

Optimising Trade in the Australian Vegetables Industry

Export Market Factsheets

February 2025

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Acknowledgements

This research is supported by the Hort Innovation Vegetables Levy and Onions Levy. We also acknowledge the in-kind support of the project's industry participants.

Background, Purpose and Scope

This report was developed as part of Project MT24001 Optimising Trade in the Australian Vegetables Industry, which had the primary objective of assessing Australia's position in the global vegetables market. The project involved a comprehensive global competitor benchmarking analysis on key export competitiveness factors, as well as six detailed comparative studies evaluating Australia's performance against a key competitor in an identified priority export market. These six priority export markets – Singapore, UAE, Vietnam, Taiwan, and Spain – and the corresponding key competitors, were identified through data research and consultation with industry stakeholders.

This accompanying export market factsheets booklet was developed to provide the Australian vegetables industry with market intelligence to effectively service the six identified priority export markets. Each factsheet includes a case study highlighting the performance of the selected competitor in the respective market, with a focus on specific export programs, capabilities, or efficiencies that have influenced trade outcomes.

While the factsheets include insights into general market preferences and pricing considerations, the primary emphasis of these factsheets is on export competitiveness factors, such as logistics, supply chain management, and market access, to ensure Australia can reach these markets competitively.

Disclaimer

The raw data presented below have been sourced from various international databases and are subject to fluctuations depending on seasonality, market conditions, and other external factors.

Building Export Competitiveness

Building vegetable export competitiveness requires a strategic focus on factors that enhance market appeal, operational efficiency, and global positioning. Outlined below are key drivers that play a pivotal role in unlocking new opportunities and strengthening presence in global vegetable markets.

IMPROVING MARKET ACCESS



Involving vegetable trade provisions in trade agreement negotiations enables the reduction of tariffs and non-tariff measures (NTMs), decreasing costs and time to market while improving access to existing and emerging markets.

The Australian Government support should include maintenance and reduction of tariffs and NTMs for major existing export markets and commodities such as carrots and onions. In addition, the Government should continue to work with industry to improve market access for emerging exports, such as brussels sprouts, capsicums, and beetroots in the key export markets.

CREATING CONSISTENT MESSAGING AND BRANDING



Coordinated branding is key to developing a strong presence in target markets as it reduces confusion amongst customers and supports the development of a clear value proposition.

By having a consistent 'brand Australia' style, each commodity, industry, state, or organisation that seeks to trade in a market would be underpinned by the brand with additional nuancing from producers and exporters. This can include clearly defined narratives for produce grown in specific regions, allowing championing of the unique characteristics of produce.

MAINTAINING LOGISTICS AND SUPPLY CHAIN VISIBILITY



Visibility over logistics and supply chain data enables exporters to navigate global freight challenges by forecasting costs, securing better rates, and optimising shipping schedules.

This is key for managing Australia's high logistics costs and complex supply chains, which are inherent to Australia's geography and reliance on key transport hubs/ports. By leveraging the latest logistics data, exporters can identify the best times to consolidate shipments, optimise container loads, and minimise delays/peak congestion periods.

DEVELOPING STRONG IN-MARKET RELATIONSHIPS



Strong in-market relationships and teams on the ground are key to building export competitiveness, as they foster trust, ensure reliable supply chain management, and align offerings with local market needs.

For the Australian vegetable industry, partnerships with pre-qualified importers, logistics providers, and retailers help mitigate risks, improve efficiency, and secure premium market positioning. Stakeholders who adhere to best practices in areas like traceability and quality assurance can enhance Australia's competitiveness and reliably deliver high-quality produce.

TARGETING SPECIFIC MARKET SEGMENTS



Tailoring strategies to suit different market segments will enable greater market reach whilst optimising resources. Focusing on specific market segments also enables exporters to maximise value, differentiate offerings, and align produce with customer needs.

