



Australia-China trade in horticulture: Fruit & Nuts Opportunities and Challenges of a Free Trade Agreement

澳中园艺贸易：水果和坚果 自由贸易协定带来的机遇和挑战

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Australian horticulture industry's policy position on FTAs

澳大利亚园艺业关于自由贸易协定的政策立场

All Australian FTAs should

澳大利亚所有的自由贸易协定都应确保：

- Generate trade 创造贸易机会；
- Cover all goods traded 涵盖所有进行贸易的货物；
- Produce the least trade-restrictive outcome for horticulture 把对园艺业的贸易限制降到最低水平；
- Achieve tariff/quota outcomes (at the 8 digit product level) at least as favourable as we offer 实现与我方提出的方案优惠程度相当的关税/配额成果（在八位税号水平）；
- Achieve tariff/quota outcomes (at the 8 digit product level) at least as favourable as those achieved by competitors 实现与我们的竞争者所得到的优惠程度相当的关税/配额方面的成果（在八位税号水平）；

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Australian horticulture industry's policy position on FTAs (cont)

澳大利亚园艺业关于自由贸易协定的政策立场(续)

All Australian FTAs should

所有澳大利亚自由贸易协定都应包括以下几点:

- Eliminate 'behind the borders' barriers to trade - eg IP protection 消除境内的贸易壁垒 – 如知识产权保护;
- Achieve better outcomes more speedily than through the multilateral round (Doha) 取得比多边会谈（多哈）更快更好的成果;
- Support and accelerate (but not negotiate) the science-based sanitary and phytosanitary (SPS) system 支持并加速（非通过谈判）建立以科学为依据的动植物检验检疫体系（SPS）;
- Not use horticulture as a 'bargaining chip' 不把园艺产业作为谈判的“筹码”;
- Recognise any special circumstances of anticipated free trade outcomes 承认任何自由贸易所产生的预期后果;

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What is Australian horticulture?

在澳大利亚园艺产品指的是什么？

In Australia we define horticulture as fruit (excluding wine grapes), nuts, vegetables & nursery, both primary & processed produce

我们将园艺产品定义为水果（不包括用于生产葡萄酒的葡萄）、坚果、蔬菜和苗圃，初级产品和加工产品都算。

**Gross value primary production
A\$ million:**

初级产品总值（单位：百万澳元）

Agriculture total 农业总量 \$36,900

Horticulture total 园艺总量 \$6,900

Fruit 水果 \$3,500

Vegetables 蔬菜 \$2,300

Nursery 苗圃 \$800

Nuts 坚果 \$300

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Messages in support of the FTA- 1

支持自由贸易协定的信息 1

- **Australia & China support two way trade in horticulture**
澳大利亚和中国支持园艺双向贸易
- **Direct horticultural trade between Australia & China is growing in China's favour**
澳中两国间的园艺直接贸易正在增长且中国为顺差
- **China is a larger producer & exporter of primary horticultural produce**
中国是更大的初级园艺产品生产国和出口国
- **China is a larger producer & exporter of processed horticultural producer**
中国是更大的加工园艺产品生产国和出口国
- **China is a lower cost producer of horticultural produce**
中国的园艺产品生产成本更低

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Messages in support of the FTA- 2

支持自由贸易协定的信息 2

- **Strong complementarities in most fruits and nuts for production & trade reasons**
两国在大多数水果和坚果的生产和贸易方面有很强的互补性
- **Impact of imports from lower cost producers is impacting the Australian vegetable industry creating sensitivities**
进口低成本生产国的产品正影响着澳大利亚蔬菜业，使其容易受到影响
- **Australia has a far lower import tariff regime for horticulture & would seek reciprocity in tariff rates**
澳大利亚对园艺产品实行更低的进口关税体系，因而希望寻求关税税率方面的互惠互利
- **Support for trade through FTA outcomes will need to be supplemented by improved two way quarantine access for primary horticultural produce**
改善初级园艺产品双向检疫准入将促进自由贸易协定所推进的贸易

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Australia & China support global horticultural trade

澳大利亚和中国都支持全球园艺贸易

(growth in global exports & imports US\$million)

全球进出口增长量 单位：百万美元

	2001/02 2001年7月至 2002年6月	2005/06 2005年7月至 2006年6月	2001/02 2001年7月至 2002年6月	2005/06 2005年7月至 2006年6月
	Exports 出口额	Exports 出口额	Imports 进口额	Imports 进口额
China 中国	3,466	7,468	689	1,461
Australia 澳大利亚	633	814	420	880

