



***SUBMISSION TO THE DEPARTMENT OF FOREIGN AFFAIRS AND  
TRADE***

**Possible FTA with the United Arab Emirates (UAE)**

***PREPARED BY  
SUMMERFRUIT AUSTRALIA LTD***

***4<sup>th</sup> May 2022***

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4<sup>th</sup> May 2022

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

**RE: Possible FTA with the United Arab Emirates (UAE)**

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 United Arab Emirates (UAE).

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 UAE is a valuable market 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 UAE and looks forward to assisting where practical and possible to achieve a positive result.

From our data the exports to the UAE during the 2020/21 year totalled more than 1,300 tonnes at a combine value of \$4.9 million. This represented just over 5% of the Australian Summerfruit exported in that period. This volume made the UAE our fourth (4<sup>th</sup>) most important trading partner behind China, Singapore and Hong Kong.

SAL believes that there is no local production of stonefruit in the UAE. 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 UAE Stonefruit Industry.

As you will see from the summary below, the UAE has 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	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		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

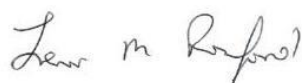
Source: MICOR Plant, DFAT, WTO; Fresh Intelligence analysis

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 UAE. 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 UAE.

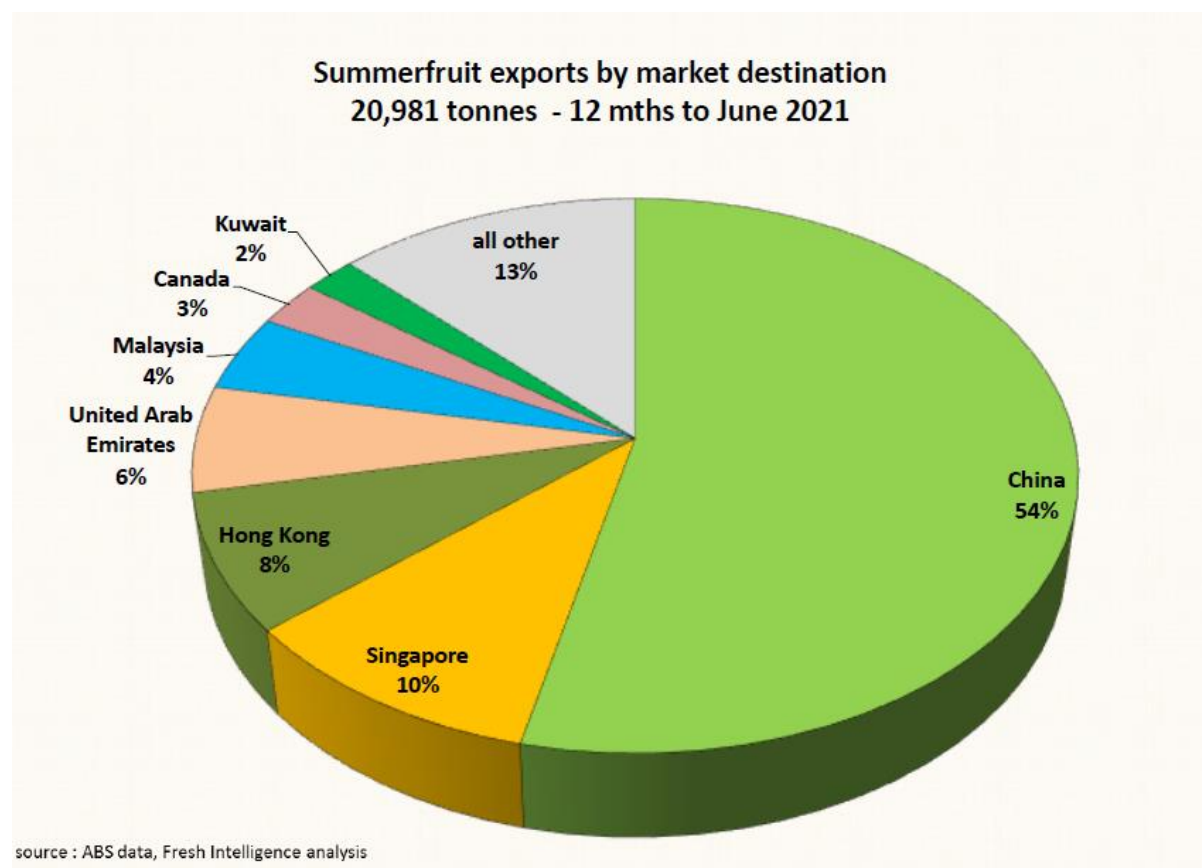
Yours faithfully



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 the United Arab Emirates.

The following is an overview of exports for the 202/21 season highlighting the importance of the UAE. 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 the UAE was our 4<sup>th</sup> most important market, by volume, during the 2020/21 season.

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

## SUMMERFRUIT

### Exports by Market

Country	Volume Tonnes (season to date)				Value \$ Million AUD (season to date)				Average price per KG	
	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
all other	420	267	-36%	1%	2.08	0.99	-52%	1%	4.95	3.70
<b>TOTAL Summerfruit</b>	<b>21,269</b>	<b>20,981</b>	<b>-1.4%</b>	<b>100%</b>	<b>89.10</b>	<b>91.90</b>	<b>3.1%</b>	<b>100%</b>	<b>4.19</b>	<b>4.38</b>

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

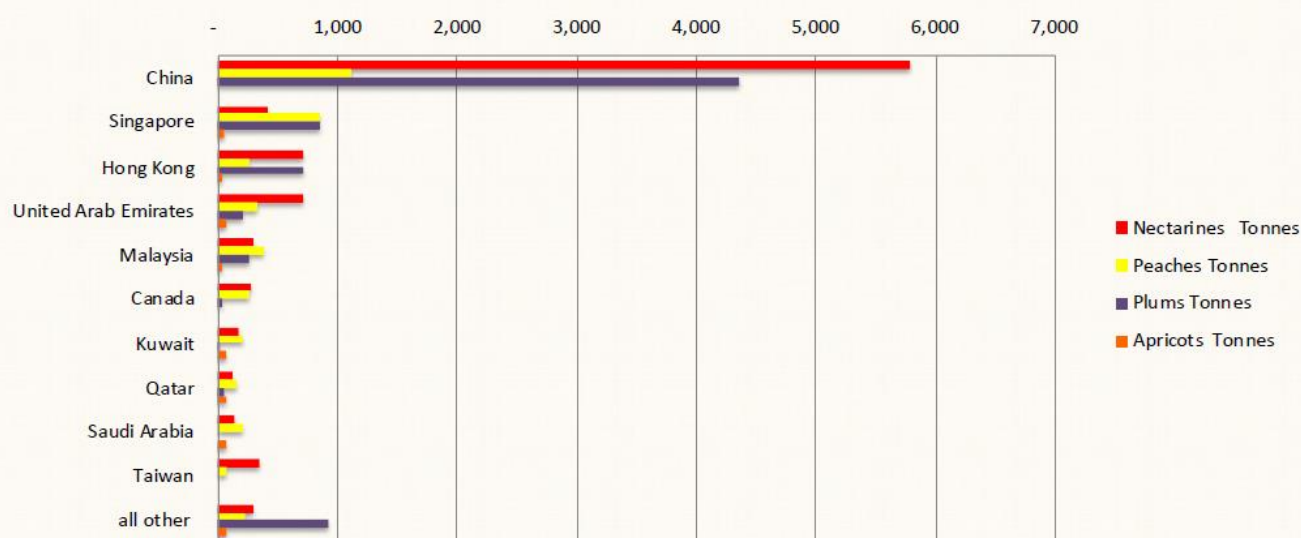
It is important to note that the UAE imports all four categories with an emphasis, currently, towards nectarines.