The growing middle class in Asia presents a unique opportunity for Australia's premium, sustainable, and niche vegetables, while counter-seasonal production advantages offer opportunities in markets like the UAE and Spain. At the same time, general markets represent an opportunity to channel mass produced vegetables, improving industry sustainability whilst maintaining profitability.

Singapore



Australia is a reputable supplier of vegetables to Singapore with an ability to market premium and niche fresh vegetables to capture the interest of the large middle class.

	Market Intelligence	Opportunities for Australia
 <p>Operating Environment</p>	<ul style="list-style-type: none"> Singapore's efforts to increase domestic food production have been impacted by increased energy and capital costs. Only 3.2% of vegetables in Singapore are produced domestically, creating significant in-market competition between exporters.¹ China, India, and Malaysia are currently key competitors in-market. These regional competitors export to Singapore at a low cost and in high volumes. Australia was a top supplier of carrots, cauliflowers, and broccoli to Singapore in 2023. Australia is well-known and reputable as a stable supplier of clean and fresh food.¹ Australia's key export, carrots, are most competitive when exported to Singapore from March to July.² 	<ul style="list-style-type: none"> Continue to leverage Australia's strong reputation in the Singaporean market. Develop targeted marketing campaigns for consumers highlighting Australia's advantages, such as superior food safety standards and quality, to differentiate from other competitors who compete primarily on cost and volume.
 <p>Market Preferences and Pricing</p>	<ul style="list-style-type: none"> Approximately 90% of consumers support a shift towards a low-carbon economy.³ Brands that adapt products and messaging to consumers' growing interest in healthy, environmentally-friendly foods and their willingness to explore global foods, can capitalise on consumer interest, particularly around local celebrations and holidays.⁴ 	<ul style="list-style-type: none"> Develop and promote eco-conscious packaging solutions that reduce waste and environmental impact. Align product offerings/marketing campaigns with specific Singaporean celebrations or events.
 <p>Regulatory Requirements</p>	<ul style="list-style-type: none"> Australian vegetable exports do not require an import permit, phytosanitary certificate, or additional declarations, and Singapore is not a protocol market.⁵ Singapore has maximum residue limits for a range of foods, available under the Ninth Schedule of the Singapore Statutes Food Regulations.⁶ Each container in a consignment must be correctly labelled.⁷ 	<ul style="list-style-type: none"> Consider other Australian vegetables that can be exported and develop approaches to diversify product offerings to capitalise on ease of access to the market.
 <p>Logistics</p>	<ul style="list-style-type: none"> Average handling and compliance costs for Australian exporters is between AUD\$400 and AUD\$850 per consignment.^{8,9} 20-foot reefer containers can cost AUD\$4,000-\$5,000, and 40-foot reefers can cost AUD\$5,000-\$6,000. Air freight can cost AUD\$5-\$11 per kilogram, depending on the commodity.^{8,9} 	<ul style="list-style-type: none"> High freight costs necessitate product premiumisation and niche products that competitors such as Malaysia do not produce, such as baby carrots. Consider freight consolidation to reduce freight costs.

Competitor Case Study – Malaysia's centralised support for exports

Malaysia has developed a strong market presence in Singapore due to the support of trade bodies. The Malaysia External Trade Development Corporation (MATRADE) is the national trade promotion agency of Malaysia, with a primary role to develop and promote Malaysian exports globally. MATRADE supports companies develop their presence in foreign markets through promotional events, trade missions, and participation in international trade fairs. MATRADE also provides Market Development Grants to support these efforts, which includes grants of up to approximately AUD\$100,000 over a company's lifetime. MATRADE also provides a directory of products and services that are exported to enable other businesses to learn from successful exporters. There are 92 vegetable exporting companies in the directory, with examples of successful products.

