Cape, Eastern Cape, Free State, Mpumalanga, Northern Provinces

**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


Dole
Local at heart, Global by nature.
dolesa.co.za

## 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.

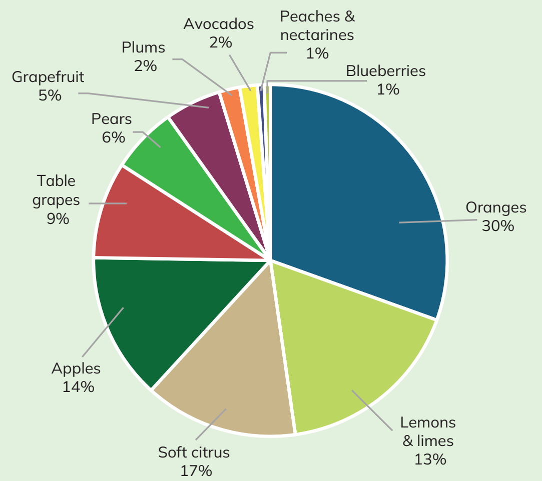
## DRIVERS AND CONSTRAINTS IN EXPORT PERFORMANCE

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

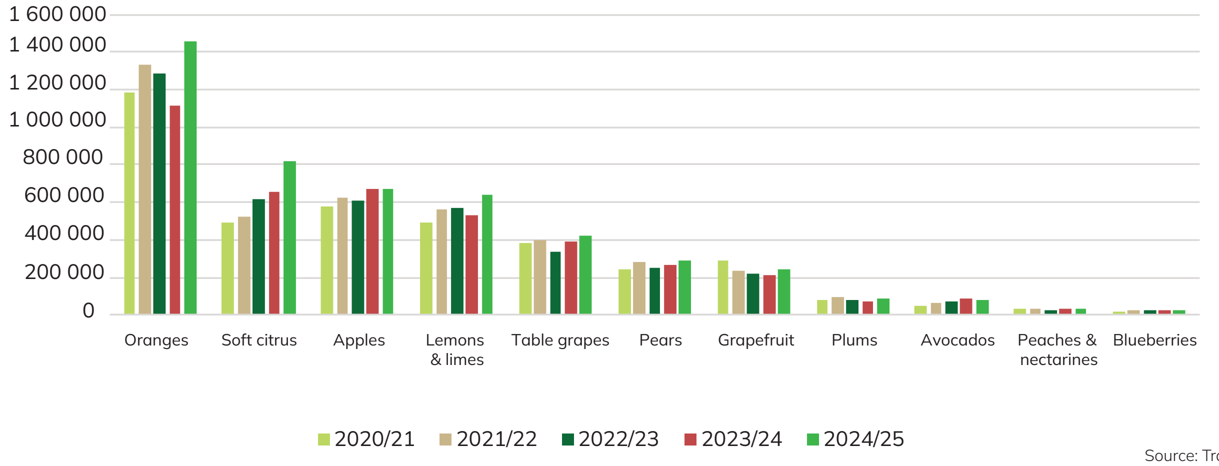



**Total exports: 4 793 220 tonnes**

| | 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.

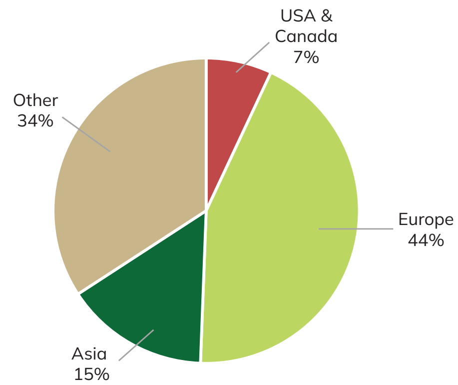
## OTHER FRUIT EXPORTS, FIVE-YEAR TREND (TONNES)




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%** | |

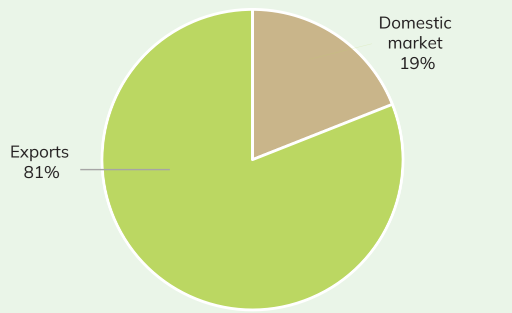



Source: Trade Map.

## 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

**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 emphases 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%** | |

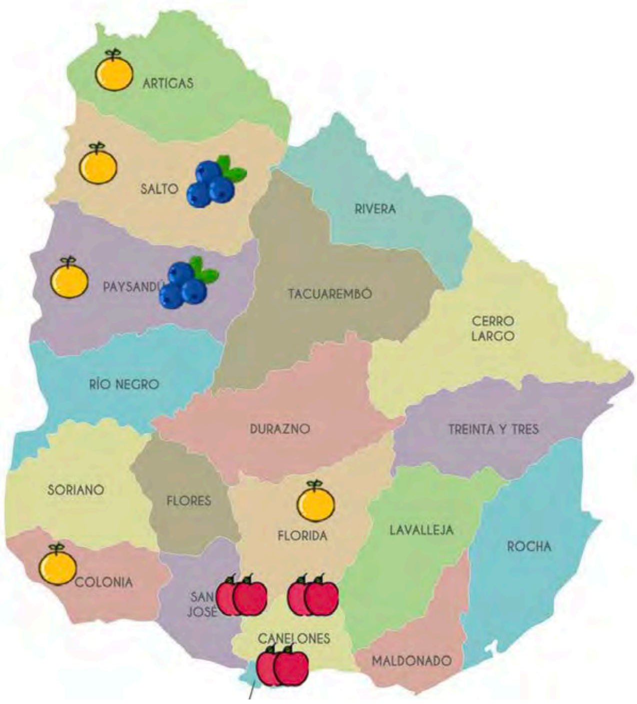
Source: FAOSTAT.

## PRODUCTION AREAS

**Citrus** – Artigas, Colonia, Florida, Paysandú, Salto

**Blueberries** – Paysandú, Salto

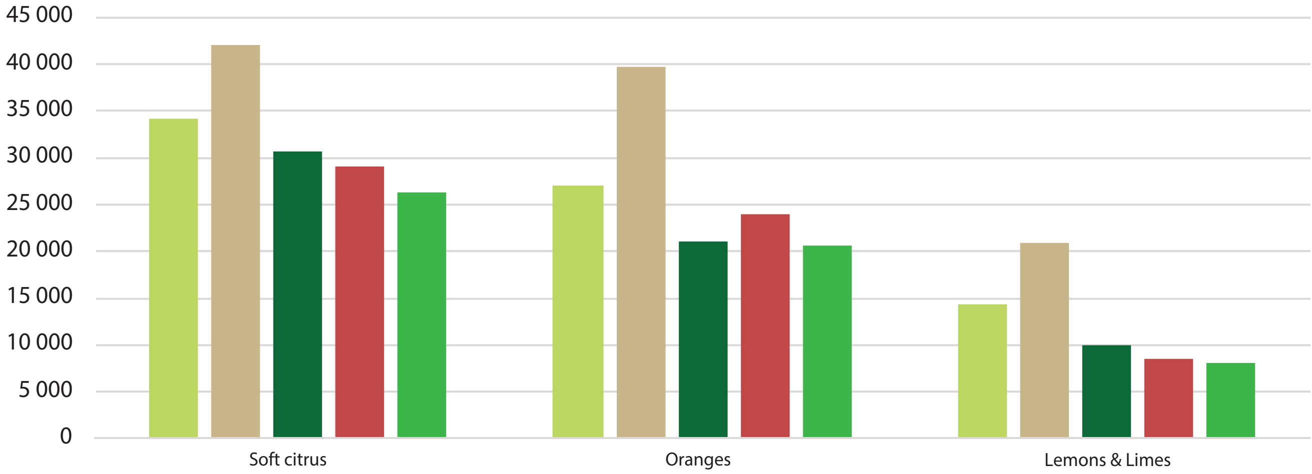
**Apples** – southern regions around Montevideo, Canelones, San José




## 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)




Source: Trade Map.

## DRIVERS AND CONSTRAINTS IN EXPORT PERFORMANCE

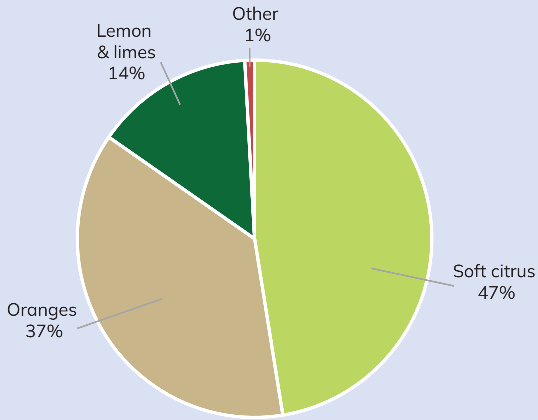
Uruguay's fresh fruit export performance is driven by its favourable climate, fertile land, and government support for technology and sustainable practices, enhancing quality particularly for its main markets in Europe and the United States of America.

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.

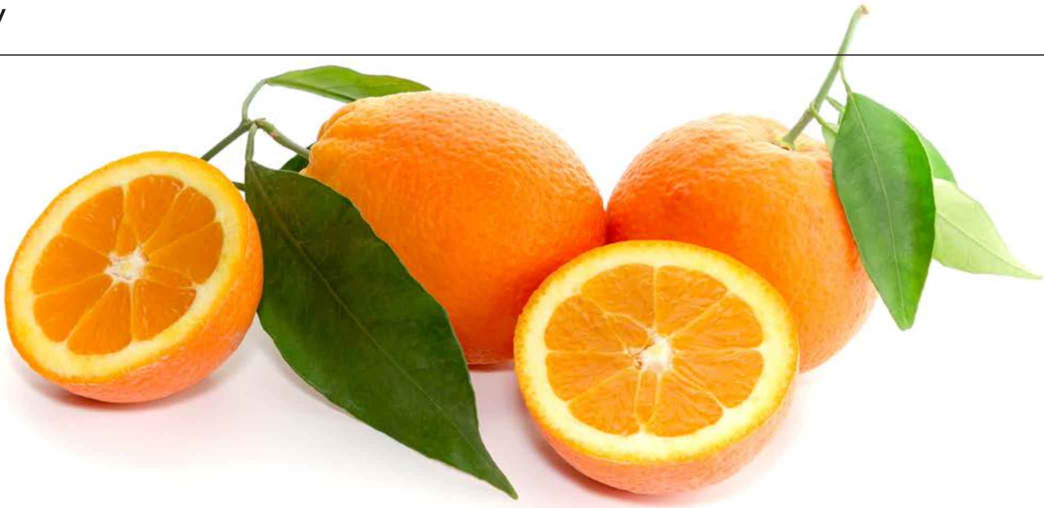
## FRUIT EXPORTS, 2024/25




Total exports: 55 498 tonnes

| | 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%** | |

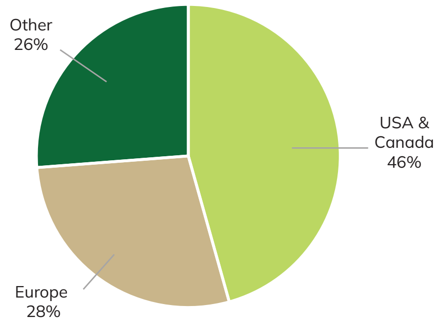
Source: Trade Map.



## 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%** | |

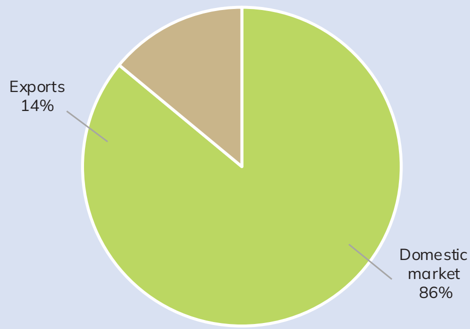
Source: Trade Map.




## 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




Total production: 406 948 tonnes

Source: Trade Map, FAOSTAT.

## SOUTHERN HEMISPHERE FRUIT ALLIANCE MEMBER IN URUGUAY

upefruy

Unión de Productores y Exportadores Frutihortícolas del Uruguay

# ZIMBABWE

**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.

## 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%** | |

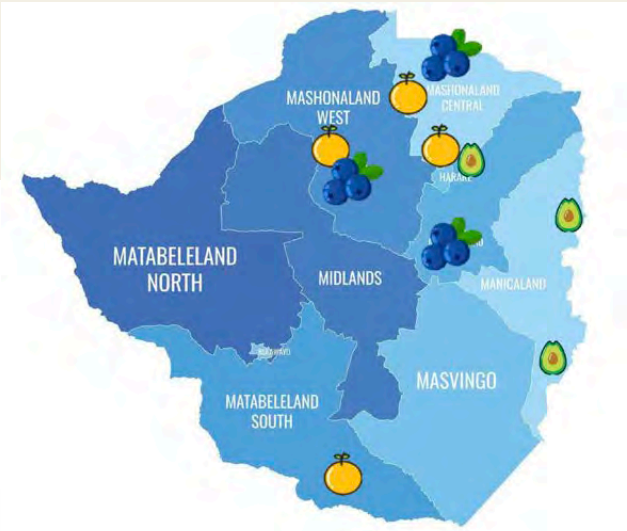
Source: FAOSTAT.

## PRODUCTION AREAS

**Avocados** – Manicaland and Mashonaland Central

**Blueberries** – Mashonaland Central and East

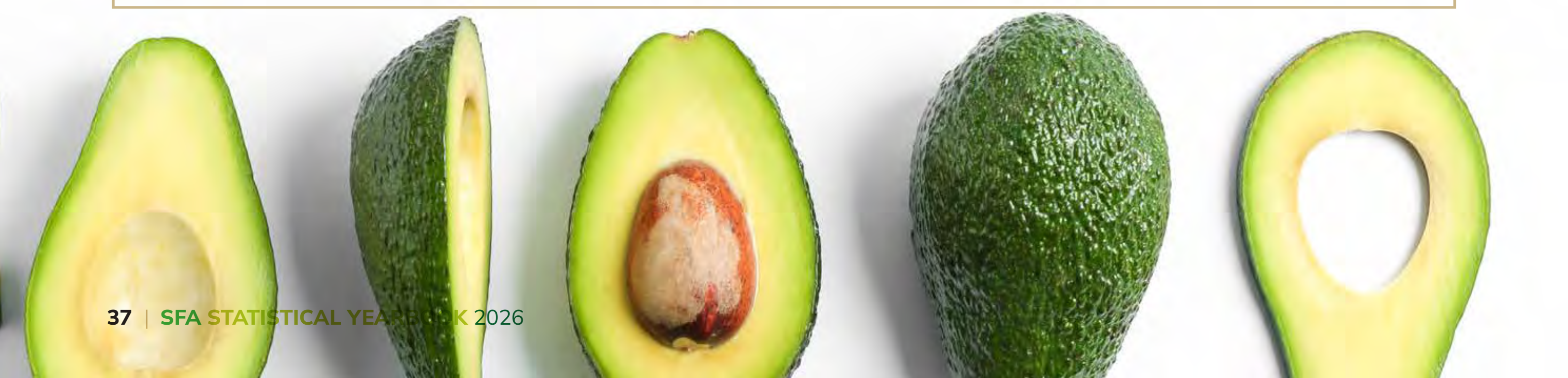
**Citrus** – Beit Bridge, Chegutu and Mvurwi areas



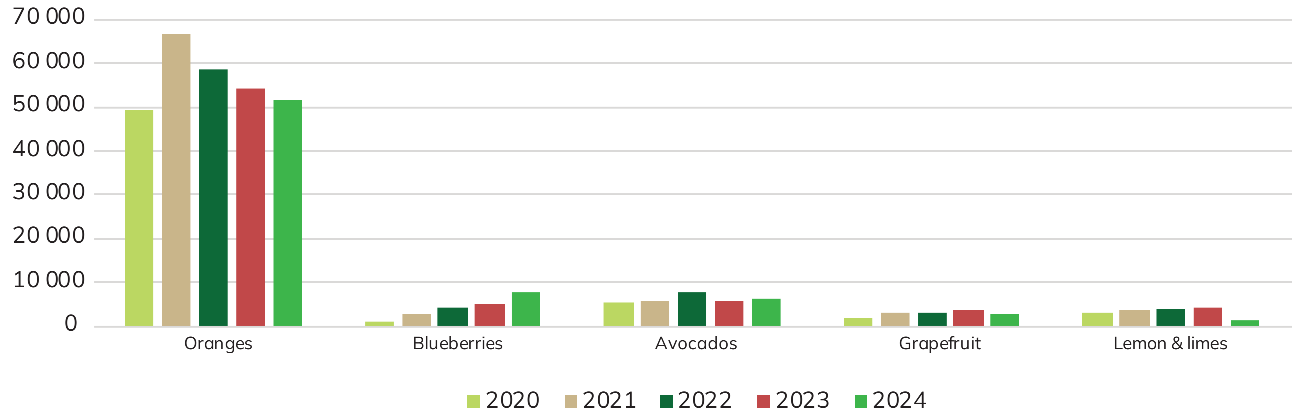

Source: Horticultural Development Council

## 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.

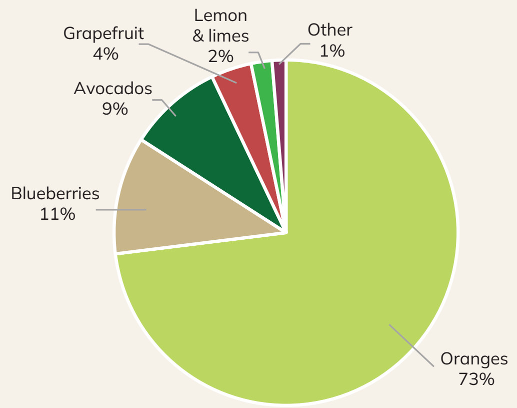
## DRIVERS AND CONSTRAINTS IN EXPORT PERFORMANCE

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



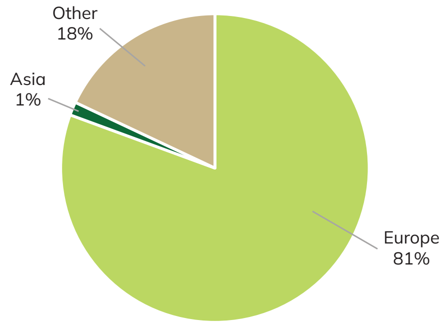

Total exports: 70 941 tonnes

| | 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%** | |



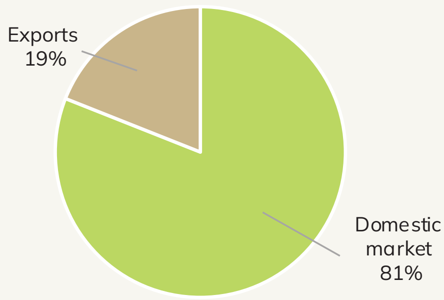

Source: Trade Map.

