

HORTGRO

Growing Fruit IQ



PHYTOSANITARY REQUIREMENTS AND ITS IMPACT ON MARKETS & MARKET ACCESS

08 June 2022

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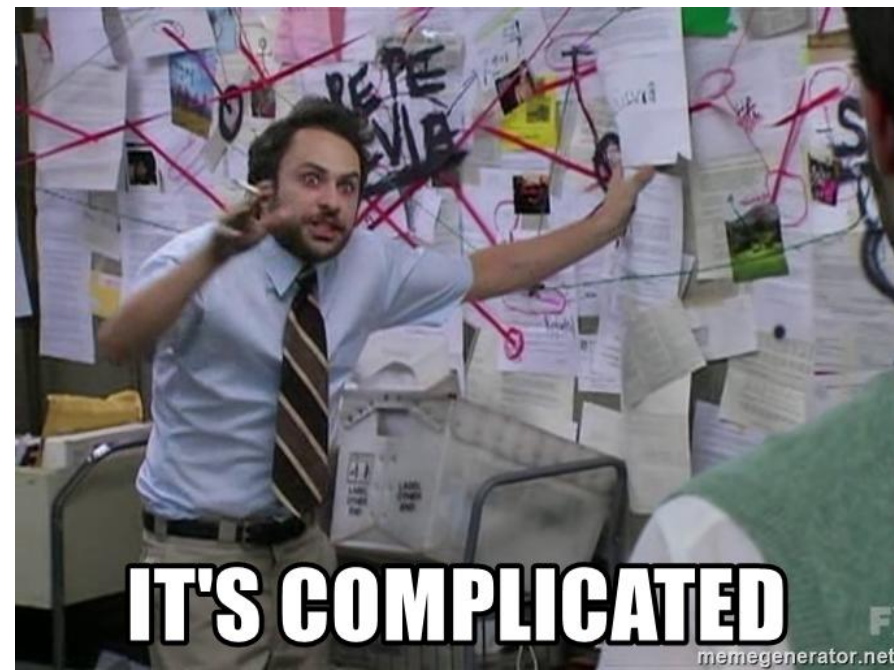
General Manager:

Trade & Markets



INTRO

- High level
- Principles
- Some examples & insight



- Generalise a bit...



