

Logistic OS Journal

Analytical review of the export market
of the agro-industrial complex:
July - December 2023

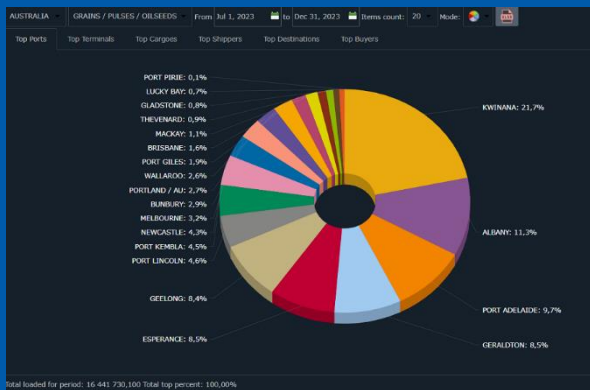
Australia

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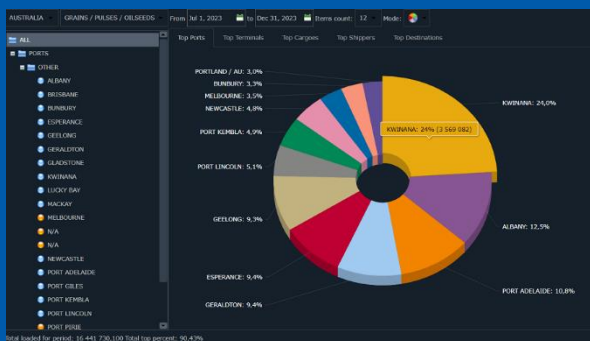
No 1
February 2024

Export of grains and legumes: statistics on volumes



From 07/01/2023 to 12/31/2023 via ports Australia exported **16 441.7 thousand tons** of grain and leguminous cargo.

Wheat accounted for 53.1% of total exports – **8 729.4 thousand tons**



The largest volume of grain shipments passed through the port of Kwinana.

From 07/01/23 to 12/31/23, **3 569 thousand tons** of wheat, rapeseed, barley, sorghum and other cargo were sent abroad through the port terminals.

KWINANA	(24,01%)	3 569 082,00
ALBANY	(12,49%)	1 857 072,00
PORT ADELAIDE	(10,78%)	1 602 709,00
GERALDTON	(9,44%)	1 403 835,00
ESPERANCE	(9,40%)	1 397 298,00
GEELONG	(9,29%)	1 380 642,88
PORT LINCOLN	(5,11%)	760 000,00
PORT KEMBLA	(4,94%)	735 000,00
NEWCASTLE	(4,80%)	713 467,33
MELBOURNE	(3,49%)	518 350,00
BUNBURY	(3,25%)	483 498,89
PORTLAND / AU	(3,00%)	446 711,00

The TOP-5 also includes ports:

Albany – 1 857.0 thousand tons
Port Adelaide – 1 602.7 thousand tons
Geraldton – 1 403.8 thousand tons
Esperance – 1 397.2 thousand tons

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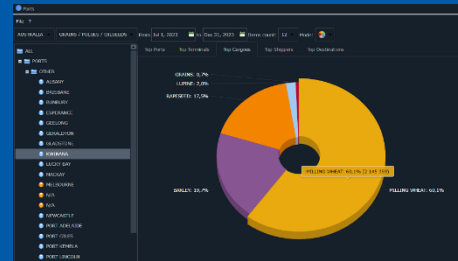
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Export of grains and legumes: cargo statistics

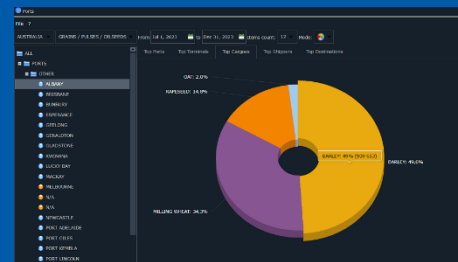
Kwinana

Wheat - 2 145.3 thousand tons
Barley - 704.6 тыс. thousand tons
Rapeseed - 625.3 thousand tons
Lupine - 69.7 thousand tons