## 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.

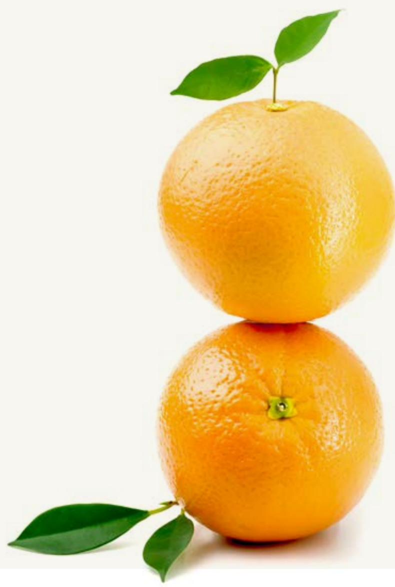
Sustainability is a core priority, with emphasis on climate-smart production practices, efficient use of water and energy, and long-term environmental stewardship. Delivering these outcomes will require a strong coordinating institution, with the Horticulture Development Council (HDC) playing a central 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

Horticultural Development Council

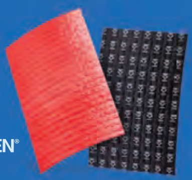
RYPEN® Ethylene Moderating Technology

The science behind RYPEN applies to all crop types. Scan the QR code or visit rypen.io to learn more:

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

## Smart Fresh Produce Packaging

RYPEN® Leaf

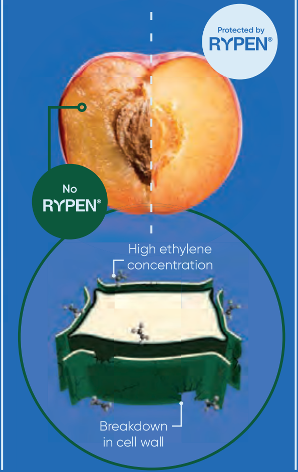


RYPEN® Pad


RYPEN® Case liner

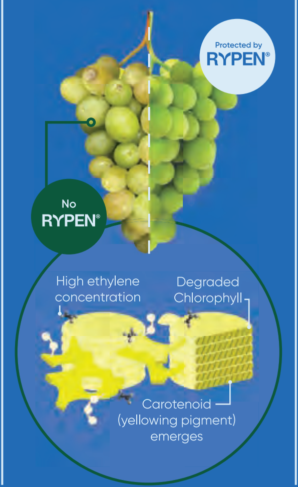
## Firmer fresh produce

Slows ethylene activity, preserving cell walls and reducing shrivelling.



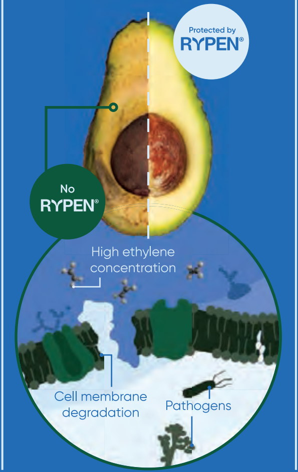

## More vibrant colours

Delays chlorophyll breakdown, maintaining greenness and fresh appearance.



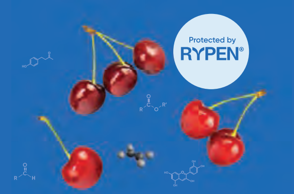

## Reduced rot, decay & mould

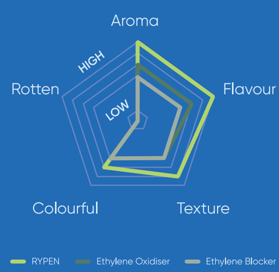
Protects membranes, limiting pathogen entry and slowing browning.




## Peak ripeness & better condition, for longer

Balances ethylene to enhance flavour and aroma while extending freshness.

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SOUTHERN HEMISPHERE EXPORTS

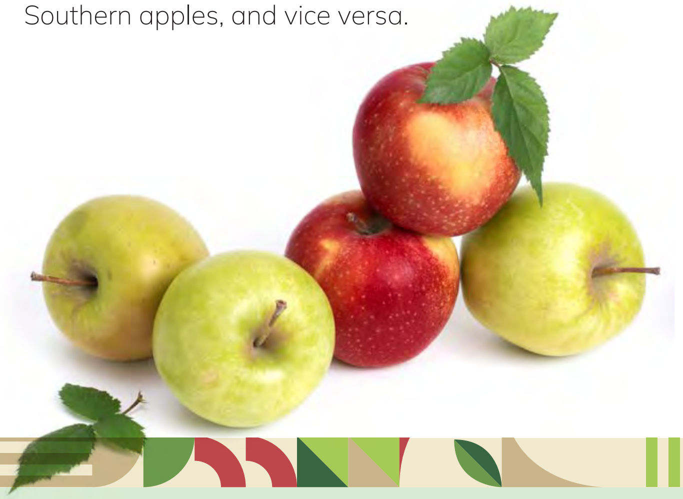
# EXPORTS BY FRUIT TYPE

# 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.

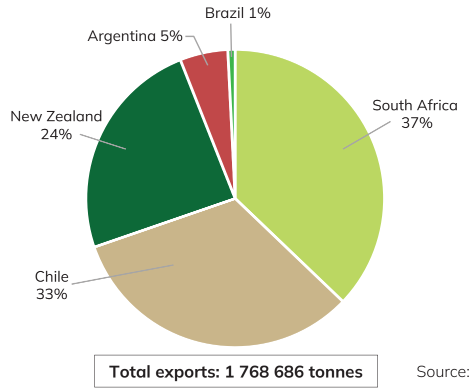
South Africa is the largest exporter of apples in the Southern Hemisphere, with over 30 percent of the country's export volume sent to African markets.

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.



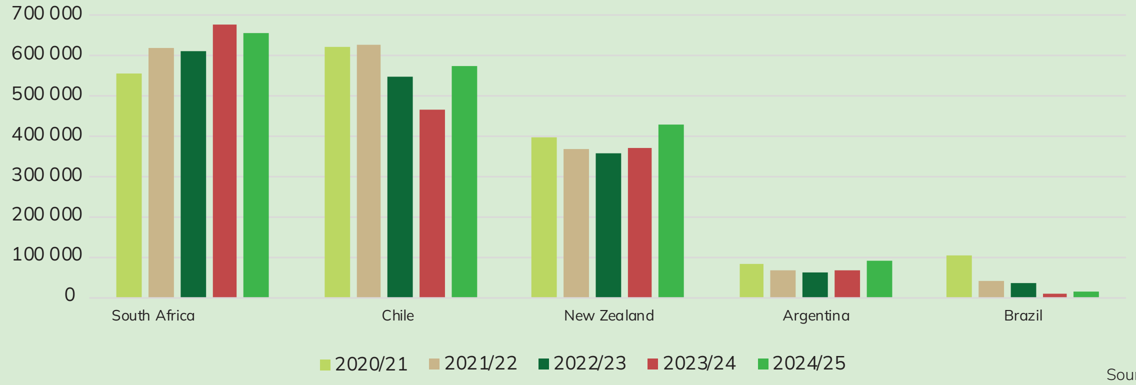
## EXPORTS OF APPLES FROM THE SOUTHERN HEMISPHERE, 2024/25

| | 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%** | |



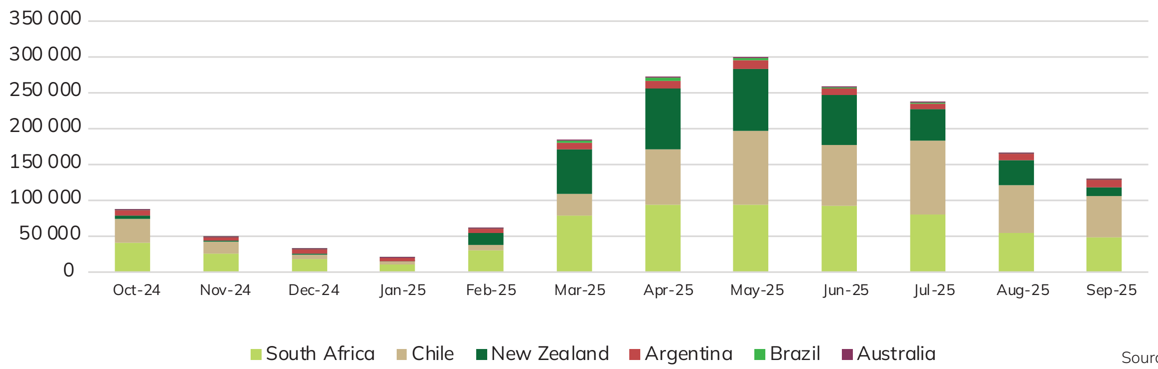

Source: Trade Map.

## 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.

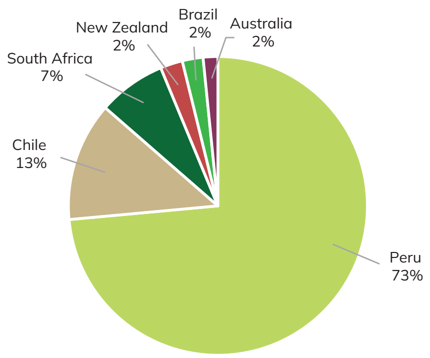
# AVOCADOS

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

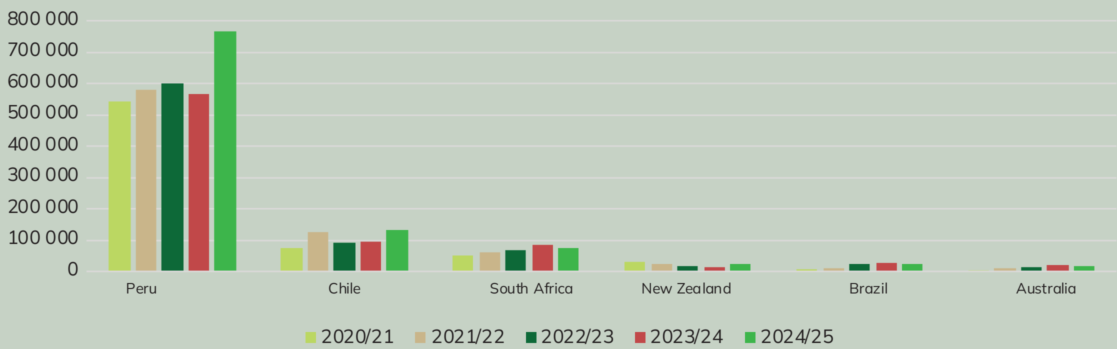
| | Tonnes | 1 yr change | 5 yr change | Share |
|---|---|---|---|---|
| Peru | 766 383 | 35% | 9% | 73% |
| Chile | 134 190 | 39% | 16% | 13% |
| South Africa | 76 506 | -10% | 10% | 7% |
| New Zealand | 25 116 | 74% | -5% | 2% |
| Brazil | 23 430 | -11% | 28% | 2% |
| Australia | 16 525 | -22% | 31%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




Total exports: 1 044 659 tonnes

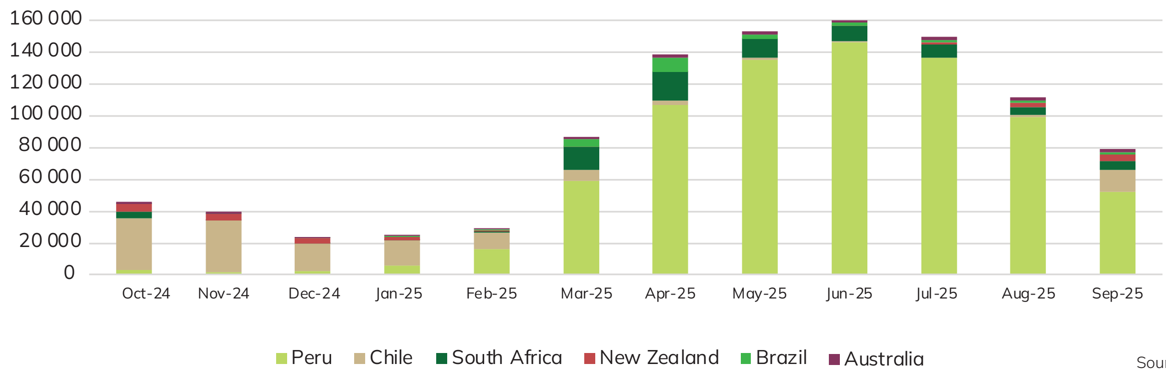
Source: Trade Map.

## 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.

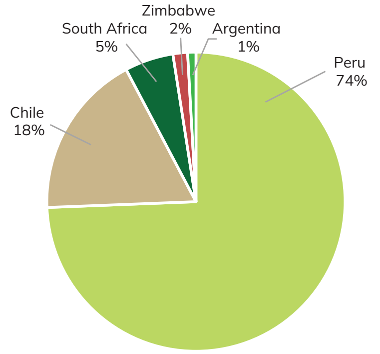
# BLUEBERRIES

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.

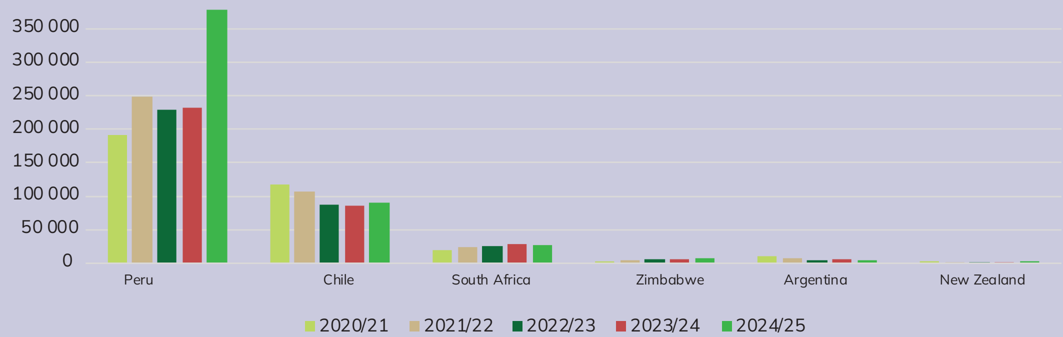
## EXPORTS OF BLUEBERRIES FROM THE SOUTHERN HEMISPHERE, 2024/25

| | 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%** | |



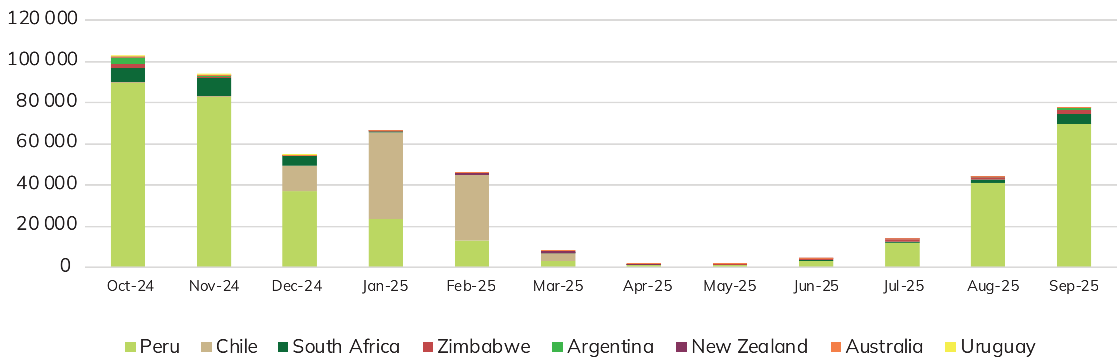

Source: Trade Map.