TRADE BARRIERS/CHALLENGES

- Tariff Barriers

- Import tariffs

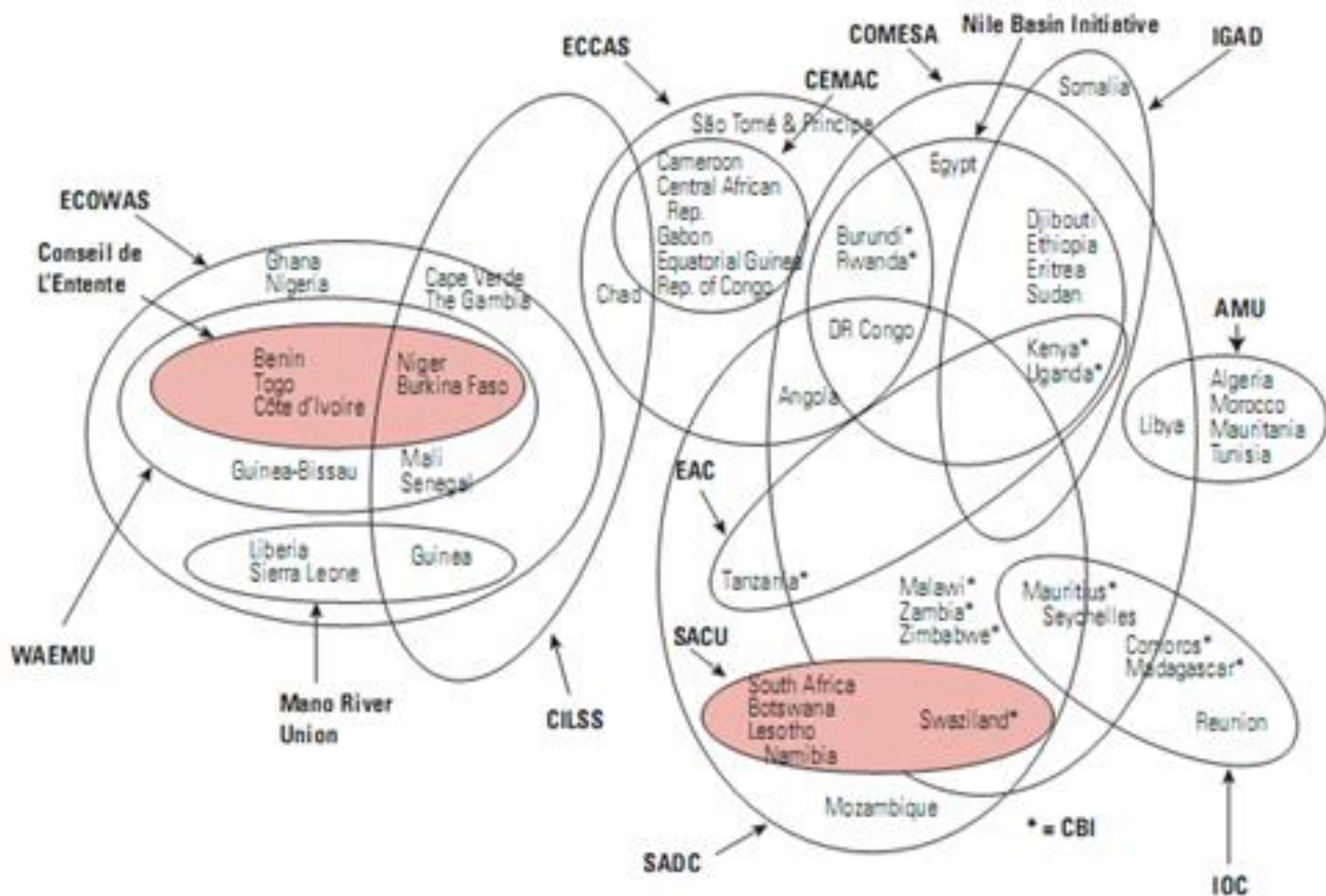
- Non-Tariff Barriers

- Quotas, Registration, Permits, etc

- Trade Agreements = Not phytosanitary

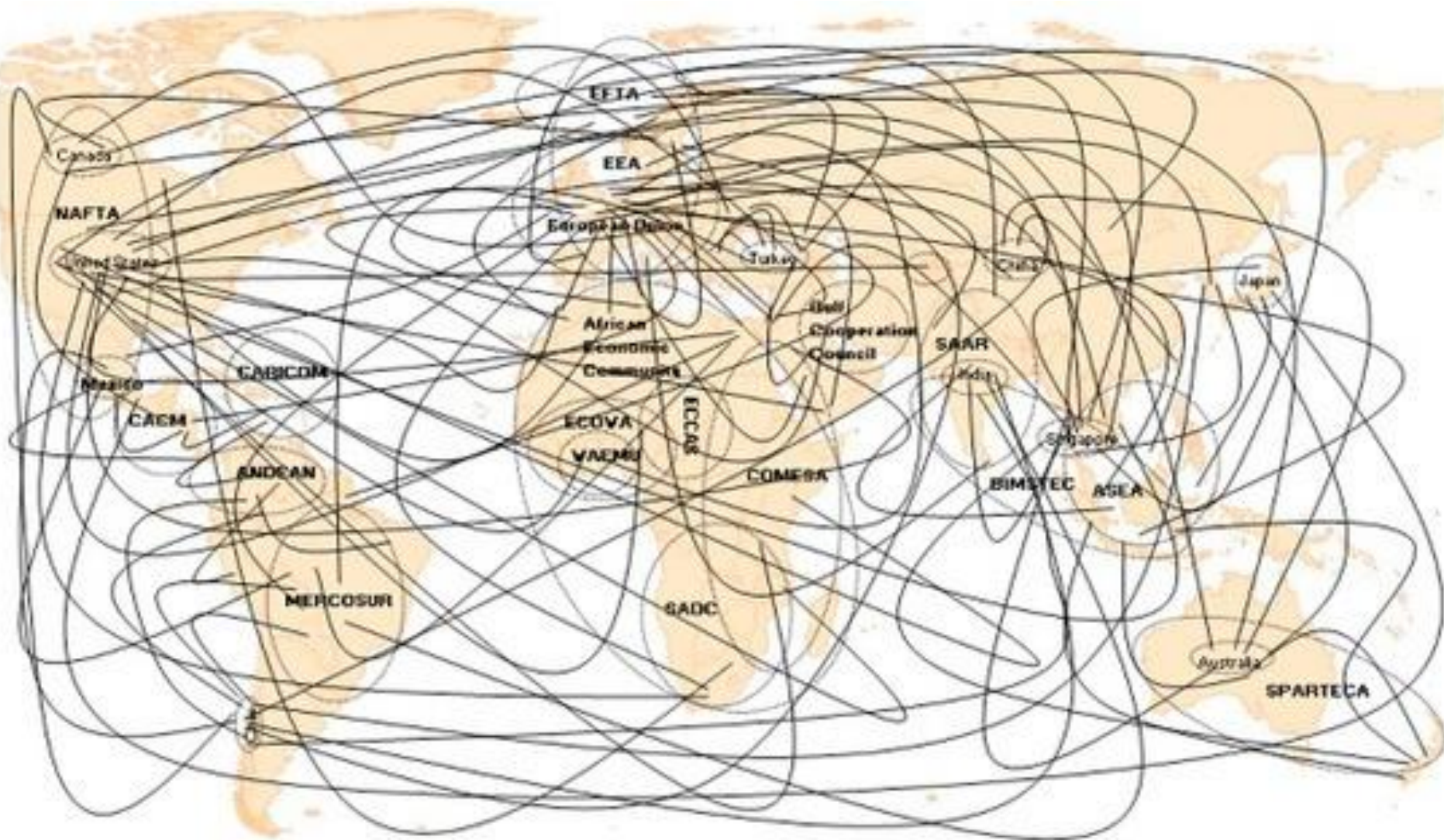
- PTA, FTA, Plurilateral, Bilateral, etc.

