SUBMISSION TO THE DEPARTMENT OF FOREIGN AFFAIRS AND TRADE

Possible FTA with Gulf Cooperation Council, including the United Arab Emirates

PREPARED BY

SUMMERFRUIT AUSTRALIA LTD

4th May 2022

27 Ludgate Hill Road ALDGATE SA 5154
Mobile: +61 417 809 172 Tel: 08 8339 4826
E-mail: ceo@summerfruit.com.au web: summerfruit.com.au

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Australia-GCC FTA Coordinator
Middle East FTAs Branch
Regional Trade Agreements Division
Department of Foreign Affairs and Trade
GCCfta@dfat.gov.au

RE: Possible FTA with Gulf Cooperation Council, including the United Arab Emirates

Dear Sir/Madam,

Summerfruit Australia Ltd welcomes the opportunity to make this submission to the Department of Foreign Affairs and Trade on a potential Free Trade Agreement with the Gulf Cooperation Council.

Summerfruit Australia Limited (SAL) is the industry voice for the betterment of Stonefruit (fresh apricots, nectarines, peaches and plums). It represents the interests of the Stonefruit industry on a national and international basis. It is the body recognised by government as the peak industry body for growers of Stonefruit and has responsibility for the management of the suite of industry topics including trade development and market access.

The GCC countries are valuable markets as they purchase a full range of apricots, nectarine, peaches and plums. As a result, SAL fully supports the proposal for an FTA with the GCC and looks forward to assisting where practical and possible to achieve a positive result.

From our data the exports to the GCC countries during the 2020/21 year totalled more than 2,700 tonnes at a combine value of $12 million. This represented just over 13% of the Australian Summerfruit exported in that period.
This volume made the GCC countries the second most important group of countries behind China.

SAL believes that there is no local production of stonefruit in any of the GCC countries. The tropical climate conditions are not suitable for the temperate climate stonefruit that is grown in Australia. As a result, there is no competition with the GCC Stonefruit Industry.

As you will see from the summary below, the UAE and no doubt the other GCC countries, have no tariffs and/or phytosanitary restrictions.

MARKET ACCESS SUMMARY

Of Australia's major trade partners for fresh fruit in 2021, summerfruit has open access to Hong Kong, Malaysia and Singapore, protocol access to China, India, Indonesia, Philippines, Thailand and Taiwan. Trade remains prohibited to Japan, New Zealand, South Korea, United States and Vietnam.

	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	JAEPA 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		9%	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 DAWE

Below are details of past and recent Australian Summerfruit (Stonefruit) exports to the GCC. Much of the information is from the 2020/21 season but once we have the final report on the 2021/22, we will make that available as it will give the Department the most up to date industry data.