References: 1. *Singapore Food Statistics* 2. <https://tasmaniangrown.au/what-we-grow/vegetables/carrots/> 3. *Sustainable Food Consumption: Demand for Local Produce in Singapore* 4. *A Brand's Guide to Singapore's Consumer Landscape* | Kadence 5. *Growth juggernaut: Three billion empowered consumers – DAFF 6. All | Micor | Department of Agriculture, Fisheries and Forestry 8. Food Regulations - Singapore Statutes Online 9. TRAINS Online 10. Freightos*

United Arab Emirates



Consumers in the UAE seek premium foods, with a range of countries exporting to the UAE year-round. Australian exporters will benefit from the recent trade agreement, with the UAE providing an opportunity as a regional import hub for Australian produce.



	Market Intelligence	Opportunities for Australia
 <p>Operating Environment</p>	<ul style="list-style-type: none"> India, Australia, USA, Canada, and China are the largest exporters of vegetables to the UAE. The UAE imports up to 90% of its food, with consumers preferring to buy food online and from hyper/supermarkets.¹ The UAE is aiming to have 50% of food produced domestically by 2051, which will increase market competition.² The UAE National Food Security Strategy also has a goal of diversifying international food sources.² Australia's key exports, carrots and onions, are most competitive when exported from January to June.³ 	<ul style="list-style-type: none"> Emphasise Australia's reliability and sustainable production practices with reference to the UAE National Food Security Strategy. Partner with UAE-based e-commerce platforms to increase reach to consumers.
 <p>Market Preferences and Pricing</p>	<ul style="list-style-type: none"> The UAE is a major hub for food imports in the Middle East. As such, it has access to a range of products from across the world, increasing the challenge of differentiation in-market.⁴ 72% of consumers actively try to eat healthily, however 53% prioritise value.⁵ Affluent citizens, expatriates, and tourists seek premium foods and have a willingness to pay for quality produce. Australia's carrot exports are typically 2AED more expensive than Chinese carrots, at 4.35AED (AUD\$1.90) per 500 grams.⁶ Premium baby carrots from the USA are sold for up to 25.80AED (AUD\$11.29).⁷ 	<ul style="list-style-type: none"> Build in-market and regional networks to establish and strengthen the UAE as a regional import hub. Continue to target the premium market with accompanying clean, sustainable messaging to emphasise the Australian origin.
 <p>Regulatory Requirements</p>	<ul style="list-style-type: none"> All food products must be clearly labelled, noting allergens, nutritional values, and whether they are halal or organic. All labels must contain Arabic. Currently, vegetables require a phytosanitary certificate and declaration that they are free from Red-back spiders and fall armyworm, with details available on the UAE's vegetable MICOR page.⁸ Australia and the UAE signed a Comprehensive Economic Partnership Agreement (CEPA) on 6 November 2024. The agreement will remove tariffs for 99% of Australian exports by value, with mechanisms to resolve non-tariff measures.⁹ 	<ul style="list-style-type: none"> Explore opportunities for other vegetable products that may become competitive under the CEPA. Develop and engage with in-market networks to understand and best cater to regulatory requirements and processes in the UAE.
 <p>Logistics</p>	<ul style="list-style-type: none"> 20-foot reefer containers can cost AUD\$5,500-6,500, 40-foot reefers can cost AUD\$6,500-7,500. Air freight can cost AUD\$8-\$14 per kilogram depending on the commodity.¹⁰ Air freight is generally too expensive to remain competitive in-market.¹¹ 	<ul style="list-style-type: none"> Consider freight consolidation to ensure optimal use of limited container availability.

