Asia and the Chancay route, a new strategic frontier for Peruvian citrus fruits

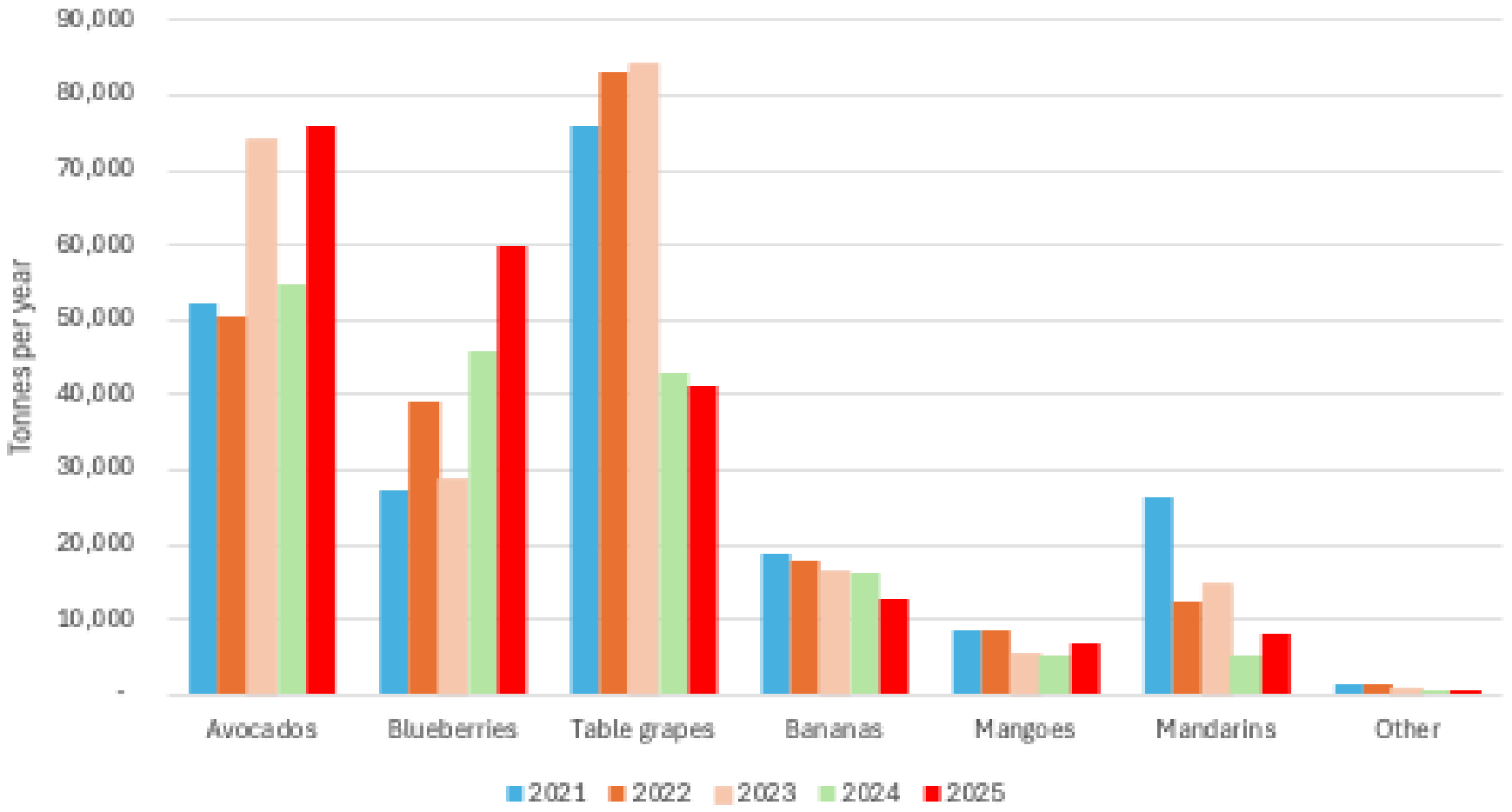
Wayne Prowse
Fresh Intelligence (Australia)
April 21 2026

XII Seminario Internacional de Cítricos 2026
21 y 22 de abril Lima - Perú

From Chancay ….

To Shanghai in under 30 days

Peru exports over 200,000 tonnes fresh fruit to Asian markets – led by avocados and blueberries

