

Final Report

Table grape export readiness and market access – ATGA

Project leader:

Jeff Scott

Delivery partner:

Australian Table Grape Association

Project code:

TG17000

Project:

Table grape export readiness and market access (TG17000)

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Content	
Content	3
Summary	4
Public summary	4
Keywords	6
Introduction	7
Methodology	7
Outputs	9
Outcomes	13
Monitoring and evaluation	30
Recommendations	32
Refereed scientific publications	
r! Bookmark not defined.	Erro
References	
r! Bookmark not defined.	Erro
Intellectual property, commercialisation and confidentiality	
r! Bookmark not defined.	Erro
Acknowledgements	
r! Bookmark not defined.	Erro
Appendices	33

Summary

The project was implemented across 3 years from 2017/18 to 2019/20. The project commenced with the establishment of a skills-based market access export advisory committee to assist in the development of priorities and annual work plans. Implementation of the work plan was based on the industry's market access strategies (see Table Grape Export Strategic Plan 2014-2019). The ATGA Chief Executive Officer, Jeff Scott, was designated as the industry's representative and was tasked with project implementation.

Project activities included:

- Closely collaborating with the export advisory committee, and provide a point of expert advice to the Department of Agriculture, Water and the Environment (DAWE), other relevant state governments, exporters and other stakeholders, Horticulture Innovation Australia (Hort Innovation), Austrade and industry growers through regional meetings and grower workshops
- Providing input into the maintenance of an industry Export Strategy by Hort Innovation detailing market access, improvement and development priorities
- Provide input into Hort Innovation's market development programs in line with priorities identified in the Export Strategy and outcome 1 of the Strategic Investment Plan
- Provide input into the development of training materials for a broad multi-industry export training program aligned to the export strategy
- Providing input into the development of Export Quality Standards
- Facilitating the logistics and providing assistance to enable DAWE's export registration and audit of export facilities
- Building industry capability through conducting compulsory annual export information seminars and the implementation of an export registration system, educational workshops and materials, outbound trade missions and participation in relevant trade shows
- Facilitating the logistics and providing assistance to enable the Department's registration and audit of export facilities
- Building relations with foreign markets through inbound trade missions, trade shows, market visits, meetings with foreign government officials and local table grape industry groups in selected export markets and closely collaborating foreign inspections
- Anticipating and being highly responsive to market access issues
- Ensuring industry growers are informed through industry publications, regional meetings and through the industry's state organisational infrastructure ensuring the continuity of knowledge within the industry
- Working collaboratively with other horticulture sectors
- Ensure the continuity of knowledge within the industry.

The successful implementation of this project has been essential in the growth of the industry. The industry has been cohesive in approaching export market access, improvement and maintenance as a priority, essential for its growth. The strength of the industry, which is its agility to appropriately respond to export issues and opportunities, is clearly demonstrated through the substantial outcomes achieved in this project:

1. Strengthened relationships and improved consultation with key stakeholders to facilitate market access for table grape exports
2. Development of industry relevant resources and tools to support table grape growers access export markets
3. Increased skills, knowledge and capacity of participating table grape growers in the compliance of export protocols
4. Increased awareness and knowledge amongst the table grape industry in existing and developing export market opportunities
5. Increased grower participation in both China and Thailand on-shore cold treatment by increased number of facilities and registrations

6. The conducting of trade seminars annually in Korea and Japan as well as The Philippines, Thailand Vietnam and Indonesia over the past 3 years
7. Attendance at relevant trade shows in Dubai, Hong Kong Japan and China over the past 3 years
8. Improved adherence to existing protocols for China, Japan, South Korea, Vietnam and Thailand has been achieved through the established export registration program which included educational workshops and materials and the development and use of an export registration software endorsed by DAWE. 100% of export registrants were approved by DAWE each year.
9. Increased workshop attendance by 35% each year reflects increased awareness of the program and its relevance to stakeholders. Growing confidence in the overall export registration system conducted by ATGA in collaboration with DAWE is evidenced by increased registration rates by 15% each year.

From the start of the project to its end (2017-2020), the industry has enjoyed a 43% increase in export volume, 65% increase in export value and a 67% increase in unit price.

Public summary

<Delete this section if not required. Complete this section if the project or aspects of the project are confidential. This summary should provide a project overview stripped of all confidential information that is suitable for public dissemination>

Keywords

<Insert keywords, for example: lettuce; Integrated Pest Management; thrips. For more advice, refer to Attachment A3: Final Report guide>

Introduction

The growth in table grape production has resulted in increased domestic market pressure with the risk of oversupply in the domestic market at peak season each year. Australian table grape growers have seen the positive effects of increased export trade on the industry's overall profitability. In recent years, the industry gained access into China, Japan and South Korea. Leading up to this project, FTA's were signed with China, Japan and South Korea which the industry has capitalised on. Tariffs have now reduced to zero in most countries and this has benefited table grape growers exporting to those countries.

This project was implemented to achieve the following objectives:

- Develop industry preparedness and vigilance in strictly adhering to export protocols
- Address the need to increase export opportunities
- Build on previous industry successes in the area of market access, market improvement and market maintenance
- Ensure consistency with industry's export strategies for 2014-2019.

Methodology

The following were achieved to deliver the necessary outcomes envisioned for this project:

1. Established a skills-based market access export advisory committee to assist in the development of priorities and annual work plans
2. Implemented an action plan in keeping with the industry's market access strategies (see Table Grape Export Strategic Plan 2014-2019)
3. Ensured collaboration with and participation of key stakeholders:
 - Export supply chain: growers, exporters, importers, wholesalers and retailers
 - Australian Government: Department of Agriculture Water and Environment (DAWE), Department of Foreign Affairs and Trade (DFAT) – Australian embassies in export countries (Australian Ambassador, Agricultural Counsellor), Austrade
 - Victorian Government Department of Jobs, Precinct and Regions – Food and Fibre Global Trade (DJPR)
 - Industry Organisations: Horticulture Innovation Australia (HIA), Australian Table Grape Association (ATGA), Plant Health Australia (PHA), Australian Horticulture Exporters and Importers Association (AHEA)
 - Foreign government in export markets
 - Local industry groups in export markets.

The project was implemented across 3 years from 2017/2018 to 2019/2020. The methodology used in achieving project outcomes was as follows:

1. Participation of industry representatives in overseas official and/or industry delegations to progress market access issues and to forge and maintain working relationships with trade partners.
2. Participation in relevant Australian government agency meetings including DFAT, Biosecurity Australia and Plant Export Department which are now part of DAWE, and Austrade.
3. Hosting of international trade and/or technical delegations to progress improvements to existing protocols.
4. Membership and participation with Plant Health Australia (PHA), the national Vine Biosecurity Committee and the Victorian Biosecurity Committee.
5. Pre-departure research on market conditions in relevant export countries.
6. Development of a market strategy to engage in the emerging supermarket trade in China, Japan and Korea. Export pathways were established which included developing product lines, distribution channels and the logistics of participating in those channels.
7. Forging relationships with appropriate importers/traders in the emerging markets to determine the consumer preferences on varieties of table grapes.
8. Market research on priority export markets – understanding language and culture that may lead to a better

insight into opportunities for Australian table grapes

9. Industry workshops to assist Australian supply chain stakeholders in understanding market opportunities and protocol requirements.
10. Participation at trade fairs in Asia, China and the Middle East.

Outputs

4.1 MARKET ACCESS ADVISORY COMMITTEE

A skills-based export advisory committee was established to discuss and prioritise all export market access and maintenance issues and activities. Members of the committee included J Scott, Chair (ATGA CEO); J Argiro (ATGA Chair and grower), R Lomman (ATGA Board Member and grower), David Minnis (Exporter), V Dimasi (ATGA Board Member and grower), D Smith (ATGA Board Member grower and exporter) N Muraca (ATGA Board Member and grower).

This committee was comprised of people with diversified skills with export related experience and knowledge. The committee met on a regular basis, either face to face or by teleconference, discussing export market access issues or planning future activities on market access or maintenance. Key markets in focus were China, Japan Korea, Thailand, Indonesia and Vietnam. Ongoing advice and input from this committee have been valuable in ensuring the relevance and effectiveness of market access programs to the industry. This committee has been providing advice for the past 6 years.

4.2 MARKET ACCESS COORDINATION, MEETINGS AND WORKSHOPS

Jeff Scott conducted regular briefings for DAWE on each season's table grape export trade and future export programs based on developments in protocols and work plans for regulated export markets. He also regularly participated in Horticulture Export Industry Consultative Committee (HEICC) meetings, instrumental in developing the current industry export strategic plan. HEICC is an initiative by the DAWE to foster and develop relations with the Plant Export Division of DAWE and provide advice on export-related policies and procedures including feedback on the cost recovery fees and charges and the newly legislated Accredited Properties Act.

Participation in teleconferences and meetings with DAWE, Hort Innovation iTAP and other horticulture export industry representatives provided a platform to address market access issues with Indonesia, Thailand, Vietnam, Japan, South Korea, India, the USA and New Zealand. Meetings and teleconferences were also conducted with the Victorian Government DEDJTR. Issues discussed were on:

Thailand – Irradiation acceptance and improvements to on-shore cold treatment requirements

Indonesia – Acceptance of import quotas, in-transit cold treatment, probe placement and removal of fumigation requirements

Vietnam – Acceptance of the new X-Ray irradiation plant in Melbourne, improvements to import permits

Japan – Acceptance of additional varieties

Korea – Removal of the need for international Inspectors and changes to pre-shipment inspection requirements

USA – Acceptance of systems-based management for Light Brown Apple Moth (LBAM)

New Zealand – Acceptance of the new X-Ray irradiation plant in Melbourne and the co-ordination of international inspectors

India – Acceptance of in-transit cold treatment

The ATGA attended various meetings/workshops such as:

- Airport metal detection workshops
- Plant Health Australia industry forums and biosecurity meetings
- Victorian Viticulture Biosecurity Committee meetings
- Australian government fruit fly meetings
- Irradiation workshops
- DFAT Seasonal Worker program
- COVID-19 with the federal and state governments
- Immigration Department on labour requirements and undocumented workers

Meetings were held with agricultural counsellors in China, Japan, South Korea, Vietnam, Malaysia, Indonesia, Thailand, Philippines and the Middle East as well as with the Australian Ambassadors in Japan, Thailand, Vietnam and the Philippines.

