

STONEFRUIT RESEARCH ROADSHOW



SUMMERFRUIT AUSTRALIA LTD

- Summerfruit Australia Limited (SAL) is the industry voice on a national and international level. It is recognised by government as the peak industry body for growers and works closely with other interested groups, government and supply chain partners to maximise profitability for the industry.
- We welcome new growers, packhouses, wholesalers, retailers, farm input suppliers and others to become involved in the industry.

www.summerfruit.com.au

SAL BOARD

- **Andrew Finlay – Chair**
- **Adrian Conti – Deputy Chair**
- **Mick Young (Victoria)**
- **Jason Size (South Australia)**
- **Scott Coupland (New South Wales)**
- **Ian Newnham (Tasmania)**
- **Trevor Ranford – Chief Executive Officer (Part time)**

SAL UPDATE

- **New Part time CEO – due to the transition to retirement of John Moore**
- **Involvement of John Moore on market access activities**
- **New weekly e-newsletter – ‘The Drupe’**
- **Overview of and involvement with R&D and Marketing activities**
- **Market access and market maintenance – liaison with the DAWR, Hort Innovation**
- **Managing the export registration for China, Thailand and Taiwan**
- **Project activities – Victorian Food Source Grant**
- **Chemical reviews**
- **Biosecurity – PHA, NMG, CCEPP**

INDUSTRY OVERVIEW

Fresh Summerfruit Overview

Pages 186-187 profile total summerfruit production and trade. They combine information on apricots, nectarines/peaches and plums. The following pages profile each summerfruit category in more detail.

For the year ending June 2018:

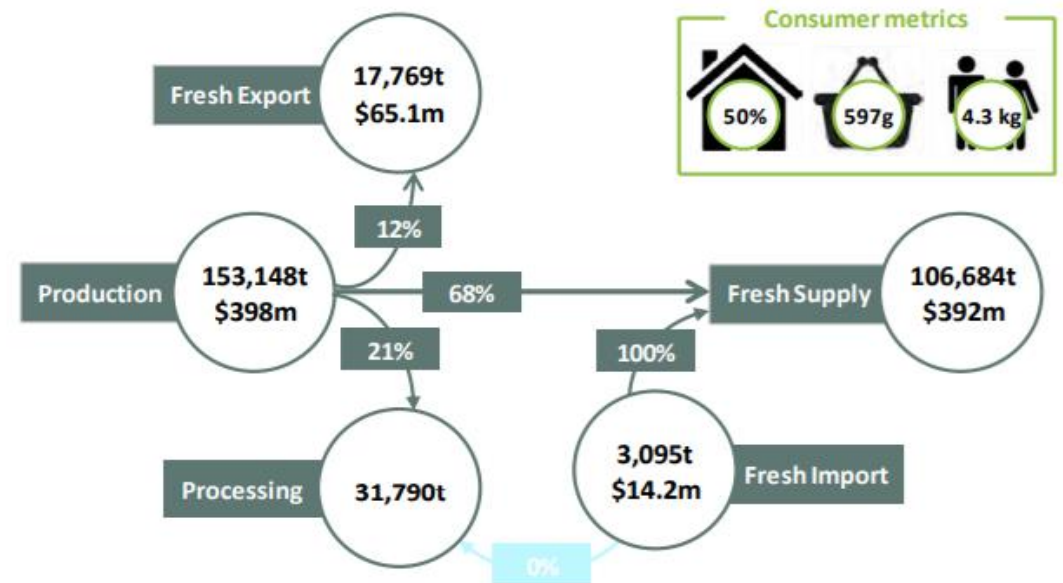
- **153,148 t** was produced.
- The value of production was **\$397.8 m** while the wholesale value of the fresh supply was **\$391.7 m**.
- **50%** of Australian households purchased a summerfruit, buying an average of **597 g** per shopping trip.
- The supply per capita of summerfruit was **4.3 kg**, based on the volume supplied.