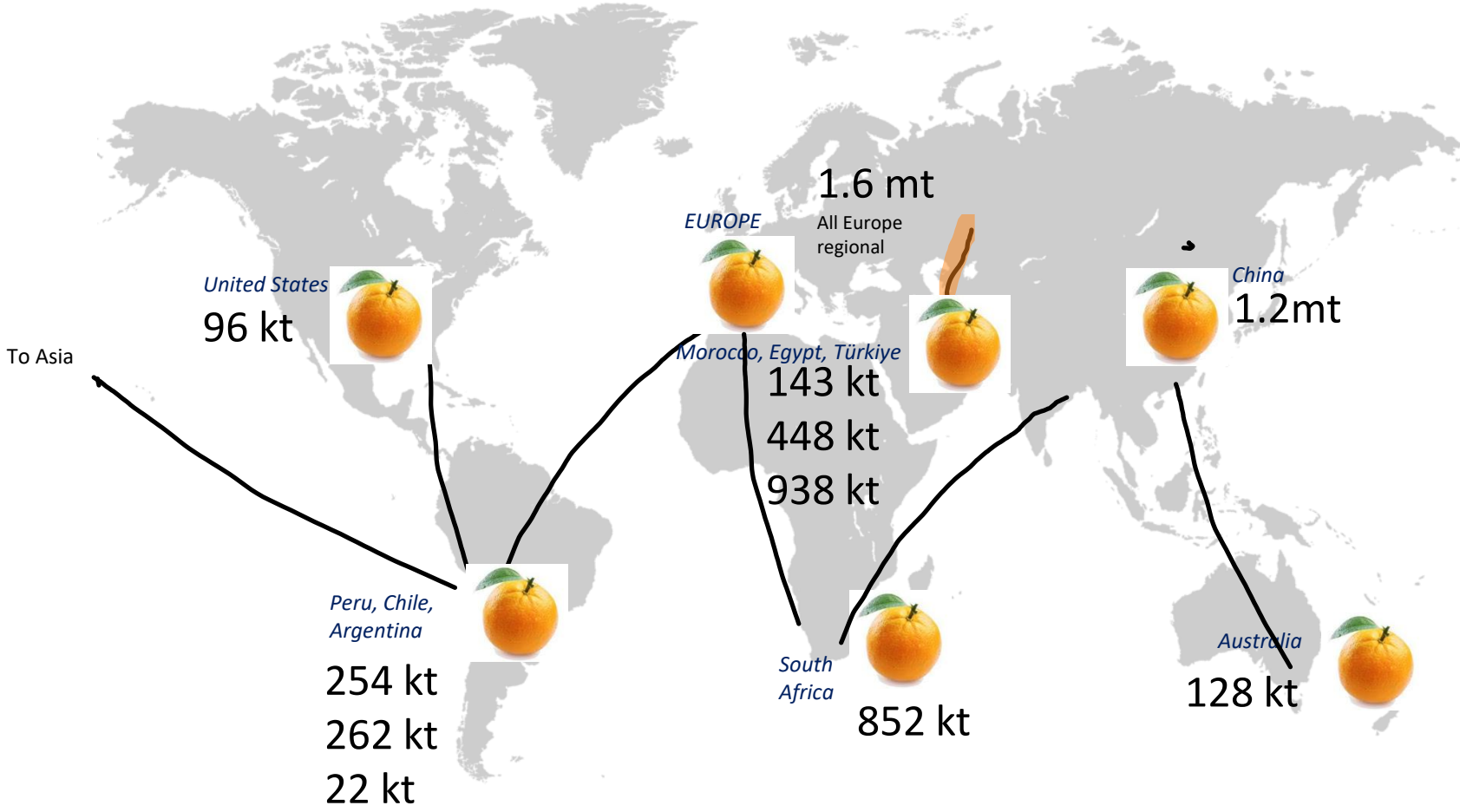


Avocados and blueberries are higher value perishable products that benefit from faster freight links – including air.

Mandarins should also also benefit

2025 Global Mandarin Export Trade

5.9 million tonnes traded



1.5 million tonnes from Southern Hemisphere

Europe accounts for 30 per cent of global trade – mostly from Spain, Italy and Greece to to intra Europe

South Africa is the largest Southern Hemisphere exporter, then Chile, Peru and Australia with trade to United States, Europe and Asia

Türkiye Egypt and Morocco were the main MENA exporters trading regionally and to Europe.

China accounted for over 95 per cent of Asian exports mostly to SE Asia and Russia, mostly mandarins.

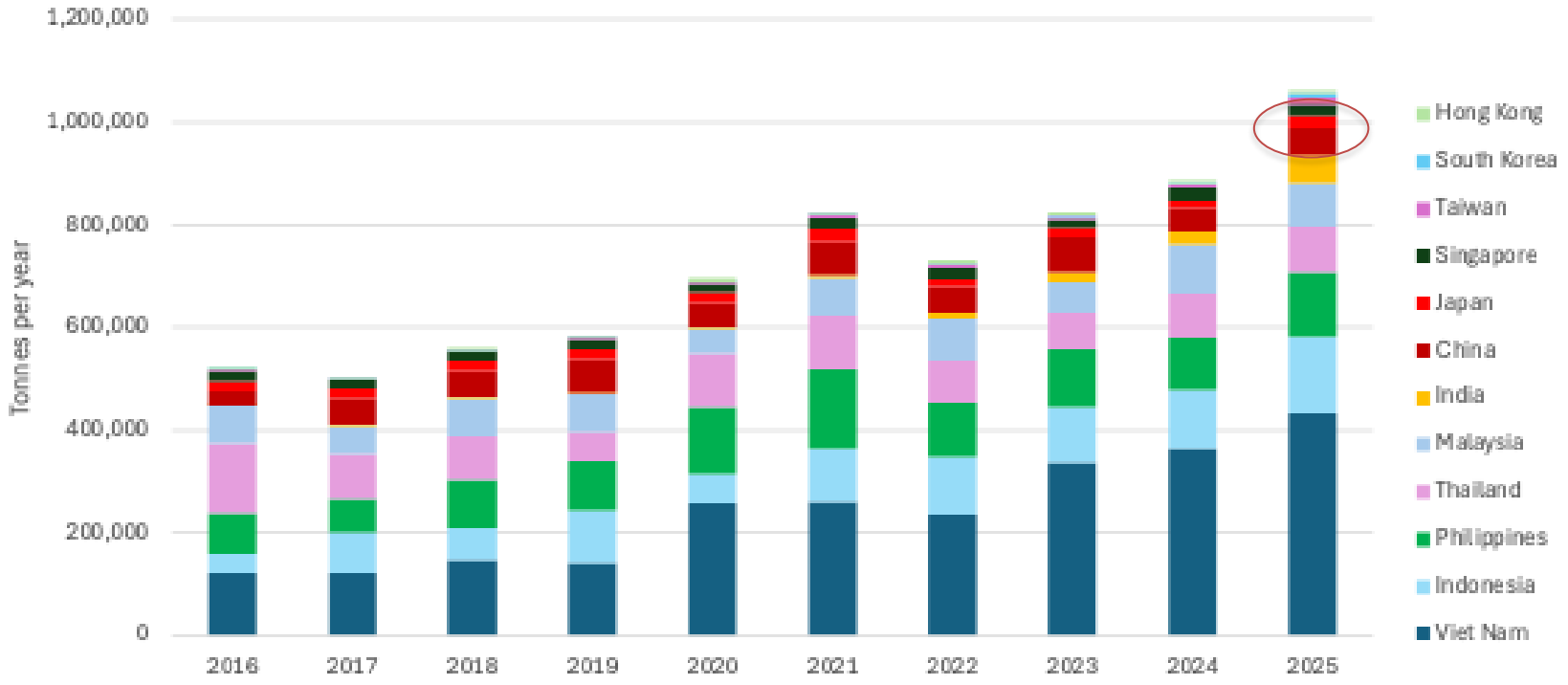
US trade mainly regional (Canada / Mexico) and to Asia.

Mandarins imported by Asia

Asian markets imported 1.1 million tonnes of mandarins in 2025 increasing **17** per cent year on year and **8.2 per cent*** per year over 10 years

Vietnam, Indonesia, Philippines, Thailand and Malaysia are major importers

China, Japan and South Korea are small importers



Source: ITC Trademap; Fresh Intelligence analysis

* Overall Citrus +10.4 and +2.6 % resp._

RUSSIA
KAZAKHSTAN
MONGOLIA
UZBEKISTAN
KYRGYZSTAN
TAJIKISTAN
AFGHANISTAN
PAKISTAN
CHINA
NORTH KOREA
SOUTH KOREA
JAPAN
Sakhalin
Kuril Islands
Hokkaido
Honshu
Shikoku
Kyushu
Nanpo Islands
Okinawa
Kyukyu Islands
NEPAL
BHUTAN
INDIA
BANGLA-DESH
TAIWAN
Taiwan
Hong Kong
MYANMAR (BURMA)
LAOS
Hainan Dao
Luzon
Paracel Islands
Northern Mariana Islands (U.S.)
Guam (U.S.)
THAILAND
VIETNAM
CAMBODIA
PHILIPPINES
Andaman Islands (INDIA)
Nicobar Islands (INDIA)
SRI LANKA
Spratly Islands
Mindanao
FEDERATED STATES OF MICRONESIA
PALAU
BRUNEI
MALAYSIA
SINGAPORE
Borneo
Sumatra
Sulawesi
New Guinea
PAPUA NEW GUINEA
INDONESIA
Java
Bali
Timor
TIMOR-LESTE
Christmas Island (AUSTRALIA)
Cocos Islands (AUSTRALIA)
Ashmore and Cartier Islands (AUSTRALIA)
AUSTRALIA
0
400 km