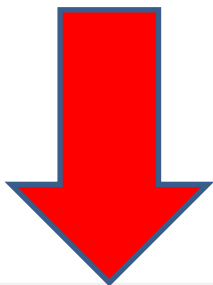






TRADE AGREEMENTS





	South Africa	Australia	New Zealand	Peru	Chile	Argentina	Uruguay
China		Bilateral	Bilateral agreement	Bilateral agreement	Bilateral agreement		
Honkong (China)					Bilateral agreement		
India	SACU (Plurilateral)			GSTP	Bilateral agreement GSTP	GSTP Mercosur - India bilateral	Mercosur - India bilateral
Indonesia		ASEAN - Australia - New Zealand	ASEAN - Australia - New Zealand	GSTP	GSTP	GSTP	
Japan		Bilateral agreement		Bilateral agreement	Bilateral agreement		
South Korea		Bilateral agreement		Bilateral agreement GSTP PTN	Bilateral agreement GSTP PTN	GSTP	PTN
Malaysia		Bilateral agreement ASEAN - Australia - New Zealand	Bilateral agreement ASEAN - Australia - New Zealand	GSTP	Bilateral agreement GSTP	GSTP	
Philippines		ASEAN - Australia - New Zealand	ASEAN - Australia - New Zealand	GSTP PTN	GSTP PTN	GSTP	PTN
Thailand		ASEAN - Australia - New Zealand Bilateral agreement	Bilateral agreement ASEAN - Australia - New Zealand	GSTP	GSTP	GSTP	
Vietnam		ASEAN - Australia - New Zealand	ASEAN - Australia - New Zealand	GSTP	Bilateral Agreement	GSTP	

RELATIONSHIP STATUS:



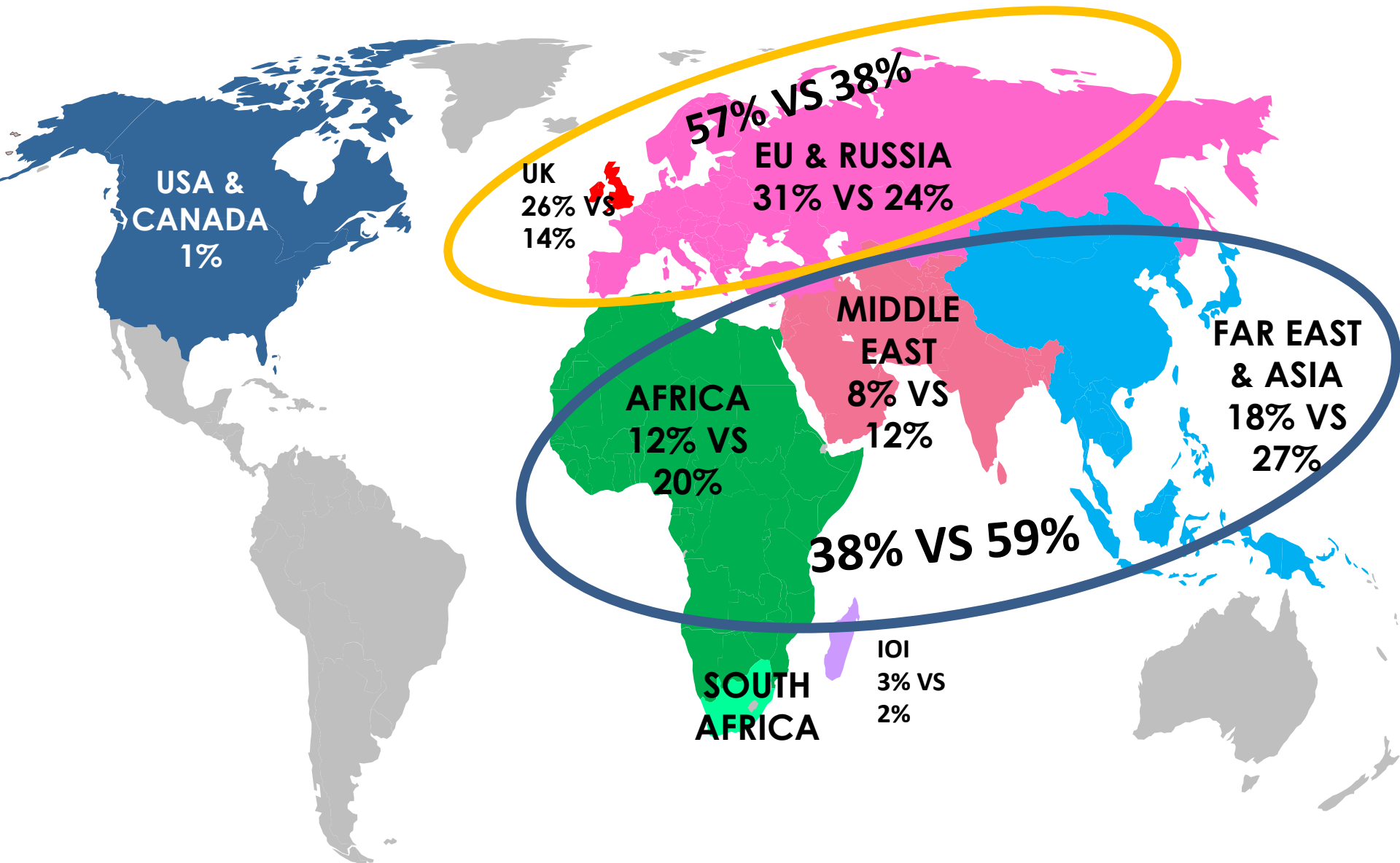
STARECAT.COM

IT'S COMPLICATED



Pome Market Split 2010 vs 2021

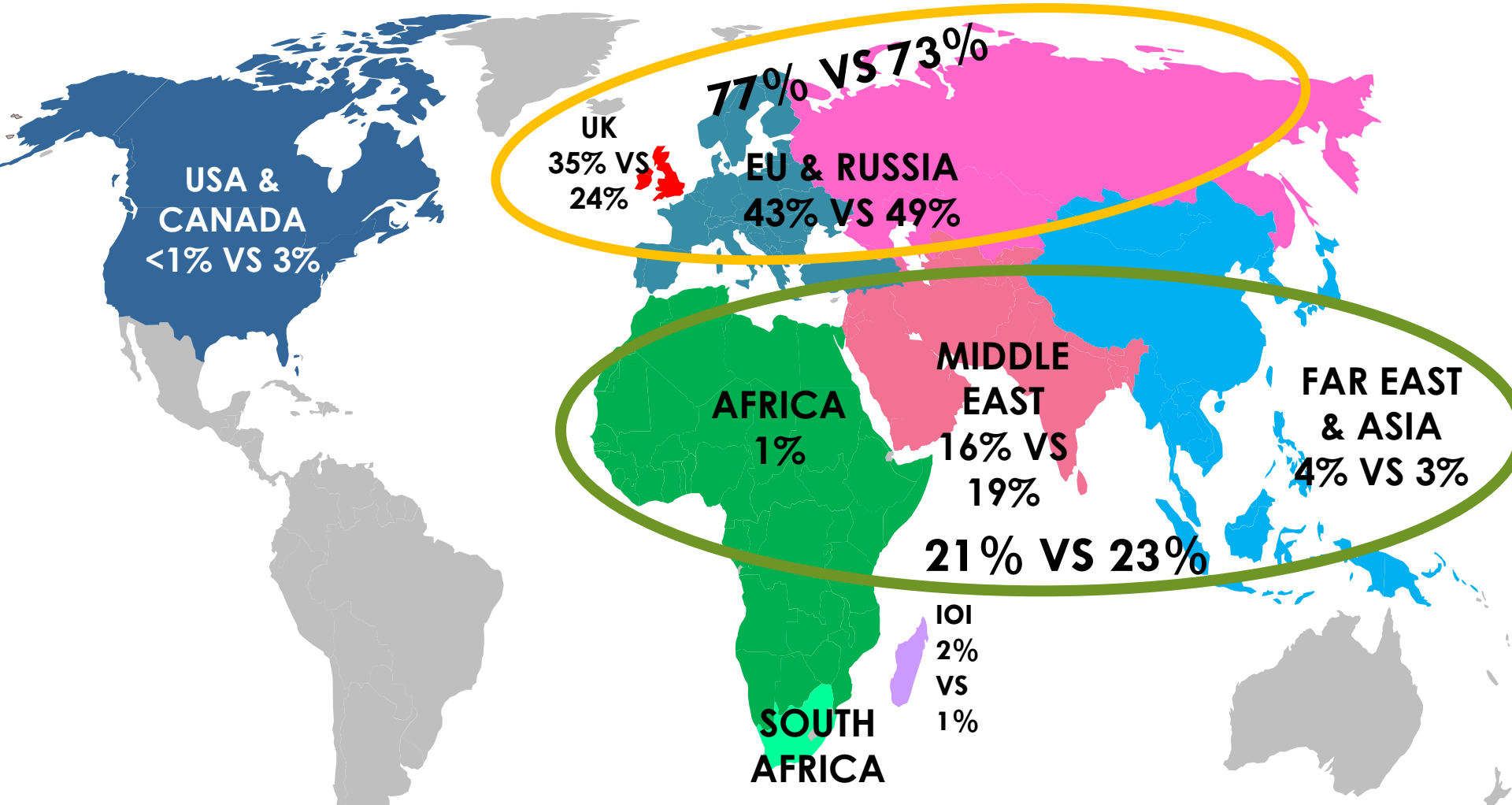
(35.3mil vs 52.29mil eqv. cartons)