Year Ending June	2016	2017		2018	
	Value	Value	% YoY	Value	% YoY
Production (t)	144,844	136,430	-6%	153,148	+12%
Production (\$m)	\$ 376.9	\$ 394.2	+5%	\$ 397.8	<1%
Producing Trees (000 Trees)	5,488	5,645	+3%	-	-
Fresh Export Volume (t)	14,366	13,975	-3%	17,769	+27%
Fresh Export Value (\$m)	\$ 48.3	\$ 51.4	+7%	\$ 65.1	+27%
Fresh Import Volume (t)	5,351	3,577	-33%	3,095	-13%
Fresh Import Value (\$m)	\$ 24.1	\$ 15.5	-36%	\$ 14.2	-9%
Fresh Supply (t)	102,853	97,163	-6%	106,684	+10%
Fresh Supply Wholesale Value (\$m)	\$ 393.1	\$ 406.5	+3%	\$ 391.7	-4%
Supply per Capita (kg)	4.27	3.96	-7%	4.28	+8%

Sources: ABS; AC; CFVIWA; GTA; SAL; MP & DD (Freshlogic Analysis)

Fresh Summerfruit Supply Chain—Year Ending June 2018



Sources: ABS; AC; CFVIWA; GTA; Summerfruit Australia Limited (SAL); MP & DD (Freshlogic Analysis)

EXPORTS – 2018/19 - SUMMARY

- **Australian summerfruit industry exported 23,013 tonnes of nectarines, peaches, plums and apricots**
- **Worth \$88.95 million,**
- **Achieving a unit value of A\$3.87.**

This was a new record result for volume, value and unit value.

Countries:

- **China was the lead market for nectarines, peaches and plums**
- **Saudi Arabia was the lead market for apricots.**

Exports by Volume:

- **Nectarines – 40%**
- **Peaches – 28%,**
- **Plums – 30%**
- **Apricots 2% –**

This was the same as last year.

By State:

- **Victoria was the largest export state followed by New South Wales. These states combined accounted for 91% of the exported volume.**
- **Western Australia dipped 41% to account for 3% of national exports.**