Southern Hemisphere supplied 261,643 tonnes of mandarins to Asia

Mostly from South Africa and Australia

	Peru	*share*	South Africa	Australia	Chile	Argentina	SH Total
China	4,270	*6.7%*	21,649	24,601	43	-	63,374
India	-	-	30,651	3,065	129	-	33,845
Indonesia	-	-	1,982	15,055	-	-	17,037
Thailand	-	-	215	16,033	-	-	16,248
Hong Kong	92	*0.7%*	8,295	5,406	-	-	14,068
Philippines	-	-	2,760	6,858	-	4,035	13,653
Malaysia	-	-	10,513	1,139	-	-	11,652
Taiwan	-	-	6,292	5,118	-	-	11,410
Vietnam	-	-	-	8,728	-	-	8,728
Japan	4,035	*18.0%*	-	6,142	78	-	22,361
Singapore	-	-	4,142	1,129	-	-	5,271
South Korea	-		-	-	-	-	-
							-
Total	**8,397**	***1.0%***	**124,809**	**98,934**	**275**	**4,035**	**261,643**

Source: ITC Trademap; Fresh Intelligence analysis

1.1 million tonnes supplied including China

Add in China and the total volume reaches over 1.1 million tonnes

Vietnam is the largest importers – mostly from China.

	Peru	*share*	South Africa	Australia	Chile	Argentina	SH Total	China
China	4,270	*6.7%*	21,649	24,601	43	-	63,374	-
India	-	-	30,651	3,065	129	-	33,845	24,291
Indonesia	-	-	1,982	15,055	-	-	17,037	118,834
Thailand	-	-	215	16,033	-	-	16,248	72,885
Hong Kong	92	*0.7%*	8,295	5,406	-	-	14,068	19,909
Philippines	-	-	2,760	6,858	-	4,035	13,653	93,371
Malaysia	-	-	10,513	1,139	-	-	11,652	51,364
Taiwan	-	-	6,292	5,118	-	-	11,410	-
Vietnam	-	-	-	8,728	-	-	8,728	422,102
Japan	4,035	*18.0%*	-	6,142	78	-	22,361	
Singapore	-	-	4,142	1,129	-	-	5,271	10,933
South Korea	-		-	-	-	-	-	
							-	
Total	**8,397**	***1.0%***	**124,809**	**98,934**	**275**	**4,035**	**261,643**	**857,897**

Source: ITC Trademap; Fresh Intelligence analysis

71 million tonnes of citrus is produced in Asia

including 27.1 million tonnes of mandarins in China

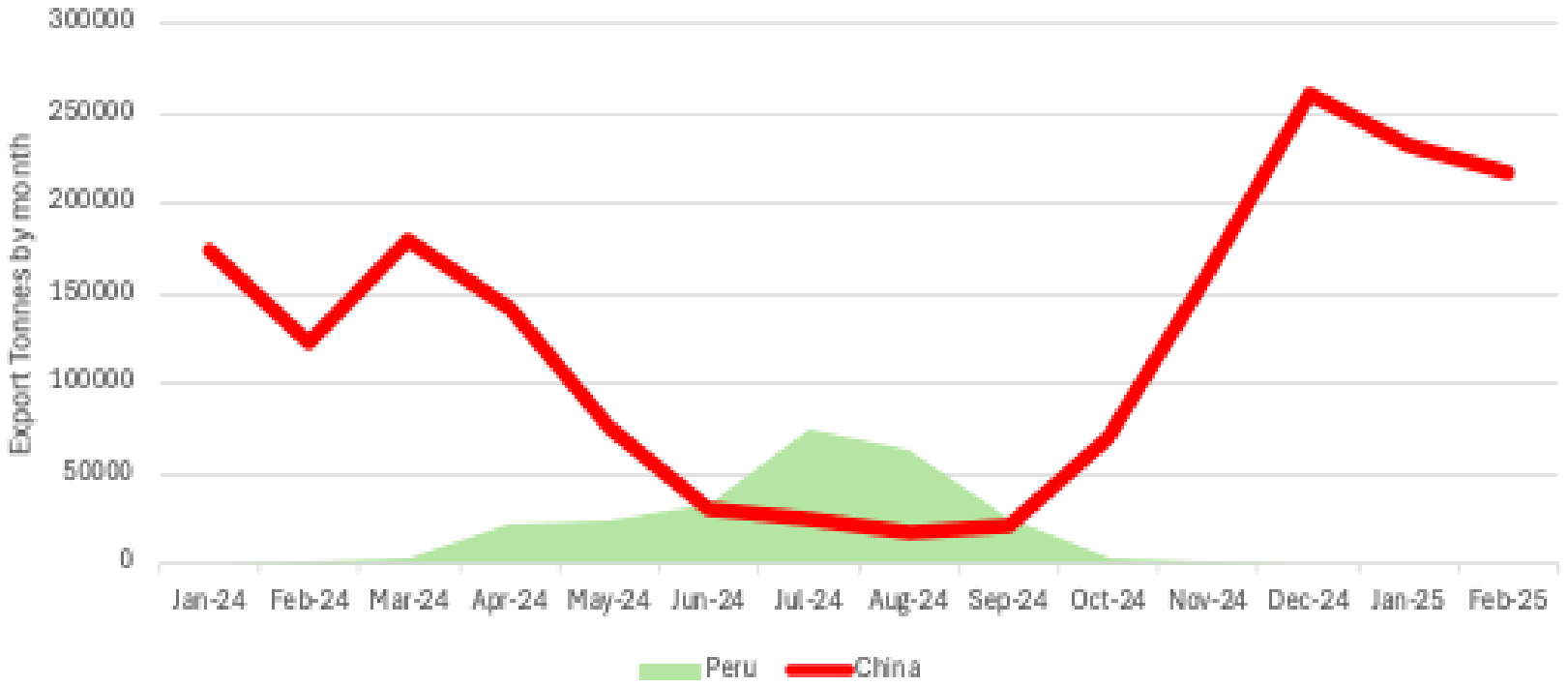
Culturally Sensitive

	Oranges	**Mandarins**	Lemons & limes	Grapefruits	Other	Total
China	7,620,000	**27,100,000**	2,319,972	5,250,000	5,507,206	47,797,178
India	3,851,837	**6,075,893**	3,835,727	-	789,051	14,552,508
Viet Nam	1,915,530	-	-	1,224,307	-	3,139,837
Indonesia	2,575,129	-	-	-	-	2,575,129
Thailand	515,006	**263,379**	168,398	266,186	40,000	1,252,969
Japan	28,057	**632,980**	8,657	-	50,822	720,515
South Korea	-	**640,229**	-	-	1,100	641,329
Taiwan	120,712	**151,484**	32,783	82,737	73,800	461,516
Philippines	1,458	**8,887**	1,554	28,066	110,005	149,969
Malaysia	5,723	-	22,916	15,000	-	43,639
Hong Kong	-	-	-	-	-	-
Singapore	-	-	-	-	-	-
Total	16,633,451	**34,872,852**	6,390,007	6,866,296	6,571,983	71,334,590