The ATGA also worked with the new X-Ray irradiation plant in Melbourne to be accepted domestically and internationally.

4.2.1 Foreign Market Industry Relations

The table grape industry was a signatory to the Memorandum of Understanding (MOU) with CIQA which took place at China FVF 2015. Other signatories included the Summerfruit, citrus, cherry, and the apple and pear industries. The MOU was intended to foster relationships and develop trade between both countries. ATGA presented its strategies on cooperative collaboration between table grape industries of both countries.

To foster the MOU, the ATGA attended a forum, held in Beijing, with AQSIQ and CIQ in 2019. The forum's agenda included presentations from both countries with the ATGA being able to present an update of the Australian table grape industry and to offer further activities in support of the joint co-operation between the 2 countries. China advised of its new structure where it is combining ASQIQ and CIA into one organisation GACC. The ATGA presented information on the new X-Ray irradiation facility in Melbourne and invited GACC to attend the word Irradiation forum in Melbourne the following year. This was warmly received by GACC.

The ATGA also met with representatives from Japan MAFF in January 2018, January 2019 and December 2019, South Korean APQA in January 2018, January 2019 and December 2019, Vietnam's MARD in February 2019 and December 2019 and Thailand's DOA in February 2019 and Indonesia's MA in December 2019. These meetings were based around the table grape industry gaining improved market access into each of those countries and to discuss current issues with these countries that were restricting trade. Japan MAFF were understanding of additional varietal access for Australian grapes but needed to work through the process of Mangoes varietal access first. South Korea verbally agreed to withdraw the requirements for pre-shipment inspections by Korean inspectors and Thailand was accepting of irradiation as a post-harvest treatment but needed to work through the access to Persimmons first.



4.2.2 Inspections by Foreign Government Representatives

International government inspectors arrived in Australia and provided excellent feedback to the Australian government. These inspections have been coordinated and organised by the ATGA.

The ATGA organised and logistically supported market improvement and trade development work with Thailand, specifically on onshore cold treatment facility approval. Eight facilities from Melbourne, Mildura and Robinvale expressed interest to be verified by Thailand as having onshore cold treatment facilities. One Thai inspector was accompanied by Jeff Scott to audit the eight premises during a two-week stay in Australia. The verification visit was also attended by DAWE officials.

Historically a single Korean inspector was organised to come to Australia. Due to increased export demand, two inspectors were invited to Australia and coordinated by the ATGA during the life of this project to verify the trade sent to South Korea. The ATGA organised the inspector's logistics from South Korea in conjunction with South Korean government department in Seoul. The inspectors were in Australia for 60 days overseeing consignments to South Korea. Official meetings were conducted with the inspectors regarding market improvements and development with the inspectors reporting back to Seoul on a daily basis. The objective of the meetings was to have market improvements occur as a result of the discussions at the meetings. As a result of these meetings Korea agreed to suspend the protocol inspection requirements of 2% plus supervision of container loading to just a 600-bunch inspection. This decreased the inspection time from 2-3 hours per inspection to just 20 minutes each.

The Japan verification audit of table grapes and citrus in Mildura and the Riverland was also coordinated in 2017 and 2018.





4.3 GROWER ACTIVITIES

4.3.1 Online Platform for Export Registrations and Mapping

Continued up-upgrades and efficiencies were made to the on-line export registration platform in the form of multi logins, ability to download a pest monitoring record and upload all types of files to allow third party agronomists to upload their pest monitoring records. A change was made to the declaration by the grower to ensure it complied with the new Accredited Properties legislation.

The system facilitated the following:

- Online registrations by growers and pack houses who were interested in table grape exports for China, Japan, South Korea, Vietnam and Thailand
- Desk top audit of the registrations
- Scheduling of physical audits of growers via the mapping system, clustering properties by location to save on travel time and generate efficiencies.
- Online report generation to replace manual analysis of all hard copy data
- Automated grower notifications through email and text messaging of audit outcomes and requests for additional information
- Trap locations on individual blocks for LBAM
- GPS destination meeting points for Audit services personnel
- Pest monitoring recording allowed DAWE to monitor the pest monitoring system and to notify growers if they were falling behind on their fortnightly recording. Growers could download the pest record spreadsheet, complete it and then upload to their registration record.
- Self-paced on-line training on pest monitoring requirements

4.3.2 Online Export Manual

Enhancements to the online export manual and information sheets were undertaken, which provided up-to-date and relevant information to support growers in their understanding of the export registration system and keeping

growers up to date with protocol and work plans for every regulated market which supported growers to successfully pass the DAWE export audit. Growers were provided with Standard Operating Procedures for their picking and packing process, their pack house operations, and a training manual for their staff.

4.3.3 Workshops and Seminars

Workshops have been held in Mildura, Robinvale, St George and Emerald in Queensland and Swan Valley in Perth in 2018 and 2019 but were postponed due to COVID -19 in 2020. At the Mildura and Robinvale workshops representatives of DAWE attended. Presentations were given by Jeff Scott and DAWE officials. The presentations contained information for growers on gaining an understanding of export requirements for the upcoming harvest season. Details of any changes to the protocol requirements and work plans were presented to growers, pest monitors and exporters. Updates on the Accredited Properties were also presented by DAWE and issues from the previous audits were explained. The workshops finished off by taking the growers through the registration process required by DAWE under ATGA supervision.





4.3.4 Industry and Market Intelligence

Industry and Market intelligence including trade statistics were an on-going monitoring practice to further ensure the effectiveness of the industry's export strategies and action plans. Analysis of these data was regularly presented in grower meetings to assist in the growers' respective business planning. Weekly market reports were distributed to growers and exporters throughout the export season and monthly export statistics updates were also provided to all stakeholders along with an annual export analysis.

JiangNan Market Report														
DATE:	Mar. 02, 2020		Monday		Cloudy		Temp.:		18-26		℃			
ITEM	COLOR	ORIGIN	BRAND	VARIETY	PACKAGE	N. W.	SIZE	Selling Price	SIZE	Selling Price	Movement			Mark.
											good	so-so	poor	
Grape	Black	SA	Angon	S13	Carton	4.5kg	XL	95-90				X		New 1/C
Grape	Black	SA	Safpro	Sugrathirtyfive	Carton	4.5kg	XL	130-125			X			New 1/C
Grape	Black	SA	Geo	Autumn royal	Carton	4.5kg	L	120-115			X			New 1/C
Grape	Black	SA	Vdmf	Black seedless	Carton	4.5kg	L	120-115			X			New 1/C
Grape	Red	SA	Alliance	Crimson	Carton	4.5kg	L	120-115			X			New 1/C
Grape	Red	SA	Safe	Crimson	Carton	4.5kg	L	120-115			X			New 1/C
Grape	Green	Aus	Romeo's best	Thompson	Styro	9kg		330-300				X		New 1/C
Grape	Red	Aus	TG251	Crimson	Styro	9kg		300-280						New 1/C
Grape	Red	Aus	Sunvale produce	Crimson	Styro	9kg		390-380				X		New 11
Grape	Red	Aus	Fruitful trading	Crimson	Styro	9kg		310-300				X		New 26
Grape	Red	Aus	GQ	Crimson	Styro	9kg		310-300			X			New 26
Grape	Red	Aus	Sweet gold	Crimson	Styro	9kg		360-340				X		New 20
Grape	Red	Aus	TG102	Crimson	Carton	9kg		300-290				X		New 26
Grape	Red	Aus	Pearl	Long crimson	Styro	9kg		370-360				X		New 1/C
Grape	Red	Aus	Cordoma	Long crimson	Styro	9kg		380-360				X		New 8 P
Grape	Green	Aus	TG316	Menlode seedless	Carton	9kg		370-360				X		New 20
Grape	Black	Aus	Crillo	Sweet sapphire	Styro	9kg					X			New 1/C
Grape	Green	Peru	Red dragon	Sweet globe	Wooden	4.5kg	SVX	135-130					X	New 2/C
Grape	Green	Peru	Sn miguel	Sweet globe	Plastic	4.5kg		110-105			X			New 1/C
Grape	Green	Peru	Riachuelo	Sweet globe	Wooden	7.3kg	JJ	310-300	J	285-280	X			New 2/C
Grape	Green	Peru	Gini	Sweet globe	Wooden	7.3kg	J	300-290	XL	280-270		X		New 1/C

4.4 TRADE SHOWS AND CONFERENCES

4.4.1 Asia Fruit Logistica (AFL) in Hong Kong 2018-2019

AFL is Asia's largest fresh food trade show attracting large importers from all over the world but most especially in Asia. The table grape industry represented by ATGA has been attending this trade show for several years and long-lasting relationships have developed. The industry connected with Australian exporters and the growth in Chinese exports has stemmed from attending AFL. The trade show lasts for 3 days and generally all in attendance have their time fully booked with enquiries from existing importers and potential new importers wanting Australian grapes. Each year, Australia Fresh and now called Taste Australia, organised a formal networking function. In earlier years, the industry represented by Jeff Scott, had the opportunity to address those in attendance. It is a very worthwhile and effective way to communicate with all Asian importers. 70 table grape growers attended in 2018, 80 in 2019. The 2020 Asia Fruit Logistica was cancelled due to COVID-19. In 2018 and 2019, the ATGA expanded their show floor space and invited interested growers and exporters to be part of the ATGA stand. Up to 4 grower/exporters participated each year. Growers have provided positive feedback on ATGA-coordinated meetings with importers, distributors and retailers as these meetings facilitate trade.