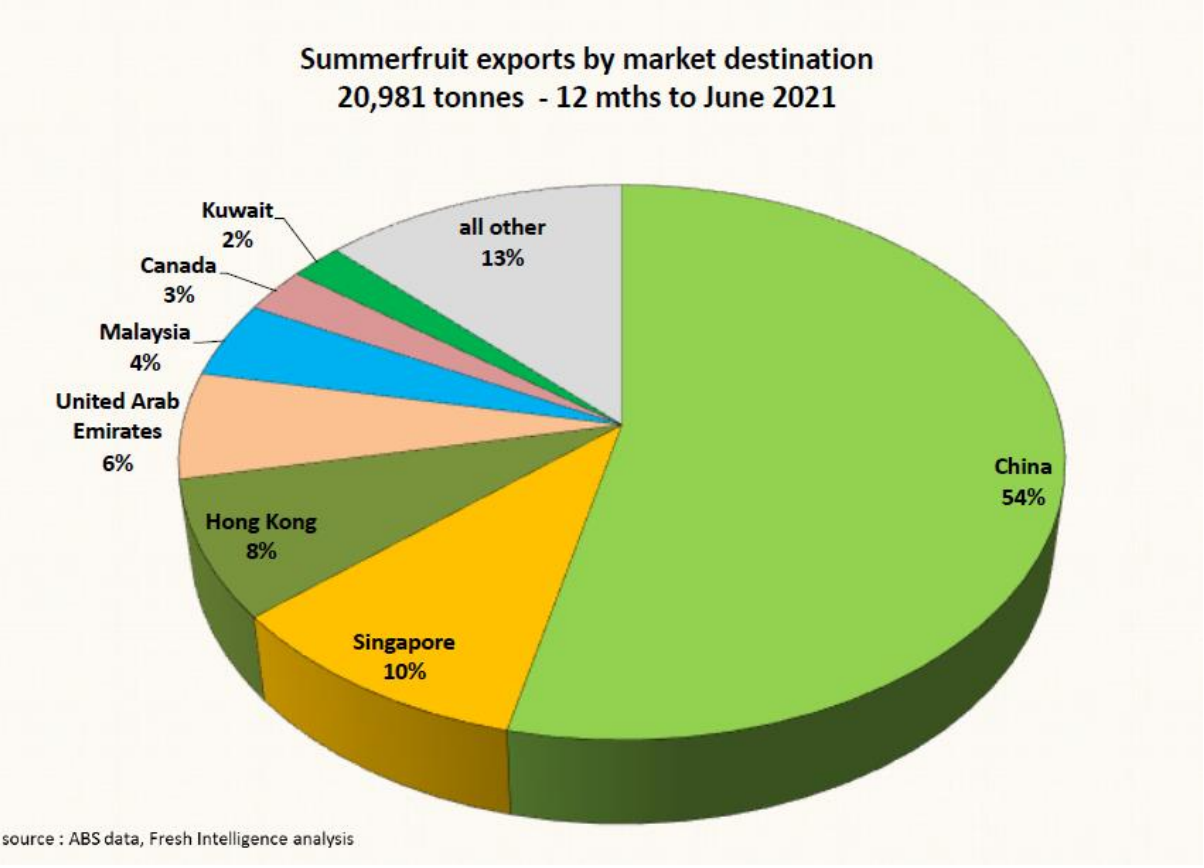
SAL is willing to supply any further information and support for the negotiations ahead with the GCC.

Yours faithfully

Trevor M Ranford B.Sc., Dip (AIMSA), Adv Dip Hosp (Wine Marketing), AFIML.
Chief Executive Officer
Summerfruit Australia Ltd

Australian exports of Summerfruit (apricots, nectarines, peaches, plums) to Gulf Cooperation Council

The following is an overview of exports for the 202/21 season highlighting the importance of a number of the GCC countries. The information that follows gives more specific details on both the total Summerfruit category and the four individual categories of Apricots, Nectarines, Peaches and Plums.



As you will see from the table where the member GCC countries rate in relation to exports during the 2020/21 season: -

- UAE – 4th by volume
- Kuwait – 7th by volume
- Qatar – 8th by volume
- Saudi Arabia – 9th by volume
- Oman – 13th by volume.

These figures are just a snapshot and as you will see vary across the particular years.