Source: FAOSTAT; Fresh Intelligence analysis

Culturally Sensitive

China’s production is counter seasonal to Peru



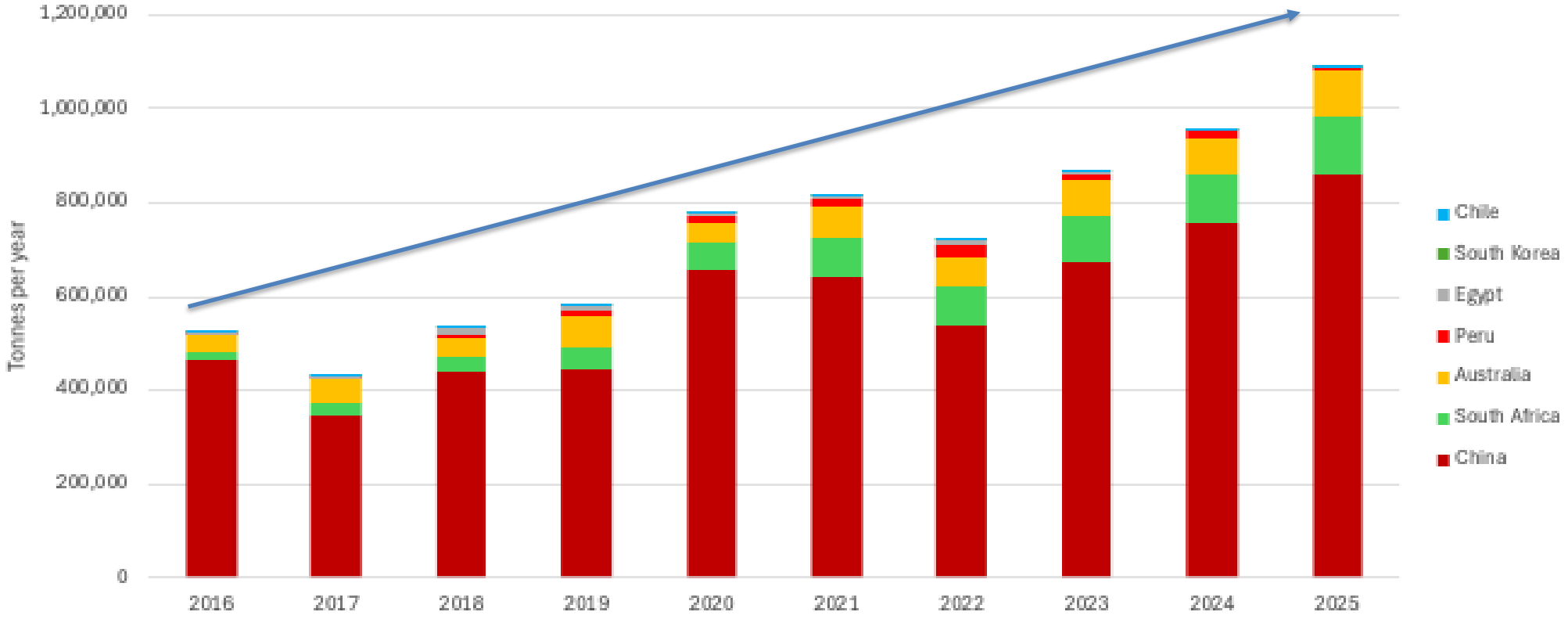
China exports mandarins from October to May mostly to Southeast Asia

Mandarin supplier trends to Asia

Overall growth 8 per cent per year over 10 years

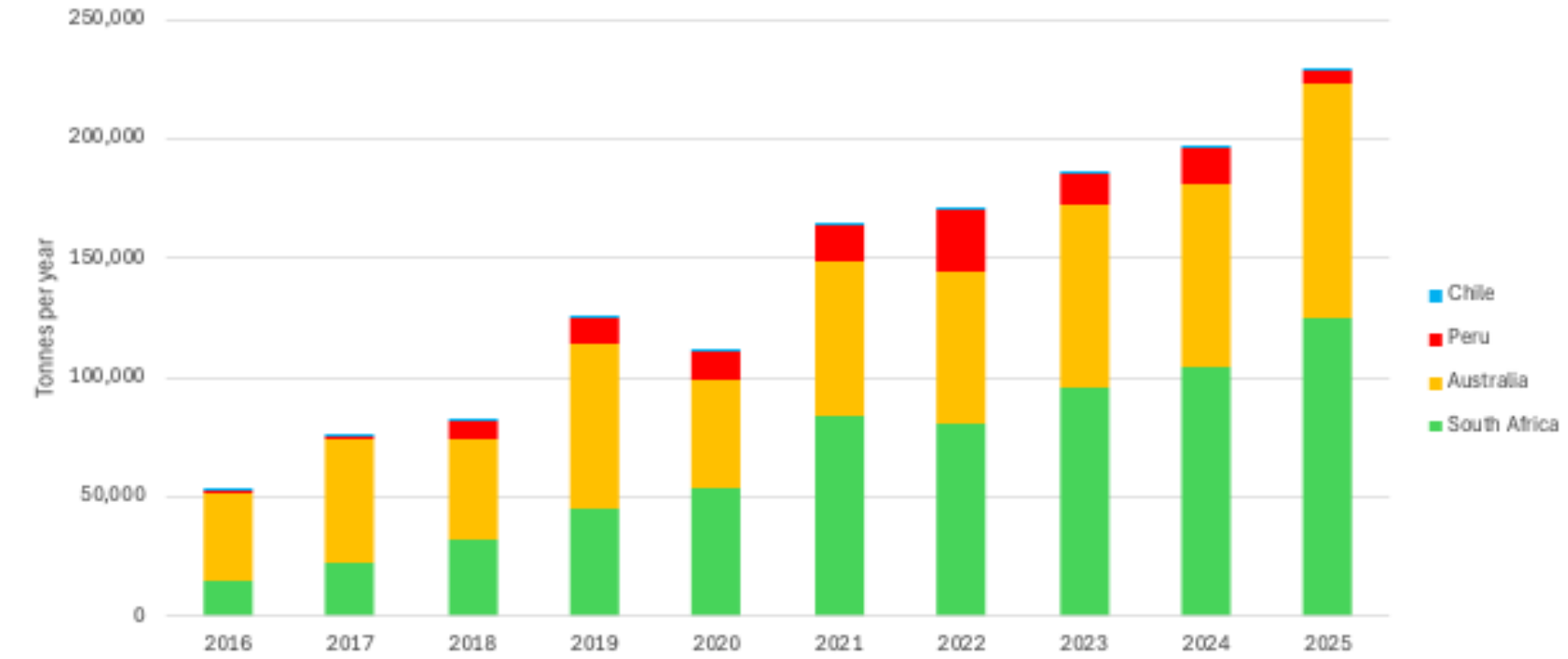
79 per cent supplied from China to SE Asia