## 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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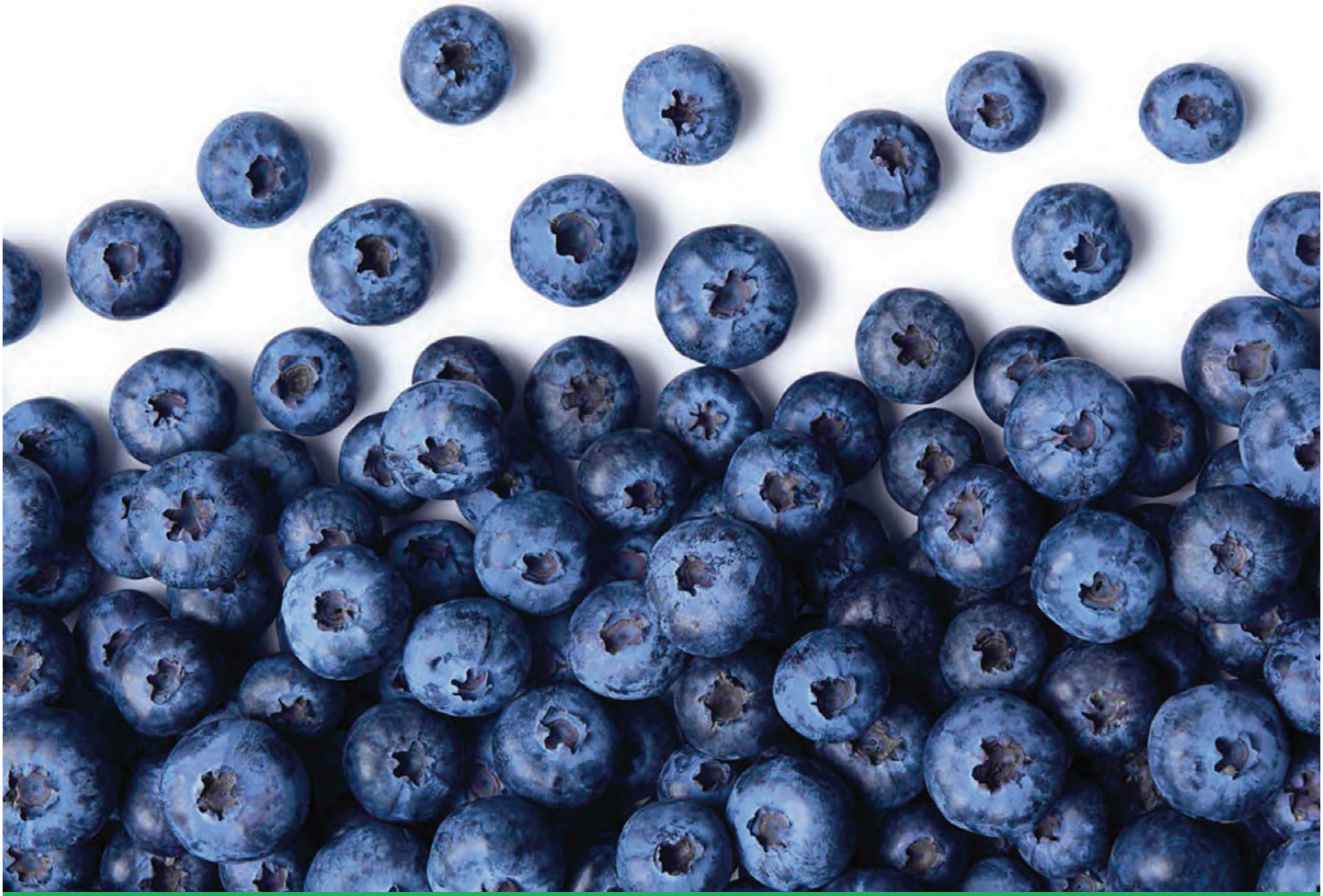

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# CHERRIES

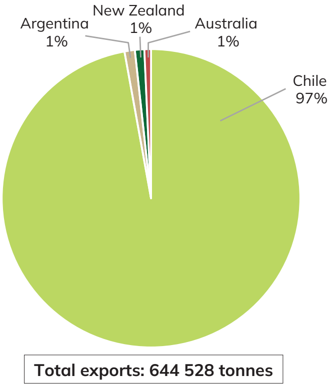
Chile dominates Southern Hemisphere cherry exports, accounting for around 97 percent of overall export volumes and serving as the world's leading exporter of fresh cherries.

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.

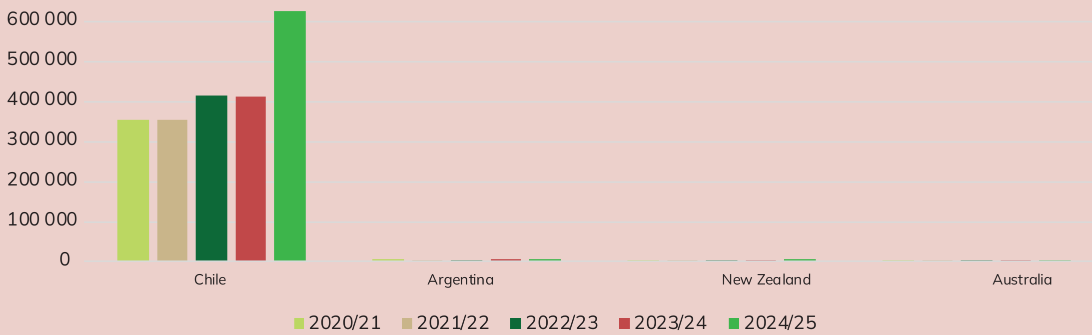
## EXPORTS OF CHERRIES FROM THE SOUTHERN HEMISPHERE, 2024/25

| | 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%** | |



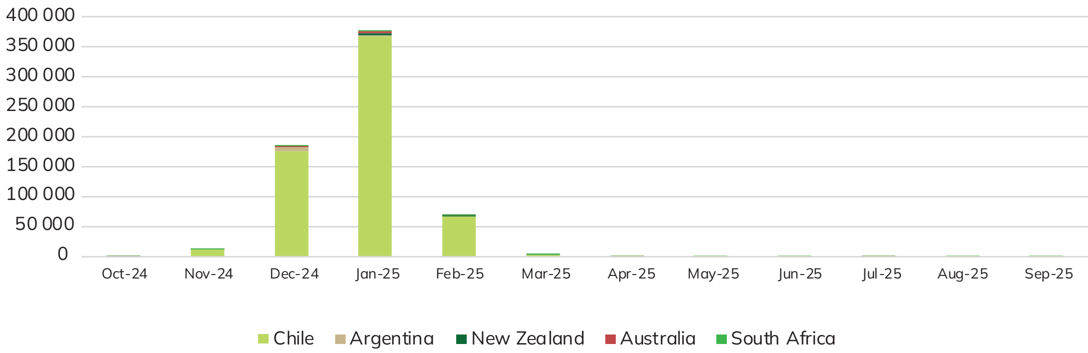

Source: Trade Map.

## 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

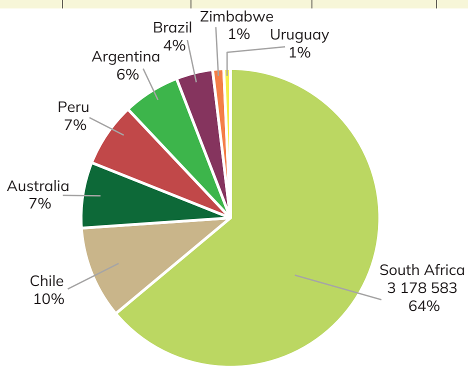
Overall citrus exports from the Southern Hemisphere increased by 23 percent year-on-year in 2024/25 to 5 million tonnes. The five-year trend is an average growth of 5 percent per year.

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

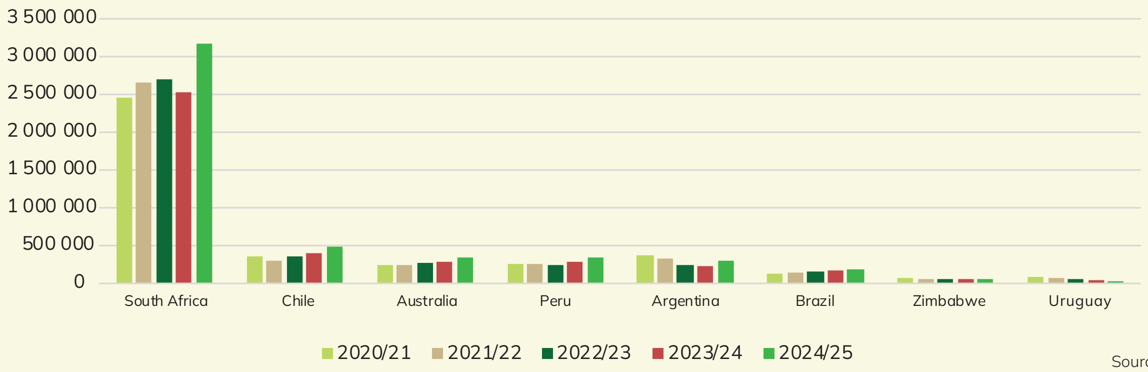
| | Tonnes | 1 yr change | 5 yr change | Share |
|---|---|---|---|---|
| South Africa | 3 178 583 | 26% | 7% | 64% |
| Chile | 496 054 | 23% | 8% | 10% |
| Australia | 354 217 | 22% | 9% | 7% |
| Peru | 344 751 | 16% | 7% | 7% |
| Argentina | 306 291 | 34% | -5% | 6% |
| Brazil | 197 003 | 10% | 8% | 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

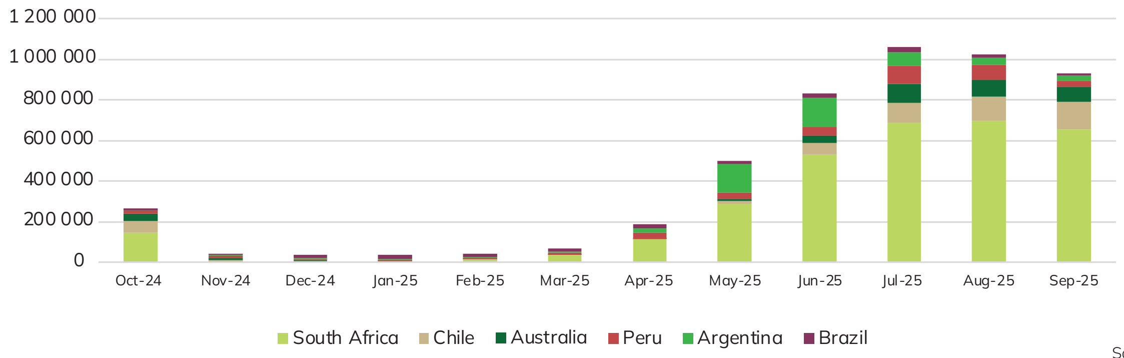
Source: Trade Map.

## 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.

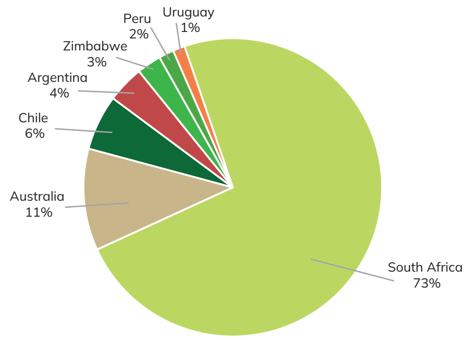
# ORANGES

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

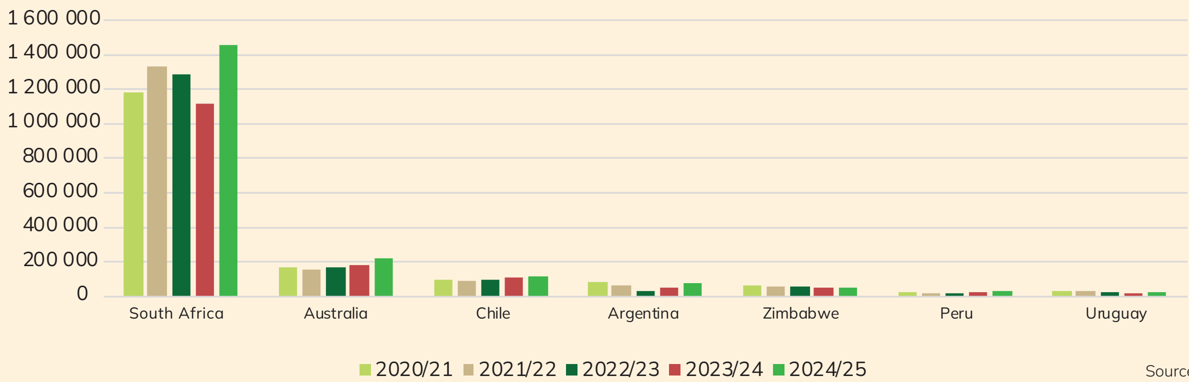
| | Tonnes | 1 yr change | 5 yr change | Share |
|---|---|---|---|---|
| South Africa | 1 455 822 | 31% | 5% | 73% |
| Australia | 218 872 | 21% | 7% | 11% |
| Chile | 118 921 | 11% | 5% | 6% |
| Argentina | 79 592 | 51% | -1% | 4% |
| Zimbabwe | 52 414 | 2% | -6% | 3% |
| Peru | 32 317 | 32% | 7% | 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

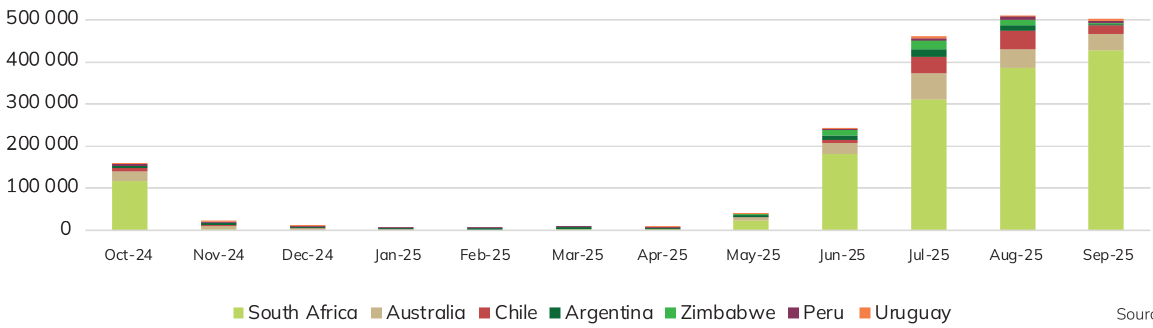
Source: Trade Map.

## 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.

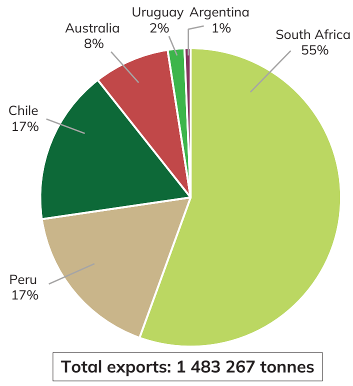
# SOFT CITRUS

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.

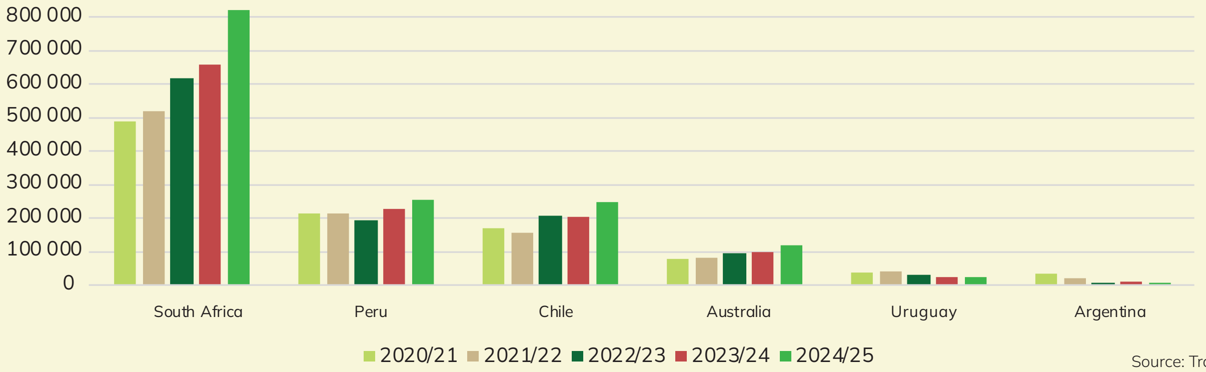
## EXPORTS OF SOFT CITRUS FROM THE SOUTHERN HEMISPHERE, 2024/25

| | 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%** | |



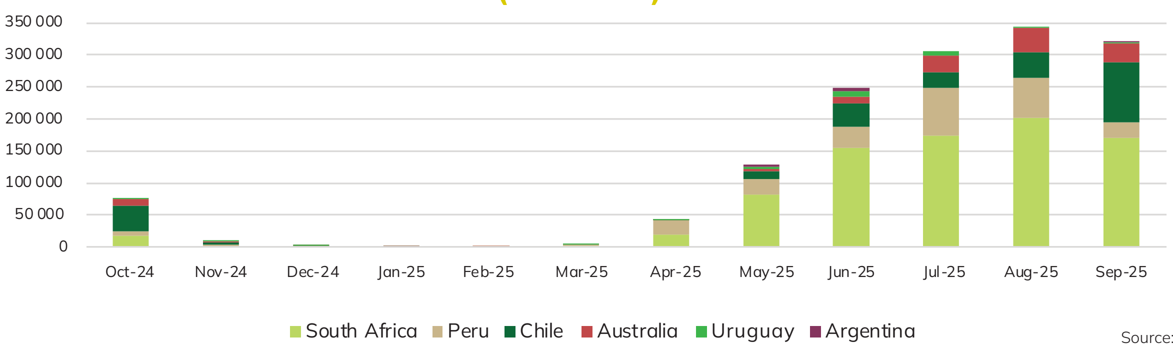

Source: Trade Map.