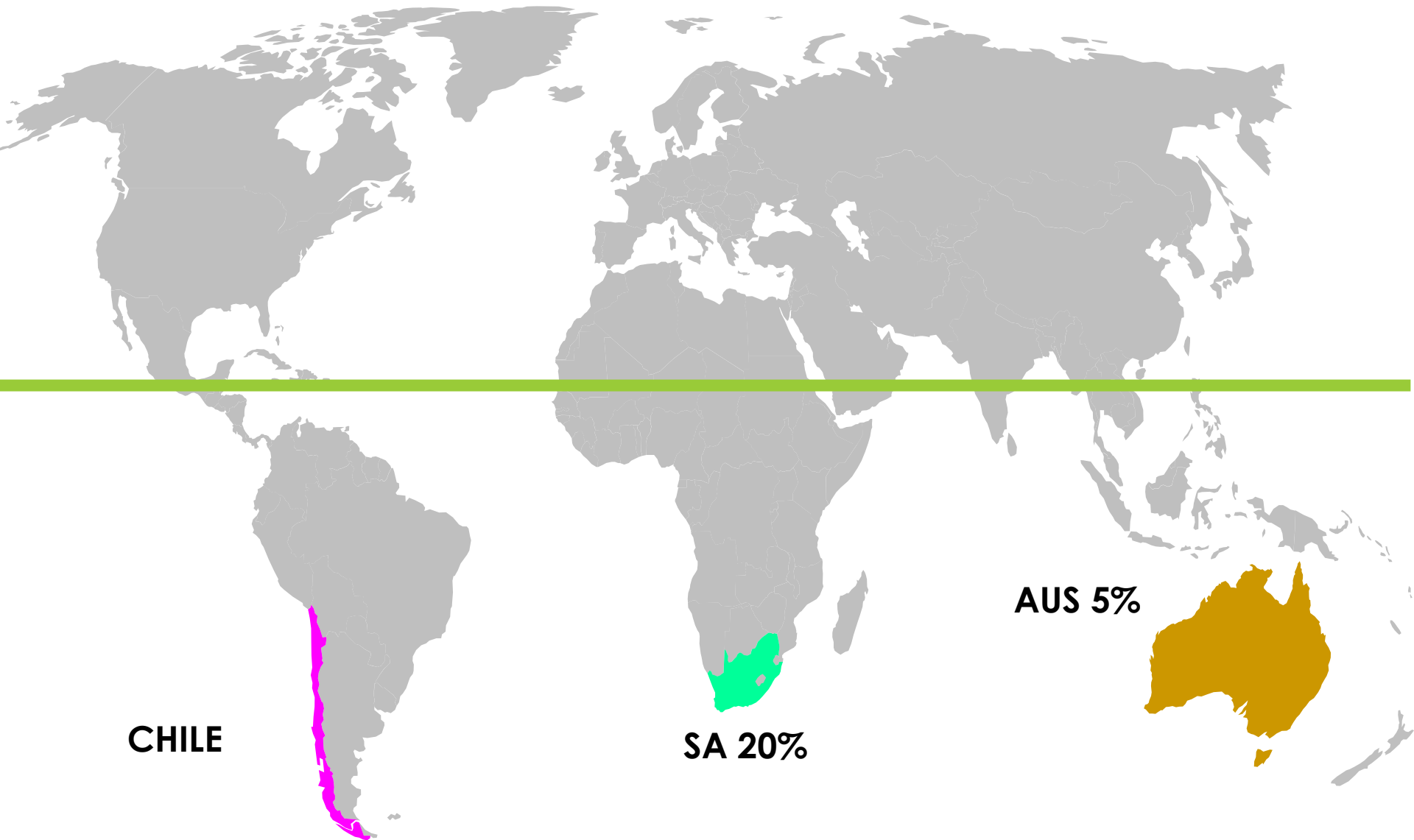
STONE MARKET SPLIT

(09/10 52 372T VS 21/22 97 074T)





ON THE BACK-FOOT





TRADE BARRIERS

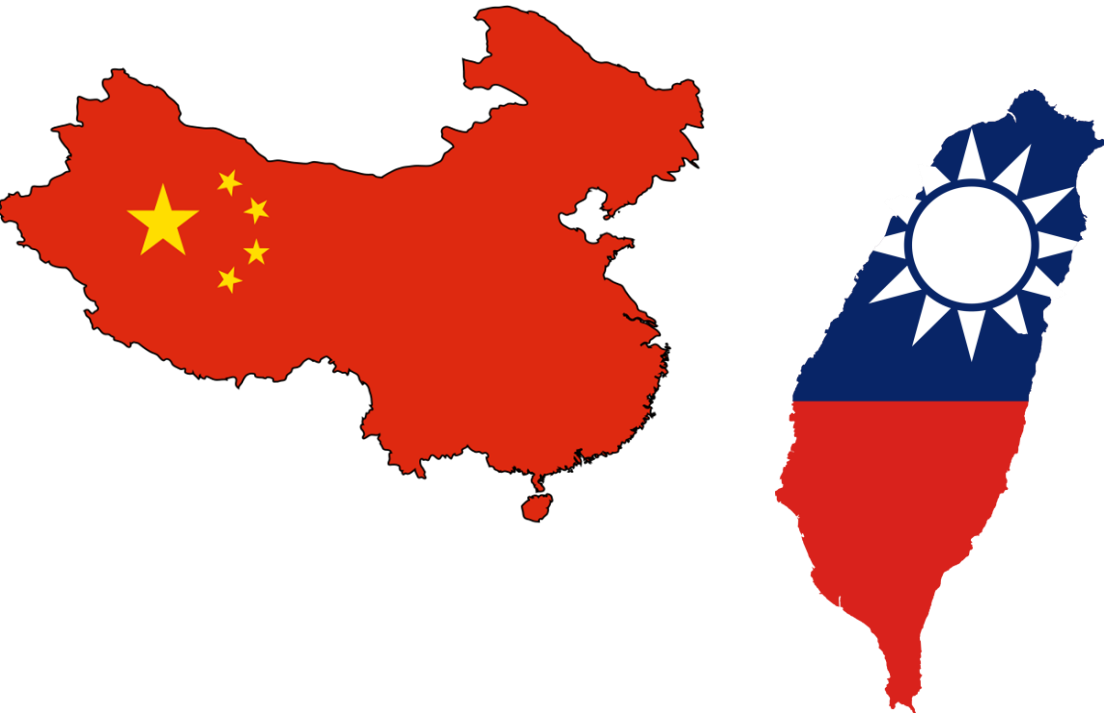
- Commercial
 - MRL's
 - Ethical
 - Environmental
 - Etc.





TRADE BARRIERS

- Protectionism & others





TRADE REQUIREMENTS (BARRIERS)

- Phytosanitary & Sanitary