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Two way direct horticultural trade is in China's favour

双向直接园艺贸易中中国为顺差

(two way exports & imports 2005/06 US\$million)

2005年7月至2006年6月双向进出口额 单位：百万美元

	China exports to Australia 中国向澳大利亚出口	China Imports from Australia 中国从澳大利亚进口
Processed 已加工产品	58.9	2.2
Vegetables 蔬菜	25.1	small
Fruit 水果	7.4	0.4
Nuts 坚果	5.5	7.8
Nursery 苗圃	1.1	0.1
Total 总量	98.1	10.5
Share * 比例	11.1%	0.01%

Source: China Customs Statistics. Not including trade through HK. Note: *Share of importing country's horticultural imports in 2005/06. 信息来自：中国海关数据。不包括经香港的贸易。注：2005年7月至2006年6月的园艺产品进口额比例

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China is a larger producer of fruit than Australia

中国的水果产量比澳大利亚的水果产量大
(production, thousand tonnes , latest year statistics)

最近一年产量数据 单位：千吨

	Production China 中国产量	Production Australia 澳洲产量
Apples 苹果	19,000	320
Citrus 柑橘	14,500	700
Peach/Nectarine 桃/蜜桃	8,200	76
Pears 梨	8,000	138
Table Grapes 鲜食葡萄	5,000	120
Plums 李子	1,700	23
Cherries 樱桃	110	10

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Australia's capacity to increase production is limited by water

澳大利亚水果产量增长受水资源的限制

- **Australia is the driest inhabited continent on Earth > 30% desert.**

澳大利亚是地球上最干燥的居住地，有超过30%的沙漠

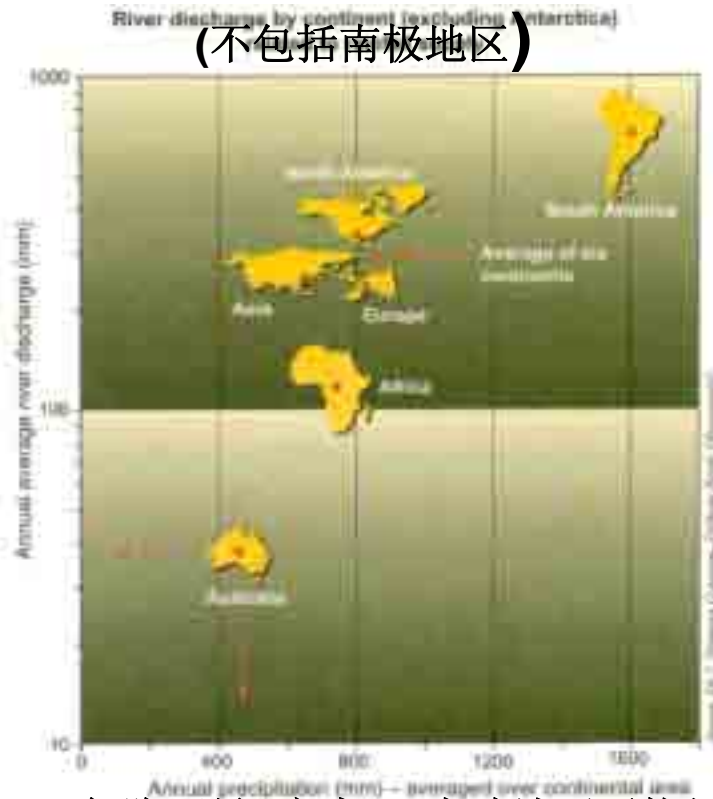
- **Water supplies for horticulture already limit production.**

水资源的有限已经限制了澳大利亚园艺的生产

- **Increases in production in one industry falls of production in another.**

一个产业的产量增长 另一个产业的产量下降.

与降雨量相联系的各大洲河流量
(不包括南极地区)



年降雨量 (毫米) - 大陆地区平均量

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China is a larger exporter of fruit than Australia

与澳大利亚相比，中国是更大的水果出口国

(global exports, thousand tonnes, 2005/06 statistics)

全球出口额2005年7月至2006年6月数据 单位：千吨

	Exports China中国出口量	Exports Australia澳洲 出口量
Apples 苹果	768	9
Citrus 柑橘	388	161
Pears 梨	362	8
Table Grapes 鲜食葡萄	21	48
Peach/Nectarine桃/蜜桃	19	8
Plums 李子	8	5
Cherries 樱桃	Small较少	1

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China is a lower cost exporter of fruit than Australia