Competitor Case Study – USA partnering with retailers to ensure avenues to market

The USA capitalises on brand name recognition of major retailers to rapidly grow the presence of products in-market. In the UAE, Walmart partnered with Majid Al Futtaim to operate the Carrefour chain. This enables USA exporters to deal with Walmart domestically and subsequently have their produce offered under the Carrefour brand in the UAE. As a result, USA exporters benefit from local knowledge and an existing infrastructure network.¹² Carrefour operates hypermarkets and supermarkets that provide fresh food, and there are online stores available that sell Walmart products in the UAE.¹³

References: 1. UAE Market – Factsheet 2. AGSIW | The UAE's Path to Food Self-Sufficiency 3. Carrots—Sweet, crisp, and juicy | Tasmanian Grown 4. Attitudes towards food in the UAE 2024 | Statista 5. Differentiation holds the key to success in UAE grocery sector 6. Shop | GulfFruits Trade Co LLC 7. Baby Carrot USA 200g – HorecaStore 8. Vegetables - Additional Requirements | Micor | Department of Agriculture, Fisheries and Forestry 9. australia-uae-cepa-key-benefits-for-australia.pdf 10. Freightos 11. Industry Consultations 12. Is there a Walmart in Dubai? - GB Times 13. Carrefour Walmart

Indonesia



Australia benefits from its proximity to Indonesia and fresh vegetables can be marketed to more affluent consumers. To retain the advantage, Australian producers should be prepared for the incoming 'prior notice' requirement.



	Market Intelligence	Opportunities for Australia
 <p>Operating Environment</p>	<ul style="list-style-type: none"> Australia, the USA, Argentina, China, and India are the largest vegetable competitors in-market.¹ Indonesia has recorded strong export value growth year-on-year, with export value increasing by 20.5% from 2022-23 to 2023-24, indicating increased domestic production of a range of horticultural products.² Fresh vegetables are typically purchased at traditional markets, with supermarkets accounting for 5% of vegetable purchases.³ Australia's key export, onions, are most competitive when exported to Singapore from March to July.⁴ 	<ul style="list-style-type: none"> Build strong relationships with importers with established distribution networks, for both premium modern retailers and traditional markets, to gain greater market reach in the Indonesian market.
 <p>Market Preferences and Pricing</p>	<ul style="list-style-type: none"> Consumer satisfaction for imported vegetables is typically higher than domestic produce.⁵ Consumers are considering the environmental impacts of their purchases, making messaging around sustainable practices more impactful.⁶ The middle-to-upper class is increasingly willing to purchase high-quality vegetables, with price and accessibility to fresh vegetables the strongest factors in consumer decision-making.⁴ 	<ul style="list-style-type: none"> Build a strong 'Australian' brand for vegetables, promoting Australia's sustainability credentials and practices. Emphasise quality and safety of fresh vegetables through educational programs.
 <p>Regulatory Requirements</p>	<ul style="list-style-type: none"> Indonesia has import quotas for Australian carrots, totalling 5,000 tonnes.⁷ Australia's largest export to Indonesia, onions, require a phytosanitary certificate and additional declaration/endorsement that consignments are free of brown wheat and have been treated if they are from an area with brown wheat mite.⁸ Further information is available on Indonesia's vegetable MICOR page. From 6 October 2024, Australian plant and plant product exporters must submit 'prior notice' to the Indonesian Quarantine Authority <i>before goods depart Australia</i>. For products recognised under Australia's Country Recognition Agreement, exporters can submit the notice before goods arrive in Indonesia.^{9,10} This requirement will be fully implemented on 5 February 2025.¹¹ 	<ul style="list-style-type: none"> Prepare for the additional 'prior notice' requirement, noting that vegetables such as artichokes, asparagus, onions, carrots, spinach, beetroot, broccoli, cauliflower, chillis, leeks, cabbages, brussels sprouts, turnips, cucumber, lettuce, celery, and peas can have their notices submitted before goods arrive rather than before they depart Australia.
 <p>Logistics</p>	<ul style="list-style-type: none"> Average handling and compliance costs for Australian exporters is between AUD\$700 and AUD\$1,400 per consignment.¹² 20-foot reefer containers can cost AUD\$4,500-\$5,500, 40-foot reefers can cost AUD\$5500-\$6500. Air freight can cost AUD\$7-\$13 per kilogram, depending on the commodity.^{12,13} 	<ul style="list-style-type: none"> Consider freight consolidation to maintain consistent, high-volume deliveries to market.