SUMMERFRUIT
Exports by Market

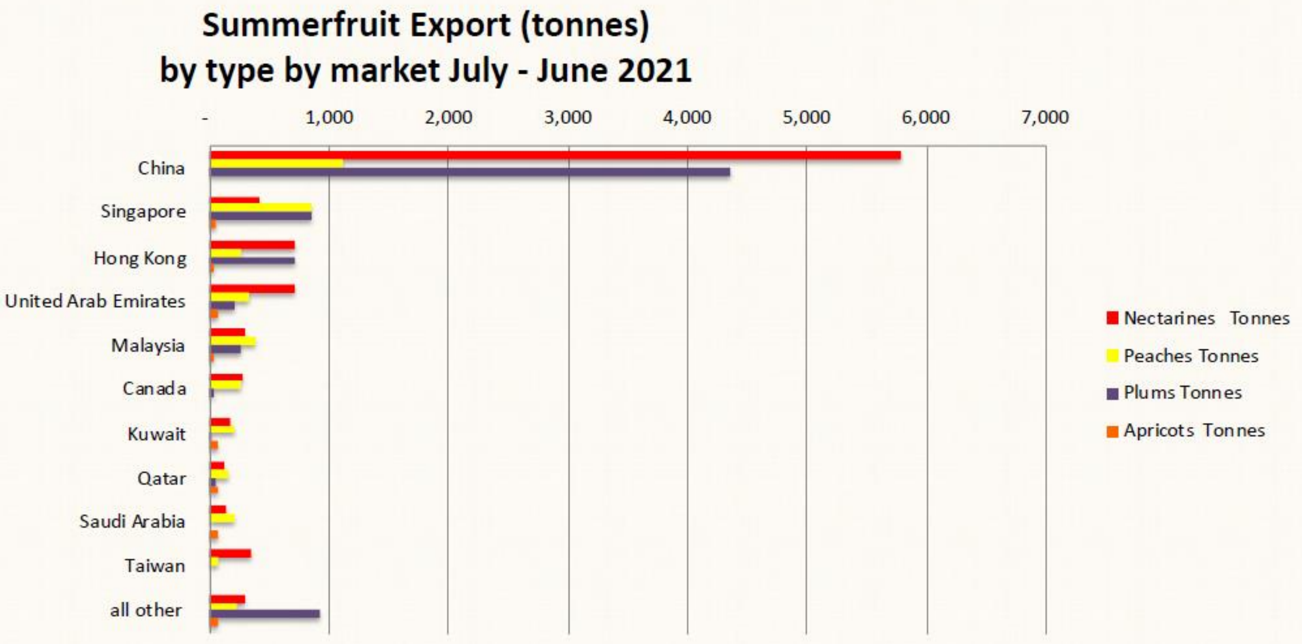
	Volume Tonnes (season to date)				Value $ Million AUD (season to date)				Average price per KG	
Country	July to Jun-20	July to Jun-21	Change to LY	Share %	July to Jun-20	July to Jun-21	Change to LY	Share %	July to Jun-20	July to Jun-21
TOTAL SUMMERFRUIT	21,269	20,981	-1%	100%	89.10	91.90	3%	100%	4.19	4.38
China	10,428	11,256	8%	54%	46.33	51.36	11%	56%	4.44	4.56
Singapore	2,042	2,140	5%	10%	7.59	7.58	0%	8%	3.72	3.54
Hong Kong	956	1,687	77%	8%	5.11	7.32	43%	8%	5.34	4.34
United Arab Emirates	1,219	1,302	7%	6%	4.56	4.83	6%	5%	3.74	3.71
Malaysia	911	938	3%	4%	3.99	4.33	8%	5%	4.38	4.61
Canada	812	560	-31%	3%	4.06	3.22	-21%	4%	5.00	5.76
Kuwait	700	452	-35%	2%	2.84	2.39	-16%	3%	4.06	5.29
Qatar	400	359	-10%	2%	1.85	2.01	9%	2%	4.62	5.60
Saudi Arabia	1,728	405	-77%	2%	5.82	1.83	-69%	2%	3.37	4.52
Taiwan	91	397	334%	2%	0.34	1.65	382%	2%	3.74	4.15
Indonesia	981	529	-46%	3%	2.49	1.59	-36%	2%	2.54	3.01
India	34	323	861%	2%	0.17	0.94	442%	1%	5.17	2.92
Oman	458	196	-57%	1%	1.61	0.94	-42%	1%		4.79
Philippines	82	96	17%	0%	0.20	0.53	158%	1%	2.49	5.52
Cambodia	8	76	833%	0%	0.05	0.39	679%	0%		5.17
				0%						
all other	420	267	-36%	1%	2.08	0.99	-52%	1%	4.95	3.70
TOTAL Summerfruit	**21,269**	**20,981**	**-1.4%**	**100%**	**89.10**	**91.90**	**3.1%**	**100%**	**4.19**	**4.38**

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

While all four of the stonefruirt categories are export it is important to note that in relation to Apricot exports the GCC countries of Kuwait, UAE and Saudi Arabia are leading markets.
There is a good opportunity not only to expand this trade but also promote the other stonefruit categories in these countries.

SUMMERFRUIT EXPORTS BY TYPE

China was the lead market for nectarines, peaches and plums, while **Kuwait, UAE and Saudi Arabia** were similar leading markets for apricots.



The following tables highlight the long-term trends for the total Summerfruit category and the four individual categories.

LONG TERM TREND ANALYSIS

SUMMERFRUIT (total) – over 10 years Summerfruit exports have increased by an average 10 per cent per year though dipped 3 per cent year-on-year in 2020/21 impacted by COVID19 and lack of air freight capacity.

