



MARKET ACCESS UPDATE

OF SOUTHERN AFRICA

CITRUS MARKETING FORUM

30 OCTOBER 2014

RECAP: MARCH CMF PRIORITIES

- SOUTH KOREA
- INDONESIA
- VIETNAM
- INDIA
- IRAN
- AFRICA



SOUTH EAST ASIA (SEA) FRUIT SOUTH AFRICA DELEGATIONS

- Delegation composition;
 - HORTGRO
 - SATI
 - FPEF
 - CGA
 - SUBTROP
- Three major stakeholder groups;
 - South African Embassy
 - Importing Government
 - Importers and Distributors

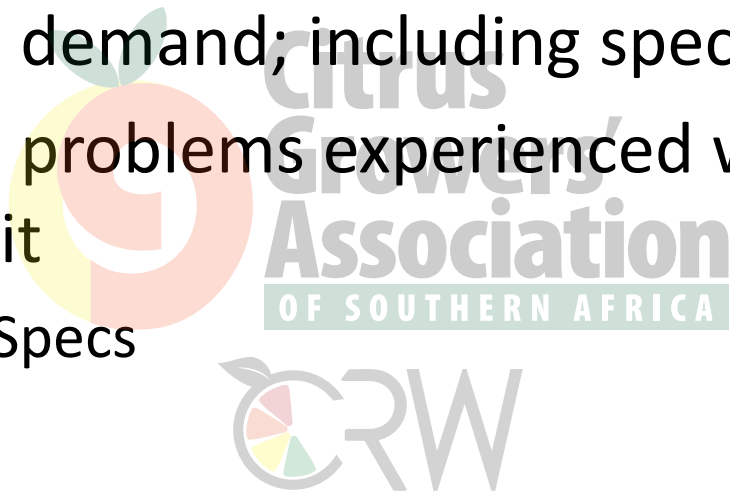


SEA DELEGATION OBJECTIVES

- Embassy
 - Raise awareness of South African fruit and market access hurdles
 - Get political buy in for solutions
 - Determine joint market development opportunities
 - Discuss opportunities and threats
- Importing Country Government
 - Address specific market access issues
 - Plant Health
 - Tariffs

SEA DELEGATION OBJECTIVES (cont.)

- Importers
 - Determine demand; including specifications
 - Determine problems experienced with South African fruit
 - Quality/ Specs
 - Logistics
 - Documentation
 - Tariffs/costs
 - Market development opportunities



SEA Delegation 2014

- May 2014
 - Japan
 - **South Korea**
 - Philippines
- August 2014
 - **India**
 - **Indonesia**
 - Hong Kong
- November 2014
 - Thailand
 - **Vietnam**
 - China



SOUTH KOREA

- Tariffs: SC 144%; LE 68%; OR 50%; GF 30%
 - Challenge: FTA – USA and Australia (++)
- Existing Protocol; Excludes Soft Citrus
 - Pending application
- Strengths:
 - Grapefruit Demand
 - Demand small fruit
- Awareness
 - USA Stronghold; Florida Promotions
- Clause 5.1 in Protocol: Reinfestation
- 24-22 Day Cold Steri



INDONESIA

- Tariff; SC 20%; OR/LE/GF 5%
- Mutual Country Recognition
 - Jakarta Port
 - Food Safety certificates
- Strong Embassy support
- Good networking with importers
- Article 42: 2 to 4 Degrees C for 16-20 days