Competitor Case Study – Dutch port efficiency and automation

The Port of Rotterdam's automated terminals increases efficiency and productivity, ultimately reducing the time and cost per kilometre to reach distant markets such as Indonesia by 25%-35%.¹⁴ Traceability is enhanced for users through automated vehicles, digitised services, and Portbase integration. To reduce port waiting times, the Netherlands has also developed a digital twin to provide data on water levels, salinity, wind speeds, visibility, and currents. Dutch producer and exporter awareness and use of this technology helps to lower freight costs, save fuel, and expedite export consignment loading.¹⁵

References: 1. [Indonesia Vegetable Imports by country 2022 | WITS Data](#) 2. [Horticulture exports 2023-24](#) 3. [Boosting fruit consumption key for Indonesia](#) 4. [Microsoft Word - ON2205m.docx](#) 5. [Local Vegetable Competitiveness](#) 6. [Consumer Insights in Indonesia: Lifestyle Choices, Consumer trend](#) 7. [Quota usage reports – DAFF](#) 8. [Onions | Micor](#) | Department of Agriculture, Fisheries and Forestry 9. [2024-64: Plant Exports – DAFF](#) 10. [2024-27: Plant Export Operations – DAFF](#) 11. [Indonesia: Update to Guidance on Prior Notice Requirements for All US Commodity Shipments to Indonesia | USDA Foreign Agricultural Service](#) 12. [Freightos | Online Freight Shipping Marketplace & Platform](#) 13. [Industry Consultations](#) 14. [Why does the U.S. lag other nations so badly in the automation of its ports? — APM Research Lab](#) 15. [Smart shipping process | Port of Rotterdam](#)

Vietnam



Australia's existing trade agreements, proximity to Vietnam, and the growing middle class continue to provide strong opportunities for Australian fresh vegetables that target premium segments.

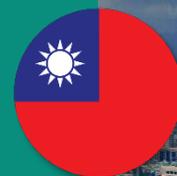
	Market Intelligence	Opportunities for Australia
 <p>Operating Environment</p>	<ul style="list-style-type: none"> China and USA are key competitors in-market.¹ Fruit and vegetable imports from China grew by 24% between 2023 and 2024, driven by 10-30% lower prices compared to imports from other countries, owing to reduced transportation costs and zero import taxes as part of the ASEAN-China Free Trade Area.² The Vietnamese fresh produce market grew by 15.7% in the first 10 months of 2024, with an increase in imports from the USA, Thailand, and Myanmar, signalling increased interest and export competition in the Vietnamese market.³ Australia's largest exports, cauliflowers and broccoli, are competitive when exported from June to September. 	<ul style="list-style-type: none"> Market the fresh, sustainable, and high-quality characteristics of Australian fresh vegetable exports to Vietnamese importers. Continue to trade into Vietnam during counter-seasonal periods.
 <p>Market Preferences and Pricing</p>	<ul style="list-style-type: none"> Vietnam's demographic shift to urbanisation, growing middle class (30% of population by 2026), and the influence of social media has led to an increase in demand for convenient, fresh, and nutritious food options, particularly in fruit and vegetables.^{4,5} Urbanisation has led to demand for convenient, pre-packaged vegetable options, and e-commerce or home delivery.^{3,6} Steady rise of GDP per capita (from USD\$3,759.9 in 2021 to USD\$4,346.8 in 2023) has led to rising disposable income, allowing consumers to spend more on quality food products.^{4,5} However, Vietnam remains a price sensitive market as their imports from China are more than double the value of imports from the USA, noting USA vegetables have premium pricing.¹ 	<ul style="list-style-type: none"> Bi-monthly seminar inviting Vietnamese importers, foodservice, and retailers to showcase Australian production and familiarise the market with Australian goods. Continue premiumisation of fresh vegetables, with a focus on urban and online distribution channels. Export quantities of mass-produced vegetables that are not sold in Australia.
 <p>Regulatory Requirements</p>	<ul style="list-style-type: none"> All shipments require a phytosanitary certificate and must be free from pests, soil, weed seeds, and extraneous material proven through the completion of other permits and certifications.⁷ Information is available through Vietnam's vegetable MICOR page. No vegetables are prohibited. Low to no export tariffs from Australia to Vietnam due to ASEAN-Australia-New Zealand Free Trade Agreement.⁸ 	<ul style="list-style-type: none"> Leverage Australia's market access for all vegetables to build a strong brand presence with diversified products, and position Australia as a go-to premium vegetable source.
 <p>Logistics</p>	<ul style="list-style-type: none"> It can take 17-28 days to ship from Australia to Vietnam.⁹ Average handling and compliance costs for Australian exporters is between AUD\$580 and AUD\$1,160 per consignment.¹⁰ 20-foot reefer containers can cost AUD\$4,400-\$5,400, 40-foot reefers can cost AUD\$5,400-\$6,040. Air freight can cost AUD\$6.5-\$12.5 per kilogram depending on the commodity.¹⁰ 	<ul style="list-style-type: none"> Consider freight consolidation with various Australian vegetables given strong market access in Vietnam.