Australian Exports of Summerfruit (all) - July to June 2011 to 2021

Rank		2011/12	2012/13	2013/14	2014/15	2015/16	2016/17	2017/18	2018/19	2019/20	2020/21	Change to 2019/20	10 yr CAGR growth trend
	Value A$ Million	26.2	32.8	39.9	38.7	48.3	51.4	65.2	89.0	89.8	91.9	2.3%	15%
	Avg A$per kg	$ 2.86	$ 2.87	$ 3.53	$ 3.05	$ 3.36	$ 3.68	$ 3.66	$ 3.86	$ 4.17	$ 4.39	5%	5%
		Tonnes	Tonnes	Tonnes	Tonnes	Tonnes	Tonnes	Tonnes	Tonnes	Tonnes	Tonnes		
1	China	-	-	-	-	-	1,868	4,985	9,334	10,455	11,256	8%	
2	Hong Kong	4,628	5,551	5,598	5,959	6,408	4,862	3,308	2,485	1,019	1,679	65%	-11%
3	Singapore	1,412	1,527	1,178	1,851	2,022	1,660	2,462	2,602	2,125	2,105	-1%	5%
4	United Arab Emirates	1,801	2,473	2,317	2,467	2,718	2,104	1,888	1,783	1,219	1,302	7%	-4%
5	Malaysia	286	460	483	560	702	584	884	1,092	921	938	2%	14%
6	Canada	25	12	23	61	59	301	274	396	812	560	-31%	41%
7	Indonesia	66	105	94	151	228	341	620	1,074	1,062	529	-50%	26%
8	Kuwait	112	166	151	269	409	467	598	744	700	452	-35%	17%
9	Saudi Arabia	96	139	175	463	879	1,140	1,378	1,950	1,728	405	-77%	17%
10	Taiwan	162	259	-	132	61	19	98	84	91	397	334%	10%
11	Qatar	64	137	169	124	222	181	353	387	402	358	-11%	21%
12	India	14	10	50	27	84	15	52	51	34	343	921%	43%
13	Oman	-	-	-	-	48	4	374	443	458	196	-57%	++
14	New Caledonia	117	133	139	119	114	89	105	157	132	95	-28%	-2%
15	EUROPE	104	63	48	46	57	53	85	64	58	42	-28%	-10%
16	French Polynesia	8	25	11	14	29	17	42	38	30	37	23%	18%
17	Bahrain	18	44	66	78	97	63	69	95	14	19	35%	1%
18	Thailand	53	3	9	108	115	120	96	87	113	12	-90%	-16%
19	Philippines	-	7	16	32	40	20	20	48	82	92	13%	
20	Vietnam	46	130	544	120	0	-	-	-	-	-		
21	Russia	81	111	159	-	-	-	-	-	-	-		
	all other	62	81	69	82	68	56	91	132	86	137	60%	9%
	TOTAL SUMMERFRUIT (Tonnes)	9,154	11,436	11,298	12,665	14,362	13,963	17,783	23,045	21,540	20,952	-3%	10%

LONG TERM TREND ANALYSIS

Over 10 years apricot exports have increased an average 3 per cent per year. The volume dropped 53 per cent year-on-year in 2021 after a record level of 885 tonnes in 2020.