4.4.2 China World Fruit & Vegetable Fair (China FVF) in Beijing 2018 2019

China (FVF) is coordinated by CIQA and it a trade show that helps to strengthen Australia's relationships with two key bodies in China for market access: AQSIQ and CIQA. The beneficial aspect of participating in this trade show is the networking dinner with AQSIQ, organised by Australia Fresh. This function is an ideal way to informally discuss any concerns and issues about China market access. In 2019 there was a formal information sharing work shop with AQSIQ and CIQ. Here China announced the amalgamation of the 2 departments into one, now known as GACC. China FVF was not held in 2020 due to COVID-19 restrictions.

4.4.3 Japan Foodex 2018, 2019

Discussions with existing and potential new importers in Japan proved to be very beneficial to the rise of Australian table grape exports. Access to Japan was granted by MAFF Japan in March 2014. Consistent participation at Japan Foodex each year, developed and strengthened the industry's network of influential importers and distributors, which consequentially resulted in a significant growth in exports to this market.



4.4.4 Gulfood Dubai 2018, 2019

The table grape industry participated in Gulfoods in 2018 and 2019. The Middle East countries have become a major export destination for the industry. One-on-one meetings were held with new and potential importers from the Middle East, discussions of which were very positive. In 2018, interests in direct investment in table grape properties in Sunraysia were received. Interested was on green field development of a significant size. Meetings will be organised when they visit Australia.



4.4.5 Taste Australia 2018, 2019, 2020

The table grape industry has been participating in the Taste Australia campaign, coordinated Hort Innovation. Countries covered were China, Japan, South Korea, Thailand, Vietnam, Indonesia and the Philippines 2018-2020. The program expanded from 3 countries in 2017 to include the largest exporting and emerging export markets for table grapes. The program consisted of meeting with targeted importers, retailers and distributors. The ATGA took the opportunity to share industry information on the Australian table grape industry as well as provide advice on product handling, storage and packaging. Included in the 2019 program was a meeting with the Vietnamese biosecurity department where ATGA gave a presentation on the industry. Presentations were also given in Thailand and the Philippines.



4.5 TABLE GRAPE TRADE SEMINARS

The ATGA commenced trade seminars in 2018 going to Japan and South Korea. The cities of Tokyo, Osaka and Seoul were targeted as market access had recently been granted to those countries. The events were co-organised by Austrade in each of the cities. The major importers, distributors and retailers were all invited to the seminars where presentations were given by the CEO of the ATGA advising all about the Australian table Grape industry, export statistics and capabilities and innovations being adopted by the industry to enhance quality production. Hort Innovation Trade and Promotions Manager also presented on the promotional and advertising campaign and support that would be provided to retailers for the coming export season. A similar theme was undertaken in 2019 and 2020 but expanded to include not only Japan and South Korea but also to Vietnam, Thailand and Indonesia.

Grower/exporters were invited to attend and those that participated gained new commercial contacts and export sales. In 2020 over 500 importers distributors and retailers attended the trade seminars.

4.6 INBOUND TRADE MISSIONS

Numerous in-bound trade missions were received and hosted by the ATGA. In-bound trade missions from South Korea, Japan, China, Thailand, Vietnam, Indonesia, Malaysia, Myanmar, Philippines, Singapore and India visited Mildura during the past 3 years. Most delegations included international media attending. In nearly all in-bound missions, the ATGA hosted a networking event with growers and mission delegates in attendance. An industry presentation was delivered by Jeff Scott, who likewise introduced all growers present. For nearly all of the in-bound missions they were given an induction to the Australian table grape industry and visited various table grape properties, meeting with leading growers, packers and exporters to facilitate business to business trade relationships. Various networking functions and meetings were also organised.

4.7 OUTBOUND TRADE MISSIONS AND MARKET VISITS

4.7.1 Trade Mission to China to attend the China International Fruit Conference

Jeff Scott attended the China International Fruit Conference hosted by China Chamber of Commerce of Import & Export of Foodstuffs held in Jiaxing. This was an invitational event to Jeff Scott who was asked to do a presentation at the conference by China Chamber of Commerce of Import & Export of Foodstuffs.

The presentation informed those in attendance of the Australian Table Grape industry, the recent growth in exports and the new varieties that were in production and projected production and export growth for the coming years. The China Chamber of Commerce of Import & Export of Foodstuffs has an agenda to foster international networking and to align importers with exports. It was a 3-day event, with an evening reception dinner held for extensive networking with relevant industry leaders from various Provinces in China.



4.7.2 Trade Mission to India

The delegation was organised by Austrade at the request of interested parties wanting to explore the opportunities of increased exports to India backed by the change of protocol conditions to allow in-transit cold treatment. The delegation started its visit in Delhi. Visitations to wholesale and retail outlets was undertaken with individual meetings with the dedicated international fruit procurer. A meeting at the Australian High Commission with the Agricultural Counsellor and Trade Commissions followed. A departure to Mumbai saw visitations take the delegation to meet with International importing companies, the Agricultural Produce Market Committee and the Bharat Mumbai Container Terminals. Chennai was the last destination again visiting International importers, cold storage facilities and the major wholesalers and retailers with individual meetings at each place. A networking dinner with the major importing businesses concluded the trade mission. The retail outlets did not display a large array of Australian produce as India had not been a preferred export destination to date. The change in the protocol conditions will alter this thinking as a number of potential importers took a great deal of interest and new relationships were created. At all of the arranged meetings Jeff Scott gave a presentation on the Australian table grape industry and the strong prospect of increasing trade in the future.





4.8 COMMUNICATIONS

The Vine is an industry publication which has provided an effective means of communicating various relevant information and program reports to growers and other related stakeholders. Information included export market and trade intelligence analysis, trade statistics, market access developments, activity reports, etc. The ATGA held face to face meetings with growers in all major growing regions communicating all facets of previous export seasons including all market intelligence, export statistics, reports from overseas countries inspection results and rejections, out-turn and receipt of fruit and DAWE reports.

Output Summary

Outputs identified in TG17000 Project Definition & Variation	2017-2018	2018-2019	2019-2020
Commercially applicable protocols and FTAs	Workshops and seminars conducted on grower export registration process in conjunction with DAWE Minimum of 4 face to face meetings with Department of Agriculture, Water and Environment On-going advice via teleconferences with Department of Agriculture, Water and Environment Meetings with Department of Trade and Foreign Affairs Further development strategies for an irradiation plant in Melbourne Meetings with the US Embassy Meeting with the new Agricultural Counsellor to China	Korea agree to suspend the pre-shipment protocol requirement to a more manageable amount of 600 bunch Workshops and seminars conducted on grower export registration process in conjunction with DAWE Minimum of 4 face to face meetings with Department of Agriculture, Water and Environment Further development strategies for an irradiation plant in Melbourne Market improvement for Thailand – onshore cold treatment facility approval Meetings with the US Embassy Meetings with Vietnamese Biosecurity Department Presented strategies on cooperative collaboration with government officials in Vietnam, the Philippines and Thailand	Korea agree to send an additional inspector and continue with the protocol suspension of pre-shipment inspections to 600-bunch India announce the acceptance of In-transit cold treatment New Zealand accept Melbourne' Irradiation facility Workshops and seminars conducted on grower export registration process in conjunction with DAWE Market improvement for Thailand – onshore cold treatment facility approval Minimum of 4 face to face meetings with Department of Agriculture, Water and Environment Meetings with the US Embassy Further development strategies for an irradiation plant in Melbourne Meeting with the new Agricultural Counsellor to Korea

Outputs identified in TG17000 Project Definition & Variation	2017-2018	2018-2019	2019-2020
Annual status report presented at conference	Presentation at the annual Export Table Grape Conference	Presentation at the annual Export Table Grape Conference	Presentation at the annual Export Table Grape Conference
Ongoing detailed status report for internal use	Ongoing advice and input from the Export Advisory Committee	Ongoing advice and input from the Export Advisory Committee	Ongoing advice and input from the Export Advisory Committee
Articles for The Vine Magazine	See Appendix A Asia Fruit Magazine, Fresh Plaza, FruitNet Daily News, ABC	See Appendix A Asia Fruit Magazine, Fresh Plaza, FruitNet Daily News, ABC	See Appendix A Asia Fruit Magazine, Fresh Plaza, FruitNet Daily News, ABC
Trade delegation visits to and from China, Japan, Korea Trade delegation visits to and from Indonesia, Thailand, Vietnam, Philippines and Taiwan	• Trade mission to China with table grape growers and exporters • Trade mission to Japan with table grape growers and exporters • 3 Korean in-bound delegation of importers • 2 Chinese in-bound delegation of importers • 2 Thailand in-bound delegation of importers	• Trade mission to China with table grape growers and exporters • Trade mission to India with Hort Innovation and other commodities • 2 Inbound delegation of Chinese Importers • Inbound delegation of Japanese Importers • Inbound delegation of importers from Japan, Korea, Philippines, Indonesia and China • Inbound delegation of importers from Japan, Thailand, Philippines, Indonesia, Vietnam and China • Trade mission to China in conjunction with CIQ and CIQA	• Inbound delegation of importers from Japan, Thailand, Philippines, Malaysia, Myanmar and China • Inbound delegation of Japanese Importers • Trade mission to Vietnam with table grape growers and exporters
Strategic International Marketing Plan updated for all countries	Meetings with Hort Innovation to provide input into the Marketing plan for Hort Innovation action	Meetings with Hort Innovation to provide input into the Marketing plan for Hort Innovation action	Meetings with Hort Innovation to provide input into the Marketing plan for Hort Innovation action

