

Logistic OS Journal

Analytical review of the export market
of the agro-industrial complex:
results of July - March 2022/23

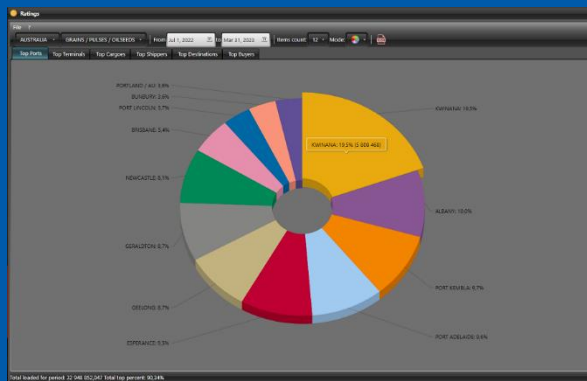
AUSTRALIA

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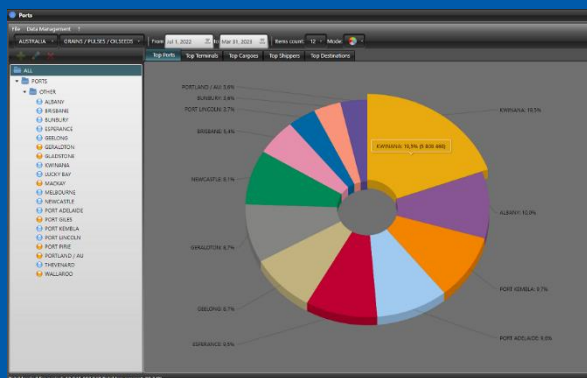
№ 5
June 2023

Export of cereals and legumes: volume statistics



From 07/01/2022 to 03/31/2023 via ports Australia exported **32 948.8 thousand tons** of grain and legumes.

62.6% of total exports came from for wheat - **20 611.8 thousand tons**



The largest part of grain shipments went through the Kwinana port, which is capable of loading grain at a speed of up to 5,000 tons per hour and has a berth length of 291 meters.

In the nine months of the 2022/2023 season, **5 808.4 thousand tons** of wheat, rapeseed, barley, lupine and oats were sent abroad through the port terminals.

The TOP-5 also includes ports:

Albany - 2 961.6 thousand tons

Port Kembla - 2 890.9 thousand tons

Port Adelaide– 2 846.6 thousand tons

Esperance– 2 812.9 thousand tons

KWINANA	(19,51%)	5 808 468,00
ALBANY	(9,95%)	2 961 694,00
PORT KEMBLA	(9,71%)	2 890 927,00
PORT ADELAIDE	(9,56%)	2 846 676,00
ESPERANCE	(9,45%)	2 812 981,00
GEELONG	(8,70%)	2 590 391,00
GERALDTON	(8,69%)	2 586 144,19
NEWCASTLE	(8,12%)	2 416 869,01
BRISBANE	(5,36%)	1 595 375,40
PORT LINCOLN	(3,72%)	1 108 165,00
BUNBURY	(3,62%)	1 078 649,00
PORTLAND / AU	(3,59%)	1 068 927,14

*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 - 3 424.2 thousand tons
Barley - 1 206.8 thousand tons
Rapeseed - 1 056.7 thousand tons
Lupine - 97.6 thousand tons