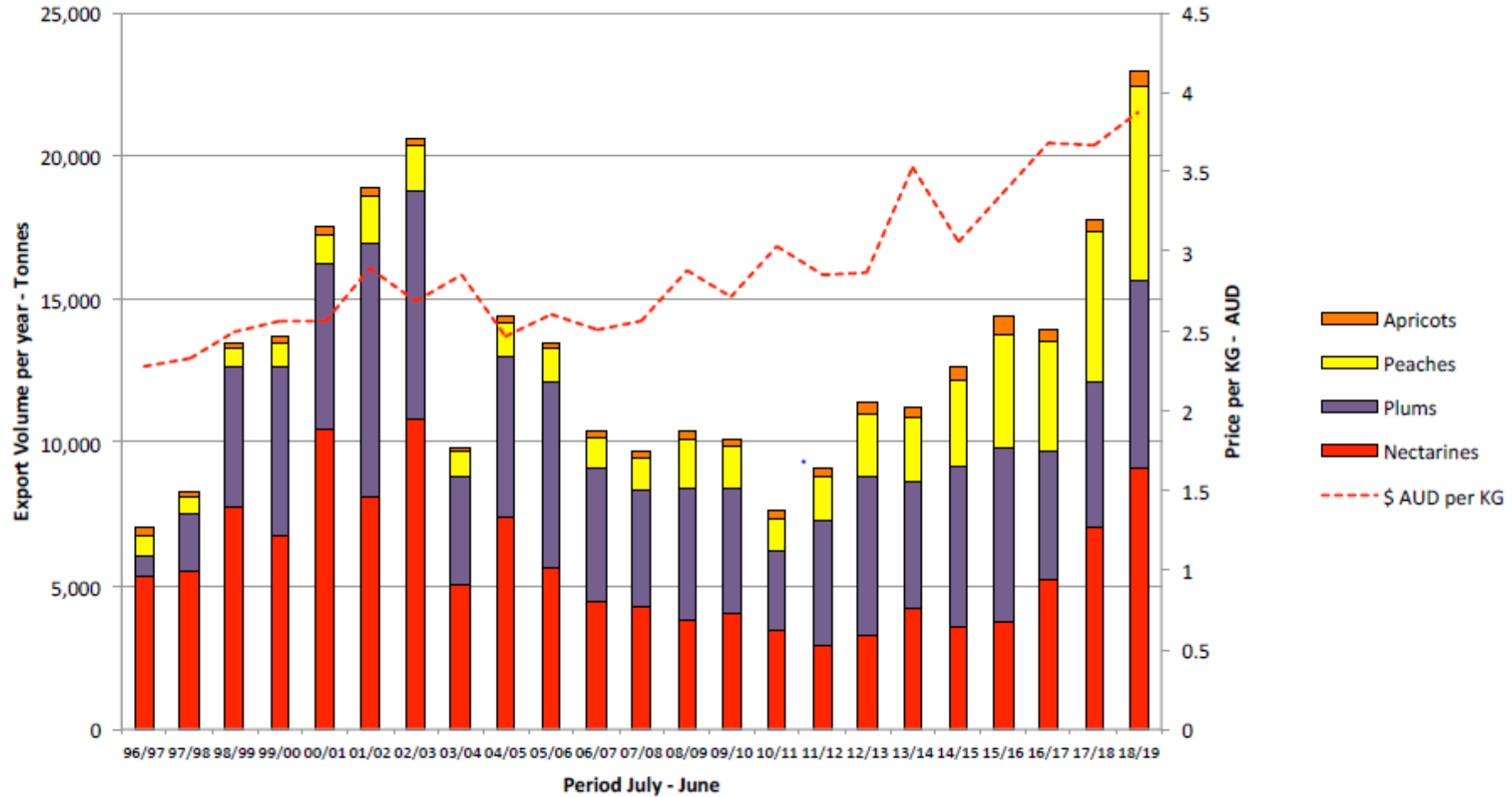
Exports have

- **increased by an average 6% per year over 10% per year**
- **increased 29% year-on-year to 2017/18 driven by China demand.**

Over 10 years summerfruit imports by key Asian markets from all sources have increased from 101 to 162 thousand tonnes.