Competitor Case Study – China's advancement of AgTech and supply chain management systems

China has been able to rapidly grow their vegetable production and outcompete other countries in exporting to South East Asia. The rapid growth has been underpinned by advancements in greenhouse cultivation technologies, efficient supply chain management, further transparency of farm practices, and the expansion of e-commerce platforms.^{11,12} Additionally, the strategic recruitment of experienced agronomists from across the globe such as USA, Korea and Chile, has significantly contributed to the industry's success.¹² This trend has led to several competitive advantages of China's products that the Vietnamese market values, including the 10–30% lower price compared to those from other countries, and a wide range of varieties,^{12,13} which enhances the marketability of China's fresh vegetables.

References: 1. Vietnam's imports of fruit and vegetables remain steady in October 2. Vietnam imports 24% more fruit and vegetables from China 3. Vietnam's fruit and vegetable imports rise 15.7% in 2024. US seeks tariff reductions 4. Vietnam Fruits and Vegetables Market - Size, Trends & Report Analysis 5. Fresh Vegetables - Vietnam | Statista Market Forecast 6. Vegetables - Vietnam | Statista Market Forecast 7. Tariffs for exporting 07031019 to Vietnam | Tariff finder tool 8. Requirements | HS code 070310 to Vietnam | Export rules finder 9. Container Shipping to Vietnam | Shipa Freight 10. Freightos 11. China's Fruit and Vegetable Market Exceeds \$1.34 Trillion | Produce Report 12. The amount of fresh produce grown in China is mind-blowing 13. Vietnam's Stance Toward the Belt and Road Initiative (BRI) 12. Imports of Chinese vegetables, fruits soar in 2024 - VnExpress International

Taiwan



Existing tariffs can make Taiwan a difficult export market. Australian exports can target the middle class and foodservice to develop and maintain familiarity with Australian produce.