## 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.

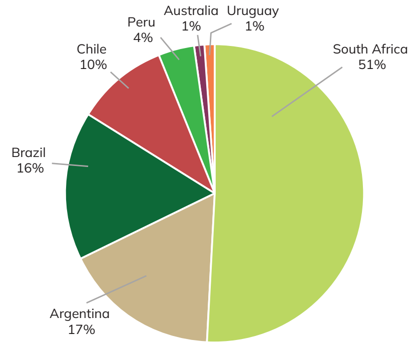
# LEMONS AND LIMES

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

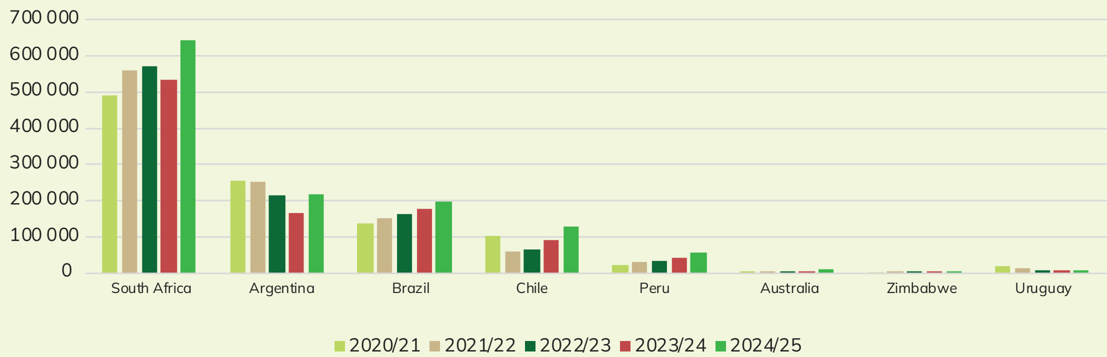
| | Tonnes | 1 yr change | 5 yr change | Share |
|---|---|---|---|---|
| South Africa | 642 749 | 21% | 7% | 51% |
| Argentina | 216 534 | 31% | -4% | 17% |
| Brazil | 196 429 | 10% | 9% | 16% |
| Chile | 127 643 | 39% | 6% | 10% |
| Peru | 56 256 | 33% | 27% | 4% |
| Australia | 11 667 | 80% | 28% | 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

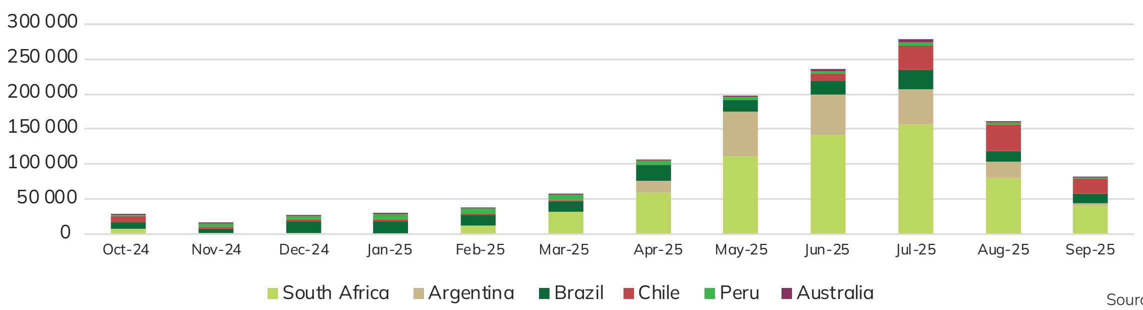
Source: Trade Map.

## 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.

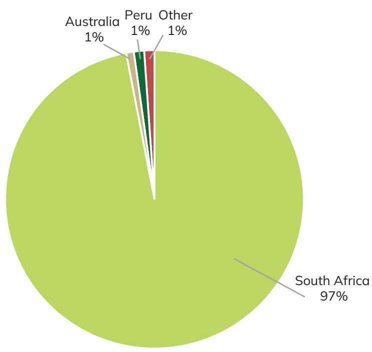
# GRAPEFRUIT

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

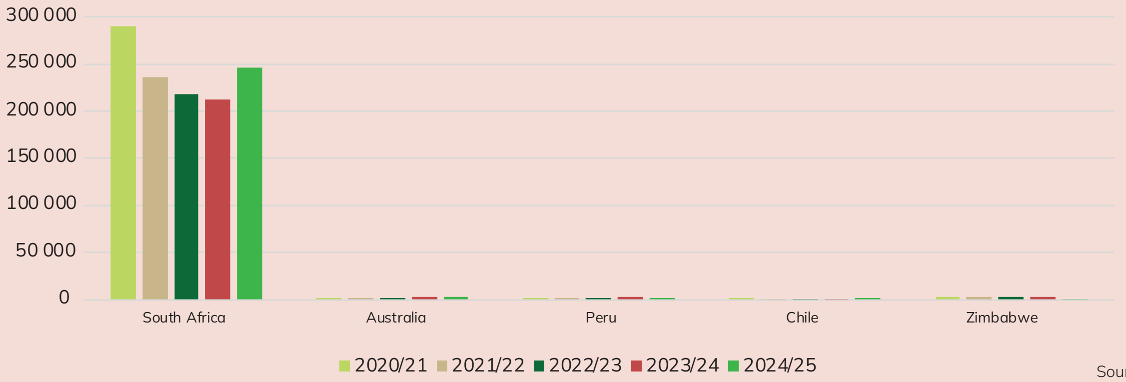
| | Tonnes | 1 yr change | 5 yr change | Share |
|---|---|---|---|---|
| South Africa | 245 748 | 16% | -4% | 97% |
| Australia | 2 898 | 7% | 12% | 1% |
| Peru | 1 999 | -32% | 1% | 1% |
| Chile | 1 404 | 65% | -7% | 1% |
| Zimbabwe | 1 260 | -58% | -20% | <1% |
| Argentina | 517 | -32% | -9% | <1%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




Total exports: 253 857 tonnes

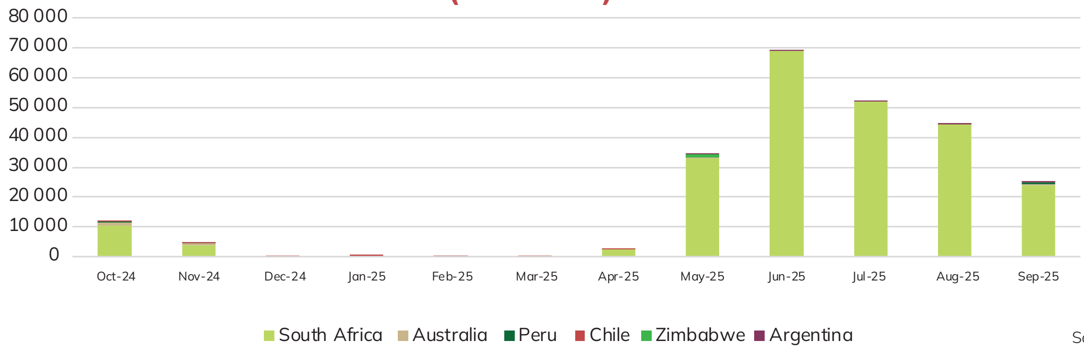
Source: Trade Map.

## 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

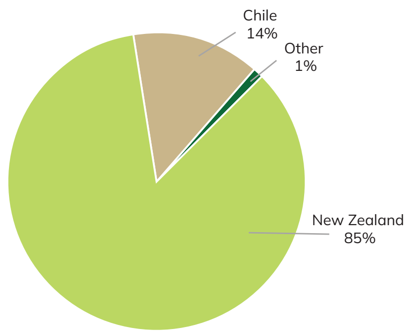
Overall kiwifruit exports from the Southern Hemisphere increased by 19 percent year-on-year in 2024/25 to a total 1 million tonnes; the five-year trend is an average 6 percent growth per year.

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

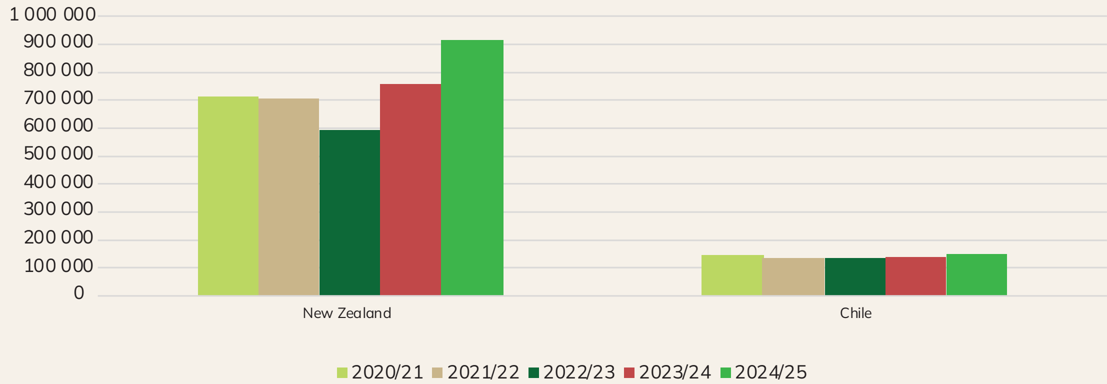
| | Tonnes | 1 yr change | 5 yr change | Share |
|---|---|---|---|---|
| New Zealand | 915 261 | 21% | 6% | 85% |
| Chile | 151 123 | 8% | 1% | 14% |
| Argentina | 3 219 | 189% | 24% | <1% |
| South Africa | 3 016 | 44% | 31% | <1% |
| Australia | 258 | 48% | -20% | <1% |
| Brazil | 56 | 27% | 9% | 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




Total exports: 1 072 934 tonnes

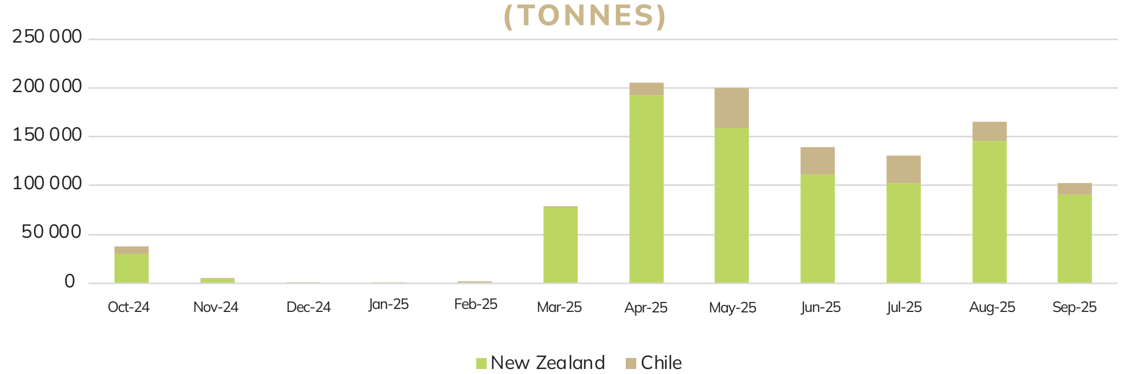
Source: Trade Map.

## 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

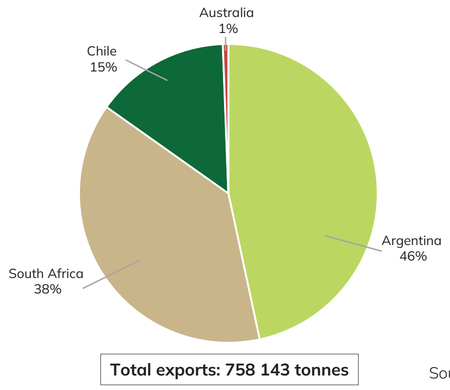
Total exports of pears from the Southern Hemisphere increased by 9 percent in 2024/25 to 758 000 tonnes; over the past five years, exports grew by an average of 2 percent annually.

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.

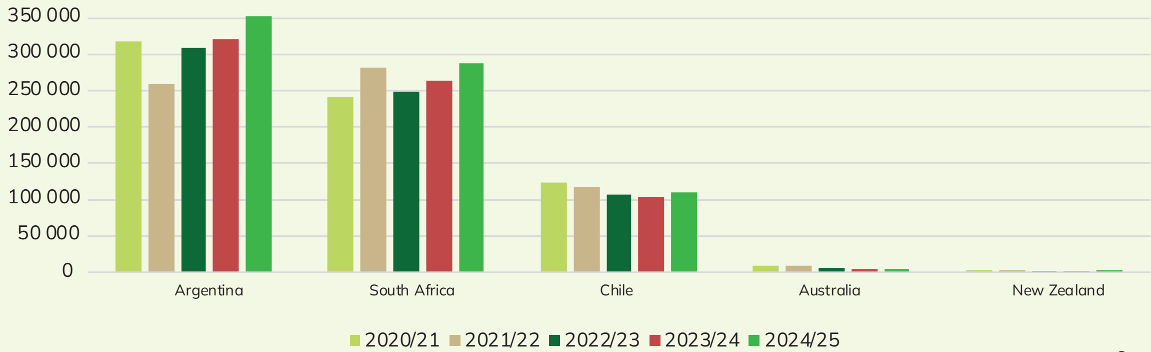
## EXPORTS OF PEARS FROM THE SOUTHERN HEMISPHERE, 2024/25

| | 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%** | |



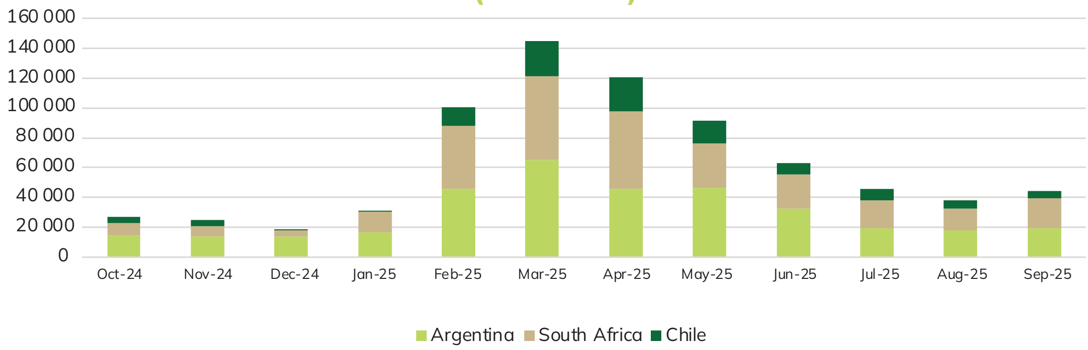

Source: Trade Map.

## 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

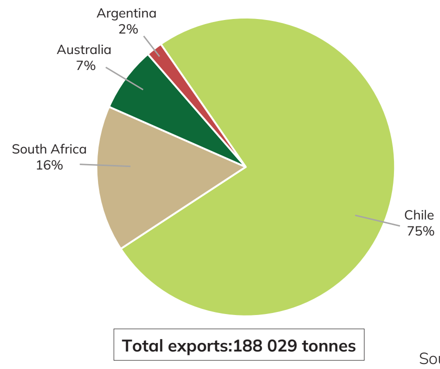
Overall peach and nectarine exports from the Southern Hemisphere increased 14 percent year-on-year in 2024/25, to 188 000 tonnes; the average annual growth rate over the past five years stands at 5 percent.

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.

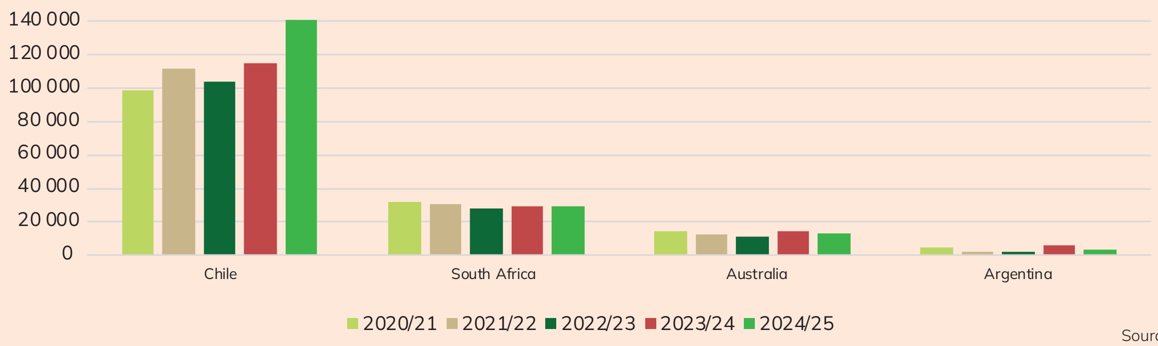
## EXPORTS OF PEACHES AND NECTARINES FROM THE SOUTHERN HEMISPHERE, 2024/25

| | 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%** | |



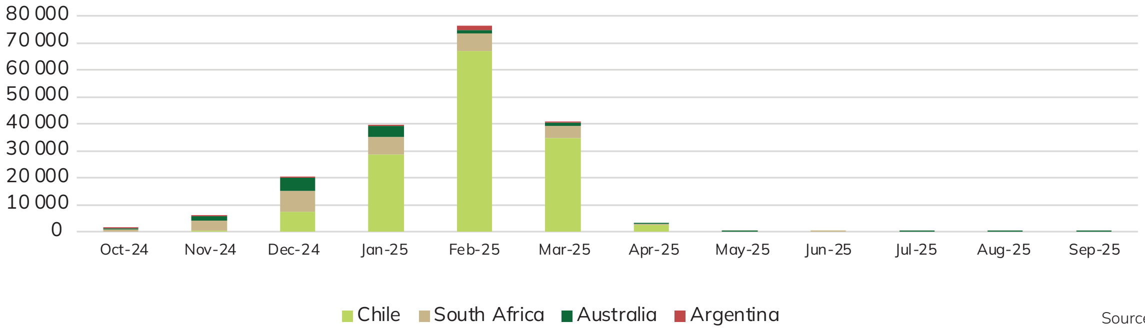

Source: Trade Map.

## 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

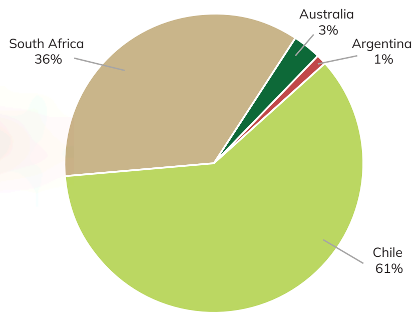
Overall plum exports from the Southern Hemisphere were steady in 2025 at 252 700 tonnes, while the average annual growth rate over the past five years stands at 4 percent.