Australian Exports of Apricots - July to June 2011 - 2021

Rank		2011/12	2012/13	2013/14	2014/15	2015/16	2016/17	2017/18	2018/19	2019/20	2020/21	Change to 2019/20	10 yr CAGR growth trend
	Value A$ Million	1.4	1.5	2.0	1.7	2.5	1.7	1.9	2.4	4.1	2.4	-43%	6%
	Avg A$per kg	*$ 4.50*	*$ 3.86*	*$ 4.99*	*$ 3.33*	*$ 4.21*	*$ 3.89*	*$ 4.72*	*$ 4.26*	*$ 4.67*	*$ 5.70*	*22%*	*3%*
		Tonnes	Tonnes	Tonnes	Tonnes	Tonnes	Tonnes	Tonnes	Tonnes	Tonnes	Tonnes		
1	United Arab Emirates	120	131	197	208	232	120	64	52	95	66	-31%	-6%
2	Kuwait	5	11	13	28	45	30	37	85	118	64	-46%	31%
3	Saudi Arabia	16	29	30	51	151	136	99	164	311	64	-79%	16%
4	Qatar	3	13	12	13	26	15	25	41	54	56	5%	40%
5	Oman	-	-	-	-	11	0	37	55	71	44	-38%	++
6	Singapore	9	47	38	33	47	51	50	42	121	43	-64%	20%
7	Hong Kong	95	77	56	128	30	50	52	28	16	28	82%	-13%
8	Malaysia	3	6	5	7	10	4	16	37	36	25	-31%	25%
9	New Caledonia	4	6	11	4	6	6	4	3	4	5	18%	2%
10	Canada	-	1	1	2	5	0	-	0	25	4	-82%	++
11	EUROPE	10	18	11	8	13	8	8	11	12	2	-83%	-16%
12	Indonesia	1	0	1	0	1	1	0	1	2	2	15%	6%
13	Brunei Darussalam	1	0	1	1	2	1	1	1	1	2	215%	14%
14	India	0	1	0	1	1	1	1	3	2	1	-35%	29%
15	Bahrain	3	4	7	9	16	5	6	9	1	1	-52%	-16%
16	Papua New Guinea	1	2	2	3	1	1	1	0	0	0	-20%	-12%
17	Lebanon	0	-	0	0	1	1	1	4	2	0		
18	New Zealand	20	29	10	-	-	-	-	-	-	-		
19	Russia	9	6	6	-	-	-	-	-	-	-		
20	Thailand	2	1	-	-	-	-	-	-	0	-		
	all other	10	2	1	1	2	1	1	23	15	6		
	TOTAL APRICOTS (Tonnes)	**311**	**382**	**403**	**498**	**601**	**431**	**403**	**561**	**885**	**414**	*-53%*	*3%*

Source of Data: ABS via IHS Global Trade Atlas; Fresh Intelligence Analysis

LONG TERM TREND ANALYSIS

NECTARINES - 10-year exports by market volume (July to June) showing that volumes have increased on average 6 per cent per year for the decade though decreased 5 per cent year-on-year in 2020/21.

Australian Exports of Nectarines - July to June 2011 to 2021

Rank		2011/12	2012/13	2013/14	2014/15	2015/16	2016/17	2017/18	2018/19	2019/20	2020/21	Change to 2019/20	10 yr CAGR growth trend
	Value A$ Million	11.5	14.2	14.9	16.1	18.3	18.2	23.9	35.0	39.8	38.1	-4%	14%
	Avg A$per kg	$ 2.63	$ 2.55	$ 3.35	$ 2.86	$ 3.03	$ 3.51	$ 3.38	$ 3.84	$ 4.10	$ 4.14	1%	5%
		Tonnes	Tonnes	Tonnes	Tonnes	Tonnes	Tonnes	Tonnes	Tonnes	Tonnes	Tonnes		
1	China	-	-	-	-	-	1,866	3,641	5,046	6,321	5,786	-8%	
2	Hong Kong	2,644	3,239	2,796	3,055	3,406	856	484	528	214	702	228%	-14%
3	United Arab Emirates	848	1,205	825	1,055	1,128	946	921	864	562	701	25%	-2%
4	Singapore	359	380	214	548	372	293	375	441	291	405	39%	1%
5	Taiwan	162	256	-	101	61	19	98	84	91	334	266%	8%
6	Malaysia	81	103	110	169	224	162	221	288	259	296	14%	15%
7	Canada	13	10	11	39	33	128	103	149	366	271	-26%	40%
8	Kuwait	45	54	57	102	163	193	239	300	269	164	-39%	16%
9	Saudi Arabia	29	52	74	186	304	464	497	827	698	127	-82%	18%
10	Qatar	23	45	65	45	88	71	112	131	139	116	-16%	20%
11	Oman	-	-	-	-	19	2	163	186	214	71	-67%	
12	India	3	4	1	2	2	7	20	14	14	62	348%	40%
13	New Caledonia	74	54	57	52	61	38	39	62	51	35	-31%	-8%
14	Indonesia	16	15	12	20	39	31	31	45	70	28	-60%	6%
15	EUROPE	11	9	8	10	8	7	8	27	21	14	-33%	2%
16	Bahrain	3	21	23	30	31	25	25	39	5	9	64%	13%
17	Papua New Guinea	5	7	7	4	5	6	4	4	4	3	-36%	-5%
18	Thailand	21	1	2	52	55	41	40	24	66	3	-96%	-20%
19	Vietnam	29	57	123	113	0	-	-	-	-	-		
20	Russia	23	31	55	-	-	-	-	-	-	-		
	all other	7	21	16	45	46	27	52	60	52	67	28%	28%
Nectarine	**VOLUME Tonnes**	**4,395**	**5,565**	**4,456**	**5,631**	**6,044**	**5,184**	**7,073**	**9,119**	**9,708**	**9,193**	*-5%*	*9%*