Outputs identified in TG17000 Project Definition & Variation	2017-2018	2018-2019	2019-2020
Preparation of industry information pack for emerging markets	Development of on-line export manual Grower compulsory education training conducted Development of on-line registration and mapping platform for exports to protocol markets	Development of on-line export manual Grower compulsory education training conducted Development of on-line registration and mapping platform for exports to protocol markets	Development of on-line export manual Grower compulsory education training conducted Development of on-line registration and mapping platform for exports to protocol markets
Guidance of the R&D program on market research proposals based on current information from key export markets	Continued market intelligence reports from China Trade Statistics & Analysis Input into the Hort Innovation SIAP on R & D requirements	Continued market intelligence reports from China Trade Statistics & Analysis Input into the Hort Innovation SIAP on R & D requirements	Continued market intelligence reports from China Trade Statistics & Analysis Input into the Hort Innovation SIAP on R & D requirements
Australian grape producers are provided with input into matter affecting biosecurity involving vine health and table grape production	Regular regional meetings with growers on table grape production, vine health, export strategies, domestic updates: Mildura, Robinvale, Emerald, St. George, Perth, Carnarvon, Riverland	Regular regional meetings with growers on table grape production, vine health, export strategies, domestic updates: Mildura, Robinvale, Emerald, St. George, Perth, Carnarvon, Riverland	Regular regional meetings with growers on table grape production, vine health, export strategies, domestic updates: Mildura, Robinvale, Emerald, St. George, Perth, Carnarvon, Riverland
Minimum of 6 registered establishments audited by the Thailand government auditors in Mildura, Robinvale, Melbourne, Griffith and Shepparton	Visit of Thailand inspectors to audit 6 premises in Melbourne, Mildura and Robinvale.	Visit of Thailand inspectors to audit 4 premises in Melbourne, Mildura and Robinvale	

Outputs identified in TG17000 Project Definition & Variation	2017-2018	2018-2019	2019-2020
Australian visit of a Korean inspector to certify and inspect table grapes destined for Korea Australian visit of a Japan inspector to certify and inspect table grapes destined for Japan and to	Visit of Korean government inspectors Visit of Japanese government inspector	Visit of Korean government inspectors Visit of Japanese government inspector	Visit of 2 Korean government inspector Visit of Japanese government inspector Visit of 3 New Zealand Government inspectors
Attendance and participation in all activities with China CIQA inbound trade development mission Horticulture forum held bi-annually in China and Australia	China FVF 2018, Forum, CIQA & AQSIQ meetings	China FVF 2019, Forum, CIQA & AQSIQ, now known as GACC, meetings and networking functions Continued support of MOU with CIQA Cooperative relationship with Xinjiang Table Grape Association in China Developed on-going relationships with targeted table grape growing provinces in China	Attendance was suspended due to COVID-19
Attendance at Asia Fruit Logistica under the Australia Fresh Pavilion in Hong Kong Attendance and participation at Gulfood in Dubai under the Australia Fresh Pavilion Attendance at Japan Foodex under the Australia Fresh Pavilion	AFL 2018 Japan Foodex 2018 - Taste Australia Gulfood 2018	AFL 2019 Japan Foodex 2019 - Taste Australia Gulfood 2019	Attendance was suspended due to COVID-19

Outputs identified in TG17000 Project Definition & Variation	2017-2018	2018-2019	2019-2020
Attendance and participation at the table grape trade seminars in Japan Korea, Vietnam, Thailand and Indonesia	Trade seminars in Japan and Korea	Trade seminars in Japan, Korea and Vietnam	Trade seminars in Japan, Korea Vietnam, Thailand and Indonesia
Meetings and discussions with PHA to determine the strategy for the table grape industry and Industry Biosecurity Emergency Preparedness for growers in the event of an exotic incursion	Attendance at PHA industry workshop Participation at the Victorian Biosecurity Committee	Attendance at PHA industry workshop Participation at the Victorian Biosecurity Committee Participation at workshop on Emergency preparedness in the event of an exotic incursion	Attendance at PHA industry workshop Participation at the Victorian Biosecurity Committee Participation at workshop on Emergency preparedness in the event of an exotic incursion
Minimum of 2 meetings with DAWE to review previous seasons export outcomes and to evaluate the grower approval platform for enhancements and pest monitoring	Attendance at bilateral discussions and other market access and biosecurity related meetings and teleconferences Participation in Commonwealth committees Participation in meetings with state governments on market access and fruit fly issues Participation in meetings with state governments on issues with MRL's for table grapes	Attendance at bilateral discussions and other market access and biosecurity related meetings and teleconferences Participation in Commonwealth committees Participation in meetings with state governments on market access and fruit fly issues Attendance at traceability standards roundtable discussions Participation in meetings with state governments on issues with MRL's for table grapes	Attendance at bilateral discussions and other market access and biosecurity related meetings and teleconferences Participation in Commonwealth committees Participation in meetings with state governments on market access and fruit fly issues
Minimum of 2 meeting workshops in Mildura, 2 in Robinvale, 2 in Queensland and 2 in Western Australia at the major growing regions	Workshops and seminars conducted on grower export registration process in conjunction with DAWE Attendance numbers: 370 Mildura 190 growers Robinvale 110 growers Queensland 25growers WA 45 growers	Workshops and seminars conducted on grower export registration process in conjunction with DAWE Attendance numbers: 440 Mildura 240 growers Robinvale 130 growers Queensland 20 growers WA 50 growers	Workshops and seminars conducted on grower export registration process in conjunction with DAWE face to face were suspended due to COVID-19. On-line workshops were held open to all interested growers. Unable to access actual numbers

Outputs identified in TG17000 Project Definition & Variation	2017-2018	2018-2019	2019-2020
Evaluate and support grower export approvals	Coordinated DAWE internal audits of grower export facilities	Coordinated DAWE internal audits of grower export facilities	Coordinated DAWE internal audits of grower export facilities
	Meetings with Agricultural Counsellors in China, Japan, Korea, Vietnam, Malaysia, India, Indonesia and the Middle East Meeting with Australian Ambassador in Japan Meeting with Australian Ambassador in Korea	Meetings with Agricultural Counsellors in China, Japan, Korea, Vietnam, Malaysia, India, Indonesia and the Middle East Meeting with Australian Ambassador in Japan Meeting with Australian Ambassador in Korea	Meetings with Agricultural Counsellors in China, Vietnam, Korea and Japan Meeting with Australian Ambassador in Vietnam Meeting with Australian Ambassador in Japan Meeting with Australian Ambassador in Korea Meeting with Australian Ambassador in Thailand

Outcomes

Implementation of TG17000 has delivered positive outcomes as outlined below.

5.1 TARGET OUTCOME 1: DEVELOP AND MAINTAIN TABLE GRAPE INDUSTRY MARKET OPPORTUNITIES TO HAVE IMPROVED AND SUSTAINABLE ACCESS

Develop and maintain table grape industry market opportunities both domestically and exports to increase demand and support the industry's future viability and sustainability

The ATGA has achieved the desired outcomes to provide table grape growers with the opportunity to diversify and expand their export opportunities. There have been regular meetings with industry participants to determine the priority and challenges new and improved access. The outcomes of these meetings have paved the way for negotiations with DAWE. Many meetings have taken place with exporter groups in determining trade volumes and varieties to each country. All this has been done with the Table Grape Export Strategic Plan as a guide. The Export Strategic Plan 2014-2019 has been used to inform Hort Innovation and the Federal government market access agenda and priorities.

The industry in recent years has gained official access to all markets in the world. Prior to commencing this project, Australia received access for table grapes into China, Japan and Korea and improvement of access into these markets were identified in the industry's export plan for 2014-2019. In addition, access issues into Thailand and Vietnam developed while Indonesian trade access continues to be challenging.

The industry has negotiated with good intentions from both Australian and the Korean Government in having Korea accept the current protocol pre-shipment arrangements were a restraint on trade. Korea agreeing to suspend the existing protocol and accept a more manageable inspection rate that did not hinder trade.

Acceptance by India of in-transit cold treatment will provide an opportunity for growers to diversify their export markets.

The industry has gained official access to all markets in the world. Prior to commencing this project, Australia received access for table grapes into China, Japan and Korea and improvement of access into these markets were identified in the industry's export plan for 2014-2019. In addition, access issues into Thailand and Vietnam developed while Indonesian trade access continues to be challenging. Throughout the life of the project and because of long-term efforts in building deeper relations with export market stakeholders and the Australian government, the following are access issues, as identified in the industry's export plan 2014-2017, that have been addressed in part and/or in full:

- The move to allow access for all other table grape varieties into Japan has been included in the agenda for bi-lateral negotiations with Japan. Japan government officials have granted Mangoes access for additional varieties. When this is ratified by Japan MAFF it will open the pathway for table grapes. Varietal access for grapes into Japan is on the agenda at the next bi-lateral meeting
- India have accepted in-transit cold treatment as a post-harvest treatment for fruit fly
- Thailand have accepted irradiation post-harvest treatment for persimmons. This now opens the pathway for grapes to be accepted as well
- New Zealand have accepted the new X-ray irradiation facility in Melbourne for table grapes
- Korea agreed to suspend the current protocol conditions for pre-shipment inspections from 2% plus container loading supervision to only 600 bunch inspection with container supervision.
- Korea have agreed to discuss the removal of the need for international inspectors on shore in Australia
- New Zealand negotiated for the ATGA to supervise and co-ordinate on shore pre-shipment inspections for exports to New Zealand
- Thailand continues to audit and approve on-shore treatment facilities
- Vietnam is in discussion to accept the new X-Ray irradiation facility in Melbourne
- Indonesia continues to recognise Australia as a "Country of Recognition". Audits are conducted every 1-2 years. ATGA has taken maximum effort to consistently pass these audits.
- The US government continues to discuss the removal of the need to fumigate and cold treat on-shore pre-shipments as a mitigation strategy for Light Brown Apple Moth.

The industry continues to forge good relationships with China's CIQA/ GACC – maintaining regular communications via face-to-face meetings across the project's period of implementation. The industry has also collaborated with the Xinjiang Table Grape Association in China and other Chinese grape growing regions. The industry maximised opportunities to further build good relations with foreign officials during inspection visits and have maintained open communications with them post-inspections.

As part of the Chinese and Korean protocol pest monitoring by growers is a mandatory requirement. The ATGA worked TOCAL College in providing a streamlined training package which assisted in increasing the number of registered crop monitors.