	Market Intelligence	Opportunities for Australia
 <p>Operating Environment</p>	<ul style="list-style-type: none"> Vegetables and onions are consumed at least once a week by the average consumer.¹ Taiwan is a key market for New Zealand onions, which has no tariffs.^{2,3,4,5}. However, New Zealand has a challenge of increasing domestic production.^{6,7} Australia has a competitive advantage in Taiwan, due to its safe, high-quality food and counter-seasonal supply.⁸ Taiwan is a stable and well-established market for Australian exports, ranking 16th by value, with onions a primary export to Taiwan and⁹ most competitive from January to June.⁹ 	<ul style="list-style-type: none"> Capitalise on counter-seasonality windows with Taiwan and key competitors, ensuring consistent supply during these periods.
 <p>Market Preferences and Pricing</p>	<ul style="list-style-type: none"> Growing concerns about food safety, along with consumer preferences for healthy and premium food products, have increased the demand for high-quality horticultural goods.^{1,8,9} Consumers have shifted away from traditional markets and supermarkets to online and convenience stores.^{1,8,9} Taiwan's expanding middle class tends to spend over a quarter of their average income on food service industry products.⁹ The increasing frequency of natural disasters may lead to long-term price increases of vegetables, as locals stock up in anticipation of market closures, as seen during Typhoon Krathon in October 2024.¹⁰ 	<ul style="list-style-type: none"> Partner with online Taiwanese retailers to grow market reach for Australian vegetables. Engage with restaurants and foodservice to establish an ongoing demand for Australian vegetables.
 <p>Regulatory Requirements</p>	<ul style="list-style-type: none"> Imports of vegetables are subject to inspection and testing for pesticides (Standard for Pesticide Residue Limits in Foods¹¹), animal drugs, and other contaminants such as toxins and heavy metals conducted by the Taiwan Food and Drug Administration (TFDA) inspectors at the port of entry.¹² Vegetables shipped must be accompanied by a phytosanitary certificate,^{12,13} and Additional Declaration/ Endorsements.¹⁴ Certificate of Origin is required for shallots to enter Taiwan.¹⁵ Information is available on Taiwan's vegetable MICOR page. Australian vegetables have an average tariff of 18.35%.¹⁶ 	<ul style="list-style-type: none"> Negotiate reductions in tariffs, similarly to New Zealand, through trade agreements with Taiwan to enhance competitiveness.
 <p>Logistics</p>	<ul style="list-style-type: none"> Average handling and compliance costs for Australian exporters is between AUD\$580 and AUD\$1,160 per consignment.¹⁷ 20-foot reefer containers can cost AUD\$4,400-\$5,400, 40-foot reefers can cost AUD\$5,400-\$6,400. Air freight can cost AUD\$6.5-\$12.5 per kilogram, depending on the commodity.¹⁷ 	<ul style="list-style-type: none"> Ensure logistics data visibility to understand optimal shipping times and consider freight consolidation options.

Competitor Case Study – New Zealand's effective and growing trade agreements

The Agreement between New Zealand and the Separate Customs Territory of Taiwan, Penghu, Kinmen, and Matsu on Economic Cooperation (ANZTEC), signed in 2013, is a trade pact that eliminates tariffs and custom duties on a majority of New Zealand's exports to Taiwan, increasing New Zealand's in-market export competitiveness.^{15,18} Provisions for mutual recognition of sanitary and phytosanitary measures ensure streamlined processes and consistent quality standards, fostering trust in New Zealand's clean, green agricultural reputation.¹⁹ For products like onions and shallots, ANZTEC provides tariff-free access, fills supply gaps during Taiwan's offseason, and meets consumer demand for premium, fresh produce.

References: 1. Kantar Summerfruits 2. Onions New Zealand structure 3. SL Follen NZ Onion Crop 4. Better returns, but lower yields and higher costs for New Zealand onions 5. New Zealand Grown Onions 6. NZ Onion Exports to Asia 7. Slower start to Asian onion exports 8. Why Australian vegetables have a competitive advantage in Taiwan – Australia Asia Forum 9. Hort Innovation | Australia's united food and wine team heads to Taiwan 10. Typhoon Krathon 11. FDA Laws 12. Agricultural Imports 13. Taiwan Plant Regulations 14. Chives, Garlic, Leeks, Onions, Shallots | Micor | Department of Agriculture, Fisheries and Forestry 15. Is Taiwan the right market? – myNZTE 16. Market Access Map 17. Freightos 18. About ANZTEC 有關臺紐經濟合作協定 | New Zealand Commerce and Industry Office 19. ANZTEC Final Text 10 July 2013

Spain



Australia benefits from counter-seasonal production to Europe, with Australian onions being a key export. The distance to market can limit opportunities for vegetables with a shorter shelf-life.