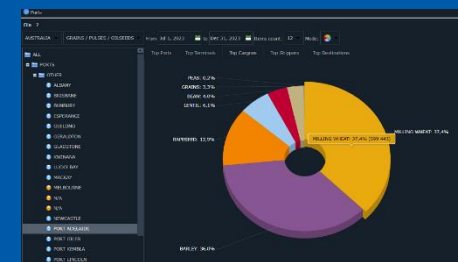
Albany

Barley – 909.6 thousand tons
Wheat – 363.0 thousand tons
Rape – 275.0 thousand tons



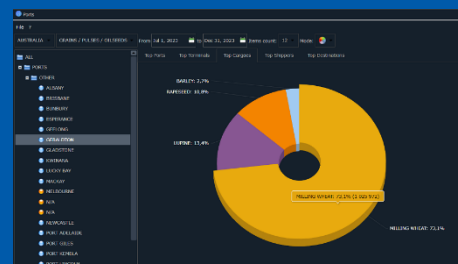
Port Adelaide

Wheat – 599.4 thousand tons
Barley – 576.7 thousand tons
Rapeseed – 207.5 thousand tons
Lentil – 97.9 thousand tons



Geraldton

Wheat – 1 02.9 thousand tons
Lupine – 187.6 thousand tons
Rapeseed – 152.5 thousand tons

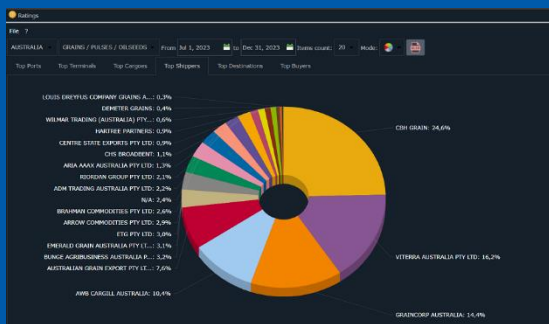


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Export of grains and legumes: statistics on exporters



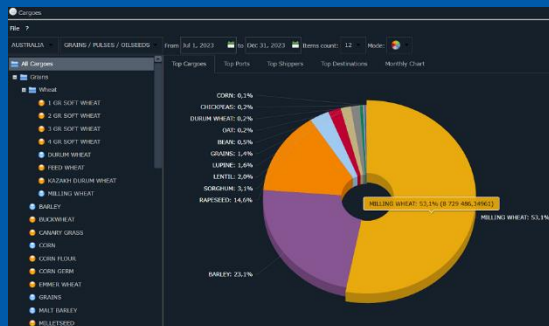
The exporter ranking continues to be topped by **CBH Grain**, Australia's largest grain exporter.

From July 1 to the end of December 2024, the company shipped abroad **3 989.4 thousand tons** of grain and leguminous cargo.

Also included in the **TOP 5** are the following companies:

Viterra Australia PTY – 2 621.3 thousand tons
Graincorp Australia – 2 342.3 thousand tons
AWB Cargill Australia – 1 691.7 thousand tons
Australian Grain Export PTY – 1 225.4 thousand tons

CBH GRAIN	(24,58%)	3 989 413,00
VITERRA AUSTRALIA PTY LTD	(16,15%)	2 621 304,00
GRAINCORP AUSTRALIA	(14,43%)	2 342 280,00
AWB CARGILL AUSTRALIA	(10,42%)	1 691 743,00
AUSTRALIAN GRAIN EXPORT PTY LT...	(7,55%)	1 225 459,00
BUNGE AGRIBUSINESS AUSTRALIA P...	(3,19%)	518 498,89
EMERALD GRAIN AUSTRALIA PTY LT...	(3,13%)	507 718,00
ETG PTY LTD	(2,98%)	484 176,00
ARROW COMMODITIES PTY LTD	(2,87%)	465 239,33
BRAHMAN COMMODITIES PTY LTD	(2,60%)	422 493,00



During this period, mainly Australia exported wheat.