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

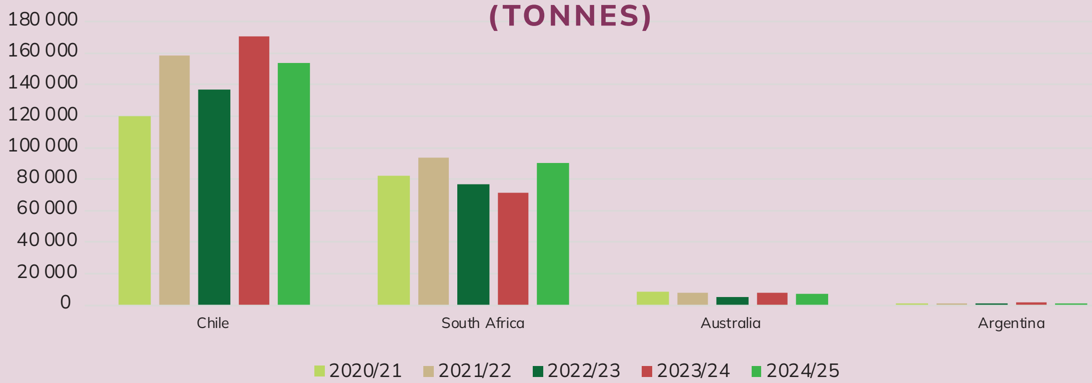
| | Tonnes | 1 yr change | 5 yr change | Share |
|---|---|---|---|---|
| Chile | 154 052 | -10% | 6% | 61% |
| South Africa | 90 169 | 26% | 2% | 36% |
| Australia | 7 054 | -11% | -4% | 3% |
| Argentina | 1 332 | -27% | 8% | 1% |
| Peru | 40 | | | <1% |
| Brazil | 32 | | | <1% |
| New Zealand | 28 |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




Total exports: 252 709 tonnes

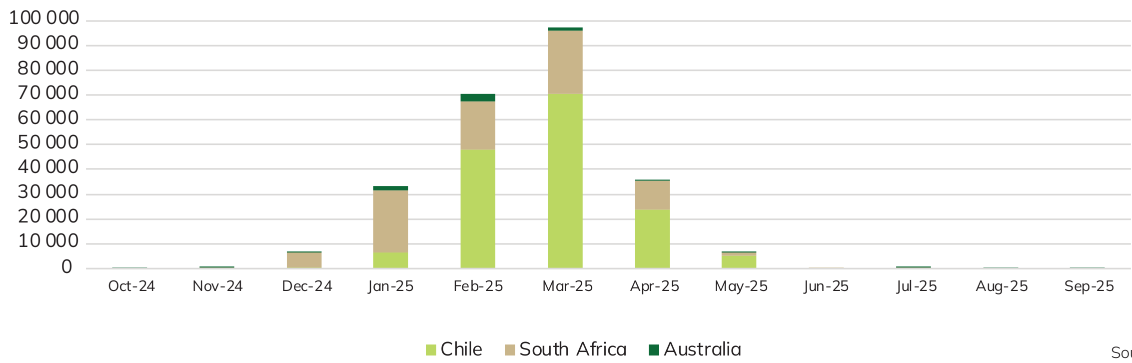
Source: Trade Map.

## 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

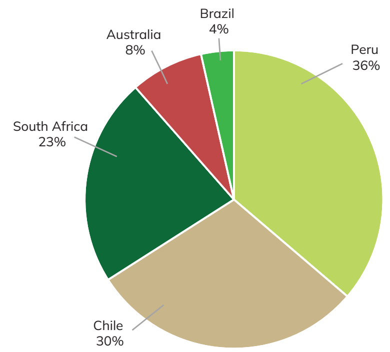
Overall table grape exports from the Southern Hemisphere increased 6 percent year-on-year in 2024/25 to 1.9 million tonnes; the average annual growth rate over the past five years stands at 0.5 percent.

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

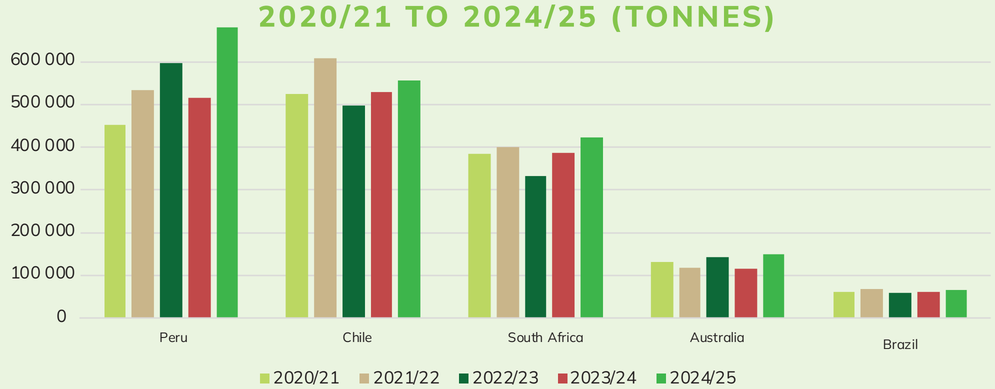
| | Tonnes | 1 yr change | 5 yr change | Share |
|---|---|---|---|---|
| Peru | 679 973 | 32% | 11% | 36% |
| Chile | 556 968 | 5% | 1% | 30% |
| South Africa | 423 601 | 9% | 2% | 23% |
| Australia | 148 339 | 29% | 3% | 8% |
| Brazil | 66 499 | 7% | 3% | 4% |
| Argentina | 2 521 | -27% | -13% | <1%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




Total exports: 1 878 132 tonnes

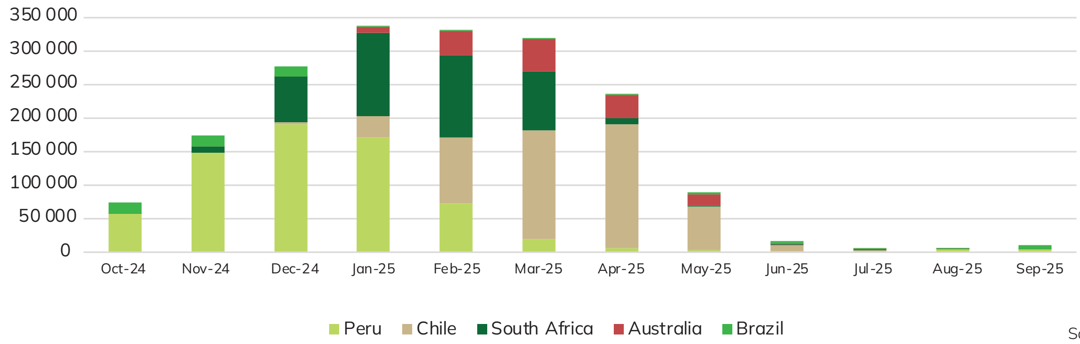
Source: Trade Map.

## 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.


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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SATI
SOUTH AFRICAN TABLE GRAPE INDUSTRY

# KEY DESTINATION MARKETS

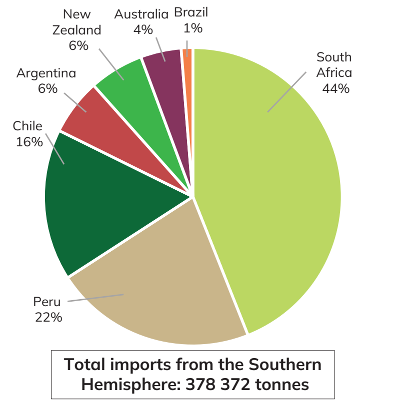

# CANADA

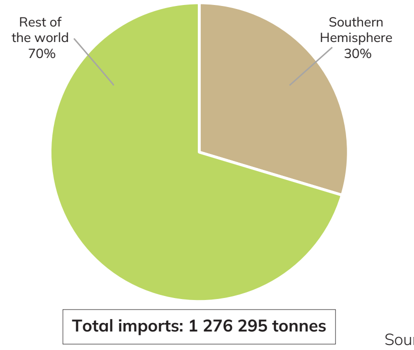
Canada imported 378 372 tonnes of fresh temperate fruit from the Southern Hemisphere in 2024/25, accounting for 30 percent of the country's total temperate fruit imports. Imports from the Southern Hemisphere increased by 18 percent year-on-year in 2024/25 and by an average 7 percent per year over the 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.



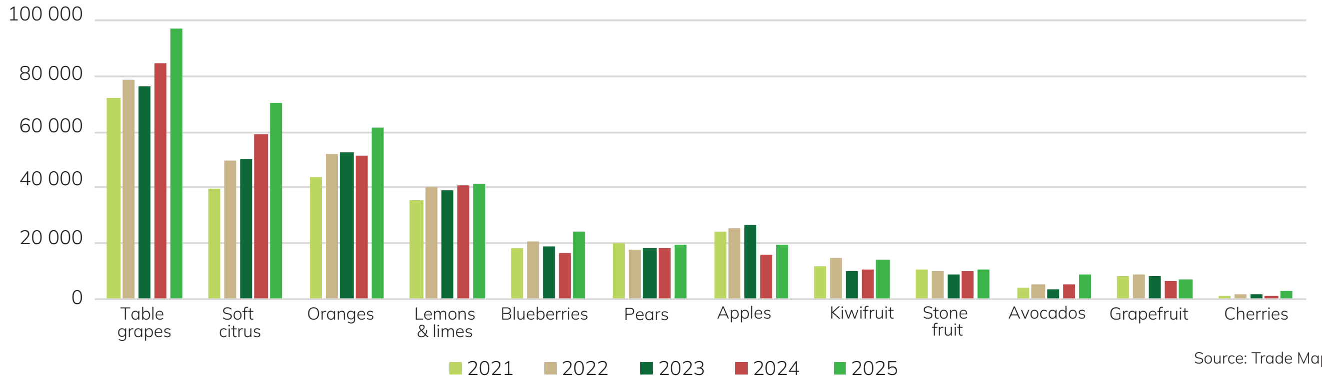

Source: Trade Map.

## 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%** | |

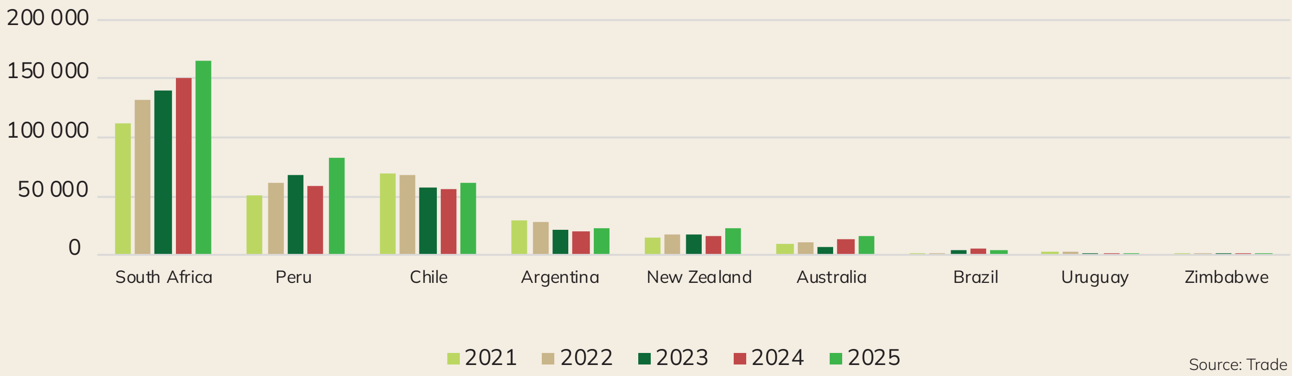
Source: Trade Map.

## 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.

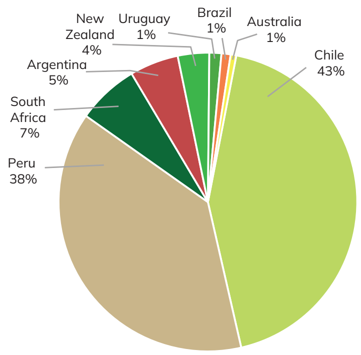
Table grapes are the largest import category for the Southern Hemisphere, taking advantage of counterseasonal supply opportunities, followed by soft citrus and blueberries (mostly from Chile and Peru). Overall, Chile is the largest Southern Hemisphere supplier to the United States of America, mostly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

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

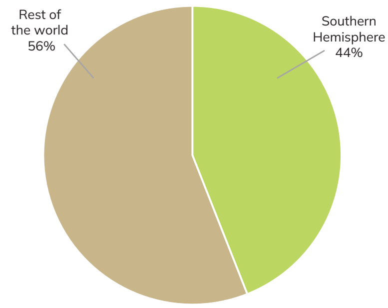
## IMPORTS INTO THE USA OF TEMPERATE FRUITS BY ORIGIN, 2024/25

| | 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.




Total imports from the Southern Hemisphere: 2 047 434 tonnes




Total imports: 4 655 642 tonnes

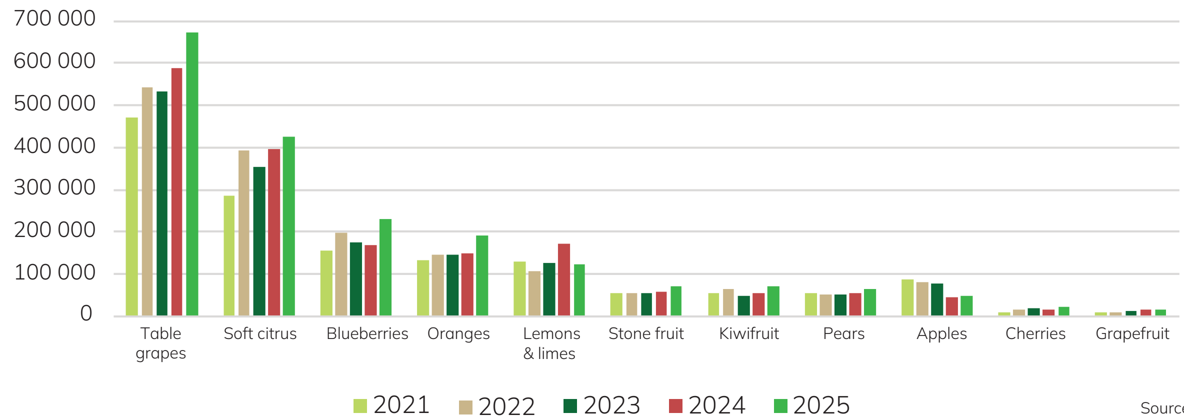
Source: Trade Map.

## 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%** | |

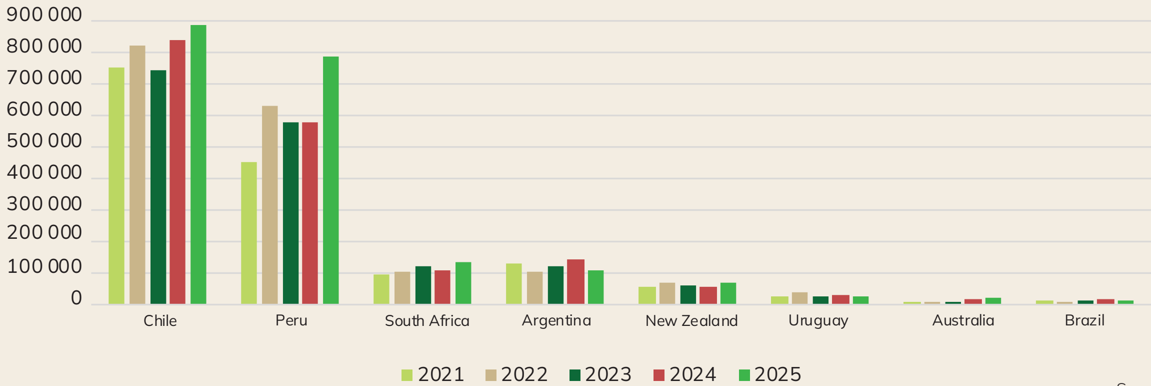
Source: Trade Map.

## 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

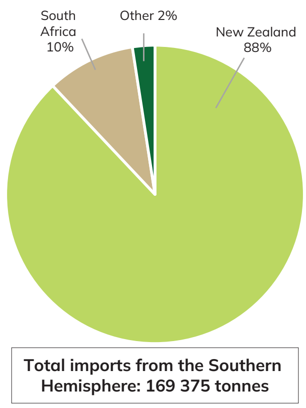
Belgium imported 169 000 tonnes of fresh temperate fruit from the Southern Hemisphere in 2024/25, representing 25 percent of the country's overall temperate fruit imports. Fruit imports are dominated by kiwifruit, with almost all kiwifruit being sourced from New Zealand since Belgium hosts the distribution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

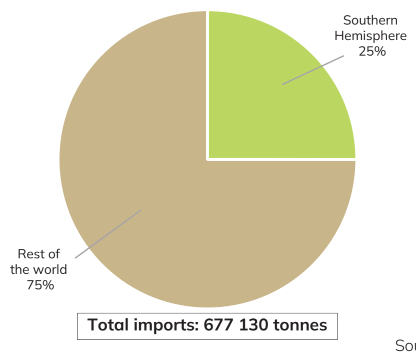
Imports of temperature fruit from the Southern Hemisphere into Belgium surged 30 percent year-on-year in 2024/25, driven by the recovery of New Zealand kiwifruit from an adverse season. On average, imports declined by 4 percent per year over the past five years.