Albany

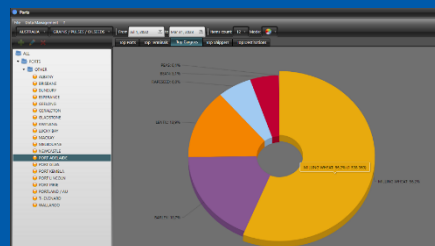
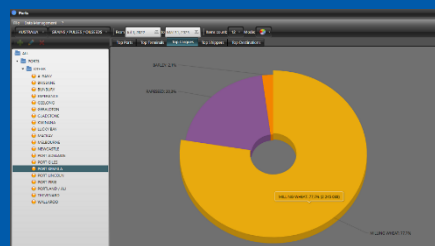
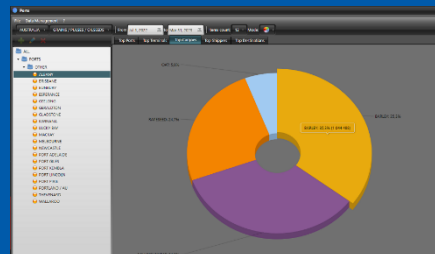
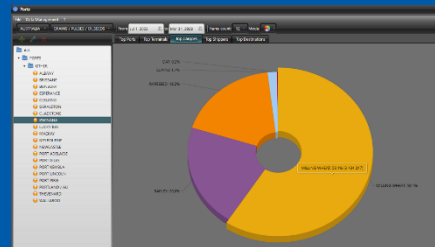
Barley – 1 044.4 thousand tons
Wheat – 1 012.9 thousand tons
Rapeseed - 731.1 thousand tons
Oats - 173.1 thousand tons

Port Kembla

Wheat - 2 245.0 thousand tons
Rapeseed - 585.8 thousand tons
Barley - 60.0 thousand tons

Port Adelaide

Wheat - 1 598.9 thousand tons
Barley - 531.4 thousand tons
Lentil - 395.2 thousand tons



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Export of cereals and legumes: statistics on exporters



The top exporter ranking is **CBH Grain**, a cooperative of farmers -Australia's largest grain exporter.

From July to the end of March 2022/23 the company shipped abroad **7 368.0 thousand tons** of grain and leguminous cargoes.

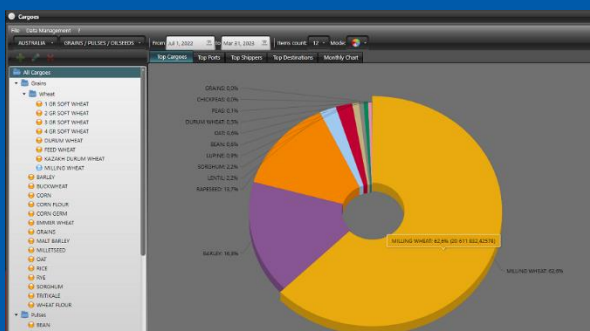
The **TOP-5** also includes the following companies:

- Graincorp Australia** – 5 397.8 thousand tons
- Viterra Australia PTY**– 5 234.2 thousand tons
- AWB Cargill Australia** – 2 874.0 thousand tons
- Australian Grain Export PTY**– 1 603.4 thousand tons

CBH GRAIN	(24,92%)	7 368 052,92
GRAINCORP AUSTRALIA	(18,25%)	5 397 896,00
VITERRA AUSTRALIA PTY LTD	(17,70%)	5 234 293,00
AWB CARGILL AUSTRALIA	(9,72%)	2 874 027,26
AUSTRALIAN GRAIN EXPORT PTY LT...	(5,42%)	1 603 409,00
ARROW	(4,59%)	1 358 064,01
BUNGE AUSTRALIA	(4,47%)	1 322 371,01
EMERALD GRAIN	(4,18%)	1 236 205,31
ADM TRADING AUSTRALIA PTY LTD	(3,12%)	923 903,00
CENTRE STATE EXPORTS	(3,00%)	887 200,00
RIORDAN GRAINS	(2,40%)	709 318,03
CHS BROADBENT	(2,22%)	657 902,11

Main exported crop Australia - wheat, the leader in sales of which abroad is the company **CBH Grain**.

According to the Australian Bureau forecast agriculture and resources, wheat production in 2022/2023 will be a record **26.2 million tons**, **33.9% less than a year earlier**.