In order to accredit growers under the new Accredited Properties legislation the ATGA provided growers with easy-to-follow templates and advice required to pass their external audits to growers. Growers were provided with Standard Operating Procedures for picking and packing, staff training requirements, pack house operating procedures, best practice hygiene procedures, pest monitoring templates and links to DAWE's website to all protocols and work plans.

Specific countries send international inspectors each year to audit the table grape industries procedures and practices for export. Coordination and management of the international audits by overseas inspectors by the ATGA was successful with no disruption to trade

Industries attendance at the federal governments Horticulture Export Industry Consultative Committee has enabled input into streamlining the government process on phytosanitary inspections and certifications resulting in cost savings to the grower.

Timely communication has been provided to growers on protocol and work plan changes as well as any overseas country issues that may have an impact on trade. Regular meetings and contact with exporters has provided important advice to the federal government on market access. Industry efforts have facilitated opportunities to immediately address foreign market concerns, avoiding potential issues escalating into formal government-to-government discussions. These opportunities have also become a platform in showcasing Australia's efforts towards quality excellence.

A number of in-bound trade missions have been coordinated throughout the period of this project with the intent to maintain strong demand for Australian table grapes and created a situation where demands exceeds supply.

5.2 TARGET OUTCOME 2: INCREASE PRICE FOR AUSTRALIAN TABLE GRAPES

Undertake RD&E to provide results that can improve quality to support demand-building strategies and increase price for Australian table grapes

The industry has placed increased efforts in communicating to all growers the need to be aware of food safety standards applied in each and individual countries. Countries such as Korea, Japan, Malaysia, Thailand, China, Vietnam and the Philippines all have throughout the past 3 years advised Australia of changes to their food safety requirements. Whether that be via changes to packaging labelling of export box information or by monitoring of increased chemical use residue on sampling of grapes once landed in country.

The industry has taken the lead in MRL awareness to its growers. In 2018, the industry updated all of its MRL information by individual country and uploaded that to the ATGA website for growers to access. In 2019, the ATGA developed and MRL App which lists every export destination, the chemicals used for production, the active Constituent of that chemical and the withholding period for each individual country. This MRL App has been used by over 400 table grape growers and is now in demand from other exporting industries to have one developed for their growers.

5.3 TARGET OUTCOME 3: BUILD SKILLS CAPACITY AND KNOWLEDGE OF GROWERS

Build skills, capacity and knowledge in the industry, both in new and existing participants, permanent and casual, so that the capability exists to implement RD&E and marketing outcomes and deliver the supply and quality improvements needed by industry.

Each of the growing regions have a coordinated group of industry leaders. Regular meetings were held with these groups to gain their views and to have issues presented to be addressed. This created a well informed and skilled industry with access to the latest technology.

The table grape national magazine, the Vine, and the industry e-newsletter provided an opportunity to report on R&D outcomes, market trends, new opportunities and new threats, resulting in a well-informed and skilled industry on how R & D levies were being invested.

Regular communication to the growers and exporters on a weekly basis on market intelligence for most countries. This enabled the growers and exporters to gain a rudimentary understanding of the quality and volume of the year's exports. It also provided advice on best management practices. This created the ability for improved forward planning and informed market decisions.

The table below shows that the industry workshops delivered over the past 3 years. There was a substantial increase in numbers until the Corona Virus arrived in March 2020 which had an impact on travel and conducting meetings. Please note that this is not an outcome but an output and has also been included in the Output section of this report.

	2017-2018	2018-2019	2019-2020
Workshops	2 – Mildura 1 – Robinvale 1 - St. George 1 – Emerald 2 – Perth/Carnarvon Total: 7	2 – Mildura 1 – Robinvale 1 - St. George 1 – Emerald 2 – Perth/Carnarvon Total: 7	2 – Mildura 1 – Robinvale Total: 3 Communication was via zoom and email
Total workshop attendees	370	440 21% more attendees	The workshops were small in number due to COVID-19
Total Registrations	215 58% of attendees	240 55% of attendees 12% more registrants	254 6% more registrants
Total Audited and Approved	215 100% of registrants	240 100% of registrants	Yet to commence DAWE audits

5.4 TARGET OUTCOME 4: IMPROVED BIOSECURITY PREPAREDNESS

Provide table grape growers with improved biosecurity preparedness against invasive plant pests that could destroy the viability and sustainability of the Australian table grape industry.

Planned strategy by the table grape industry to develop an industry biosecurity emergency preparedness in conjunction with Plant Health Australia.

ATGA continues to be a signatory to the Emergency Plant Pest Response Deed (EPPRD). The industry has participated in simulated exercises with PHA on the process through the EPPRD. A Viticulture Biosecurity Plan has been published.

The ATGA had discussions with Plant Health Australia (PHA) to undertake an industry biosecurity emergency preparedness. PHA have conducted a number of workshops during the length of this project and is still a high priority for the ATGA. Further discussions with PHA to conduct further emergency preparedness workshops are underway.

5.5 TARGET OUTCOME 5: IMPROVED EXPORT REGISTRATION PLATFORM

An improved grower approval platform that satisfies DAWE Requirements

The ATGA developed a software to capture registration and mapping requirements by the DAWE. The software was developed in close collaboration with DAWE. The platform has been effective in

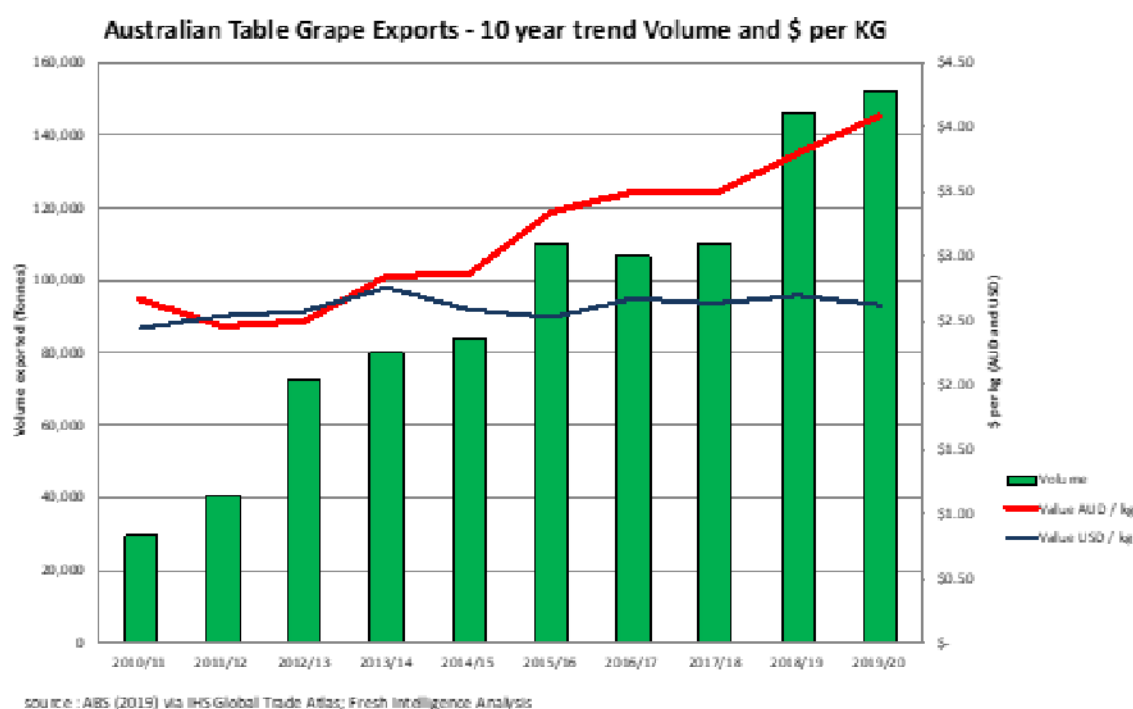
streamlining and automating the registration, mapping and reporting processes as required by DAWE. With the successful implementation of this new system by the Australian table grape industry, relevant DAWE manual systems have been integrated into the platform. With the success of this pilot program, it has been rolled out to other industries. The Summerfruit, Apple and Pear and Mangoes industries are currently adopting the same export registration process, utilising the ATGA software platform. The following season will see the Avocado industry using the system as well.

5.6 TARGET OUTCOME 6: INCREASED EXPORT TRADE

Increased sales of table grapes in Asia and the Middle East

Table grape exports have increased over 400 per cent since the low of 2010/11. While the unit value has also increased, it has been influenced by the exchange rate. The unit value in USD has been steady.

Table grapes have become Australia's largest fresh fruit exporter by value and in 2018-2019 table grapes were the first industry to break the half billion dollar mark for exports.



Over 5 years the Australian Table Grape annual export trend is 8 per cent higher *per year* measured for the 12 months to June. New access to markets for China, Japan, South Korea and Philippines has contributed strongly to the growth along with tariff reductions or eliminations to these markets under Free Trade Agreements.

Monitoring and evaluation

Export growth has been consistently gained throughout the life of this project. From the start of the project to its end (2017-2020), the industry has enjoyed a 38% increase in export volume, 62% increase in export value and a 12.5% increase in unit price. This is quite remarkable considering the high base it is coming from.

Continued education and improvements in best management practice along with increased promotional activity such as the trade seminars and taste Australia events have been instrumental in sustaining the industry's trade growth. Unlike other industries significantly impacted by access issues with various countries, the table grape industry has been able to lessen that impact due to its readiness to respond and diligence in maintaining relevant evidence-based research.

With reference to the Australian Table Grape Export Strategic Plan 2014-2019, market access KPIs were as follows:

Improved adherence to existing protocols each year

There has been zero breach of protocol among relevant markets. The industry has been more vigilant in this area after developing and implementing the DAWE-endorsed table grape export registration program. The education program for relevant growers, exporters and export facility managers has delivered 100% approval rating of registrants by DAWE each year. Increased workshop attendance by 21% each year reflects increased awareness of the program and its relevance to stakeholders. Mildura and Robinvale workshops have delivered this increase which further confirms the export potential and major export interest among growers in this region and surrounds. Growing confidence in the overall export registration system conducted by ATGA in collaboration with DAWE is distinctly seen with registration rates on the rise at 12% in the 2nd year of this project and a further 6% in the following year.