Australia enters steadily in the **TOP 10** world wheat exporters.

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Export of cereals and legumes: statistics on importing countries

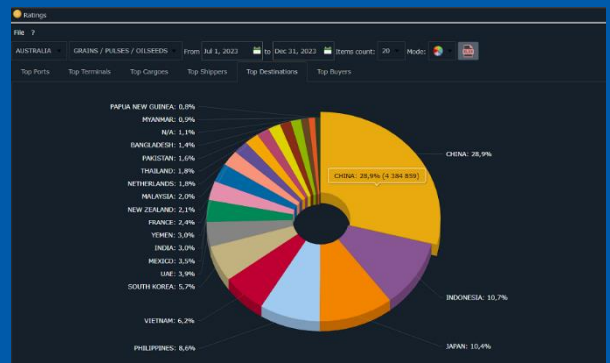
From 07/01/23 to 12/31/23, **China** became the main buyer of grains and legumes from Australia (**28.9% of the total volume**).

China mainly imported barley: from 07/01/23 to 12/31/23 the country received **2 372.0 thousand tons** from Australia.

Australia also exported grains and leguminous crops to Indonesia, the Philippines, Japan, the United Arab Emirates, Vietnam, South Korea, Mexico, India, Yemen, etc.

The TOP-5 buyers of Australian wheat included:

- Indonesia** – 1 607.0 thousand tons
- Philippines** – 1 154.1 thousand tons
- Vietnam** – 750.5 thousand tons
- South Korea** – 660.9 thousand tons



CHINA	(28,93%) 4 384 859,00
INDONESIA	(10,73%) 1 627 028,00
JAPAN	(10,44%) 1 582 108,00
PHILIPPINES	(8,57%) 1 299 105,14
VIETNAM	(6,23%) 945 127,00
SOUTH KOREA	(5,74%) 869 915,00
UAE	(3,90%) 590 535,00
MEXICO	(3,48%) 528 000,00
INDIA	(3,02%) 457 183,00
YEMEN	(3,00%) 455 238,00
FRANCE	(2,43%) 368 693,00
NEW ZEALAND	(2,11%) 319 400,00
MALAYSIA	(2,00%) 303 400,00
NETHERLANDS	(1,81%) 274 160,00
THAILAND	(1,75%) 265 737,00

INDONESIA	(20,84%) 1 607 028,00
CHINA	(19,32%) 1 490 027,00
PHILIPPINES	(14,96%) 1 154 105,14
VIETNAM	(9,73%) 750 524,00
SOUTH KOREA	(8,57%) 660 961,00
JAPAN	(6,21%) 479 082,00
YEMEN	(5,90%) 455 238,00
MALAYSIA	(3,93%) 303 400,00
NEW ZEALAND	(3,73%) 287 400,00
UAE	(3,32%) 255 850,00
MYANMAR	(1,79%) 138 000,00

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Wheat supplies from Australia have great importance for the world market, since the country is one of the largest world exporters of this crop.

Therefore, the November decrease in supplies by foreign markets have caused great concern, as they could lead to an increase in world prices.

In November 2023, wheat exports from Australia compared to October 2023 decreased by 17%.

Meanwhile, according to experts, the situation which developed in the Red Sea, can promote growth competitiveness of Australian wheat in the markets of Asia, the Middle East and Eastern Africa.

This is due to the fact that, unlike Ukraine, the EUUSA and other countries transporting grain cargo towards these countries through the Red Sea, Australia doesn't need this.

On the other hand, the situation in the Red Sea could have a negative impact on Australian canola exports.

The bulk of this crop is shipped to the EU through the Suez Canal.

And investment in canola processing is growing as demand for renewable energy rises and diets change in Southeast Asia.

Over the past 25 years, canola production in Australia has increased from 2.5 million tonnes to 8.5 million tonnes.

The country plans to attract a significant amount of investment in crop processing, because Australia now mainly exports raw materials.

The largest industry players are GrainCorp and Cargill.