Source of Data: ABS via IHS Global Trade Atlas; Fresh Intelligence Analysis

LONG TERM TREND ANALYSIS

PEACHES - 10-year exports by market volume (July to June) showing that volumes have increased on average 19 per cent per year for the decade though decreased 16 per cent year-on-year in 2019/20. This was arguably due to air freight constraints since over 95 per cent of peaches are exported by air freight.

Australian Exports of Peaches - July to June 2011 to 2021

Rank		2011/12	2012/13	2013/14	2014/15	2015/16	2016/17	2017/18	2018/19	2019/20	2020/21	Change to 2019/20	10 yr CAGR growth trend
	Value A$ Million	5.8	8.2	10.1	10.5	15.5	15.6	19.3	26.7	24.6	21.2	-14%	16%
	Avg A$per kg	$ 3.70	$ 3.67	$ 4.52	$ 3.55	$ 3.90	$ 4.09	$ 3.86	$ 4.08	$ 4.50	$ 5.32	18%	4%
		Tonnes	Tonnes	Tonnes	Tonnes	Tonnes	Tonnes	Tonnes	Tonnes	Tonnes	Tonnes		
1	China	-	-	-	-	-	-	351	1,661	1,364	1,113	-18%	++
2	Singapore	386	422	323	435	593	547	1,026	1,154	979	842	-14%	9%
3	Malaysia	65	108	119	176	254	244	419	422	388	369	-5%	21%
4	United Arab Emirates	563	943	930	1,074	1,215	1,007	777	787	505	324	-36%	-6%
5	Hong Kong	275	381	454	700	1,027	856	720	415	303	249	-18%	-1%
6	Canada	5	2	4	19	16	152	140	216	376	248	-34%	54%
7	Saudi Arabia	41	49	64	208	404	527	770	951	716	209	-71%	20%
8	Kuwait	40	71	66	107	173	231	292	312	285	205	-28%	20%
9	Qatar	30	72	87	61	105	91	147	172	178	145	-18%	19%
10	Oman	-	-	-	-	16	2	162	196	172	80	-54%	++
11	Taiwan	-	4	-	31	-	-	-	-	-	62	++	++
12	New Caledonia	21	44	32	28	27	32	40	57	49	34	-30%	5%
13	Indonesia	13	19	9	16	25	33	27	29	41	30	-27%	10%
14	India	2	5	2	2	2	5	16	22	16	16	-2%	23%
15	Bahrain	9	14	24	31	29	27	32	42	7	10	40%	1%
16	EUROPE	56	28	23	20	31	21	26	31	18	9	-49%	-18%
17	French Polynesia	2	7	2	2	9	3	16	9	7	9	22%	22%
18	Papua New Guinea	4	7	5	3	5	2	4	4	3	3	-18%	-4%
19	Thailand	14	1	-	20	30	36	34	25	37	1	-97%	-26%
20	Russia	36	36	61	-	-	-	-	-	-	-		
	all other	3	9	29	16	14	10	10	21	18	33	86%	31%
	TOTAL PEACHES (Tonnes)	**1,565**	**2,222**	**2,234**	**2,950**	**3,973**	**3,827**	**5,007**	**6,526**	**5,462**	**3,992**	**-27%**	**11%**

Source of Data: ABS via IHS Global Trade Atlas; Fresh Intelligence Analysis

LONG TERM TREND ANALYSIS

PLUMS - 10-year exports by market volume (July to June) showing that volumes have increased on average 9 per cent per year for the decade and lifted 42 per cent year-on-year in 2020/21.