Procedures of FFPO importation

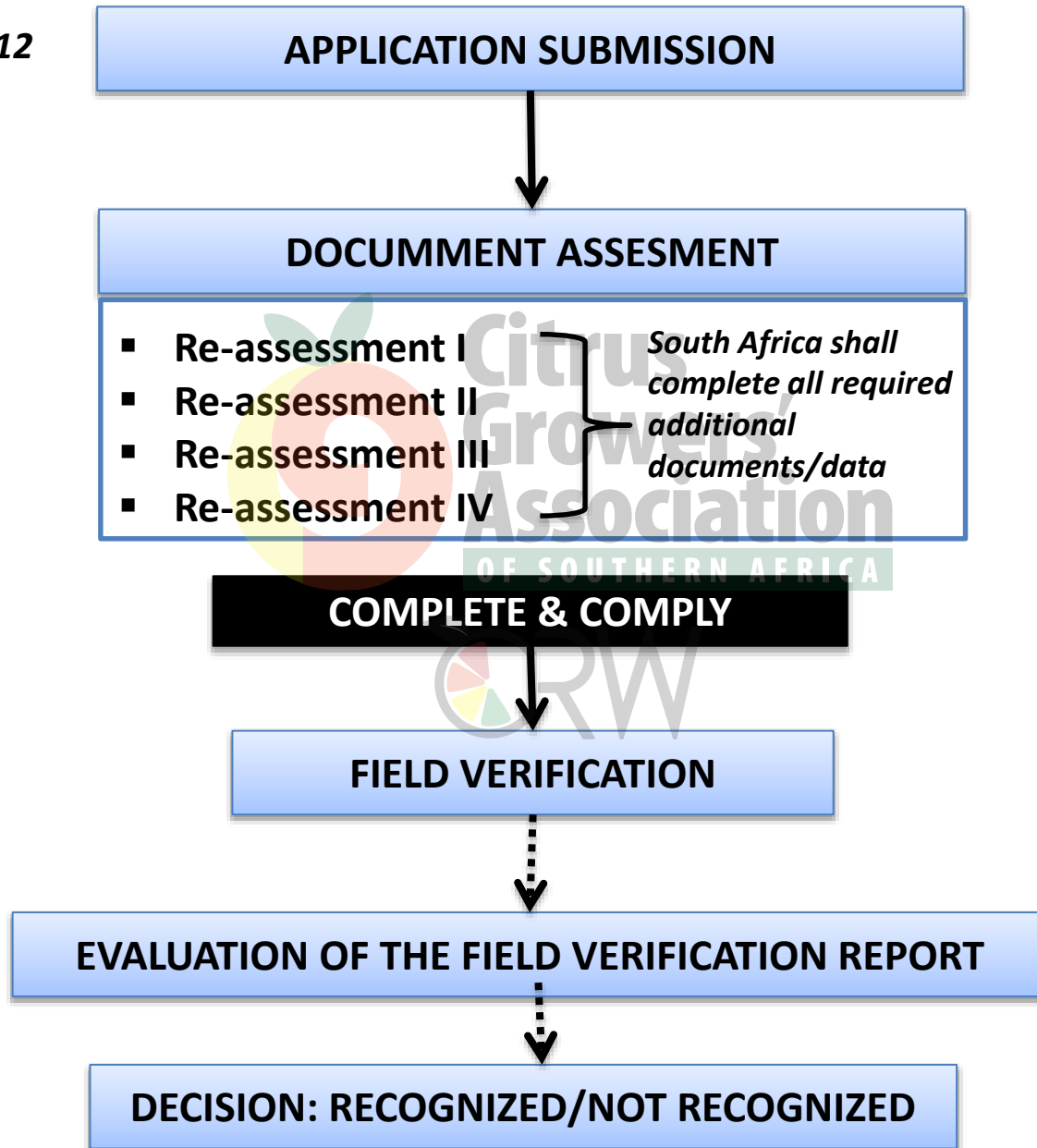
COUNTRY/PRODUCTION SITE	
HAS NOT BEEN RECOGNIZED	HAS BEEN RECOGNIZED
1. Accompanied by Food Safety Certificate/document and Prior Notice (FFPO Information)	1. Accompanied by Prior Notice (FFPO Information) only
2. Through designated entry point	2. Through designated entry point
3. Notified and submitted to Plant Quarantine Officer: <ul style="list-style-type: none"> • Document checking • Physical checking • Sample taking • Laboratory testing <ul style="list-style-type: none"> > MRLs → refused/rejected* < MRLs → released 	3. Notified and submitted to Plant Quarantine Officer: <ul style="list-style-type: none"> • Document checking • Physical checking
	<p># <u>Surveillances (conducted irregularly):</u> To assess the conformity of recognized country to comply with Indonesian Food Safety Control Requirements:</p> <ul style="list-style-type: none"> • Sample taking • Laboratory testing <ul style="list-style-type: none"> > MRLs → rejected (3x) } suspended ** < MRLs → released <p style="text-align: right; color: green;">Under supervision Of Plant Quarantine Officer</p>

* IAQA will send the Notification of Non Compliance (NNC) to the country/production sites origin of FFPO

** IAQA will send the Notification of Non Compliance (NNC) to the country/production sites origin of FFPO if there are 3 (three) unconformity of FFPO: FFPO contain chemical contaminant, biological contaminant exceeding the MRLs and formalin, the Director General of IAQA will suspend the recognition

RECOGNITION'S PROGRESS

July 31st 2012



VIETNAM

- Tariffs: OR + LE 20%; SC 30%; GF 40%
- PRA 2008; Exports to 2013
- Confusion “oranges” versus “citrus”
- Supplied PIP and additional information
- August 2014 received first draft PRA
- DAFF submitted comments October 2014
- Other PIP’s provided
- FF, FCM

INDIA

- Tariff: OR, SC + LE 30%; GF 25%
- Preferential trade agreements? Chile + NZ
 - Washington apples
- Other legislated costs
- Market awareness
- Infrastructure
- Preferred product: Valencia count 105
- CBS



PHILIPPINES

- Tariff: OR SC + LE 10%; GF 7%
- 2009 PIP provided
- Oct 2012 + June 2013 more info requested
- Visited RSA 30 August – 6 September 2014
- Feedback pending
- Difficulties 2014
 - Containers stuck
 - Special inspections
 - Customs



JAPAN

- Tariffs; OR 24%; SC 17%; GF 10%; LE 0%
- Existing protocol
- Clementines only – other SC
- Improved Cold Steri treatment
 - December visit
- Awareness: Florida Grapefruit
- Grapefruit - coordination



CHINA

- Tariffs; OR + LE 11%; SC + GF 12%
- Existing Protocol
- Rebuild relationships
 - Fruit and Veg show
- Systems approach
 - Technical bilateral needed
 - CRI MOU
- Break Bulk Shipping
 - DAFF send information to China



USA

- Tariff: 0% under AGOA
- AGOA
 - Graduation vs regionalisation
 - Meat issues (poultry, beef + pork)
 - EPA with EU
- Reversion to 22 day cold steri
 - Pilot 2014
- Houston Port
 - Pilot 2014
- Wider Access
 - Equivalence to domestic regs
 - Comment to 27 October
 - Pallet Issue
 - Awareness
 - PMA