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Export of cereals and legumes: statistics on importing countries

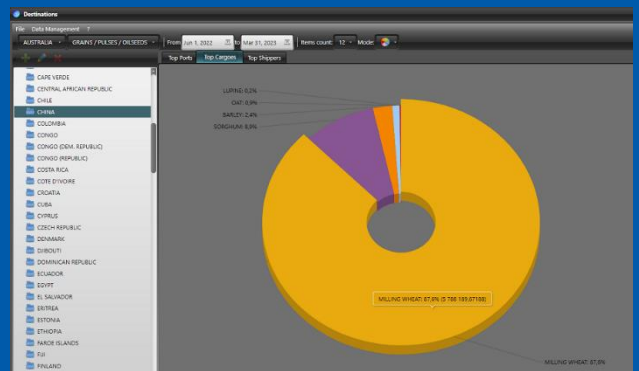
The main country where grain and leguminous cargoes are delivered from Australia - **China (23.4% of the total)**.

China mainly imports wheat: from July to the end of March 2022/23, the country received **5 965.3 thousand tons** from Australia.

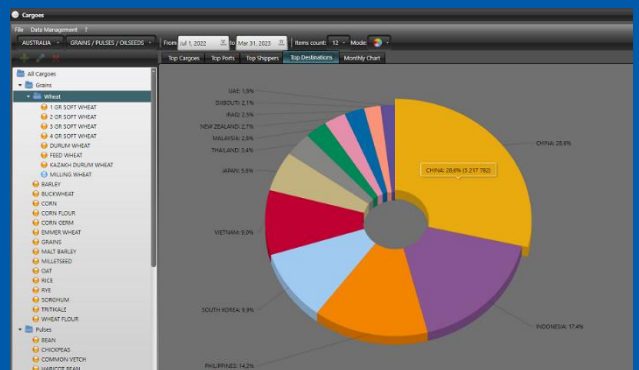
Australia also exported grains and legumes to Indonesia, the Philippines, Japan, the UAE, Saudi Arabia, Arabia, Vietnam, South Korea, Belgium, India, New Zealand and Thailand.

Among the buyers of Australian wheat, **China** is the leader, having purchased **5 217.7 thousand tons**.

Next comes **Indonesia** – **3 169.9 thousand tons**
Philippines - **2 595.5 thousand tons**
South Korea - **1 811.6 thousand tons**
Vietnam - **1 650.1 thousand tons**



CHINA	(23,36%)	5 965 347,00
INDONESIA	(12,61%)	3 219 904,26
PHILIPPINES	(10,98%)	2 803 797,73
JAPAN	(9,40%)	2 401 358,00
UAE	(8,06%)	2 059 243,31
VIETNAM	(7,89%)	2 014 738,00
SOUTH KOREA	(7,85%)	2 004 700,00
SAUDI ARABIA	(7,09%)	1 811 574,00
BELGIUM	(4,51%)	1 152 200,00
THAILAND	(3,06%)	780 783,00
INDIA	(2,69%)	687 173,00
NETHERLANDS	(2,49%)	635 378,00



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In 2023/2024 MY in Australia, a decrease in the total production of winter crops by 34% (44.9 million tons) is predicted.

If we take into account the average for the last 10 years, the decrease will be 3%.

Also, a decrease in average ten-year readings is expected in the production of wheat and barley.

According to preliminary estimates, wheat production will decrease by 34% over the year (26.2 million tons), barley production will decrease by 30% (to 9.9 million tons).

Canola production also expects a big decline, about 41% for the year, but still above the 10-year average.

The Australian Department of Agriculture cites the expected dry season as the reason for such forecasts.

Share of crops in Australia in 2023/2023 expects a decrease in acreage.

Thus, the sown areas of winter crops will decrease, but at the same time they will remain at a fairly high level (23.3 million hectares).

Wheat sown areas will decrease by 2% and rapeseed sown by 11%.

Planted areas of barley, the most drought-tolerant crop, will increase by 4% to 4.3 million ha.

The reduction in planted area will inevitably affect the total cost of agricultural production, which is expected to decline by 14% per year to 79 billion Australian dollars (\$52 billion).

Despite the expected reduction in the cost of cx production, this figure will remain the third largest on record.