Improved airfreight protocol established by 2018/19

Improvements have been seen in countries such as China, Thailand and Vietnam with on-shore cold treatment acceptance but continued work addressing this KPI is required to further progress in the next few years.

Improved access into Japan, South Korea and China within the next 5 years 2014-2019

The industry has achieved improved access into China which has delivered significant export trade for the industry. China is now the largest export market for the industry. Korea needs to ratify its change to the pre-shipment inspection rates and the possibility of no requirement for international inspectors, while work is still on-going in improving access into other markets and should be included in future industry projects.

Recommendations

The successful implementation of this project has been essential in the growth of the industry. The industry has been cohesive in approaching export market access, improvement and maintenance as a priority, essential for its growth. The strength of the industry, which is its agility to appropriately respond to export issues and opportunities is clearly demonstrated through the substantial outcomes achieved in this project. The following are recommendations in maximising current project gains and maintaining export momentum:

1. Improve airfreight protocols to allow for timely shipments and taking advantage of short windows of opportunities in delivering premium returns to the grower
2. Continue to closely coordinate with DAWE on required market access improvements
3. Vigilance in anticipating, avoiding and addressing market access issues
4. Continue to conduct the grower education program through the export registration process
5. Strengthen relationships with stakeholders in Australia (growers, supply chain stakeholders and Australian government) and in export markets (foreign government, importers/traders, local industry)
6. Explore opportunities to further strengthen ties with foreign markets while providing a better understanding of Australia's preferred protocol regimes. Example: Joint R&D projects on post-harvest sterilization
7. Provide strong representation in foreign inspections
8. Host inbound and outbound missions to further develop trade
9. Strengthen industry presence in key export markets.

Appendices

- Appendix A Australian Table Grape Market Access Matrix
- Appendix B Australian Table Grape Exports by Market 2010-2011 to 2019-2020
- Appendix C USDA Report on Australian Table Grapes 2020
- Appendix D Relevant publications from the *Vine* and *Asiafruit* Magazine

Appendix A

Australian Table Grape Export			Market Access Matrix			Main Competitors		
Export Volume (Tonnes)			2019/20			Chile	South Africa	Peru
National	share		FTA	Current Tariff	Market Access Conditions			
Unregulated Markets								
	Tonnes					Tonnes	Tonnes	Tonnes
Hong Kong	9,152	6%		Nil	Open / Unregulated	293	8,605	38,029
Singapore	3,265	2%	AANZFTA	Nil	Open / Unregulated	62	3,202	37
Malaysia	4,157	3%	AANZFTA	Nil	Open / Unregulated	1,556	6,158	150
Sub Total	16,574	11%				2,038	301	38,216
Regulated Protocol Markets (selected)								
China	62,930	41%	ChAFTA	Nil	Cold Treatment (all)	111,875	6,342	14,545
Indonesia	13,321	9%	AANZFTA	Nil	PFA (Tas / Riverland) Cold Treatment OR Fumigation OR Irradiation OR VHT (Other)	2,098	108	2,711
Japan	11,430	8%	JAEP*	Nil	Cold Treatment (all)	12,308	-	-
Philippines	8,191	5%	AANZFTA	Nil	PFA (Tas) Cold Treatment (Other)	969	74	-
Korea, South	8,155	5%	KAFTA #	Nil	Cold Treatment (all)	24,474	-	9,318
Vietnam	7,867	5%	AANZFTA	Nil	Cold Treatment OR Irradiation (all)	824	4,580	1,168
Thailand	6,966	5%	TAFTA	Nil	PFA (Tas / Riverland) Cold Treatment (Other)	1,741	172	3,604
New Zealand	3,463	2%	CER	Nil	PFA (Tas / Riverland) Cold Treatment (Other)	789	-	593
Taiwan	3,104	2%		20%	PFA (Tas / Riverland) Cold Treatment (Other)	5,088	1,380	3,253
India	168	0%		30%	PFA (Tas / Riverland) Cold Treatment OR Fumigation (Other)	324	14	336
United States	-	0%	AUSFTA	Nil	Fumigation AND Cold Treatment	275,459	2,693	162,823
Sub Total	125,595	83%				435,949	15,362	198,352
Other Markets - Phytosanitary								
MIDDLE EAST								
United Arab Emirates	3,725	2%		Nil	Phytosanitary Certificate	2,378	5,905	457
Saudi Arabia	731	0%		Nil	Phytosanitary Certificate	7,052	2,755	2,196
Kuwait	558	0%		Nil	Phytosanitary Certificate	271	477	-
Qatar	707	0%		Nil	Phytosanitary Certificate	257	619	72
Oman	247	0%		Nil	Phytosanitary Certificate	518	349	54
all other MIDDLE EAST	12	0%				610	1,818	19
Sub Total Middle East	5,980	4%				10,607	14,823	2,798
EUROPE								
	0	0			Phytosanitary Certificate	85,625	244,857	95,813
Russia	0	0		5%	Banned - Geo political	11,002	6,375	9,079
all other	4,051	3%				60,730	52,428	54,405
Total Exports	152,200	100%				605,951	334,146	398,663

^ Tariff rate applied to Australian Table Grapes (080610) in 2020 either Preferential (under FTA) or MFN (if no FTA)

* JAEP* - lower tariff 30/10 - 28/2, tariff reductions from 1/4 each year

KAFTA - preferential tariff 30/11 - 30/4 only (45% at other times no reduction)

Source: APC data via World Trade Atlas; WTO Tariff Database; DEAT; Mission Fresh Intelligence analysis

Appendix B

Australian Table Grape Exports 2010/11 - 2019/20

Market	2010/11	2011/12	2012/13	2013/14	2014/15	2015/16	2016/17	2017/18	2018/19	2019/20	share 2020	5 year trend % to LY
	Tonnes	Tonna	Tonnes	Tonna	Tonnes	Tonna	Tonnes	Tonna	Tonnes	Tonnes		
China	21	215	3,917	218	4,892	29,936	41,114	41,668	56,432	62,930	41.3%	12% 20%
Mums Kung	9,863	17,351	22,265	27,681	29,659	13,097	8,013	8,074	7,955	9,152	6.0%	15%
Indonesia	5,751	6,246	11,111	11,405	13,204	17,363	15,586	16,149	23,167	13,321	8.8%	42% -6%
Japan		-		235	2,394	9,383	8,397	10,882	13,421	11,430	7.5%	-15% 5%
Philippines	1	17	99	1,033	3,079	4,446	3,684	5,310	7,412	8,191	5.4%	11% 17%
Korea, South		-		6	588	256	162	776	3,234	8,155	5.4%	152% 137%
Vietnam	2,538	3,761	7,194	10,257	5	4,285	5,287	4,601	8,344	7,867	5.2%	-6% 16%
Thailand	2,760	2,730	5,156	3,912	4,968	6,219	4,640	5,106	7,455	6,966	4.6%	-7% 3%
Malaysia	1,452	2,059	4,311	3,420	4,389	3,748	3,691	2,894	3,249	4,157	2.7%	28% 3%
United Arab Emirates	1,256	775	3,956	4,145	6,338	7,043	4,180	2,099	2,002	3,725	2.4%	86% -15%
New Zealand	654	1,721	5,626	5,638	3,607	3,182	3,127	3,414	3,526	3,463	2.3%	-2% 2%
Singapore	2,414	3,382	4,444	6,126	5,622	4,521	3,143	3,102	3,487	3,265	2.1%	-6% -8%
Taiwan	403	187	166	902	794	1,946	1,374	1,424	1,645	3,104	2.0%	89% 12%
Bairglaclelr	603	254	451	922	909	606	415	921	1,317	2,620	1.7%	99% 44%
India	293	253	427	719	505	204	279	468	212	168	0.1%	-21% -5%
Russia	665	619	1,404	1,256	-		-			-	0.0%	
oil other	1,186	1,243	1,881	2,290	3,151	3,771	3,573	3,393	3,137	3,686	2.4%	18% -1%
I Total Exports (tonnes)	29,861	40,813	72,409	80,164	84,103	110,007	106,666	110,280	145,995	152,200	100%	4% 8%

Source : ABS dot° via iHS Global Trade Atlas; Fresh Intelligence onalysis

Revised China table grape protocol to yield dividends

Australian table grape growers are looking forward to the coming export season following a win in the bid for a revised protocol for export of table grapes to China.

Australian Table Grape Association (ATGA) Chief Executive Jeff Scott commended the Department of Agriculture and Water Resources Plant Division for their dedication in working with all with all parties to achieve this outcome.

"The main thrust of the changes was to update the table grape protocol and bring it in line with that for Australian nectarines," he said.

"The ATGA and the Plant Division have been working solidly over the last 12 months to get these important revisions to the 2011 protocol in place. China has now agreed to all our requests bar one – irradiation, although that is something we will continue to work towards."

The agreed outcome of changes to the protocol for table grape exports to China is as follows:

- Acceptance of T108A fumigation. This means growers can fumigate with methyl bromide for 2 hours at 21°C followed by 4 days of cold treatment on-shore. Once completed, produce can be air freighted to China.
- In-transit cold treatment for Eastern Australia has gone from 2.1°C for 21 days to 3°C for 18 days.



- Recognition of the Riverland Pest Free Area. This means those growers can now air-freight without the need for postharvest treatment.
- Recognition that Qfly only occurs in the eastern states and Medfly only in Western Australia. Western Australian exporters still need cold treatment of 2.1°C for 21 days.
- Maintained existing list of Pest and Disease of concern.
- Maintained current IPM and pest monitoring recording.

Mr Scott said the revised protocols had been signed, but there was still a process that needed to occur before they were ratified. Until that time growers must continue to operate under the existing protocol.

China is the largest export market for Australian table grapes. During the 2016/2017 season 106,841 tonnes of Australian grapes worth an estimated \$373 million were exported overseas, of which 40% went to China.