 - Pests & Diseases
 - MRL's – Pressure on control





Why?

PHYTO REQUIREMENTS

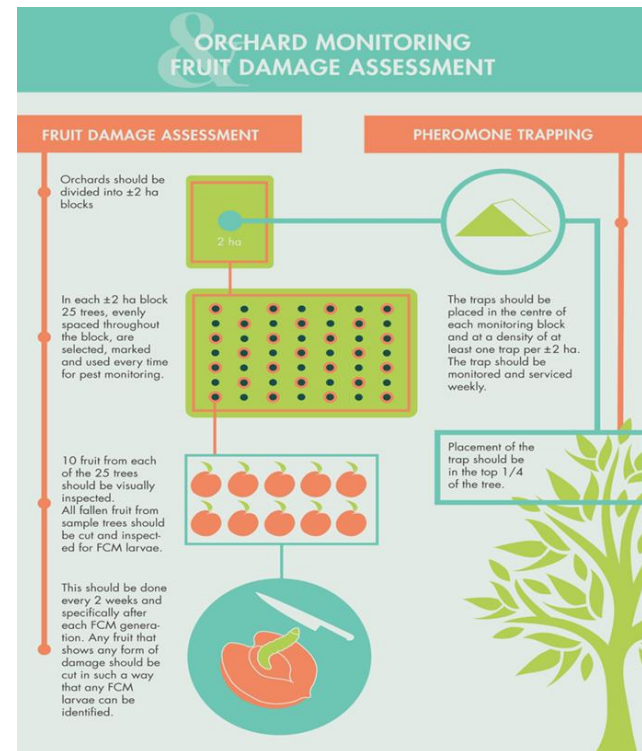
- To protect countries from importing foreign pests & diseases, spreading and causing damage to their agricultural industries
- Devastating financial & trade implications
 - Rhagoletis Pomonella (USA apples)

