

Logistic OS Journal

Analytical review of the export market
of the agro-industrial complex:
results of the first half of 2022/23 this year

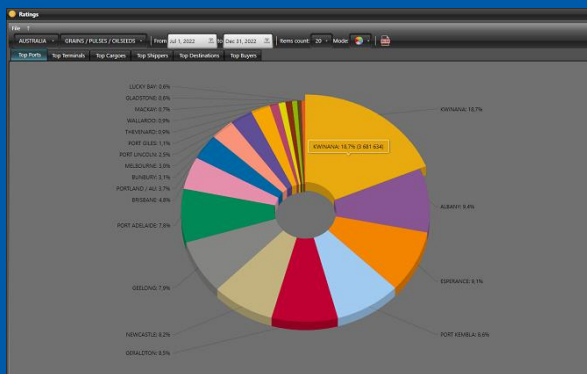
AUSTRALIA

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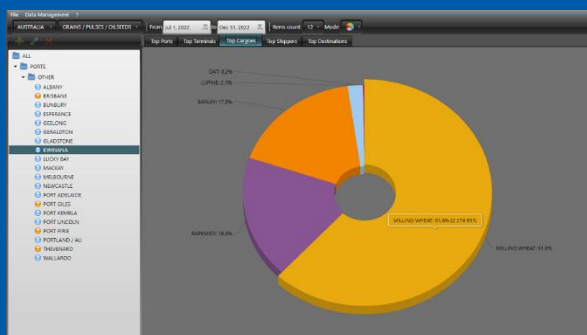
No 2
March 2023

Export of cereals and legumes: volume statistics



From 07/01/2022 to 12/31/2022,
19 637.7 thousand tons of grain and leguminous cargoes were exported through the ports of Australia.

Wheat accounted for 61% of total exports –
11 980.6 thousand tons



The bulk of grain shipments went through the port of **Kwinana**, which accounts for more than 50% of Western Australia's international grain exports.

During the first half of the 2022/2023 season,
3 681.6 thousand tons of wheat, rapeseed, barley, lupine and oats were sent abroad through the port terminals.

KWINANA	(18,75%)	3 681 634,00
ALBANY	(9,37%)	1 840 563,00
ESPERANCE	(9,08%)	1 782 801,00
PORT KEMBLA	(8,62%)	1 692 449,00
GERALDTON	(8,55%)	1 678 283,93
NEWCASTLE	(8,17%)	1 604 126,01
GEELONG	(7,87%)	1 546 191,00
PORT ADELAIDE	(7,82%)	1 534 926,00
BRISBANE	(4,75%)	932 880,00
PORTLAND / AU	(3,74%)	735 077,14

The TOP-5 also includes ports:

Albany - 1 840.5 thousand tons
Esperance– 1 782.8 thousand tons
Port Kembla – 1 692.4 thousand tons
Geraldton - 1 678.2 thousand tons

*The data given in the article are aggregated on the basis of analytical processing of independent sources of information based on the operational situation in ports in Russia and the world, and can not be used as official confirmed data.

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Logistic OS uses algorithms to collect and analyze information, which allow forming the most timely and approximate real-time information base on the movement of goods of the major exporting countries

Export of cereals and legumes: cargo statistics

Kwinana

Wheat - 2 274.9 thousand tons
Rape - 678.4 thousand tons
Barley - 644.6 thousand tons
Lupine - 75.6 thousand tons

Albany

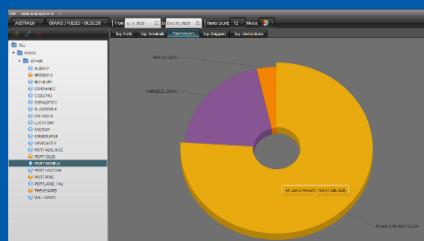
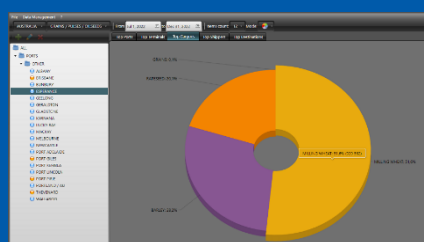
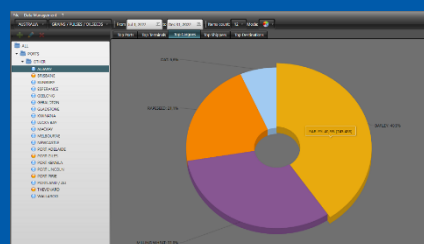
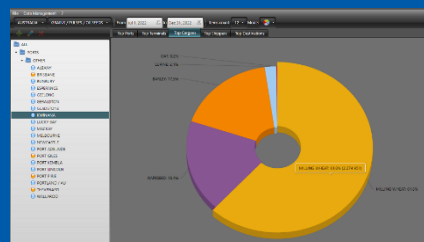
Barley - 745.4 thousand tons
Wheat - 586.0 thousand tons
Rape - 388.0 thousand tons
Oats - 121.0 thousand tons

Esperance

Wheat - 920.5 thousand tons
Barley - 502.7 thousand tons
Rape - 358.3 thousand tons

Port Kembla

Wheat - 1 286.5 thousand tons
Rape - 345.9 thousand tons
Barley - 60.0 thousand tons

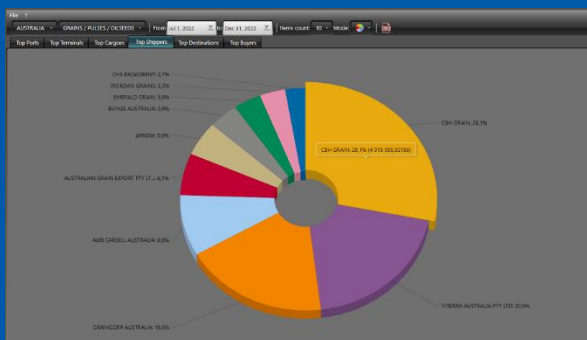


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Export of cereals and legumes: statistics on exporters



Topping the list of exporters is **CBH Grain**, a farmers' cooperative, Australia's largest grain exporter.