21 per cent is supplied from Southern Hemisphere



Source: ITC Trademap; Fresh Intelligence analysis

Mandarin supplier trends to Asia from Southern Hemisphere increased 18 % per year over 10 years



Source: ITC Trademap; Fresh Intelligence analysis

Higher growth from outside Asia, mostly Southern Hemisphere

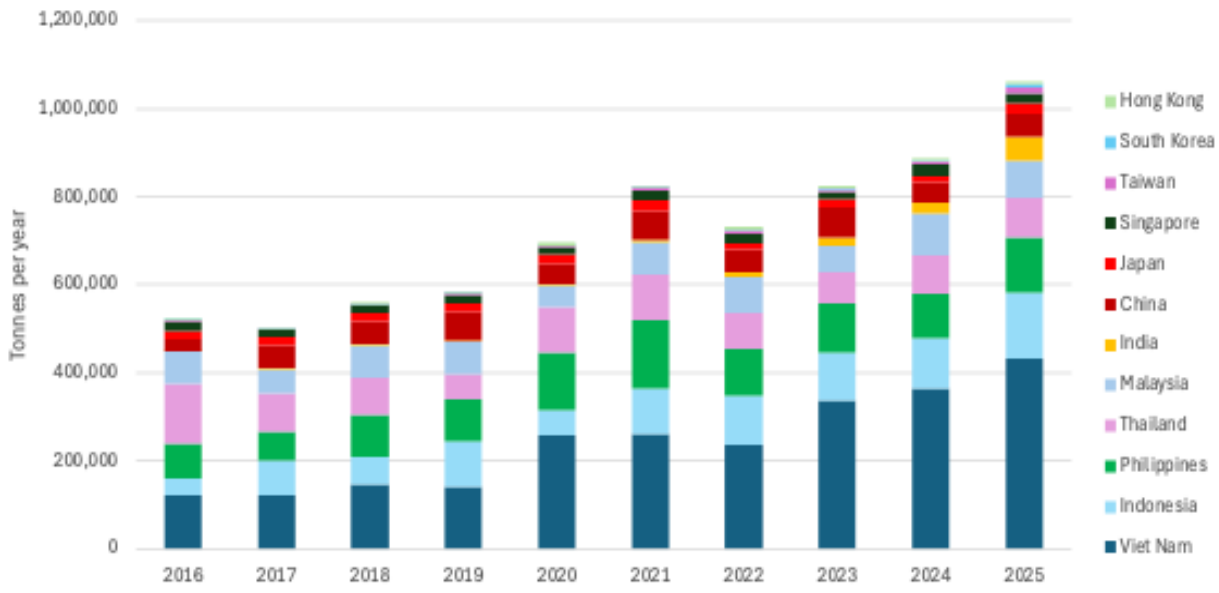
South Africa & Australia

Mandarin Import Trends by market

Vietnam is the largest importer mostly from China, followed by Indonesia, Philippines and Thailand.

	Tonnes	1 yr Change	10 yr trend	share
Viet Nam	431,173	18%	15%	40.6%
Indonesia	151,926	34%	16%	14.3%
Philippines	124,266	21%	5%	11.7%
Thailand	89,087	3%	-5%	8.4%
Malaysia	85,451	-10%	2%	8.0%
India	53,880	106%	58%	5.1%
China	51,250	11%	7%	4.8%
Japan	25,236	76%	4%	2.4%
Singapore	21,305	-17%	-1%	2.0%
Taiwan	13,910	112%	17%	1.3%
South Korea	8,079	161%	152%	0.8%
Hong Kong	7,748	41%	10%	0.7%
Total	**1,063,311**	**20%**	**8%**	**100%**

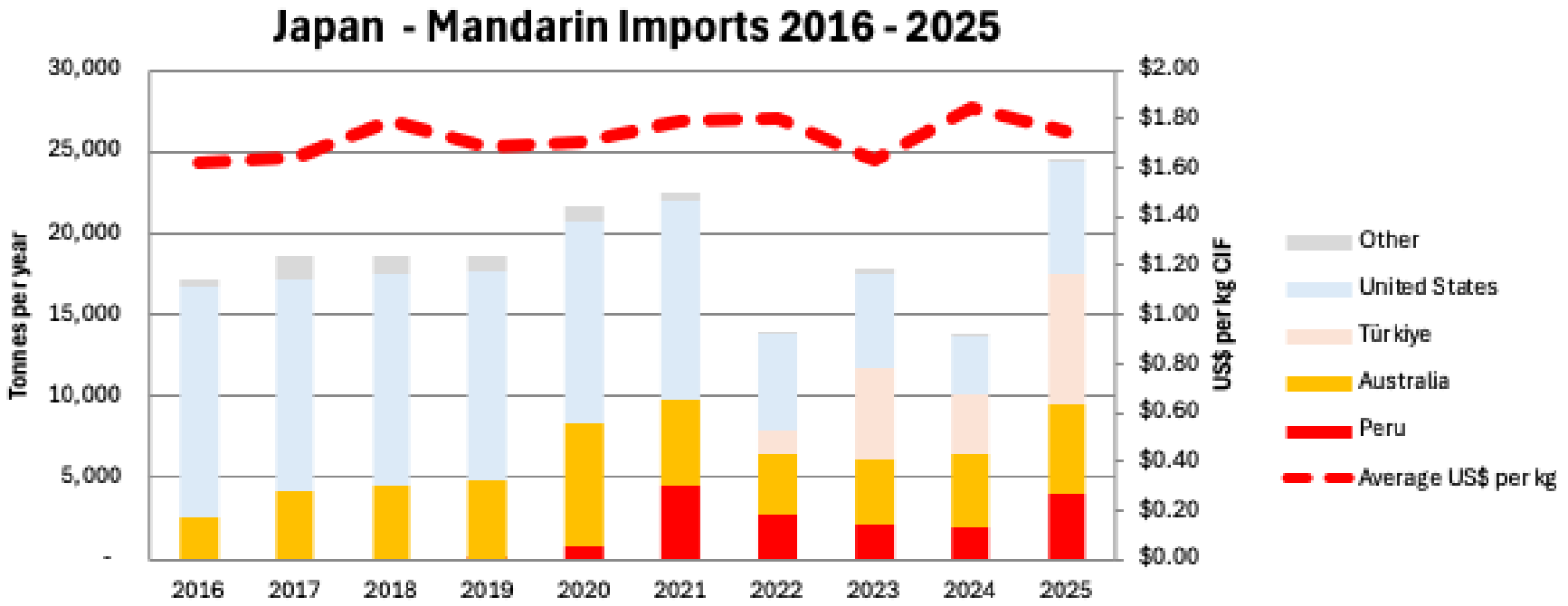
Source: ITC Trademap; Fresh Intelligenec analysis