But used for other reasons as well...



HAVE TO COMPLY

- Orchard & Packhouse registration
- Accredited/Verified
- Risk Management Systems
- Inspections
- Cold Treatment
 - Land based
 - In-transit
- (Irradiation)
- Fumigation





SOME EXAMPLES



- EU FCM & FF Stone Fruit - RMS
- Taiwan Apples – Cold Treatment
- USA Pome & Stone– Cold Treatment
- China Apples & Pears – Cold Treatment & Others
- Mexico – 40-day land-based cold treatment!
- India Pome - 10-day land-based cold treatment
- Kenya Apples & Pears
- Citrus EU...





SOME EXAMPLES

- Foot and mouth disease
 - Meat & Wool





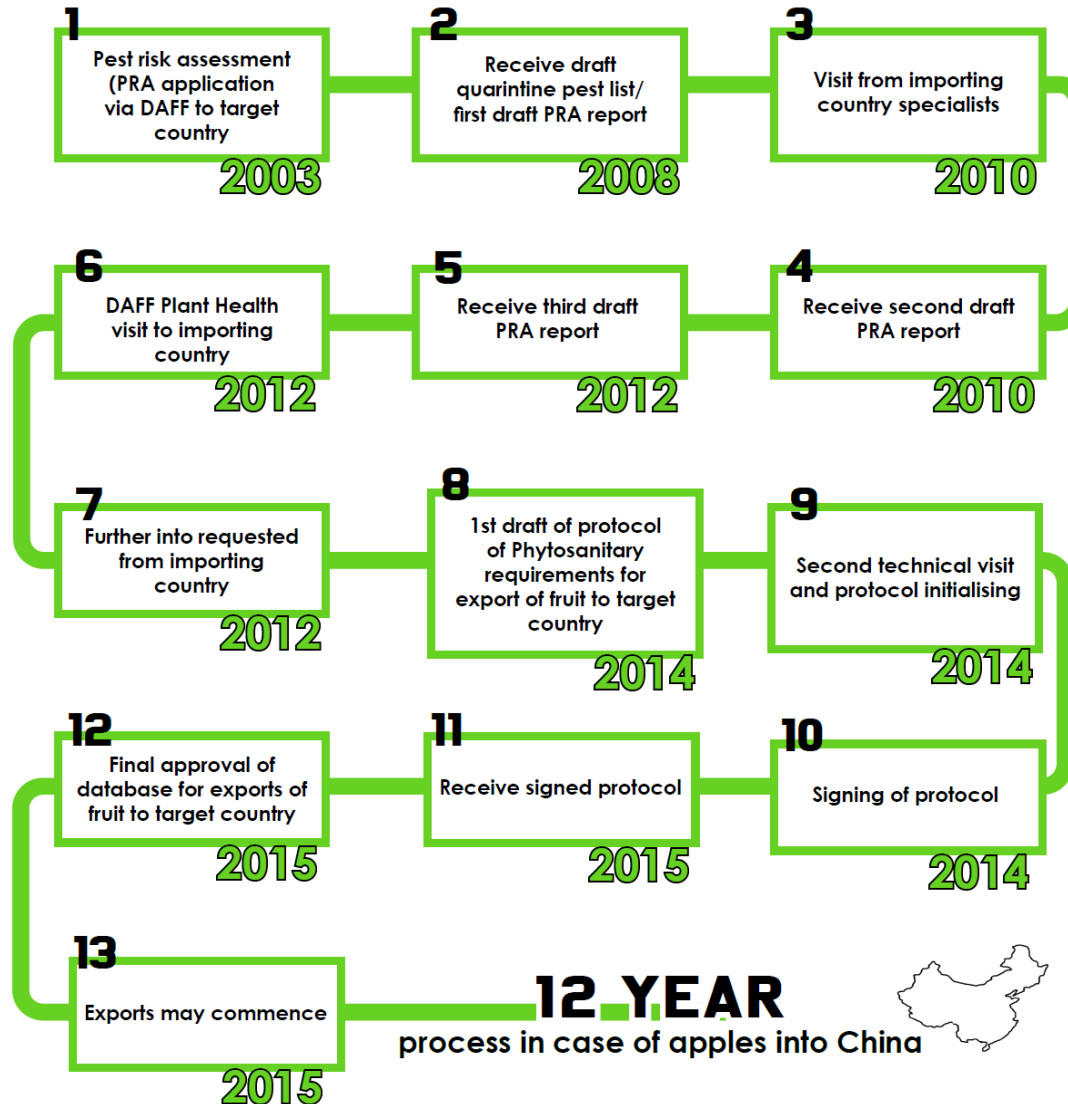
IMPACT

- Quality, logistical and administrative, compliance challenges