## 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.



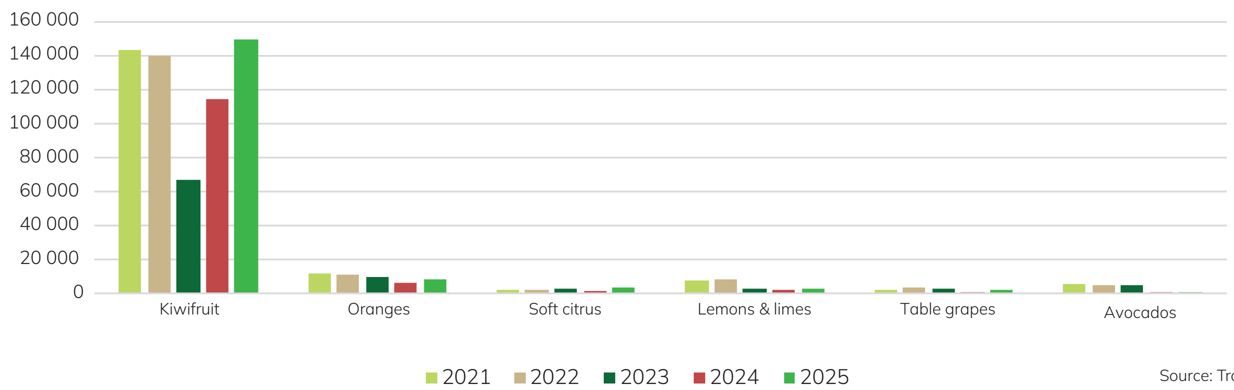

Source: Trade Map.

## 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%** | |

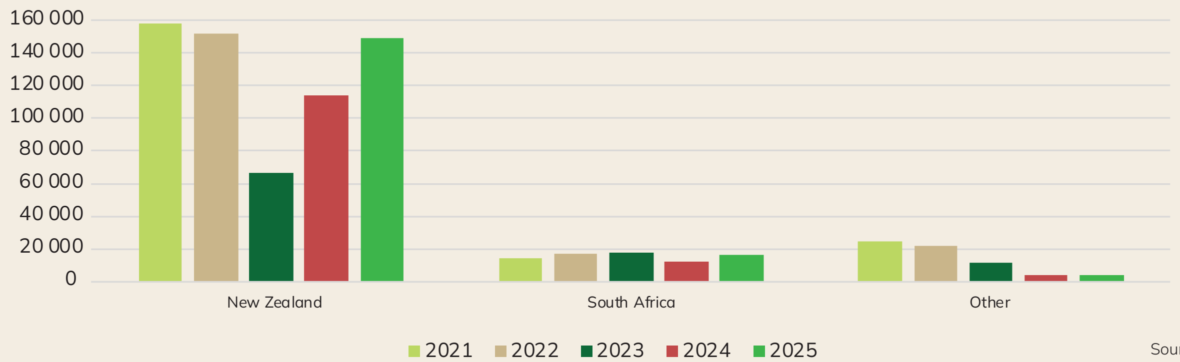
Source: Trade Map.

## 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

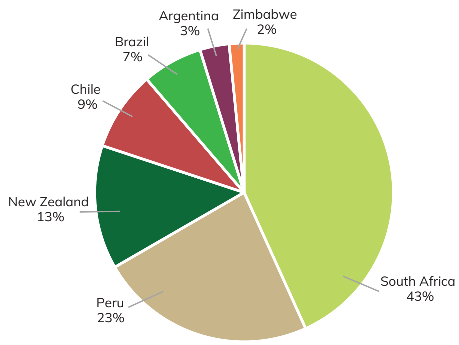
France imported 373 000 tonnes of fresh temperate fruit from the Southern Hemisphere in 2024/25, representing 21 percent of the country's total temperate fruit imports. Imports from the Southern Hemisphere increased by 27 percent year-on-year in 2024/25 and 6 percent annually over the past five years,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

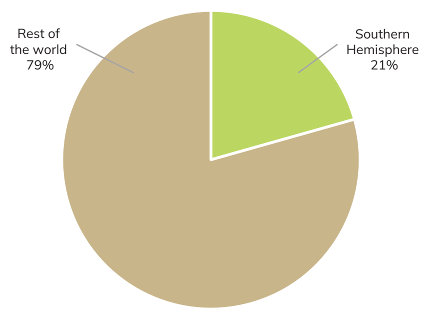
## IMPORTS INTO FRANCE OF TEMPERATE FRUITS BY ORIGIN, 2024/25

| | 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.




**Total imports from the Southern Hemisphere: 379 101 tonnes**




**Total imports: 1 837 471 tonnes**

Source: Trade Map.

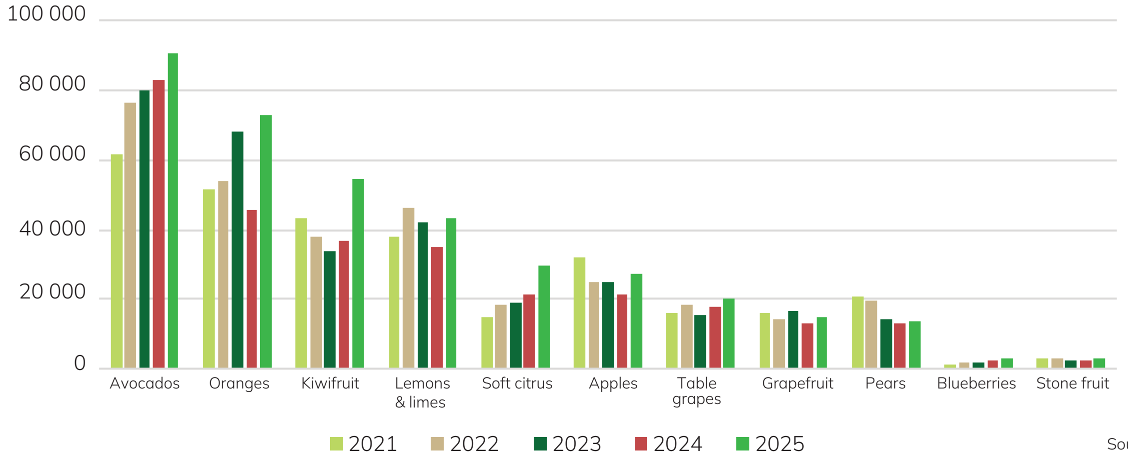
FRANCE

## 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%** | |

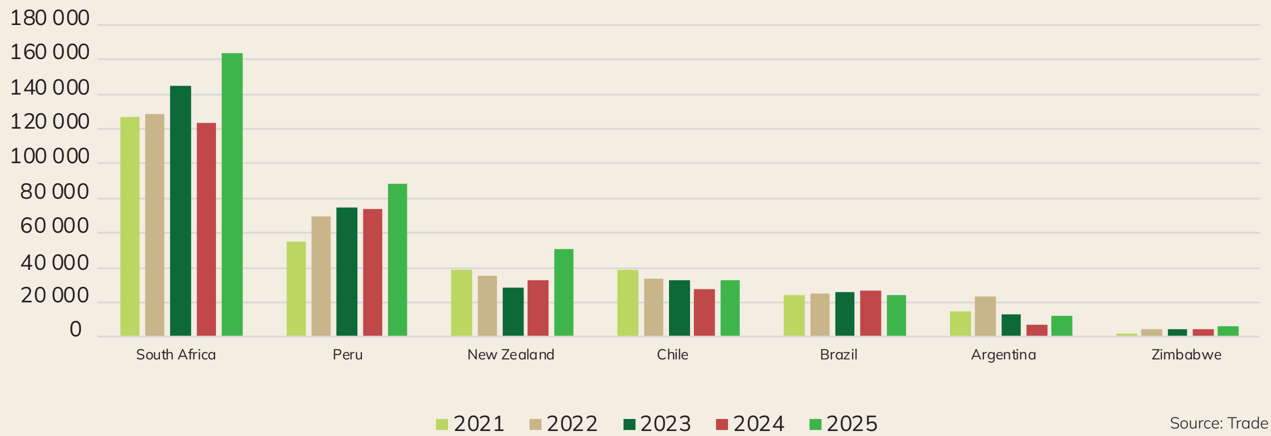
Source: Trade Map.

## 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).

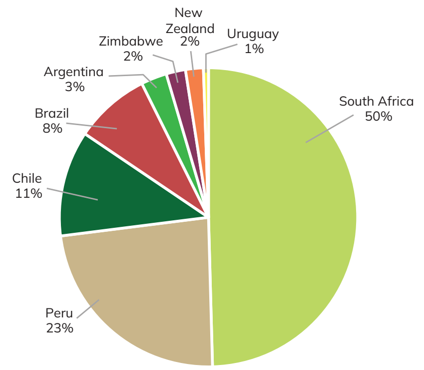
Citrus fruits collectively account for 46 percent of overall temperate fruit imports from the Southern Hemisphere, and are sourced mostly from South Africa and Brazil.

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.

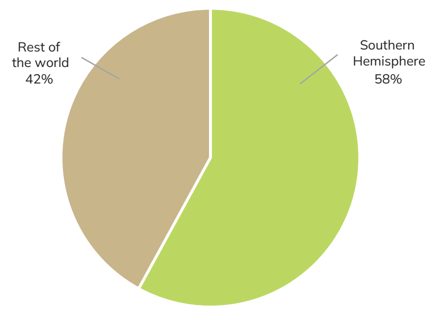
## IMPORTS INTO THE NETHERLANDS OF TEMPERATE FRUITS BY ORIGIN, 2024/25

| | 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.




Total imports from the Southern Hemisphere: 1 972 952 tonnes




Total imports: 3 401 177 tonnes

Source: Trade Map.

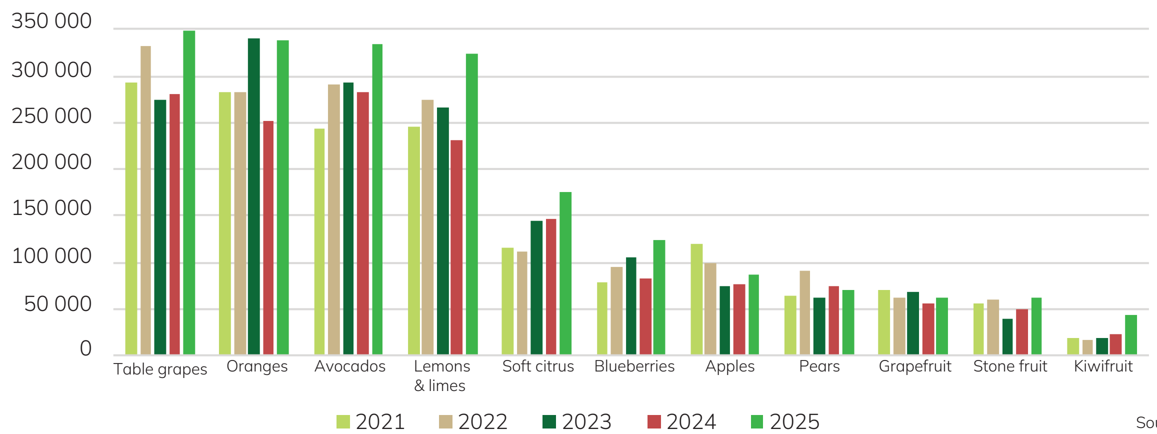
NETHERLANDS

## 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%** | |

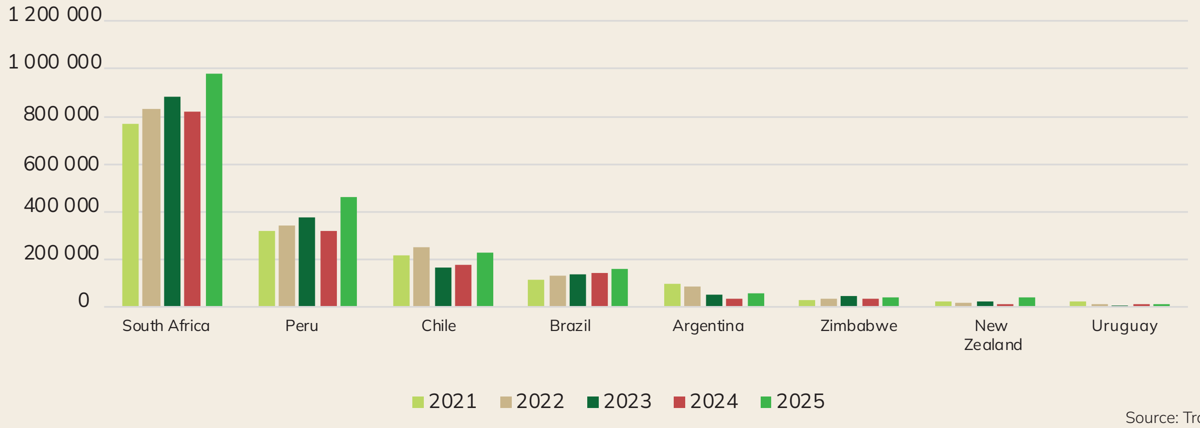
Source: Trade Map.

## 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

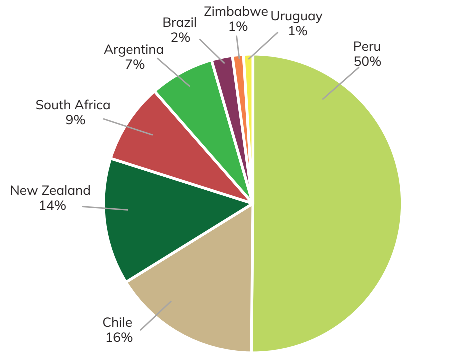
Spain imported 364 000 tonnes of fresh temperate fruit from the Southern Hemisphere in 2024/25, representing 29 percent of the country's total temperate fruit imports. Imports from the Southern Hemisphere increased by 26 percent year-on-year in 2024/25 and 11 percent annually over the past five years,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

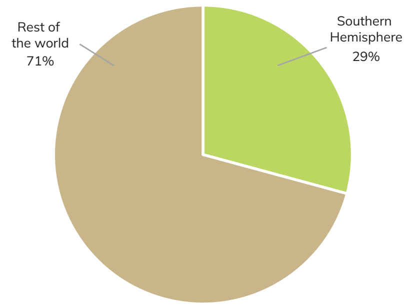
## IMPORTS INTO SPAIN OF TEMPERATE FRUITS BY ORIGIN, 2024/25

| | 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**

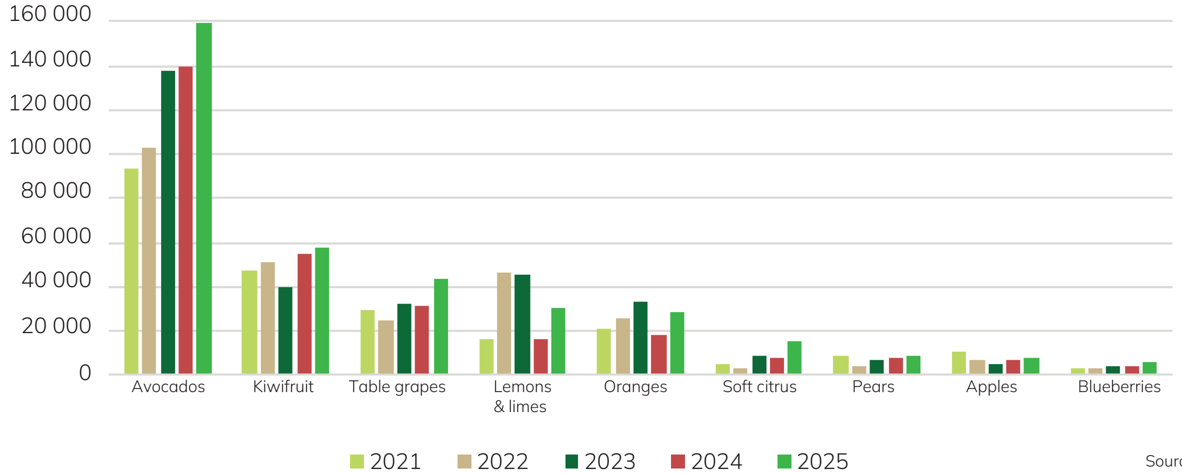
Source: Trade Map.

## 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%** | |

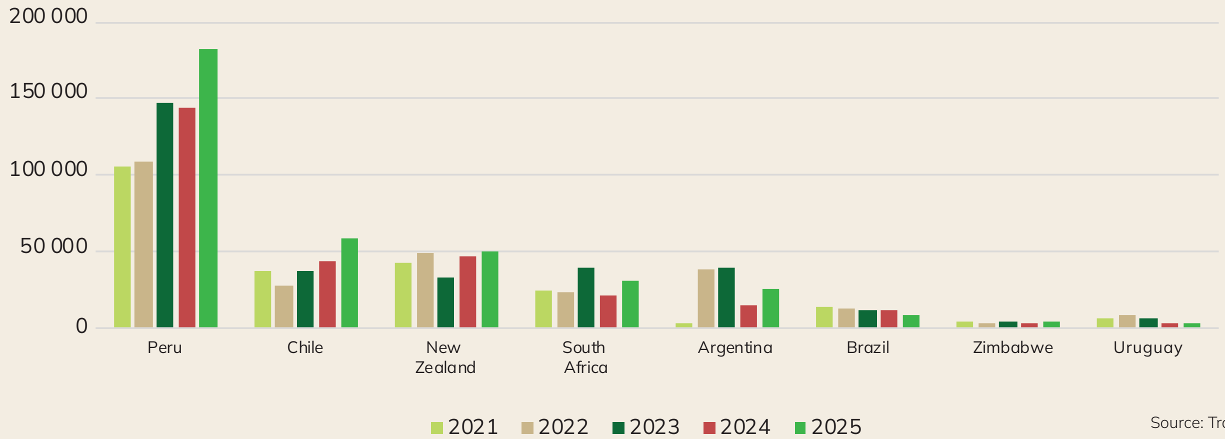
Source: Trade Map.

## 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

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.