与澳大利亚相比，中国的水果出口成本较低

(global exports, fob US\$/kg, 2005/06 statistics)

全球出口离岸价 2005年7月至2006年6月 单位：美元/千克

	Exports China 中国出口	Exports Australia 澳洲出口
Apples 苹果	0.42	1.03
Citrus 柑橘	0.33	0.80
Pears 梨	0.37	0.89
Table Grapes 鲜葡萄	0.47	1.80
Peach/Nectarine 桃/蜜桃	0.27	1.96
Plums 李子	0.26	1.85
Cherries 樱桃	3.54	6.24

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Seasonal complementarities will support bilateral fruit trade

季节互补性将有益于双边水果贸易

(months global exports by Australia & China)

以月份为单位澳中全球出口

	J	F	M	A	M	J	J	A	S	O	N	D
Oranges 橙子	Red	Red	White	White	White	Blue	Blue	Blue	Blue	Blue	Yellow	Red
Mandarins 柑桔	Red	Red	Red	White	Blue	Blue	Blue	Blue	Blue	Red	Red	Red
T.Grapes 鲜葡萄	White	Blue	Blue	Blue	Blue	Blue	White	White	Red	Red	Red	Red
Peaches 桃子	Blue	Blue	Blue	White	White	Red	Red	Red	Red	Red	White	Blue
Plums 李子	Blue	Blue	Blue	Blue	Red	Red	Red	Red	Red	Red	White	White
Mangoes 芒果	Blue	Blue	White	White	White	White	Red	Red	Red	White	Blue	Blue
Lychees 荔枝	Blue	Blue	White	White	White	Red	Red	White	White	White	White	Blue
Cherries 樱桃	Blue	Blue	White	White	White	Red	Red	White	White	White	White	Blue

(red China; blue- Australia; yellow- overlap 红色为中国、蓝色澳洲、黄色为重合)

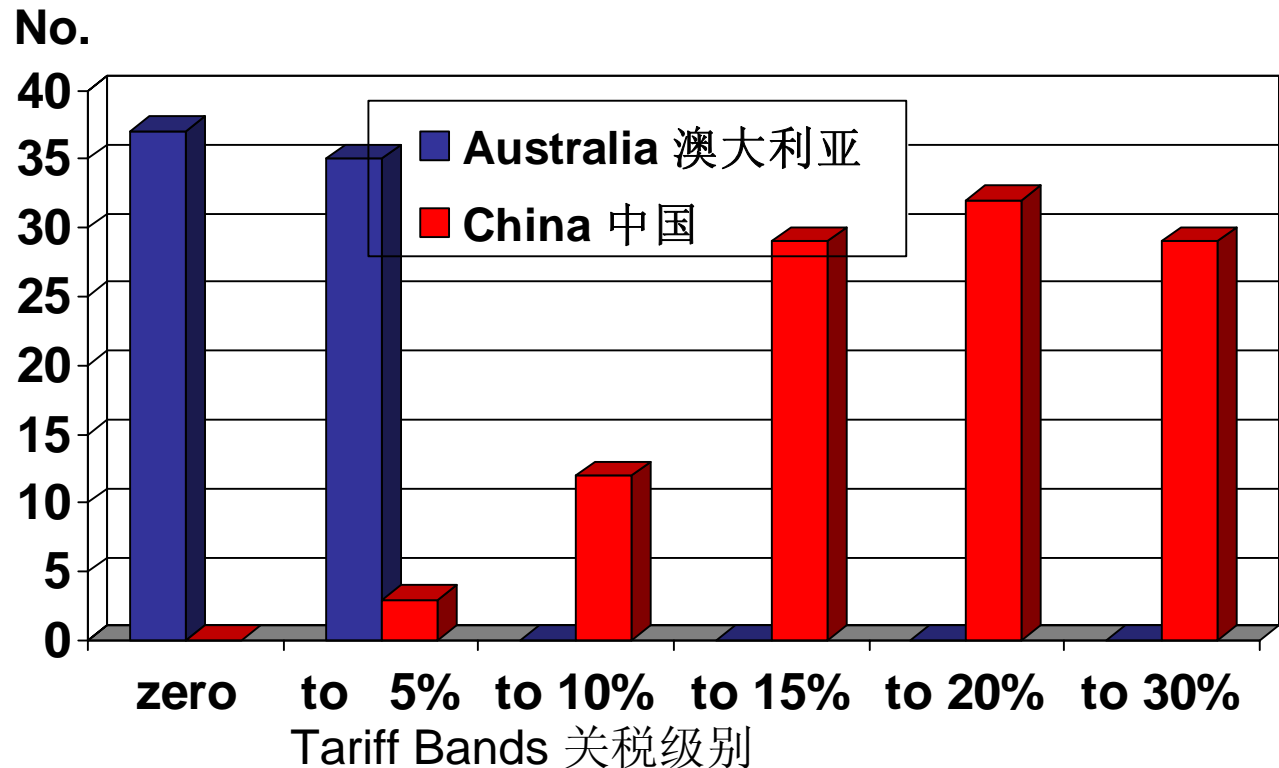
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China's tariffs on fruit lines are relatively high

