

UNDERSTANDING:

Vegetable Export Market Access

VegExportNotes are designed by AUSVEG specifically for levy-paying vegetable growers to enhance industry trade knowledge. The content provided in VegExportNotes is based on the best available information at the time of publishing.




What is Market Access?

Market access is critical to determine where you can send your product. There are various conditions, systems, rules, and regulations that underpin market access due to biosecurity or pest and disease concerns. Understanding which markets your products have access to is an important consideration for growers involved in or looking into export.

Market access involves often lengthy negotiations between the government of two countries to determine and agree the best possible way to protect biodiversity and minimise biosecurity risk. A market access negotiation for one Australian fruit or vegetable can take a number of years to achieve a viable outcome.

How does market access work?

Under the *Export Control Act 1982*, fresh vegetables are classified as 'prescribed goods'. Products prescribed in the legislation are regulated by the Department of Agriculture, Water and the Environment.

If you want to export, you must meet all export rules and regulations set by Australia and all conditions set by the importing country.

In some countries, fresh vegetables are listed as prohibited imports for reasons linked to biosecurity, pest or disease concerns.

A market with access will be classified as either a 'protocol' or 'non-protocol' market. The National Plant Protection Organisation (NPPO) in each

country is responsible to ensure all import conditions, technical treatments, and additional declarations or endorsements are met before the product can enter the market. In Australia, the NPPO is the Department of Agriculture, Water and the Environment.

A Phytosanitary Certificate is a standard importing requirement in most markets. It is a requirement in addition to other conditions set out by the importing country. Most non-protocol markets require a Phytosanitary Certificate for fresh vegetable imports. You should review the Manual of Importing Country Requirements (MICO)R database to determine whether your target market requires a Phytosanitary Certificate or additional conditions to be met prior to sending a shipment.



What is the difference between a protocol and non-protocol market?

Protocol Market

A protocol market is a market that requires a range of rules, regulations, and technical treatments to ascertain, prevent, and eradicate plant pest and diseases for the products to enter the market. These conditions are in addition to the standard importing country requirements such as a Phytosanitary Certificate. They act as biosecurity measures to protect the agricultural sector and biodiversity of the country. Countries that have an existing local agricultural sector are more likely to be protocol markets. In 2019, approximately 5% of Australian vegetable exports were to protocol markets.

Non-protocol Market

A non-protocol market is easier for new exporters to enter as the import conditions are typically easier to comply with. Countries with limited or no agricultural productions are typically identified as non-protocol markets.

The Australian vegetable industry exports to over 50 countries and enjoys good market access. Most fresh vegetable exports are undertaken via a less restricted trade pathway to non-protocol markets. In 2019, approximately 95% of Australian vegetable exports were to 'non-protocol' markets.

Which are the protocol and non-protocol markets for Australian vegetable industry?

There are currently **over 40 export protocols** for Australian fruit and vegetable exports. The vegetable industry has **4 existing protocol** markets:

- **Carrot** protocol for export to **Taiwan**, except from Victoria and Tasmania
- **Potato (seed)** protocol for export to **Thailand** and **Indonesia**
- **Potato (ware)** protocol for export to **South Korea**

Australia-New Zealand Bilateral Quarantine Arrangement (BQA)

covers 19 horticultural products (fruit fly hosts), including the following 6 vegetables: **capsicum, cucumber, pumpkin, squash, tomato, zucchini.**

Important:

Breaches of the importing country requirements, or non-compliance to biosecurity measures or agri-chemical usage may lead to shipments being detained, destroyed at cost, or in extreme circumstances the country may impose stricter import conditions on Australian exports.

How is market access different to a Free Trade Agreement?

Having a Free Trade Agreement (FTA) in place does not automatically grant access for your product to international markets. It is critical to understand that market access and FTAs are separate elements in an international trade context.