There is a good opportunity not only to expand this trade but also promote the other stonefruit categories in the UAE.

#### 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.

**Summerfruit Export (tonnes)  
by type by market July - June 2021**





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												Change to 2019/20	10 yr CAGR growth trend
Rank	2011/12	2012/13	2013/14	2014/15	2015/16	2016/17	2017/18	2018/19	2019/20	2020/21			
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												Change to 2019/20	10 yr CAGR growth trend
Rank	2011/12	2012/13	2013/14	2014/15	2015/16	2016/17	2017/18	2018/19	2019/20	2020/21			
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	33	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												Change to 2019/20	10 yr CAGR growth trend
Rank	2011/12	2012/13	2013/14	2014/15	2015/16	2016/17	2017/18	2018/19	2019/20	2020/21			
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												Change to 2019/20	10 yr CAGR growth trend
Rank	2011/12	2012/13	2013/14	2014/15	2015/16	2016/17	2017/18	2018/19	2019/20	2020/21			
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%
<b>TOTAL PLUMS (Tonnes)</b>	<b>2,883</b>	<b>3,267</b>	<b>4,206</b>	<b>3,586</b>	<b>3,745</b>	<b>4,521</b>	<b>5,300</b>	<b>6,839</b>	<b>5,214</b>	<b>7,383</b>	<b>42%</b>	<b>11%</b>

The following is a snapshot of the UAE: -



## 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 in addition to more direct trade

Population	9.9 million
Urban share	87%
GDP per capita	- USD
GDP Growth	0.00%

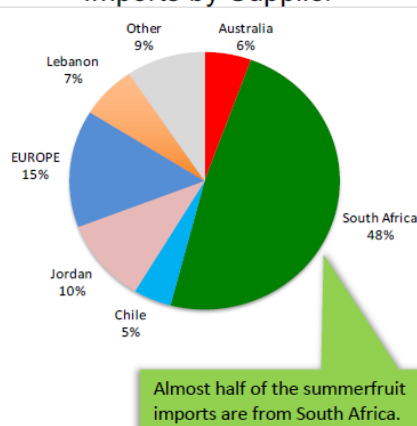
Summerfruit Production	- tonnes
Imports	22,986 tonnes
Exports	10,214 tonnes
Consumption	12,772 tonnes
Per Capita	1.29 kg p.a.

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%

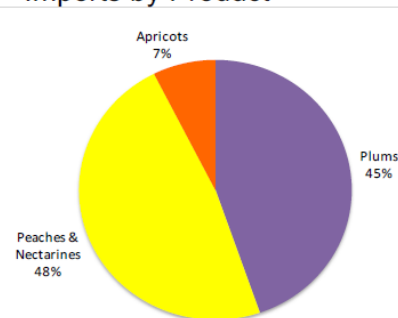
Imports from Australia	1,283 tonnes
Market share (annual)	5.6%
Market share (seasonal)	9.5%
Key Competitor	South Africa

Tariff	Free
Access	Phytosanitary Certificate

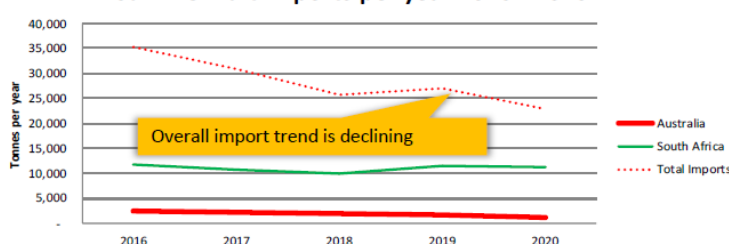
Imports by Supplier



Imports by Product



Summerfruit Imports per year 2016 - 2020



Source: ITC Trademap; Fresh Intelligence analysis

2021 Summerfruit Market Insights

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