中国水果类产品的关税税率较高

(number of tariff fruit lines at 8 digit level HS Codes 08, 20)
(水果类产品税号位数为8位, 编号为HS Codes 08, 20)



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Australia and China produce different nuts

澳大利亚和中国出产的坚果种类不同

(production, tonnes, latest year statistics)

产量 最近一年数据 单位：吨

	Production China 中国产量	Production Australia澳洲产量
Walnuts 核桃	388,000	1,100
Chestnuts 栗子	120,000	1,000
Pinenuts (kernels) 松子	11,400	0
Macadamias 夏威夷坚果	1,500	40,000
Pistachios 开心果	Small较小	840
Pecans 美洲山核桃	Small较小	1,000
Almonds 杏仁	Small较小	16,500

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Nut production differences are reflected in trade

坚果产量差异反映在贸易上

(global exports, tonnes, 2005/06 statistics)

全球出口量 2005年7月至2006年6月数据 单位：吨

	Exports China 中国出口量	Exports Australia 澳洲出口量
Walnuts 核桃	13,200	139
Chestnuts 栗子	39,300	200
Pinenuts (kernels) 松子	10,900 *	0
Macadamias 夏威夷坚果	1,600 *	8,250
Pistachios 开心果	4,400 *	538
Pecans 美洲山核桃	0	114
Almonds 杏仁	102 *	6,100

* Note: Including imported product shelled in China and re-exported 注：包括在中国进行脱壳处理再出口的产品：

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Australia China nut trade is complementary for other reasons

澳中坚果贸易由于其他原因而存在互补性

- **China processes in shell Australian nuts for re-export (macadamias 7,000 tonnes, pistachios & almonds 200 tonnes each)**
中国加工未脱壳的夏威夷坚果用作再出口（夏威夷坚果7000吨、开心果和杏仁各200吨）
- **Contract processing generates income for China and employment within China**
合同加工为中国带来收益并创造了就业机会
- **Chestnut trade is in fresh produce which will be counter seasonal with Australian production**
栗子贸易集中在与澳大利亚成反季节出产的新鲜栗子
- **China produces walnuts of different variety and grade to Australia & trade is aimed at different markets**
中国出口与澳大利亚不同品种和等级的核桃，且关注不同层次的市场

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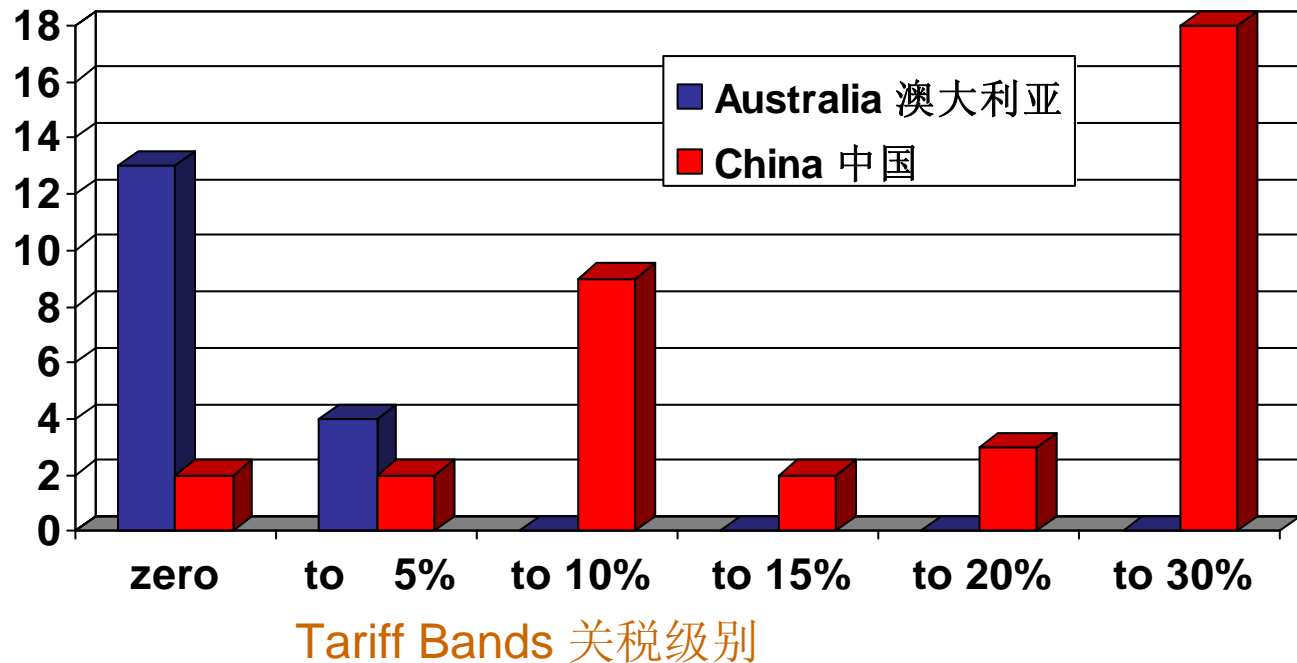
China's tariffs on nut lines are relatively high