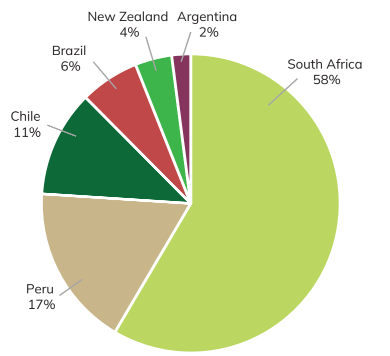
Imports from the Southern Hemisphere increased by 15 percent year-on-year in 2024/25 and 4 percent annually over the past five years, with table grapes, soft citrus, and apples as the leading products.

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

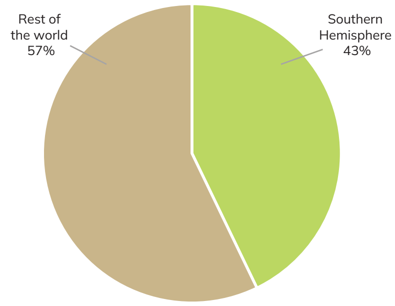
## IMPORTS INTO THE UNITED KINGDOM OF TEMPERATE FRUITS BY ORIGIN, 2024/25

| | 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.




**Total imports from the Southern Hemisphere: 777 458 tonnes**




**Total imports: 1 815 208 tonnes**

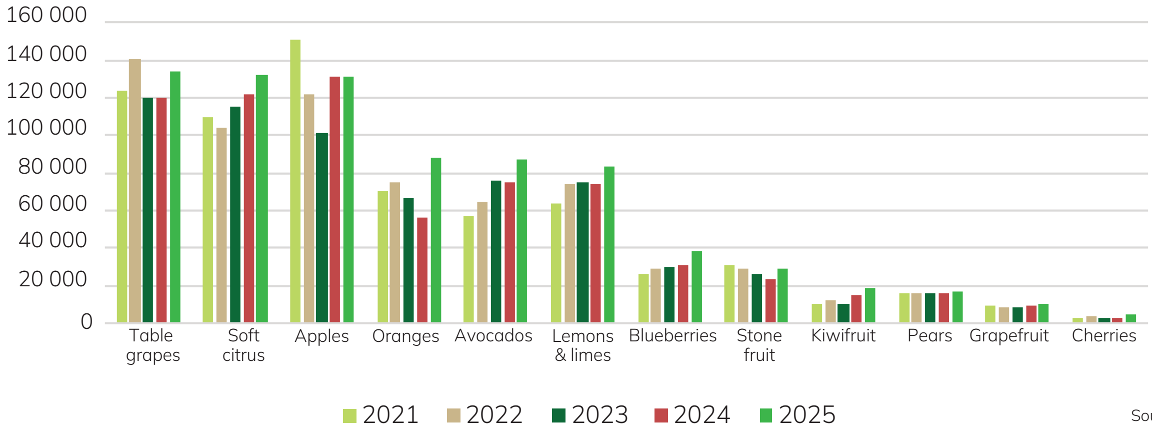
Source: Trade Map.

## 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%** | |

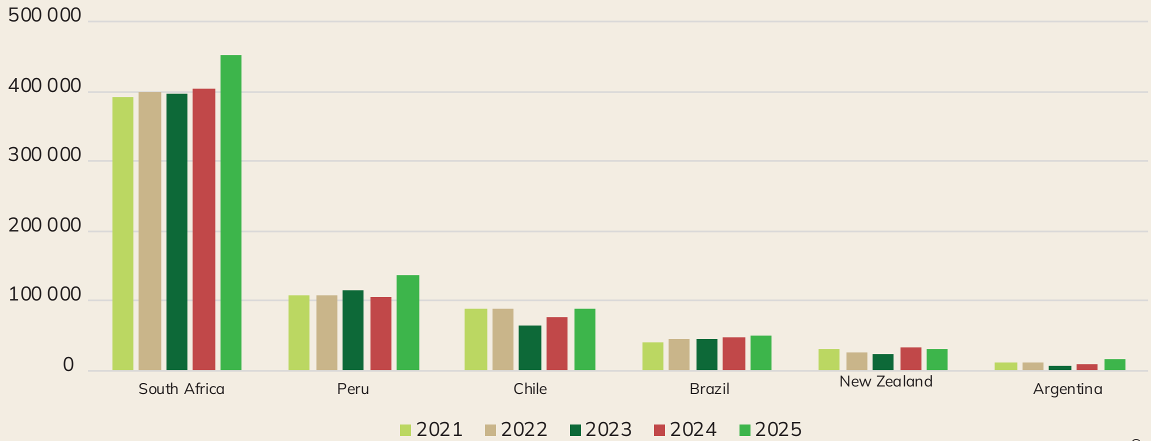
Source: Trade Map.

## 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

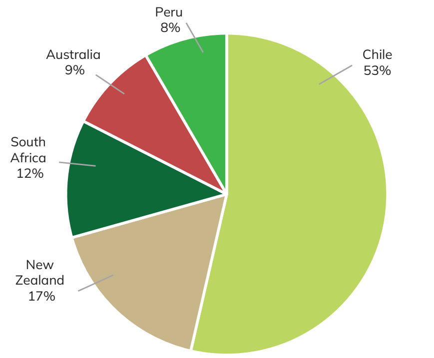
China is the world's largest producer of fresh fruit and the second-largest importer of fruits after the United States of America, with total imports reaching 6.3 million tonnes in 2024/25. While tropical fruits dominate the country's fruit import structure, China imports 1.5 million tonnes of temperate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

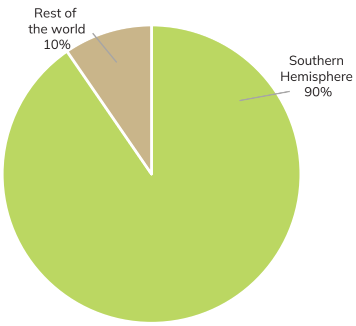
## IMPORTS INTO CHINA OF TEMPERATE FRUITS BY ORIGIN, 2024/25

| | 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.

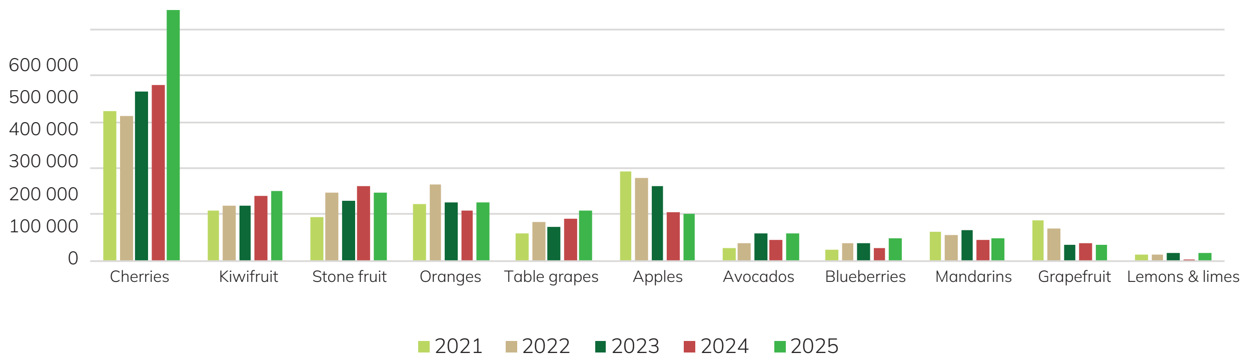
CHINA

## 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%** | |

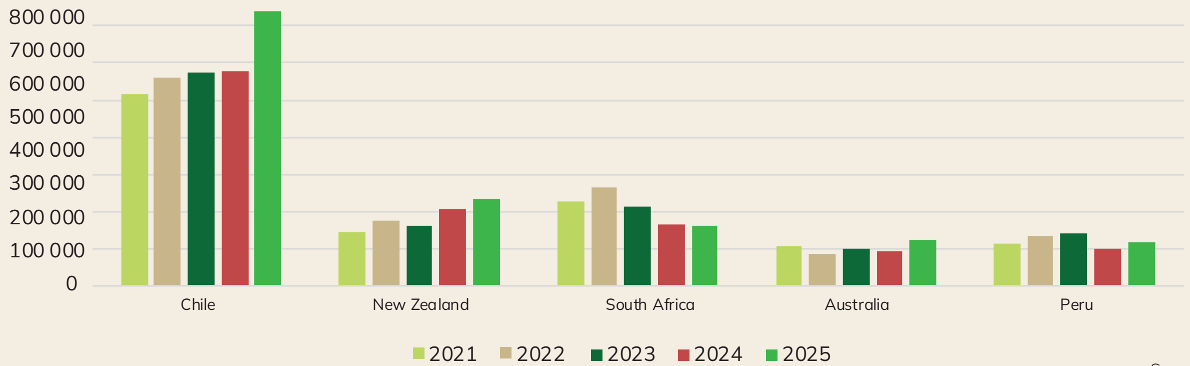
Source: Trade Map.

## 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 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.

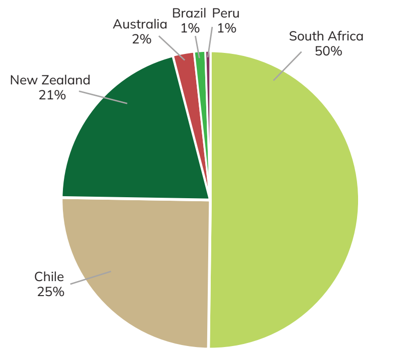
South Africa is the largest supplier of fruit from the Southern Hemisphere, increasing its exports to the country by an average 25 percent per year over the past five years. Chile and New Zealand are also significant suppliers.

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.

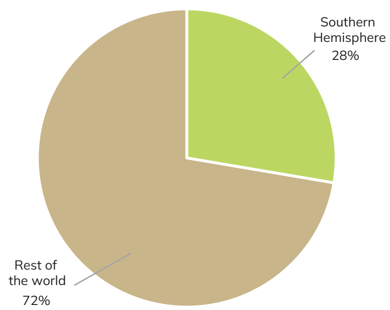
## IMPORTS INTO INDIA OF TEMPERATE FRUITS BY ORIGIN, 2024/25

| | 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.




Total imports from the Southern Hemisphere: 233 342 tonnes




Total imports: 843 261 tonnes

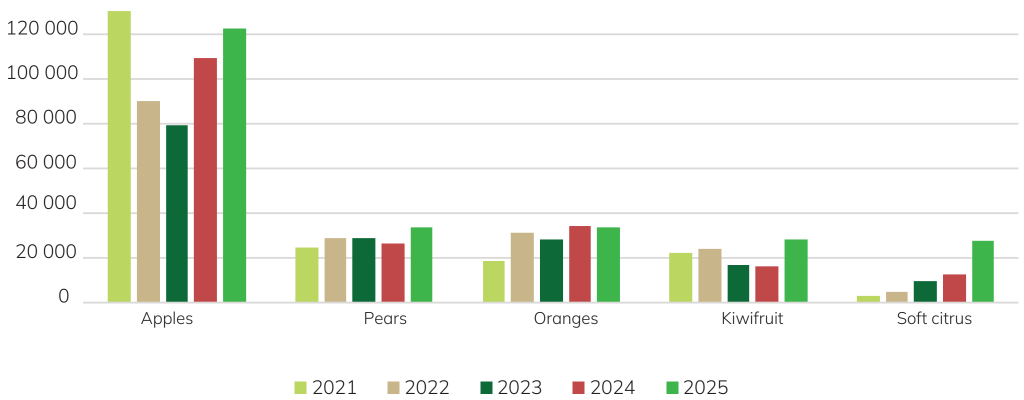
Source: Trade Map.

## 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%** | |

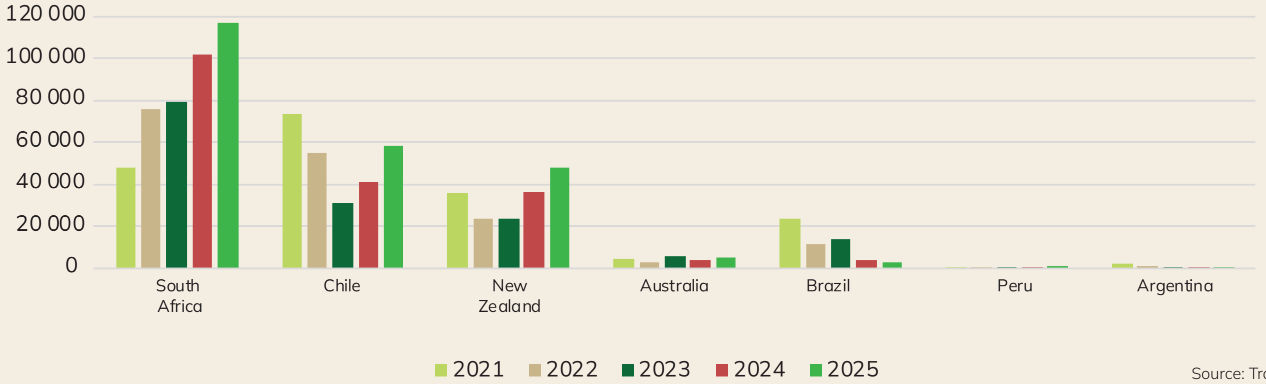
Source: Trade Map.

## 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 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.

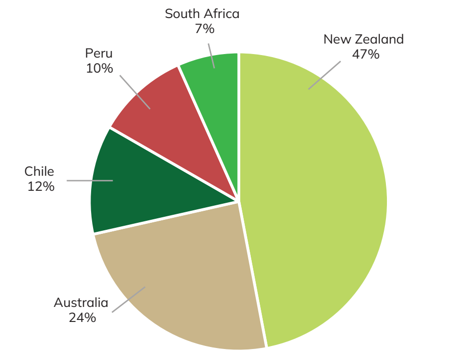
In 2024/25, the country imported more than 1.5 million tonnes of fruit, of which 409 000 tonnes were temperate fruits. Sixty-eight percent of temperate fruit imports were sourced from the Southern Hemisphere.

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.

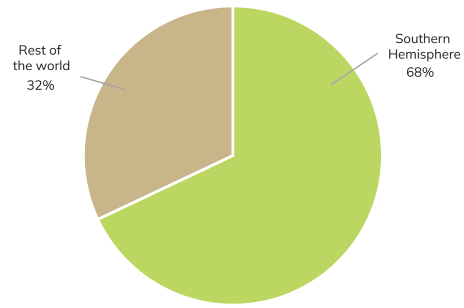
## IMPORTS INTO JAPAN OF TEMPERATE FRUITS BY ORIGIN, 2024/25

| | 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.




**Total imports from the Southern Hemisphere: 278 124 tonnes**




**Total imports: 409 097 tonnes**

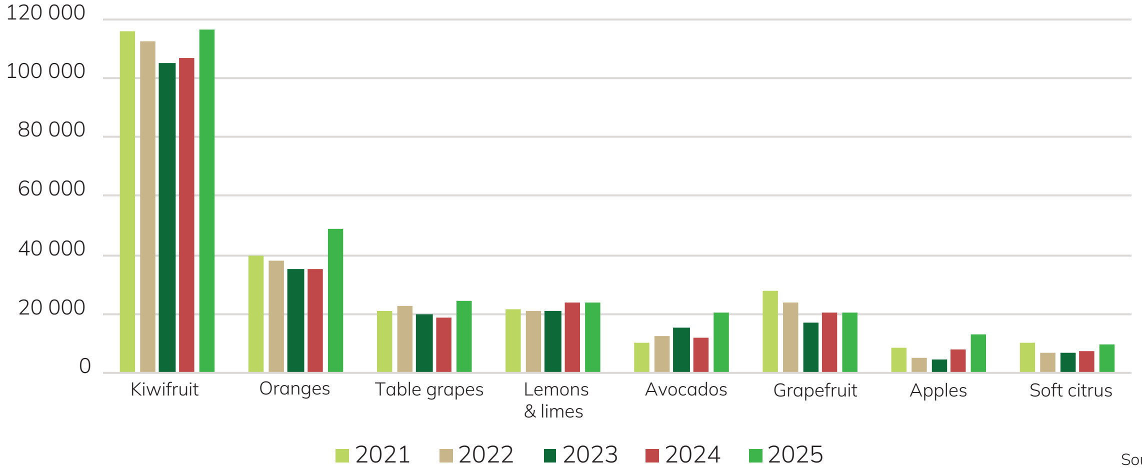
Source: Trade Map.

## 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%** | |

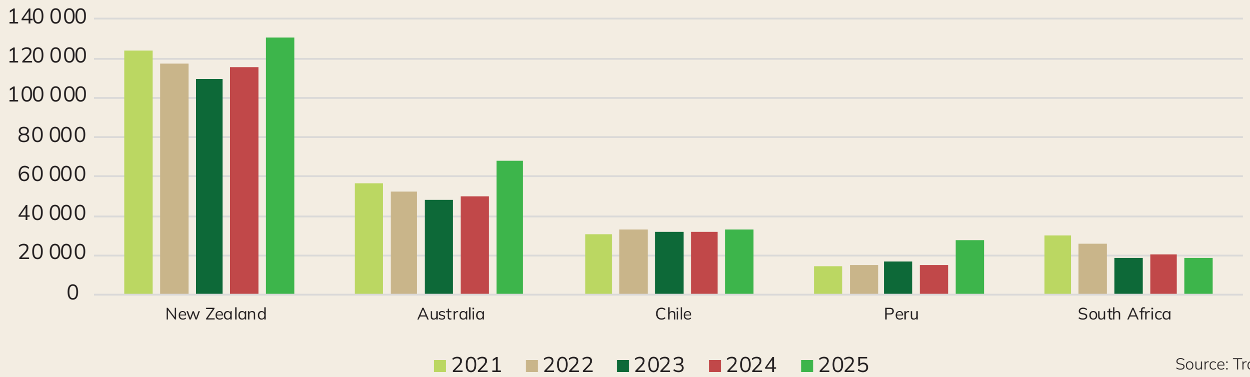
Source: Trade Map.