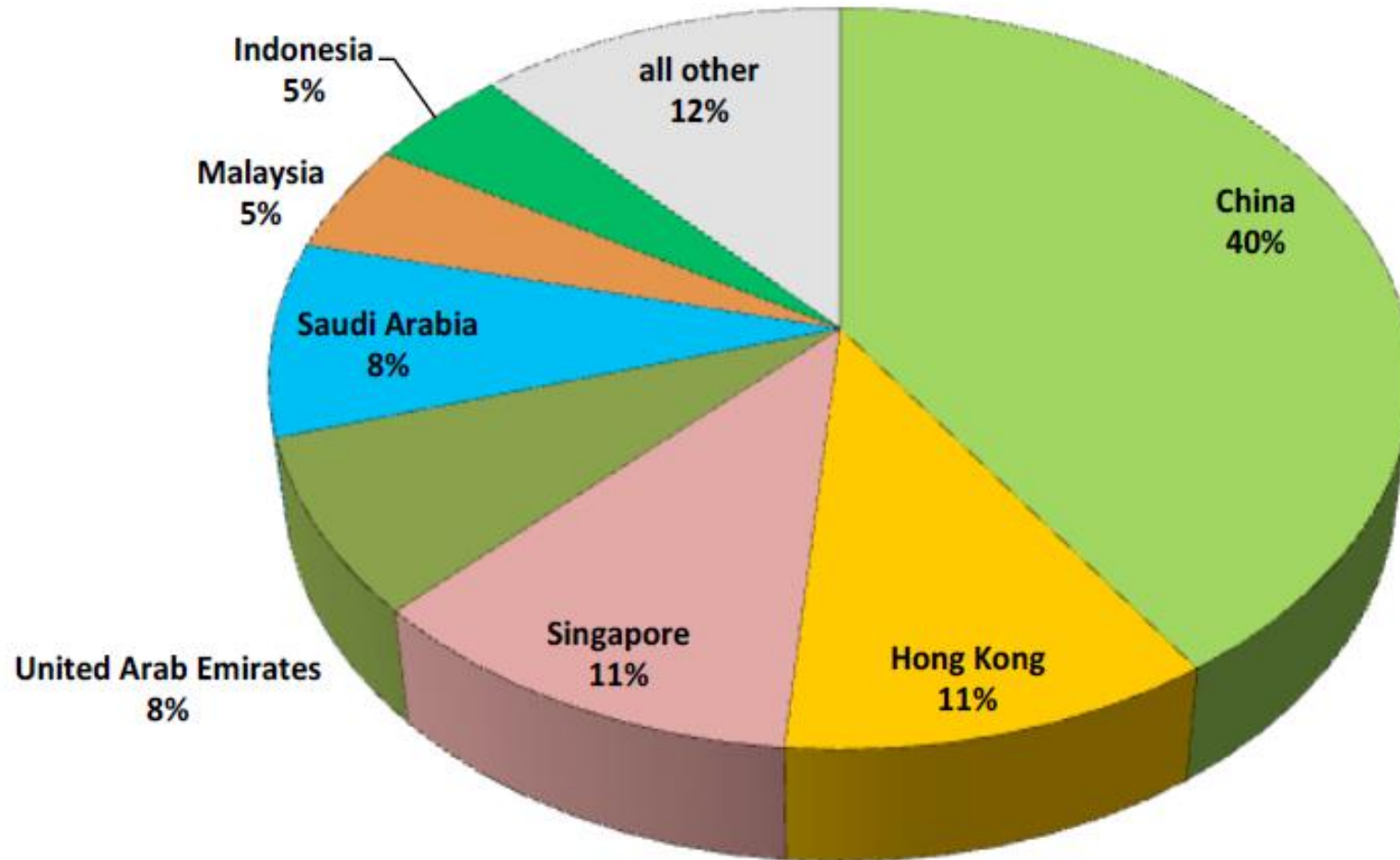
China is the largest importer of summerfruit in Asia.