- Cost of compliance vs loss of market
- USA Stone



GAINING >> MARKET ACCESS <<

CASE STUDY: CHINA, APPLES



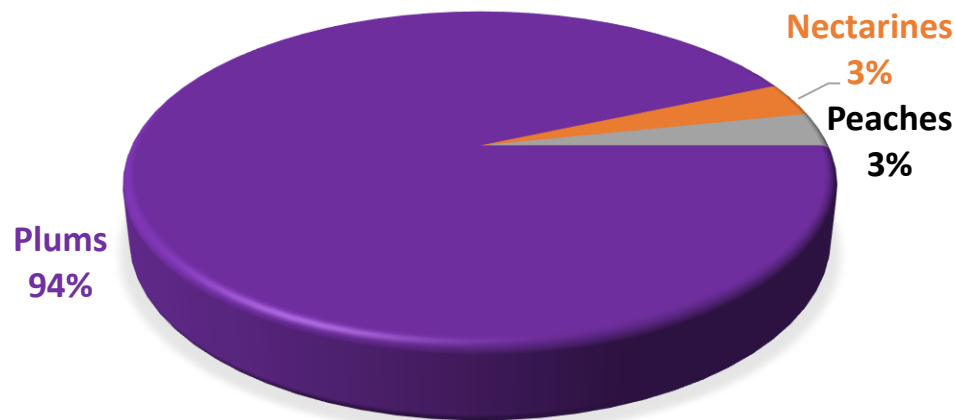
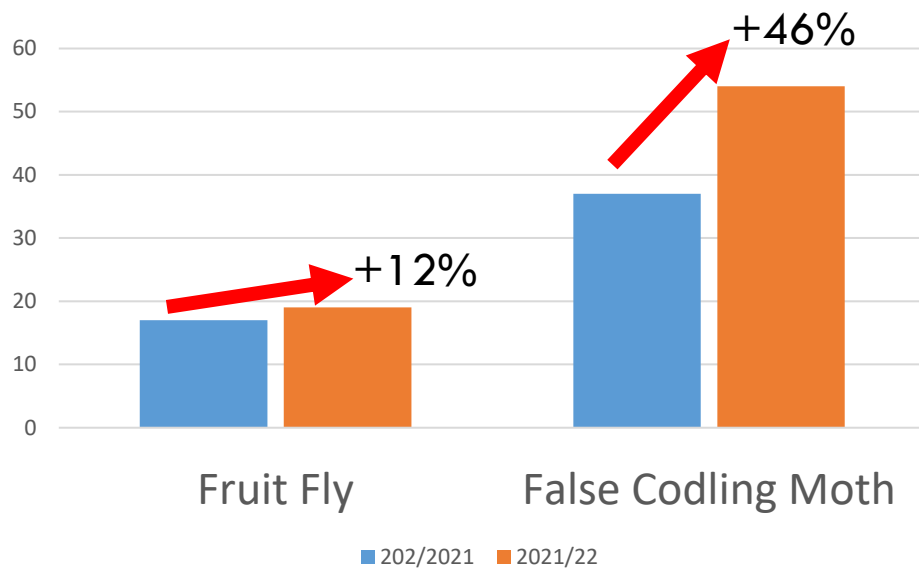


INTERCEPTIONS, FAILURE TO COMPLY

- GRO Strategy
 - Gain
 - Retain
 - Optimise
- Lose a market = NO (G)RO
- Massive financial impact & knock-on
- Massive undertaking to regain a market
 - Taiwan CM



PPECB INTERCEPTIONS





CRUCIAL



- Cannot underestimate how crucial risk management is to the stone fruit industry
- Have the scientific foundation & capacity, but

**IT'S TIME FOR US TO
GET SERIOUS
ABOUT IT.**



Thank you

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