Australian Exports of Plums - July to June 2011 to 2021

Rank		2011/12	2012/13	2013/14	2014/15	2015/16	2016/17	2017/18	2018/19	2019/20	2020/21	Change to 2019/20	10 yr CAGR growth trend
	Value A$ Million	7.5	9.0	12.8	10.5	11.9	15.9	20.0	25.0	20.6	30.4	48%	17%
	Avg A$per kg	$ 2.59	$ 2.77	$ 3.05	$ 2.93	$ 3.19	$ 3.51	$ 3.78	$ 3.66	$ 3.94	$ 4.11	4%	5%
		Tonnes	Tonnes	Tonnes	Tonnes	Tonnes	Tonnes	Tonnes	Tonnes	Tonnes	Tonnes		
1	China	-	-	-	-	-	1	993	2,604	2,728	4,356	60%	
2	Singapore	659	679	603	835	1,011	769	1,012	964	651	849	30%	3%
3	Hong Kong	1,614	1,854	2,292	2,076	1,945	3,099	2,052	1,515	423	707	67%	-9%
4	Indonesia	36	71	72	114	164	276	562	999	869	469	-46%	33%
5	Malaysia	136	243	248	208	214	174	228	346	229	248	8%	7%
6	India	8	0	47	22	80	3	15	11	2	244	14081%	46%
7	United Arab Emirates	271	194	366	130	143	31	126	79	56	211	276%	-3%
8	Philippines	-	3	16	26	26	12	16	32	55	54	-2%	33%
9	Qatar	8	6	6	5	3	4	70	43	29	41	41%	19%
10	Canada	7	-	8	1	6	20	30	31	45	37	-20%	21%
11	Kuwait	21	30	15	33	28	13	30	47	28	19	-32%	-1%
12	New Caledonia	18	29	38	35	21	13	22	35	27	19	-31%	1%
13	French Polynesia	5	9	6	8	11	9	19	17	14	18	27%	8%
14	EUROPE	24	1	1	6	0	9	20	10	7	12	70%	-7%
15	Brunei Darussalam	5	5	4	6	7	5	9	10	10	9	-9%	6%
16	Thailand	17	-	6	37	30	43	23	37	10	8	-24%	-8%
17	Saudi Arabia	9	9	7	17	21	13	13	8	2	5	132%	-7%
18	Oman	-	-	-	-	1	-	15	6	1	2	82%	
19	Vietnam	15	69	403	3	-	-	-	-	-	-		
20	Russia	13	38	36	-	-	-	-	-	-	-		
	all other	17	28	32	26	35	26	46	43	27	77	182%	19%
	TOTAL PLUMS (Tonnes)	**2,883**	**3,267**	**4,206**	**3,586**	**3,745**	**4,521**	**5,300**	**6,839**	**5,214**	**7,383**	**42%**	**11%**