Source: ITC Trademap; Fresh Intelligence analysis

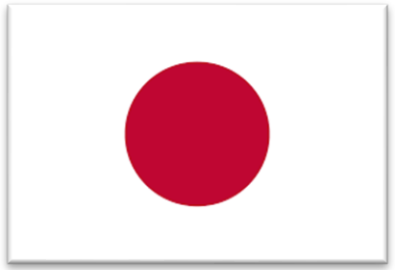
Peru mainly supplies to China and Japan

Japan's imports of mandarins have been increasing though are a small share of consumption



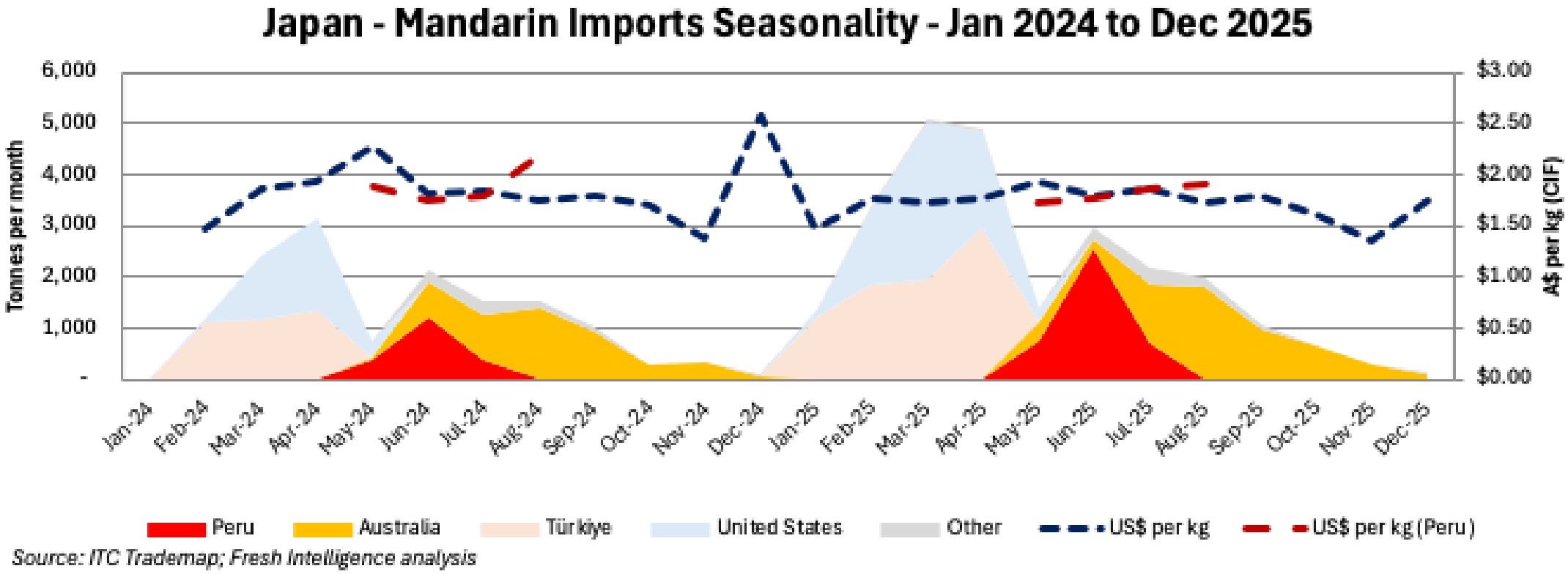
ITC Trademap; Fresh Intelligence analysis

- Mandarins are culturally significant in season
- **PERU has access with volumes showing signs of increasing**
- **Quality is critically important**
- **Clean fruit**
- **Sweet – high brix**
- **Intense flavour**
- **Unique brand story**
- **Complex supply chain via importers**



Japan imports year-round with seasonal peaks.

CIF prices for Peru are in line with the average for others



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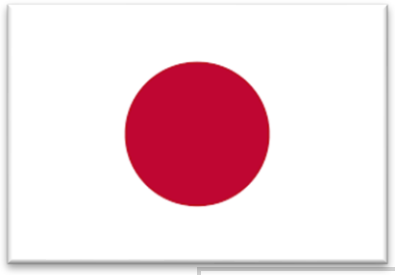


Japan has a large local production supplemented by imports

Key Numbers

Population	125.8	million
Urban share	92%	
Per capita GDP (USD PPP)	$42,390	USD (PPP)
GDP growth (5 yr trend, CAGR)	3.3%	

Mandarin Production	632,980	Tonnes
Mandarin Imports	25,236	Tonnes
Mandarin Imports growth trend	2.9%	5 yr CAGR
Reliance on Imports	4%	
Mandarin competitors	Australia	Türkiye
Mandarin Consumption per capita	5.22	kg p.p.