A good example to look at is the **China – Australia Free Trade Agreement (ChAFTA)**. When ChAFTA entered into force in 2015, all tariffs on vegetable products will be eliminated by 1 January 2019. To date, there are limited vegetable commodities that can be exported to China, including lettuce and asparagus. While the tariff elimination brings benefits to lettuce and asparagus growers, other vegetables do not enjoy the same benefit from the implementation of the ChAFTA as they do not have market access to enter China.

What does this mean to you?

AUSVEG is constantly working to improve market access for vegetable commodities in international markets. By regularly identifying opportunities and submitting official applications, AUSVEG aims to ensure new markets become available for Australian vegetables into the future. Growers are also reminded to check Manual of Importing Country Requirements (MICO_R) regularly to ensure that importing country requirements are met.



Asia Technical Market Access Summary



■ Access
 ■ Conditional
 ■ No Access

Current as at August 2020

PRODUCT	Hong Kong	Malaysia	Singapore	Vietnam	Indonesia	New Zealand	South Korea	Thailand	Taiwan	Japan	China
Beans 070820	Open Unregulated	Open Unregulated	Open Unregulated	Open with Phytosanitary Certificate	Open with Phytosanitary Certificate	Open with Phytosanitary Certificate	Open with Phytosanitary Certificate	Open with Phytosanitary Certificate	Open with Phytosanitary Certificate	TAS only	Prohibited
Broccoli 070410	Open Unregulated	Open Unregulated	Open Unregulated	Open with Phytosanitary Certificate	Open with Phytosanitary Certificate	Open with Phytosanitary Certificate	Open with Phytosanitary Certificate	Open with Phytosanitary Certificate	Open with Phytosanitary Certificate	Open with Phytosanitary Certificate	Prohibited
Cabbage/Leafy Veg 070490	Open Unregulated	Open Unregulated	Open Unregulated	Open with Phytosanitary Certificate	Open with Phytosanitary Certificate	Open with Phytosanitary Certificate	Open with Phytosanitary Certificate	Open with Phytosanitary Certificate	Open with Phytosanitary Certificate	Open with Phytosanitary Certificate	Only for Cabbage, Lettuce 070511 or Komatsushita 070999
Capsicum 070960	Open Unregulated	Open with Import Permit & Phytosanitary Certificate	Open Unregulated	Prohibited	Permitted from PFA TAS & Riverland or Protocol IRR, CT, Fum or VHT	IRR or Fumigation, or PFA (Ord River)	Prohibited	Prohibited	Prohibited	Prohibited	Prohibited
Carrot 070610	Open Unregulated	Open Unregulated	Open Unregulated	Open with Phytosanitary Certificate	Open with Phytosanitary Certificate	Open with Phytosanitary Certificate	TAS only registered facility	Open with Phytosanitary Certificate	VIC & TAS open other states subject to protocol	Open with Phytosanitary Certificate	Prohibited
Celery 070940	Open Unregulated	Open Unregulated	Open Unregulated	Open with Phytosanitary Certificate	Open with Phytosanitary Certificate	Open with Phytosanitary Certificate	Open with Phytosanitary Certificate	Open with Phytosanitary Certificate	Open with Phytosanitary Certificate	Open with Phytosanitary Certificate	Prohibited
Lettuce 070511	Open Unregulated	Open Unregulated	Open Unregulated	Open with Phytosanitary Certificate	Open with Phytosanitary Certificate	Open with Phytosanitary Certificate	Open with Phytosanitary Certificate	Open with Phytosanitary Certificate	Open with Phytosanitary Certificate	Open with Phytosanitary Certificate	Only for Lettuce 070511
Onion 070310	Open Unregulated	Open Unregulated	Open Unregulated	Open with Phytosanitary Certificate	From areas not affected by Brown Wheat Mite otherwise IRR	Open with Phytosanitary Certificate	Open with Phytosanitary Certificate	Open with Phytosanitary Certificate	Open with Phytosanitary Certificate	Open with Phytosanitary Certificate	Prohibited
Potato 070190	Open Unregulated	Open Unregulated	Open Unregulated	Open with Phytosanitary Certificate	Open with Phytosanitary Certificate	Prohibited	NSW, SA, TAS only with protocol	Restricted to processing only	Prohibited from Vic & WA	Prohibited	Prohibited
Pumpkin 070993	Open Unregulated	Open Unregulated	Open Unregulated	Open with Phytosanitary Certificate	Permitted from PFA TAS & Riverland or Protocol IRR, CT, Fum or VHT	Prohibited	Prohibited	Prohibited	Prohibited	Open with Phytosanitary Certificate	Prohibited
Sweet Potato 071420	Open Unregulated	Open Unregulated	Open Unregulated	Open with Phytosanitary Certificate	Open with Phytosanitary Certificate	Open with Phytosanitary Certificate	Open with Phytosanitary Certificate	Open with Phytosanitary Certificate	Prohibited from NSW & QLD	Prohibited	Prohibited