中国坚果类产品的关税税率较高

(number of tariff nut lines at 8 digit level HS Codes 08, 20)

(坚果类产品的税位数为8位, 编号为HS Codes 08, 20)

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To support trade, we also need improved quarantine access

& stronger commercial protocols – 1

贸易的促进要求我们改善检疫准入

和加强商业条约-1

- **Australia has official quarantine access to China for Tasmanian apples, mangoes & citrus but the protocols need to be improved to generate trade**


澳大利亚的塔斯马尼亚苹果、芒果和柑橘在中国享有正式检疫准入，但贸易条约仍有待完善

- **China has access to Australia for pears, lychees & longans. Australia supports improvements to the lychee protocol. China also has access for vegetables, eg garlic, asparagus, some mushrooms, peas & some cut flowers**

中国在澳大利亚享有检疫准入的水果包括梨、荔枝和龙眼。澳大利亚支持有关荔枝条约的完善。其他享有澳大利亚检疫准入的中国园艺产品包括大蒜、竹笋、某些蘑菇、豌豆和切花

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To support trade, we also need improved quarantine access & stronger commercial protocols – 2

贸易的促进要求我们改善检疫准入和加强商业条约-2

- **Australia & China have agreed to pursue two way access concurrently for table grapes, apples, stonefruit & cherries, as our next priorities for negotiation**

澳中两国已经同意使鲜葡萄、苹果、核果和樱桃同步享有双向检疫准入。这些品种也是我们下一步谈判的重点

- **Australia & China also have interest in progressing and improving nut access**

澳中两国也有意推进和改善两国之间的坚果检疫准入

- **Access protocols for all produce need to be both scientifically and commercially valid**

检疫准入的条约必须确保其在科学上和商业上的有效性

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Summary: Importance of the FTA for Australian & Chinese Horticulture

总结：自由贸易协定对澳中园艺业的重要性

The FTA between Australia & China will:

澳中自由贸易协定将会：

- Set a trade generating framework for development of two way trade
完善两国双向贸易发展的框架
- Help to remove any barriers to trade
帮助消除一切贸易壁垒
- Emphasise complementarity, so that neither side heavily impacts the other
强调互补性，不会对两国产生不良影响
- Be mutually beneficial
做到互惠互利
- Support a good future relationship in horticulture
建立未来园艺业的良好关系

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Summary: Importance of the FTA for Australian & Chinese Horticulture

总结：自由贸易协定对澳中园艺业的重要性


Whilst acknowledging:

我们注意：

- The FTA will be viewed with concern by Australian fruit & nut producers unless it is of mutual benefit: 如果自由贸易协定不是以互惠为原则，就会在澳大利亚的水果和坚果生产商当中引起顾虑。
 - Particularly given (i) the relative size of Chinese production, (ii) the relative labour costs in China, and (iii) the relative level of tariffs.
这种顾虑尤其基于以下几个因素：1、中国的相对产量大；2、中国的相对人工成本低；3、中国的相对关税高
- There is a clear expectation by both countries for continued progress on SPS access leading to commercial trade
澳中两国都明确期待进一步改善有利于贸易发展的动植物检验检疫（SPS）准入

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We need to create a favourable
trade climate through the FTA!

&

We need to work together to make
trade happen!

我们要通过自由贸易协定创造有利
的贸易环境！

我们要同心协力推进双方贸易！

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