For the first half of 2022/23 the company shipped abroad **4 919.49 thousand tons** of grain and leguminous cargoes.

The **TOP-5** also includes the following companies:

Viterra Australia PTY - 3 494.5 thousand tons

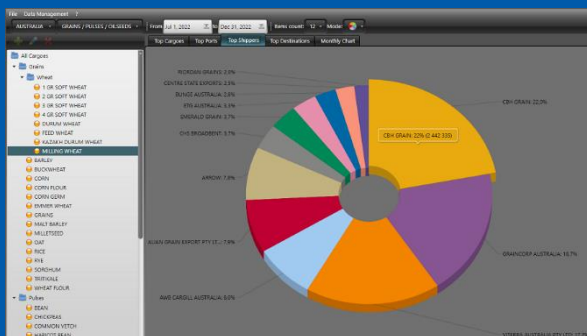
Graincorp Australia - 3 260.2 thousand tons

AWB Cargill Australia – 1 547.6 thousand tons

Australian Grain Export PTY – 1 064.1 thousand tons

Australia's main export crop is wheat, the leader in overseas sales of which is **CBH Grain**.

According to the forecast of the Australian Bureau of Agriculture and Resources, **wheat production in 2022/2023 will be a record 39.2 million tons**.



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Export of cereals and legumes: statistics on importing countries

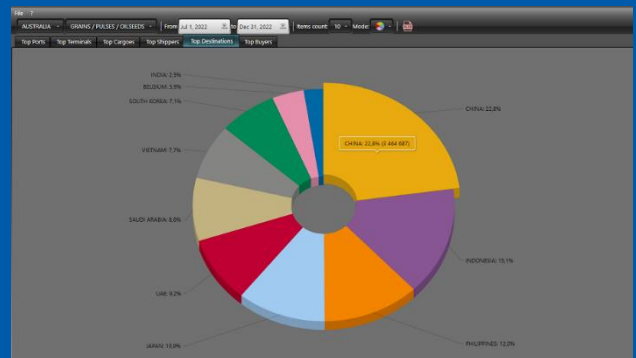
The main country where grains and legumes are delivered from Australia is **China (22.8% of the total volume)**.

China mainly imports wheat: in the first half of 2022/23, the country received **2 796.4 thousand tons** from Australia.

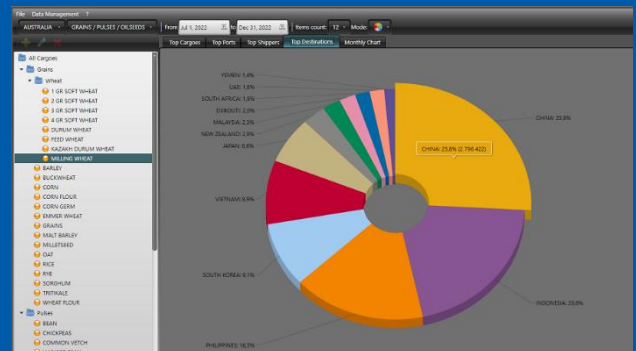
Australia also exported grains and legumes to Indonesia, the Philippines, Japan, the United Arab Emirates, Saudi Arabia, Vietnam, South Korea, Belgium, India and New Zealand.

China is the leader among buyers of Australian wheat, having purchased 3 147.5 thousand tons.

Next comes **Indonesia** – 2 245.6 thousand tons
Philippines - 1 786.6 thousand tons
South Korea - 979.8 thousand tons
Vietnam - 968.2 thousand tons



CHINA	(22,81%)	3 464 687,00
INDONESIA	(15,11%)	2 295 665,00
PHILIPPINES	(11,96%)	1 816 963,73
JAPAN	(10,90%)	1 655 445,00
UAE	(9,19%)	1 396 243,31
SAUDI ARABIA	(8,78%)	1 333 469,00
VIETNAM	(7,69%)	1 167 928,00
SOUTH KOREA	(7,15%)	1 085 400,00
BELGIUM	(3,93%)	597 200,00
INDIA	(2,48%)	376 473,00



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Downpours caused by the La Niña climate event allowed Abares (Australian Bureau of Agricultural Economics and Resources) to raise its forecast for the 2022/23 wheat harvest to **39.2 million tons**.

Some analysts predict the harvest of the main exported crop to be over **40 million tons**.

Barley production in 2022/23 MY is estimated at 14.1 million tons (the third largest harvest on record).

However, for 2023/24 MY, the forecast for barley production has been reduced to 9.9 million tons.

Canola production is set to reach 8.3 million tons (a record harvest).

In this case, the previous record will be exceeded by 21%.

USDA - The US Department of Agriculture raised its forecast for global wheat production by 2.5 million tons to 783.8 million tons in a February report.

The adjustment is associated with an increase in the recalculation of wheat production in Russia to 92 million tons.

The forecast for wheat production in Australia has also been raised to almost 40 million tons.

Another growth driver is Brazil: growth to 9.9 million tons.

The forecast for world wheat consumption is also raised by 2.1 million tons to 785.3 million tons.

A significant decrease in yield is predicted in Argentina (by 1.9 times), in Ukraine (by 1.7 times).