Source: MiCoR - micor.agriculture.gov.au

Middle East Technical Market Access Summary



■ Access
 ■ Conditional
 ■ No Access

Current as at August 2020

PRODUCT	Bahrain	Oman	Kuwait	Qatar	Saudi Arabia	United Arab Emirates
Beans 070820	Open with Phytosanitary Certificate	Open with Phytosanitary Certificate	Open with Phytosanitary Certificate	Open with Phytosanitary Certificate	Open with Phytosanitary Certificate	Open with Phytosanitary Certificate
Broccoli 070410	Open with Phytosanitary Certificate	Open with Phytosanitary Certificate	Open with Phytosanitary Certificate	Open with Phytosanitary Certificate	Open with Phytosanitary Certificate	Open with Phytosanitary Certificate
Cabbage/Leafy Veg 070490	Open with Phytosanitary Certificate	Open with Phytosanitary Certificate	Open with Phytosanitary Certificate	Open with Phytosanitary Certificate	Open with Phytosanitary Certificate	Open with Phytosanitary Certificate
Capsicum 070960	Open with Phytosanitary Certificate	Open with Phytosanitary Certificate	Open with Phytosanitary Certificate	Open with Phytosanitary Certificate	Open with Phytosanitary Certificate	Open with Phytosanitary Certificate
Carrot 070610	Open with Phytosanitary Certificate	Open with Phytosanitary Certificate	Open with Phytosanitary Certificate	Open with Phytosanitary Certificate	Open with Phytosanitary Certificate	Open with Phytosanitary Certificate
Celery 070940	Open with Phytosanitary Certificate	Open with Phytosanitary Certificate	Open with Phytosanitary Certificate	Open with Phytosanitary Certificate	Open with Phytosanitary Certificate	Open with Phytosanitary Certificate
Lettuce 070511	Open with Phytosanitary Certificate	Open with Phytosanitary Certificate	Open with Phytosanitary Certificate	Open with Phytosanitary Certificate	Open with Phytosanitary Certificate	Open with Phytosanitary Certificate
Onion 070310	Open with Phytosanitary Certificate	Open with Phytosanitary Certificate	Open with Phytosanitary Certificate	Open with Phytosanitary Certificate	Open with Phytosanitary Certificate	Open with Phytosanitary Certificate
Potato 070190	Open with Phytosanitary Certificate	Open with Phytosanitary Certificate	Open with Phytosanitary Certificate	Open with Phytosanitary Certificate	Open with Phytosanitary Certificate	Open with Phytosanitary Certificate
Pumpkin 070993	Open with Phytosanitary Certificate	Open with Phytosanitary Certificate	Open with Phytosanitary Certificate	Open with Phytosanitary Certificate	Open with Phytosanitary Certificate	Open with Phytosanitary Certificate
Sweet Potato 071420	Open with Phytosanitary Certificate	Open with Phytosanitary Certificate	Open with Phytosanitary Certificate	Open with Phytosanitary Certificate	Open with Phytosanitary Certificate	Open with Phytosanitary Certificate

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