High Urban population

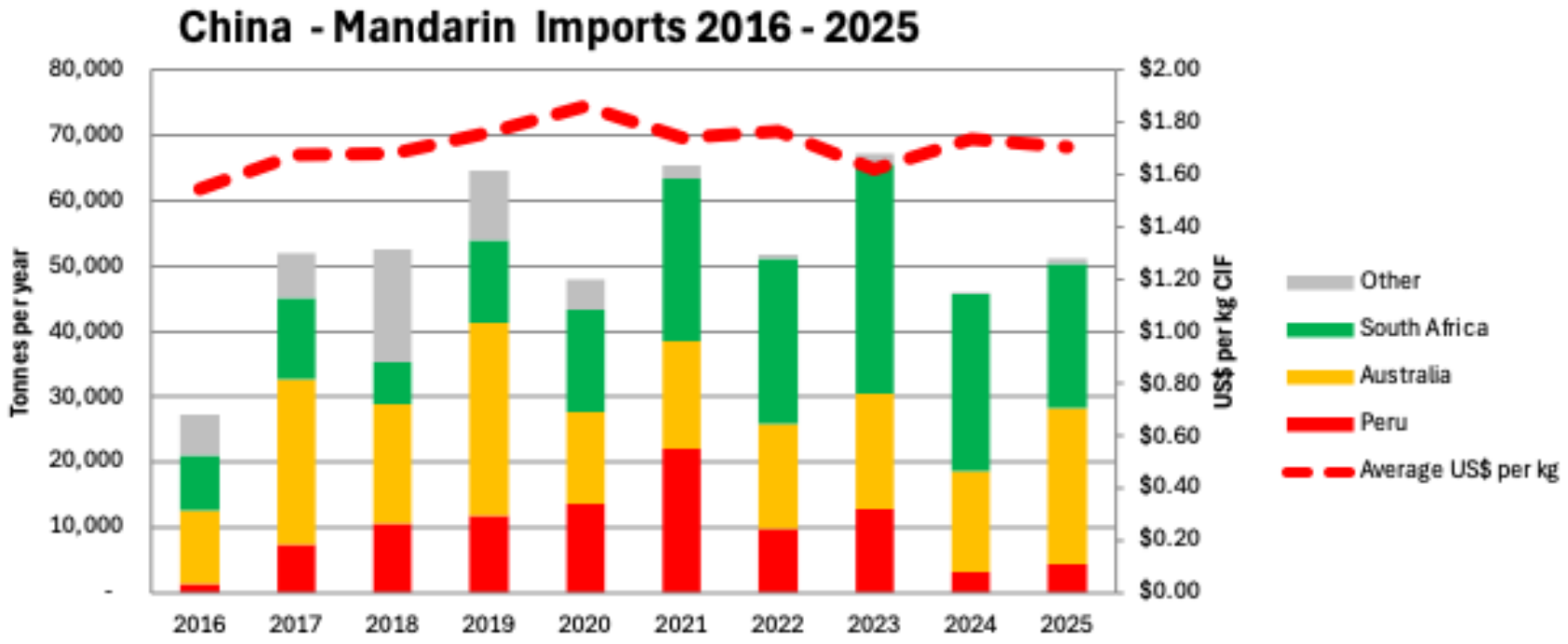
Increasing GDP

87% of all citrus

Low reliance

Moderate consumption

China is the world's largest producer of mandarins and imports for counter seasonal supply



IHS Global Trade Atlas; Fresh Intelligence analysis

- 1.4 bn population
- Mandarins are culturally significant in season

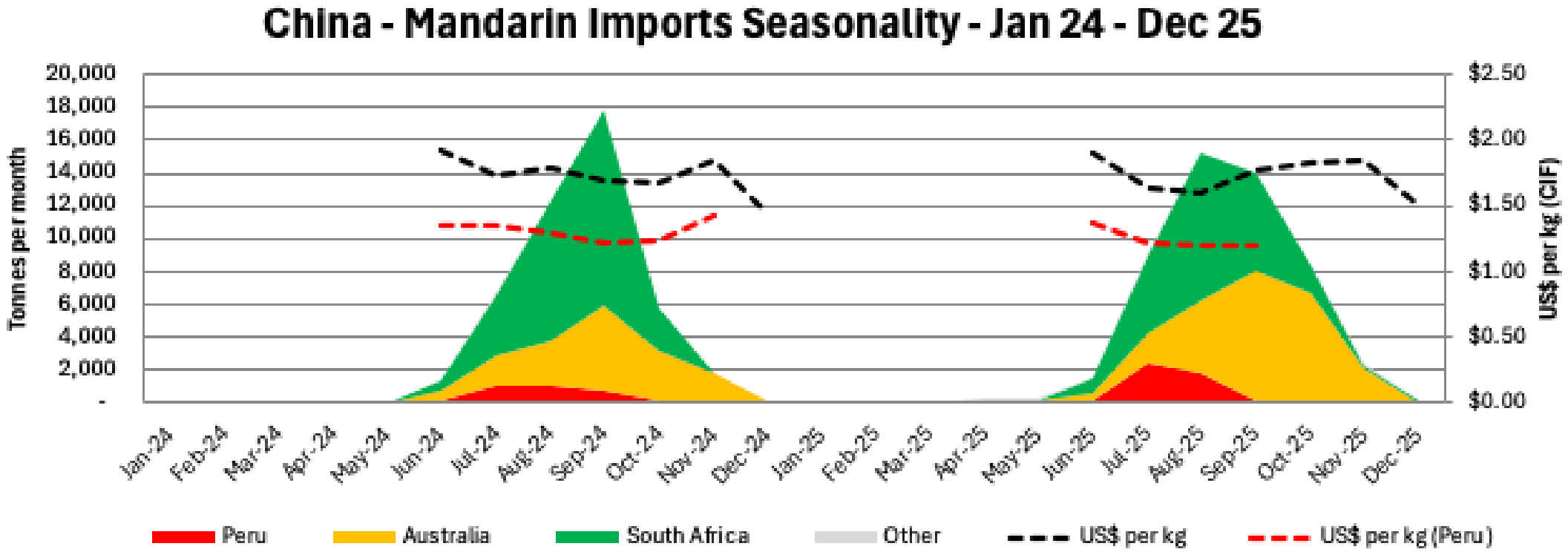
- **PERU has access though volumes are low**

- **Quality is critically important**

- **Clean fruit**
- **Sweet – high brix**
- **Intense flavour**
- **Unique brand story**

China imports only in their off season.

CIF prices are lower for Peru though does not lift volume



Source: ITC Trademap; Fresh Intelligence analysis

China has very low reliance on imports

Key Numbers

Population	1402.1	million
Urban share	61%	
Per capita GDP (USD PPP)	$17,211	USD (PPP)
GDP growth (5 yr trend, CAGR)	7.4%	

Urban dwellers

Increasing GDP

Mandarin Production	27,000,000	Tonnes
Mandarin Imports	51,250	Tonnes
Mandarin Imports growth trend	-5.9%	5 yr CAGR
Reliance on Imports	0.2%	
Mandarin competitors	Australia	South Africa
Mandarin Consumption per capita	18.39	kg p.p.