## 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

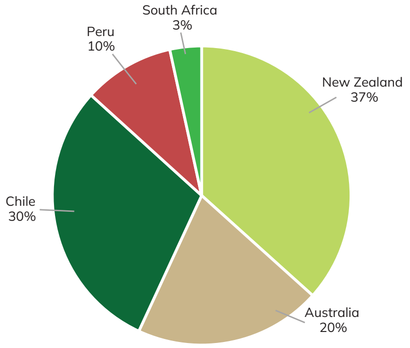
South Korea imports significant volumes of fresh fruit to supplement its domestic temperate fruit production. However, the country does not allow any imports of apples, pears, stone fruit, or soft citrus from any origin. Southern Hemisphere suppliers account for 50 percent of South Korea's fresh temperate 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.

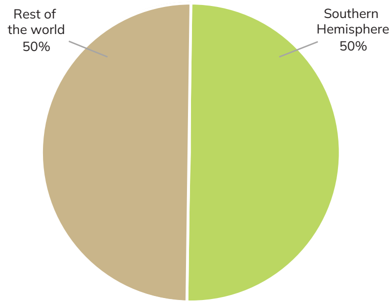
## IMPORTS INTO SOUTH KOREA OF TEMPERATE FRUITS BY ORIGIN, 2024/25

| | 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.




**Total imports from the Southern Hemiphere: 136 250 tonnes**




**Total imports: 270 210 tonnes**

Source: Trade Map.

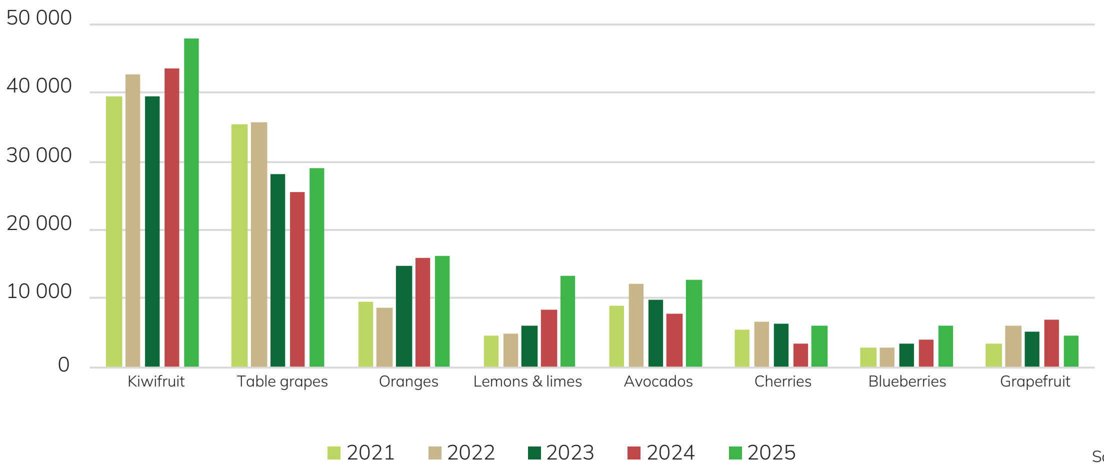
# SOUTH KOREA

## 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%** | |

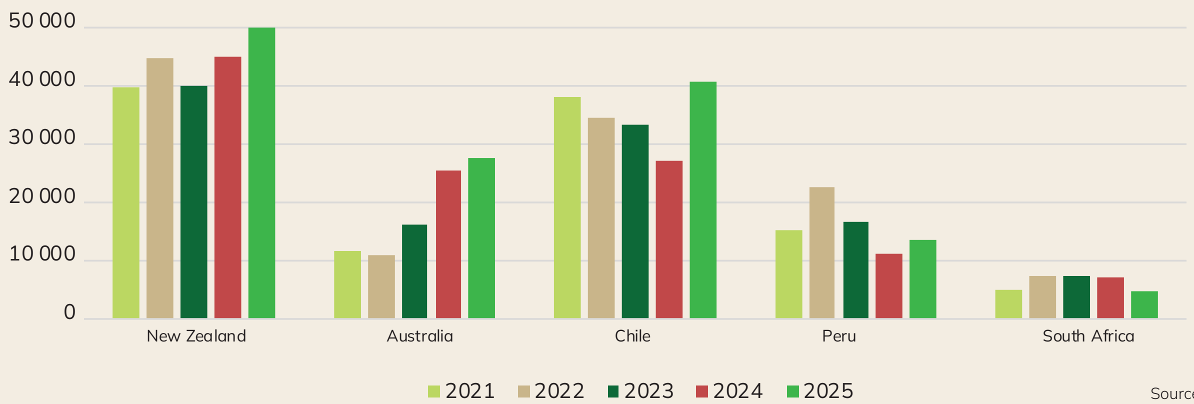
Source: Trade Map.

## 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

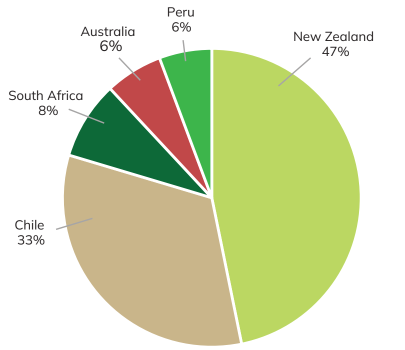
Taiwan is a producer of tropical fruits, and the demand for imported fruits focuses mainly on temperate fruit types. In 2024/25, fresh fruit imports rose 11 percent year-on-year to nearly 300 000 tonnes. Southern Hemisphere countries supplied 49 percent of these imports, while the United States of America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

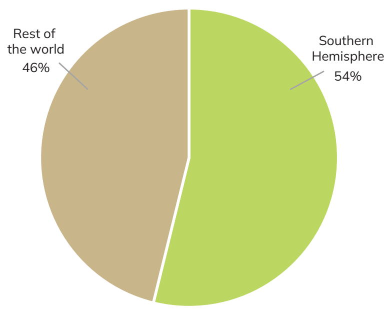
## IMPORTS INTO TAIWAN OF TEMPERATE FRUITS BY ORIGIN, 2024/25

| | 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.




Total imports from the Southern Hemisphere: 175 009 tonnes




Total imports: 325 023 tonnes

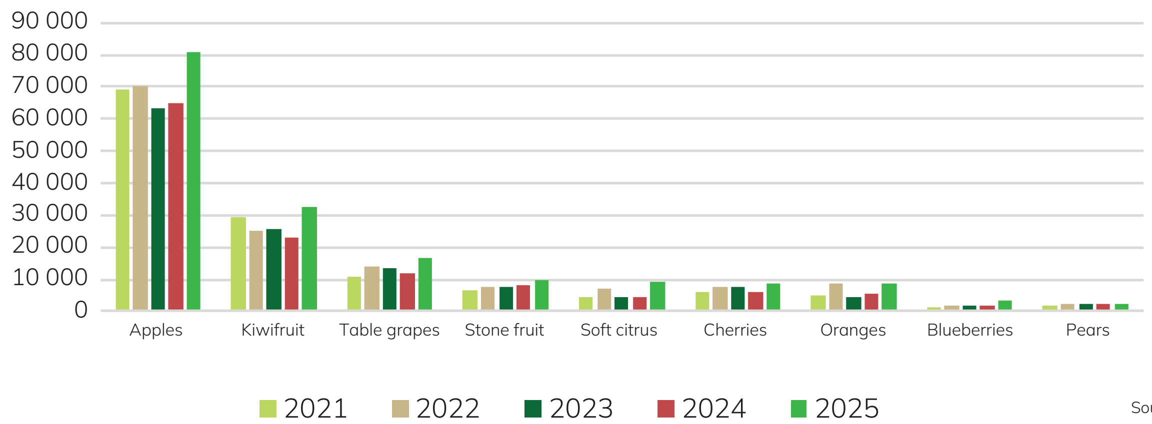
Source: Trade Map.

# 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%** | |

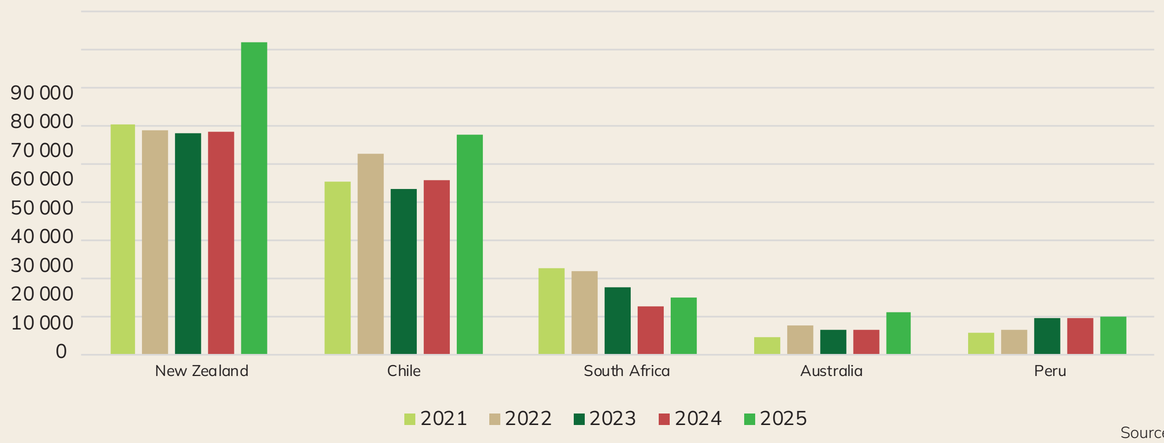
Source: Trade Map.

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

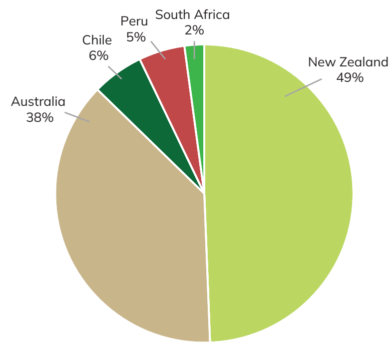
China is the largest supplier of temperate fruits to the country, with supplies dominated largely by apples and soft citrus. The Southern Hemisphere accounts for 12 percent of overall temperate fruit imports, led by apples, soft citrus, and table grapes.

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.

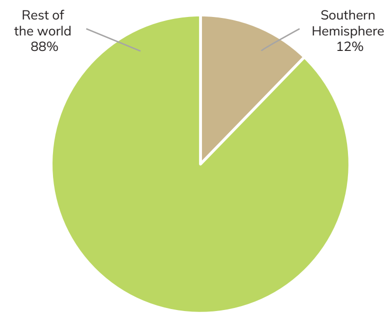
## IMPORTS INTO THAILAND OF TEMPERATE FRUITS BY ORIGIN, 2024/25

| | 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.




**Total imports from the Southern Hemisphere: 55 863 tonnes**




**Total imports: 455 915 tonnes**

Source: Trade Map.

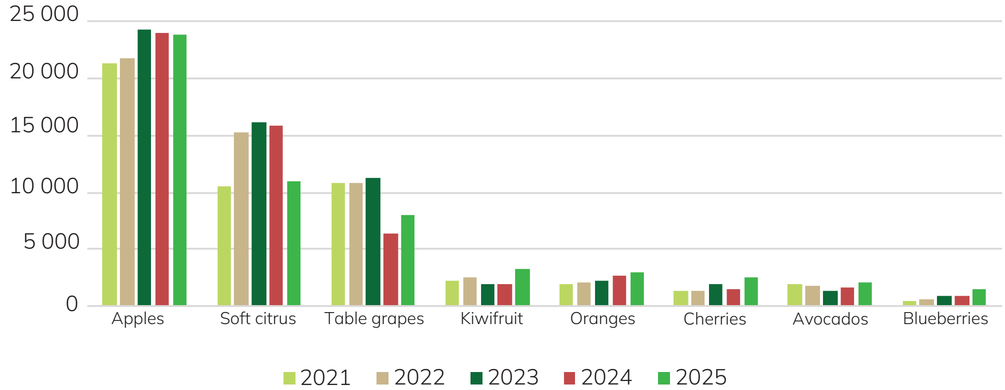
THAILAND

## 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%** | |

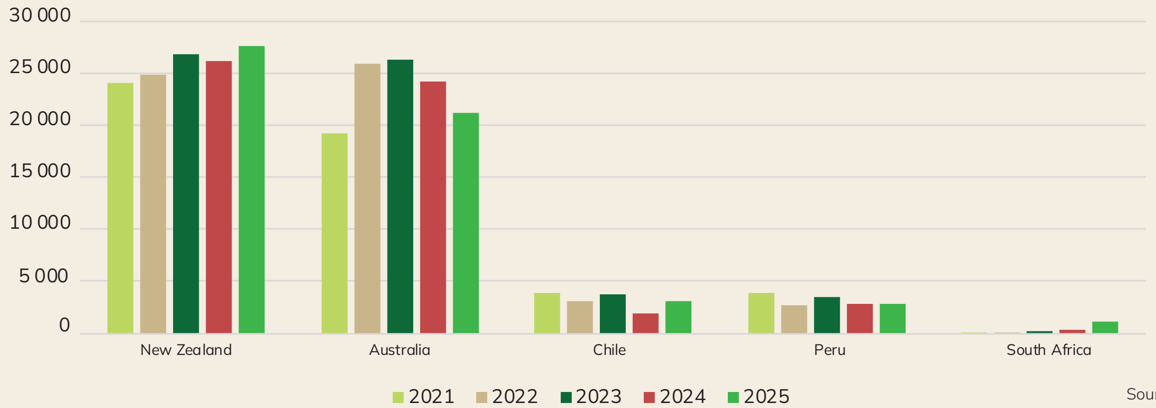
Source: Trade Map.

## 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

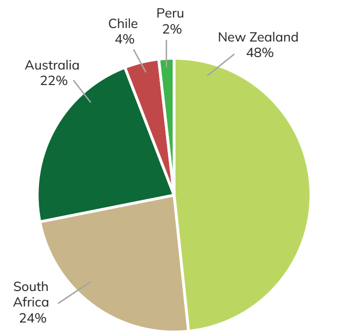
Viet Nam is a large tropical fresh fruit producer with a rapidly expanding production base. Given its tropical climate, Viet Nam imports over 1.1 million tonnes of fresh temperate fruits, mostly from China.

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.

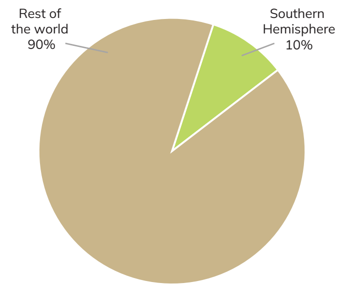
## IMPORTS INTO VIET NAM OF TEMPERATE FRUITS BY ORIGIN, 2024/25

| | 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.

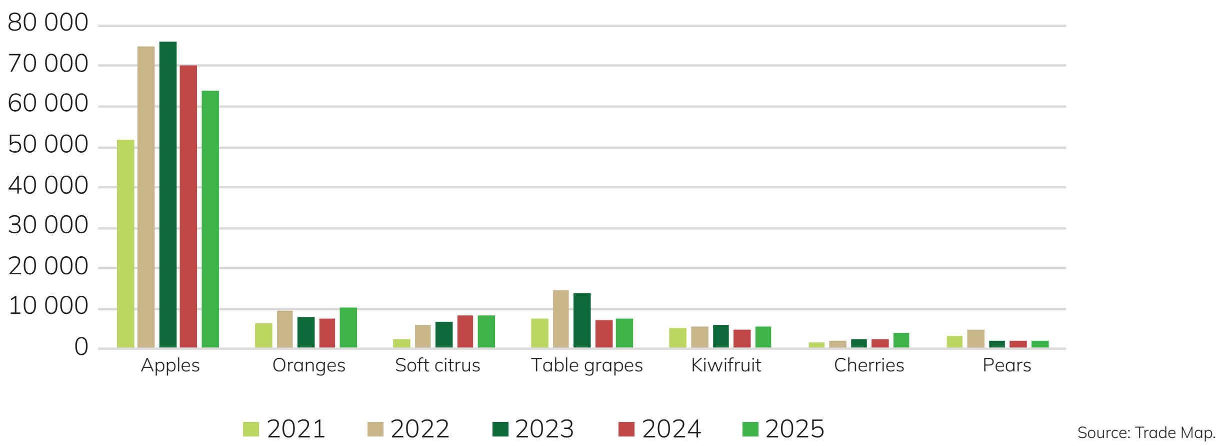
VIET NAM

## 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%** | |

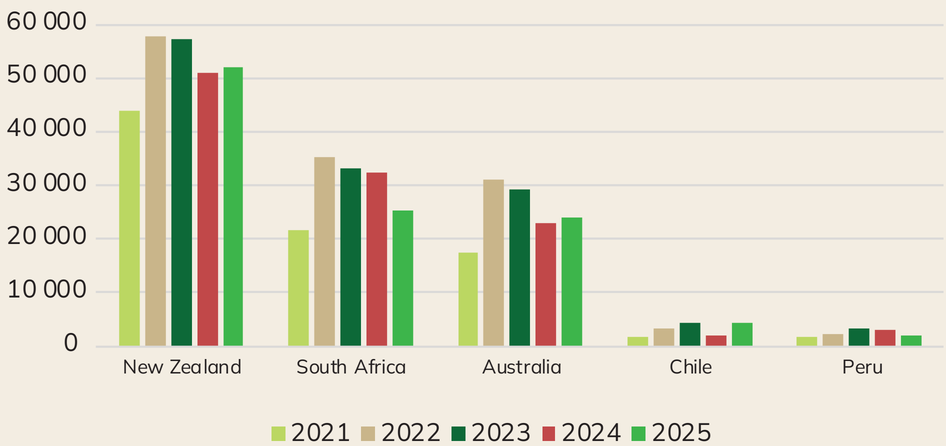
Source: Trade Map.

## 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.