Following the changes to the protocol, the ATGA predicts an increase of 20,000t of table grapes will be exported

Major changes to protocol

- Acceptance of T108A fumigation: Methyl bromide fumigation for 2 hours at 21°C followed by 4 days of on-shore cold treatment.
- ITC for Qfly: 18 days cold storage at 3°C
- Recognition of the Riverland as a Pest-Free Area
- Recognition that Qfly only occurs in Eastern Australia and Medfly in Western Australia

to China in the next two to three years. Mr Scott estimates this to be worth an additional 100 million dollars to the industry.

"The revisions to postharvest fumigation are a game changer. It enables growers to airfreight fumigated table grapes directly to market after only 4 days of cold treatment and will open new marketing opportunities in northern China, servicing what are known as second tier cities," Mr Scott said.

"Also of note is the move to allow 18 days cold storage at 3°C. Previously growers had to cold store for 21 days at 2.1°C.

"This change will facilitate greater flexibility in transportation of produce to market and help growers to meet customer demands in a timelier manner," Mr Scott said.



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New varieties

New varieties and Chinese export opportunities driving strong table grape season

With new table grape varieties coming into play this year, the Australian Table Grape Association says the industry is in for a very exciting season.

Chief Executive Officer Jeff Scott says Sweet Sapphire has been one of the more prominent new grape varieties in recent years, but others are starting to come into full crop production as vines have now been growing for two to three years.

"Ivory Seedless, which is an early green variety that is available from mid-January to late February and has large berries and exceptional crunch," he said.

"We also have Sweet Globe, a mid-season green variety with nice formed bunches available from mid-February to mid-March."

Mr Scott said Pristine was available late March to late April. Its large elongated shaped berries are seedless and sweet with a crispy texture.

Red grapes are also doing well. "SunriseRed is one of the earliest ripening red seedless varieties available from late December to early January. It produces naturally dark berries with a crisp texture.

"Allison Seedless is another red available early March to late May. Its large fruit and crisp textured grape have great flavour," he said.

Mr Scott said Melody was a superb black seedless variety which is proving popular. The berries are large, fully flavoured and crisp in texture. They are available mid-February to late March.

"All these are proprietary commercial varieties, so not every grower has got them. They come with a licence and those growers that do have them, are finding they sell quite well."

But Mr Scott adds that the new varieties will take time to develop to their potential in the market, and traditional varieties will remain as the main breadwinner for growers.

"It will take one hell of a variety to knock off our Australian Crimson Seedless from the top perch," Mr Scott said.

"Australia tends to grow Crimson Seedless exceptionally well, compared to other regions. We can get the sweetness, we can get the colour,



Allison Seedless



Ivory Seedless



Melody



SunriseRed

New varieties doing well in Asia. Clockwise from left: Allison Seedless, Ivory Seedless, SunriseRed and Melody. Photos courtesy of Sheehan Genetics Australia Pty Ltd.

we can get the flavour and they are available January through to May. So, it will take a long time before Crimson gets knocked off the top perch. The new varieties are there for diversification for the various markets and give growers different options. It all adds to the quality of Australian grapes."

It comes as Australian growers now have improved export opportunities throughout China, after their government ratified new protocol conditions for fumigation and cold treatment. Mr Scott says it could be a major advantage, as growers can theoretically have grapes in the Chinese market within five days of harvest.

"Potentially that could be very big in terms of going to second-tier markets," he said. "We've been doing some research on that and there are very few fruits going to second-tier markets. With the opening up of airlines going to these markets - either direct or just one stop - there is potential for Australian grapes to go these cities that have a reach of 50-100 million people."

While it is still early in the season, and there is not a lot of data available yet, the ATGA is expecting an increase in export volumes compared to last year.

"So far the season is looking good," Mr Scott said.

"We've been exporting for a while, and growers are happy with returns. The fruit is good quality, so everything is going well. It's a normal year so to speak. Grapes are always a sort after commodity. Domestic demand is always strong. We have some good keen suppliers to the domestic market that supply the major supermarkets here and Australian consumers always look forward to Australian grapes."

One of the main reasons for the strong numbers can be put down to the generally good growing conditions. While there has been some heat and isolated storms across Australia, Mr Scott says it has not impacted yields.

"It's been a dry winter, little rainfall, but very cold nights and nice days," he said. "That really brings out the sweetness and the colour and the size of the berries when they come into full production. While we have had some hot spells here, it has had very little impact on the grapes. The growers know how to treat the grapes when the hot spell comes - they keep the water up and put the demisters on. The grapes have stood up to it quite well."

Adapted from an article written by Matt Russell which was published on www.freshplaza.com on 11/02/2019.

ATGA Chief Executive's report

Season preparations progressing well




Jeff Scott
ATGA CEO

I hope you all had a good Christmas and great new year.

At the time of receiving *The Vine*, harvest will be coming to an end for the northern Australian growers, and growers in the southern and western Australian regions will be preparing for the commencement of their harvest.

By all accounts it has been a reasonable year for most growers. The Sunraysia region was looking forward to a good season with above average yield and increased interest from importers. Let's hope the weather is kind to all for a positive finish.

In recent months, the Department of Agriculture and Water Resources (DAWR) announced the completion of the assessment for market access resulting in India being granted full access to export to Australia. India do grow large volumes of Thompson Seedless from March to May, so here's hoping they do not export much to Australia, if any, during that time period, as it will collide with Australian product being on retail shelves.

New legislation and grower audits

The introduction of the new Accredited Properties legislation has led to a number of changes for those growers registering for exports in 2018. There is now more onus on growers to ensure all Standard Operating Procedures (SOP) are in place, particularly those regarding hygiene, staff training, waste management, picking and packing processes, storage requirements and record keeping. Under the new legislation, growers will be required to keep two years of records which may be requested for presentation at the time of the audit.

Whilst undertaking audits this year, the DAWR Audit Team was quite helpful, providing useful instructions and advice to ensure growers understood what will be expected of them with the implementation of the new legislation.

While a number of growers received a 'non-compliant' outcome from their audit, they were still accredited to export this season. DAWR has advised they will not be so forgiving in future years and if growers do not have the required Standard Operating Procedures and records in place, they will be assessed as 'non-compliant' and will not be accredited.

"If growers do not have the required Standard Operating Procedures and records in place, they will be assessed as 'non-compliant' and will not be accredited."

Thus, it is crucial that businesses who intend to export in the coming years have a thorough understanding of the Accredited Properties legislation and maintain all required Standard Operating Procedures.

In 2019, the Australian Table Grape Association (ATGA) intends to design a set of basic templates for growers to use and adapt to suit their own practices and requirements.

Trade seminars

There is an expectation that the ATGA will be conducting trade seminars in Japan and Korea in January. There is also hope to include Vietnam in this year's workshops. An open invitation will be extended to any grower/exporter who wishes to attend. Last year five exporters attended and had access to one-on-one meetings and networking opportunities with close to 100 importers, distributors and media personal at each of the three venues where the trade seminars were held.

Fruit fly workshops

The ATGA, in conjunction with Alison MacGregor, Andrew Jessup and Hort Innovation, held the first mandatory Queensland fruit fly Area Wide Management workshops on Tuesday 11 December in Mildura and Robinvale. A number of repeat workshops are being scheduled for January.

It was great to see so such a strong number of growers attend the first two workshops held in Mildura (94) and Robinvale (81). Given the announcement of a Qfly outbreak in Loxton in December, control of fruit fly on farms in Sunraysia is more critical than ever.

It is an offence to market your grapes knowing that your fruit is infected with Qfly. All growers must now incorporate pest monitoring for fruit fly in their fortnightly pest monitoring regime as a matter of course.

At the conclusion of the workshops the ATGA will design a fact sheet and standard operation procedure for area wide management of fruit fly on farm. This will become part of your Accredited Properties documentation and support your audit processes with DAWR.

Ongoing market access efforts

The ATGA continues to pursue improved market access conditions to all counties with the addition of irradiation postharvest treatments. The new Steritech plant in Melbourne is scheduled to be finalised by December 2019 and offers a fast and efficient postharvest treatment that would enable produce to arrive on the Chinese or Thai market only two to three days after being picked.

Vietnam is the only country currently accepting irradiated produce, but negotiations to accept irradiated fruit are underway with China, Thailand and the Philippines.

Thailand recently approved irradiation treatment of Australian persimmons, which opens the pathway for discussion with other commodities. Table grapes is certainly high on the list in those negotiations.

The same for China. Whilst China does not currently accept irradiation as a postharvest treatment, they do irradiate a significant amount of their own fruit. At a recent meeting with China last November, irradiation was mentioned at every opportunity and there was no definite "No's" from China, so hopefully it will not be long before discussions commence with Australia on irradiation.

Trade activities

Thailand delegation visits Mildura

In March the Victorian State Government hosted a two-day visit to the Mildura region for a delegation of importers from Thailand. Acting Senior Trade Manager for Food and Fibre Brendan Larkin led the delegation which was made up of buyers from Tesco, Diva Studios, Central Food Retail, Global Trade and Distribution and Vachamon Foods.

Many of the importers were familiar with the region having previously visited, although buyers from Vachamon Foods were visiting for the first time.

Preceding trips had allowed buyers to build relationships with industry and this trip they requested meetings with those companies and exporters that they had done business with in the past. In addition to this, they also requested meetings with organic producers.

There was also an opening for the wider industry to meet with the buyers at a network function held in Mildura.

The function provided an important opportunity for the local industry to

meet with the delegation, exchange information and has the potential for those in attendance to establish genuine relationships with the Thai buyers.

The impact on the growth in markets by such visitation programs cannot be under estimated. When trade delegations see the table grapes in season, they see the volumes available and the quality of fruit when it is at its best.

They also have real time information and real time discussions. The relationships built over time allow for honest and open conversations which only strengthens the business between the parties.

The market in Thailand continues to grow. Tesco's this year will be running a month-long promotion of Australian grapes across 400 stores. This is up from 150 stores last year.