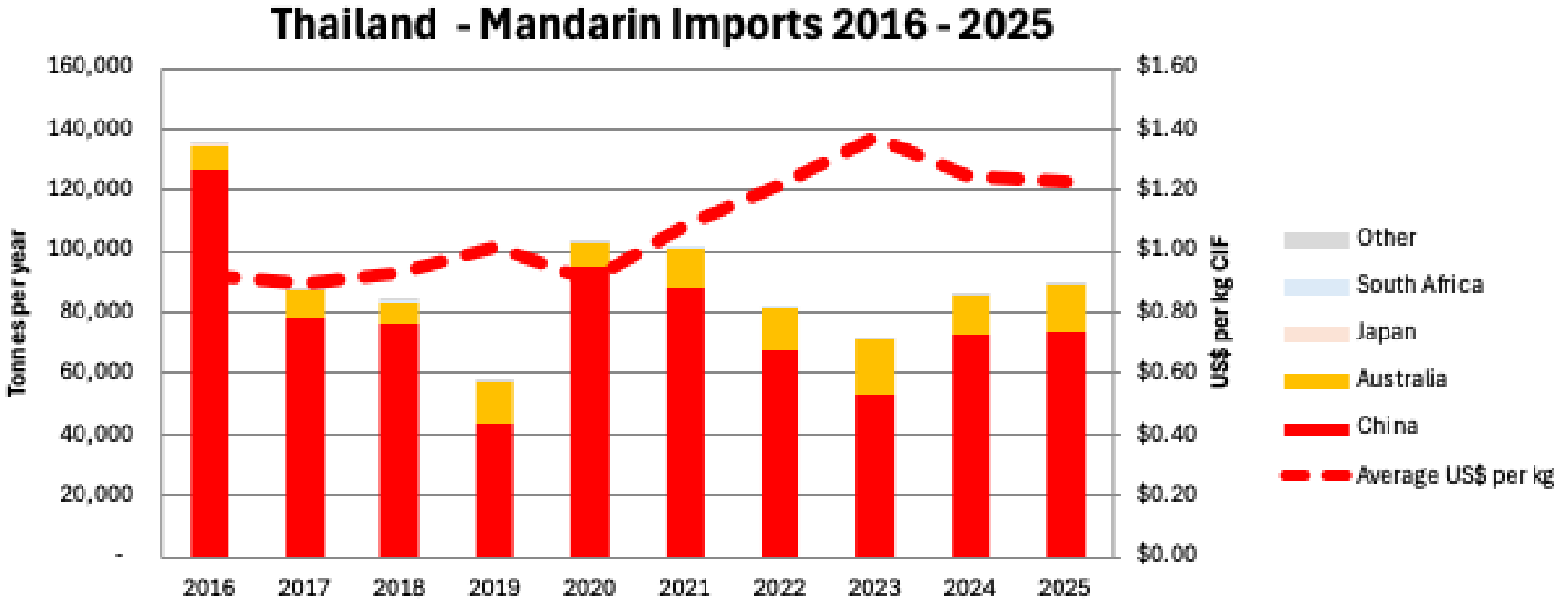
Large production

Low reliance

High consumption

Thailand imports of mandarins have been decreasing

Prices have increased, influenced by China, though are lower than China's import price

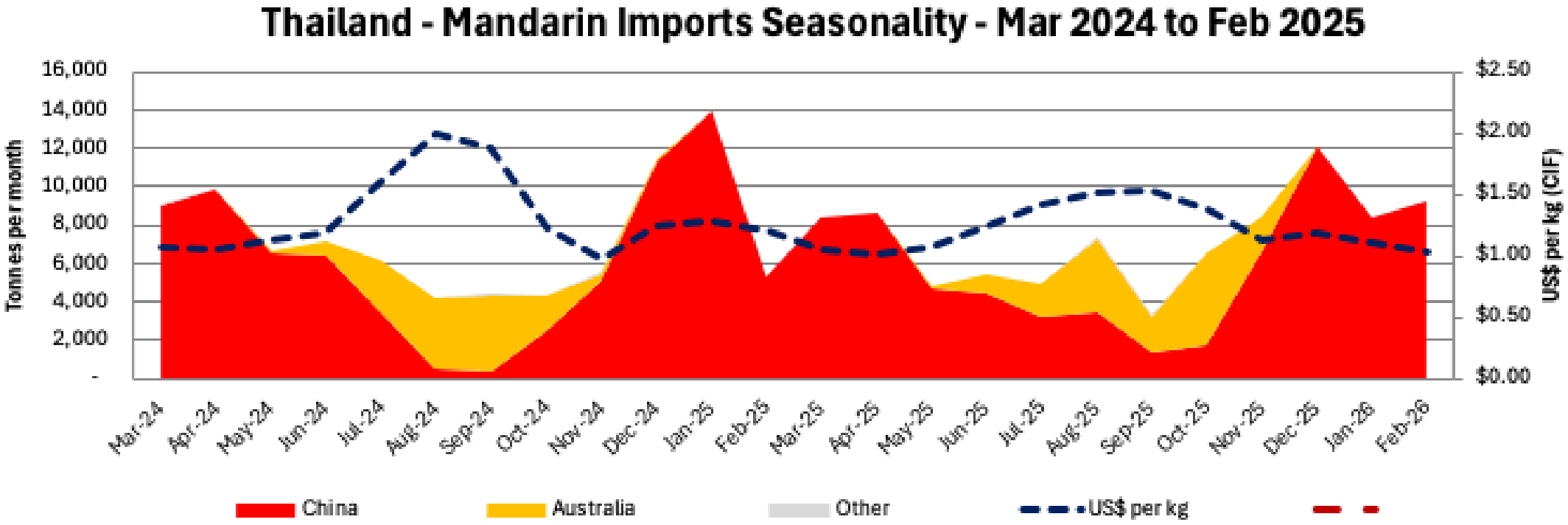


ITC Trademap; Fresh Intelligence analysis

- **71 m population**
- Thailand produces large volumes of tropical fruits and trades mainly with China.
- **Market access is challenging, very sensitive to any fruit imports**
- Thailand-Peru FTA may open opportunities to negotiate access.

Thailand imports year-round, mostly from China.

Australia is the main counter season supplier



Source: ITC Trademap; Fresh Intelligence analysis

Thailand has local production and imports from China, plus 17 per cent counter seasonal

Key Numbers

Population	71.7	million
Urban share	62%	
Per capita GDP (USD PPP)	$24,712	USD (PPP)
GDP growth (5 yr trend, CAGR)	2.5%	USD

Mandarin Production	263,379	Tonnes
Mandarin Imports	89,087	Tonnes
Mandarin Imports growth trend	-3.2%	5 yr CAGR
Reliance on Imports	25%	
Mandarin competitors	China	Australia
Mandarin Consumption per capita	4.89	kg p.p.

Urban dwellers

Increasing GDP

Modest production

Moderate reliance on imports

Moderate consumption

Opportunities in Asia

- **Market Access**
  - Access to Japan and China
  - Open to Hong Kong, Singapore and Malaysia
  - Negotiate for Thailand, Vietnam, and Indonesia
- **Quality** is paramount
  - Gift giving culture
  - Culturally sensitive – good luck, gold
  - firm, sweet, clean, safe, high colour
- **Brands** are valued
  - Point of difference to others (varieties, colour, seedless, marketing programs)

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Asia and the Chancay route

- Faster shipping should enhance quality on arrival
- Cost savings ???
- More reliable timings for customers – than via Mexico or US ports
- China only? Or benefits to other Asia with access

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gracias

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REFERENCES

- International Trade Centre, TRADE MAP www.trademap.org/
- FAOSTAT www.fao.org/faostat

DISCLAIMER

- Fresh Intelligence Consulting collated the data for Pro Citrus Peru from data provided by the international trade databases as referenced.
- While every effort is made to ensure that the data is a true reflection of the trade, some errors may occur due to the reporting and Fresh Intelligence Consulting takes no responsibility for any losses that may occur as a result of decisions based on this data.
- Views expressed are personal and may not reflect the same views of Pro Citrus Peru.

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