Australian Summerfruit Exports since 1996



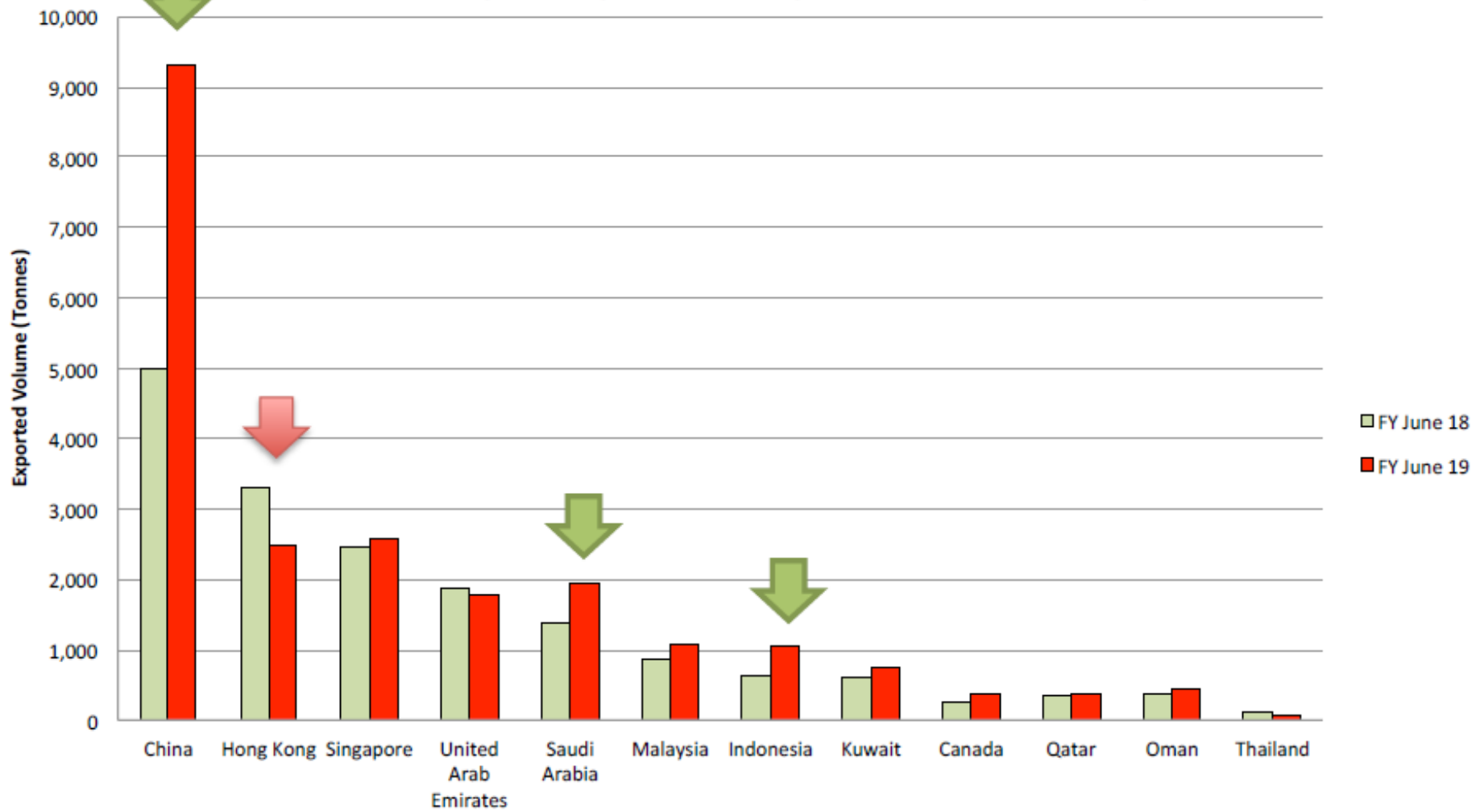
Source: ABS data via IHS Global Trade Atlas; Fresh Intelligence analysis

23,013 tonnes - 12 mths to June 2019



source : ABS data, Fresh Intelligence analysis

Summerfruit exports by market July to June 2019 vs last year



Source: ABS via IHS Global Trade Atlas; Fresh Intelligence analysis

MARKET ACCESS

Market Access for Summerfruit

	Technical status		Tariff	Status
China	Protocol	PFA (Tas,Riv), CT or Fum	Nil	ChAFTA fully implemented
Hong Kong	Open	unregulated	Free	
India	Protocol	CT for Med fly	30%	FTA in negotiation
Indonesia	Protocol	PFA (Tas) or CT,Fum, IRR, or VHT	Nil	AANZFTA fully implemented
Japan	Prohibited		Nil	JAPEA fully implemented
Malaysia	Open	unregulated	Nil	AANZFTA fully implemented
New Zealand	Prohibited		Nil	CER
Philippines	Protocol	PFA (Tas) or CT	Nil	AANZFTA fully implemented
Singapore	Open	unregulated	Free	
South Korea	Prohibited		18%	KAFTA Nil by year 10 (2023)
Thailand	Protocol	PFA (Tas) or CT	Nil	TAFTA fully implemented
Taiwan	Protocol	PFA (Tas,Riv) or CT	20%	MFN tariff
United States	Prohibited		Nil	AUSFTA fully implemented
United Arab Emirates	Open	with Phyto	Free	
Vietnam	Suspended	negotiating	Nil	AANZFTA fully implemented

Source: MICOR Plant, DFAT, WTO; Fresh Intelligence analysis

Caution: this is a broad summary only and exporters MUST refer to the detailed work plans available from DAWR

INDUSTRY CHALLENGES

- **Water - permanency**
- **Labour – permanent and casual – skilled and unskilled - Contractors**
- **Fruit Fly – management programs – Pest Free Areas**
- **Biosecurity – exotic pests and diseases**
- **Market Access and Market maintenance**
- **Research, Development and Extension**
- **Communications – to growers – to government – to consumers**

CONTACTS

For more information contact

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