Source of Data: ABS via IHS Global Trade Atlas; Fresh Intelligence Analysis

The following are country snapshots of both the UAE and Saudi Arabia: -

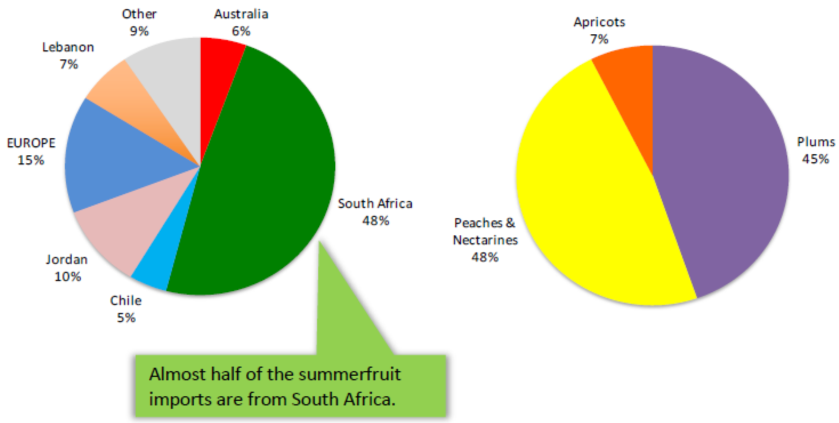
United Arab Emirates

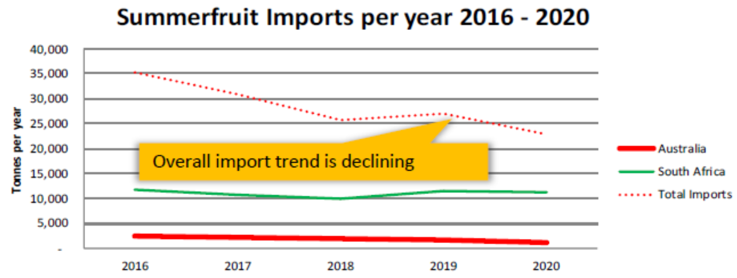
The UAE imports of summerfruit has been declining. The market has been a growth market for Australia although has slowed more recently due to air freight restrictions and I addition to more direct trade

Population	**9.9**	**million**
Urban share	87%	
GDP per capita	-	USD
GDP Growth	0.00%	
Summerfruit Production	**-**	**tonnes**
Imports	22,986	tonnes
Exports	10,214	tonnes
Consumption	12,772	tonnes
Per Capita	1.29	kg p.a.
Reliance on Imports	**180.0%**	
1 yr import change	-14.5%	year on year
5 yr import trend	-10.1%	per year
Southern seasonality	59%	
Imports from Australia	**1,283**	**tonnes**
Market share (annual)	5.6%	
Market share (seasonal)	9.5%	
Key Competitor	South Africa	
Tariff	Free	
Access	Phytosanitary Certificate	

Imports by Supplier

Imports by Product





Source: ITC Trademap; Fresh Intelligence analysis

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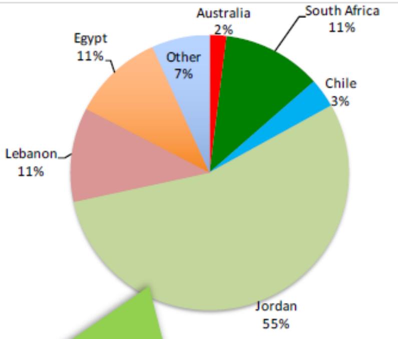
Saudi Arabia

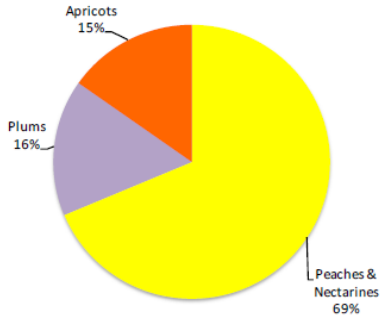
Saudi Arabia is a significant importer and has good potential for Australia. South Africa is the key competitor. The main imports are from the Middle East region during the northern hemisphere season.

Population	**34.8**	**million**
Urban share	84%	
GDP per capita	20,110	USD
GDP Growth	-4.11%	
Summerfruit Production	**-**	**tonnes**
Imports	58,808	tonnes
Exports	2,253	tonnes
Consumption	56,555	tonnes
Per Capita	1.62	kg p.a.
Reliance on Imports	**104.0%**	
1 yr import change	6.8%	year on year
5 yr import trend	-1.7%	per year
Southern seasonality	17%	
Imports from Australia	**1,151**	**tonnes**
Market share (annual)	2.0%	
Market share (seasonal)	11.6%	
Key Competitor	South Africa	
Tariff	Free	
Access	Phytosanitary Certificate	

Imports by Supplier

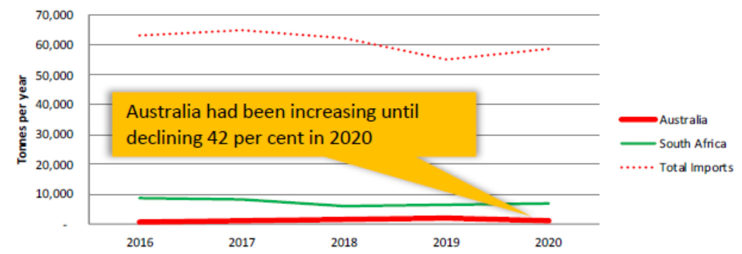


Imports by Product



Jordan is the main supplier along with Lebanon and Egypt during the northern season.

Summerfruit Imports per year 2016 - 2020



Source: ITC Trademap; Fresh Intelligence analysis

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