Australian table grapes are seen as a category leader and solid past performer for buyers. They attract and draw customers into the store and once



Grape Co. Grower and exporter Adrain Kaia with members of the delegation.

they are in, customers then buy other products.

As a result of the visit it is expected that the volume of grapes into Thailand will increase this year.

Feedback from the buyers confirm the trip is well worth it and it is hoped that in the future there will be more activities that bring delegations from South East Asia to Australia.

Korean protocol temporarily changed due to market growth

Engagement with importers at a trade seminar in Seoul, South Korea has already provided proven dividends with a Korean delegation visiting growers in the Mildura region in early February.

Further to this, Austrade has reported good exposure for the table grape industry through the trading papers in South Korea.

In February Korean Inspector Young So An arrived in Australia to undertake inspections in Robinvale and Mildura. After an increase in the number of inspections booked, it was soon clear that a second inspector would be required to assist with the work load.

The Australian Table Grape Association put in a request to the Government of South Korea for a second inspector at the start of the season and pursued the request as the season continued.

By mid-season the growth in exports had surpassed that of last season. This unrepresented growth in exports to South Korea can be largely attributed



South Korean Inspector Young So An.

to the trade activities undertaken last year and this year.

The Government of South Korea was unable to accommodate the request for a second inspector. This led to further negotiations about how best to manage the growth in exports. The Government of South Korea agreed to a proposal for a temporary revision of the protocol, which has reduced the inspection rate from 2% of the shipment to 600 bunches per shipment as an interim measure. That means that 12 boxes will need to be inspected, not the 40 boxes.

The interim change also allowed Authorised Officers to solely load the containers, with the provision that the Korean Inspector reserves the right to supervise any if she so chooses.

This was a great outcome for the industry and the ATGA is grateful to the Government of South Korea for accommodating the industry's request.

ATGA Chief Executive's report

Market access gains




Jeff Scott
ATGA CEO

The table grape industry had another good year with the annual export results recently released. 110,281 tonnes were exported last year which was 3.4% higher than the previous season and valued 3.1% higher at \$384.7 million. This was a pleasing result given that most growers were saying their Crimson yield was down nearly half that of previous seasons.

This season started strongly compared to the previous year, but that was not surprising as the previous season was delayed by late-maturing fruit.

China is still the strongest export destination with 41,668mt, followed by Indonesia with 16,149mt. Japan trade increased by 30% to become our third largest market, while trade with the Philippines increased 44% compared to last year.

Market access

There is an annual trend of 8% growth in exports over the past five years. The effort, time and money the Australian Table Grape Association has spent on gaining and maintaining market access is certainly paying dividends for the industry. It is expected that as more growers improve their knowledge and understanding of the requirements of each importing country in terms of maturity, colour and size, exports will continue to increase.

Gaining market access can be a slow process. The table grape industry is fortunate in that it has access to nearly every country in the world; however, gaining access is only one aspect – maintaining and improving access can prove just as difficult.

The ATGA is currently working to improve access to the protocol markets that we already have.

Late last year the China protocol improved to allow on-shore cold treatment and fumigation. The next step is for China to accept irradiation.

Japan differs to other countries in that it only accepts market access based on variety. Currently only three varieties can be exported to Japan. The industry

would dearly love to have access for all Australian-grown varieties and progress has been made on that front.

To enable additional varieties, Australia must demonstrate that it meets world standards for cold treatment of table grapes.

The Australian cold treatment data (Medfly, 3°C for 20 days and Qfly, 3°C for 14 days) has been accepted by the Technical Panel for Phytosanitary Treatments (TPPT) for all cultivars of table grape. The TPPT is a technical panel of the Food and Agriculture Organization of the United Nations. They evaluate data submissions and review, revise and develop phytosanitary treatments. The TPPT also provides guidance to the Standards Committee (SC) regarding specific phytosanitary treatment issues.

The TPPT has recommended the Australian treatment for table grape to the SC for country consultation. The Department of Agriculture and Water Resources (DAWR) has a representative on the SC which usually meets in November. Assuming there are no questions raised, or the TPPT can answer all questions at that meeting, it will go out for country consultation mid next year. Again, if DAWR can answer all country comments easily, the SC should recommend the treatment to the Commission for Phytosanitary Measures (CPM) for adoption as an ISPM (International Standard for Phytosanitary Measures).

All countries are members of the CPM. Australia's case would most likely be heard at the April 2020 CPM meeting. Once adopted, the industry then has the strongest case to remove Japan's varietal restriction requirements.

As this example illustrates, changes to market access are not simple and Australian table grape growers should feel privileged with the market access achieved in the past five years.

Conversely, overseas countries are endeavouring to gain access for their grapes to Australia. DAWR has recently granted access to India with the following measures agreed to:

- cold treatment for fruit flies; *Bactrocera dorsalis*, *B. correcta*. DAWR has not accepted area freedom for these flies so a treatment is required
- cold treatment for *Drosophila suzukii*. DAWR has not accepted area freedom for this fly so again a

treatment is required

- Sulphur pad for Phylloxera
- In-field monitoring and management of fungal rots (fortnightly monitoring)
- Inspection for all pests including mealybugs, thrips, mites and a leaf rolling moth

DAWR has accepted in-transit cold treatment and will be using that to push for the same for us.

Export registration

There was a great turnout at the registration sessions in Mildura, Robinvale, Queensland and Western Australia. Export registrations are closed, and all applications have been vetted by the ATGA and sent to DAWR. Hopefully this year DAWR will complete their desk and physical audits in sufficient time to send the registered grower and packhouse lists to China before grapes are ready to be shipped.

Next generation leading the way

Congratulations to Jennifer Zappia of Sunraysia who was recently appointed to the Victorian Minister for Agriculture's Young Farmers Advisory Council. Jennifer is a third-generation table grape grower who graduated from university and returned to the family farm. Jennifer will gain great insight to the operations of government and the role she can play in influencing government policy.

Congratulations also to Domenic Sergi for getting to the interview stage of selections for the Hort Innovation Board. Domenic is also a third-generation grower who has been educated at university and returned to the farm.

The table grape industry has a bright future with people like Jennifer and Domenic leading the way.

Labour hire

Labour hire has been a hot topic of recent times. The Federal Government has introduced the *Modern Slavery Act* and a number of State Governments have introduced *Labour Hire Licensing Bills*. These Acts of Parliament will have major consequences for the industry going forward and all growers need to have a good understanding of the implications.

Table grape exports

June 2018 table grape export summary

By the end of the 2017/18 season, Australian table grape exports totalled 110,281 tonnes, worth \$384m. This result was 3.4% higher than the previous season.



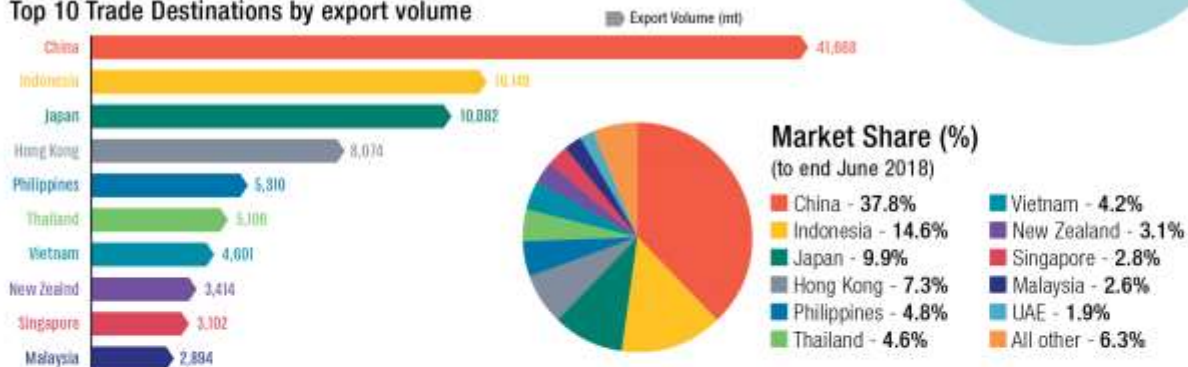
Table 1: Table grape key measures

	YTD	Chg LY
Volume (tonnes)	110,281	3.4%
Value (M AUD)	384.07	3.1%
\$ per kg	\$3.48	0%

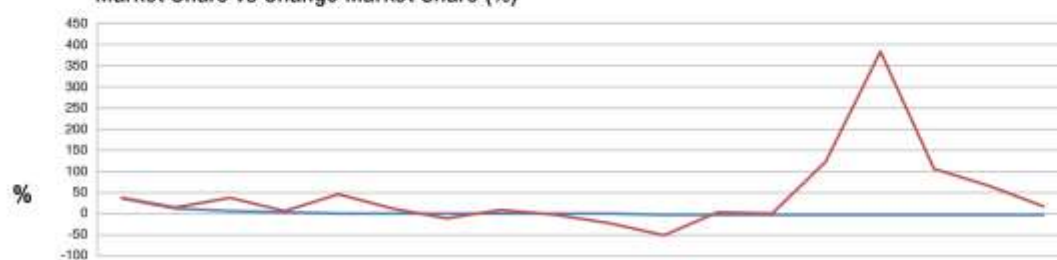
Source: Fresh Intelligence Consulting for ATGA

Japan has grown 30% since last season. Other growth markets include: **Philippines 44%, Thailand 10% and New Zealand 9%.**

Top 10 Trade Destinations by export volume



Market Share vs Change Market Share (%)



	China	Indonesia	Japan	Hong Kong	Philippines	Thailand	Vietnam	New Zealand	Singapore	Malaysia	United Arab Emirates	Saudi	Sri Lanka	Bangladesh	Korea South	Qatar	India	Fiji
Change Market Share (%)	37.8	14.6	9.9	7.3	4.8	4.6	4.2	3.1	2.8	2.6	1.9	1.3	0.9	0.8	0.7	0.5	0.4	0.3
Total Market Share (%)	1	4	30	1	44	10	-13	9	-1	-22	-50	4	3	122	379	107	68	21

Qatar was up 10%.

The United Arab Emirates was 50% lower.