Market Intelligence

Opportunities for Australia



Operating Environment

- Australia's largest vegetable exports to Spain are onions, shallots, garlic and leeks, valued at \$2.33m in 2023.¹
- Spain is the top importer of fresh fruit and vegetables from France with an all-time high value of \$522m imported in 2023, including \$13.04m worth of onions, shallots, garlics and leeks.²
- Despite being the largest producer of fruit and vegetables in Europe, Spain has faced adverse weather conditions and increasing production costs in the last few years, leading to a fall in exports and an upward trend in imports.^{3,4,5}
- Non-European onions are imported primarily through March, April, June, and July.³

- Focus on Spain as an opportunity during decreases in European production and the decline in supply (March, April, June, and July), to ensure a competitive price point. This will reduce in-market competition.



Market Preferences and Pricing

- Spain is the leading country in Europe for the volume of fresh fruit and vegetables purchased at 323kg per household in 2022.^{3,6,7} Consumers in Spain have a strong preference for sustainable packaging, with one-third valuing reduced plastic usage in packaging, along with other highly prioritised factors such as sustainability measures throughout the value chain.³
- Due to inflation and the rising cost of living in Spain, price is increasingly becoming a key consideration in purchasing behaviour,^{8,9} with 57% of consumers citing the balance of price and quality as a priority when buying fresh products at supermarkets in 2024.³

- Build narratives of Australian provenance.
- Consider sustainable packaging solutions that can be tailored to a Spanish consumer.
- Develop messaging around Australia's sanitary, phytosanitary, and sustainability practices.



Regulatory Requirements

- A License to Import Agricultural Products⁹, Certificate of Inspection for Organic Produce¹⁰, Common Health Entry Document for Plants and Plant Products¹¹, Certificate of Conformity to Marketing Standards¹² (may be required), Phytosanitary Certificate¹³, must be completed prior to exporting to Spain.¹⁴
- Australian fresh vegetable exports to the EU have an average tariff of 13.12%.

- Negotiate reductions in tariffs through trade agreements with Spain to enhance competitiveness.



Logistics

- Average handling and compliance costs for Australian exporters is between AUD\$700 and AUD\$1,400 per consignment.¹⁵
- 20-foot reefer containers can cost AUD\$5,500-\$6,500, 40-foot reefers can cost AUD\$6,500-\$7,500. Air freight can cost AUD\$8-\$14 per kilogram, depending on the commodity.¹⁵

- Due to time-to-market, consider freight consolidation.
- Ensure logistics data visibility to understand optimal shipping times.

Competitor Case Study – France's narrative around the provenance of produce

French producers often develop narratives around the unique qualities of their products to establish an aspect of premiumisation, allowing them to be sold at a higher price point. France is the leading producer of traditional shallots in Europe, cultivating 40,000 tonnes annually. Of this, 90% are long shallots, while 10% are demi-long varieties.¹⁶ Traditional shallots are planted and harvested by hand. A portion of French shallots are granted Protected Geographical Indication (PGI) status, and approximately 3% are produced organically.¹⁶ Shallot farmers from the Beauce and Drôme region of France formed a new brand in 2024 to market the unique qualities of shallots from those regions.¹⁷ While the provenance of those two regions was promoted, packaging also contained clear red, white, and blue colouring to maintain connection to France.

References: 1. [Australian Exports to Spain](#) 2. [Spanish Imports from France](#) 3. [The Spanish market potential for fresh fruit and vegetables](#) | CBI 4. [Spain's fresh produce exports rise in 2024](#) | News | Fruitnet 5. [Would the BRICS be an opportunity for Spanish fruit and vegetables?](#) 6. [European Statistics Handbook 2024](#) 7. [Latest Food Trends in Spain, Consumer trends in Spain are actively](#) 8. [European consumers' preferences for fresh fruit and vegetables](#) 9. [Consumption of fruit and vegetables by Spaniards decreases significantly](#) 10. [Licence to Import Agricultural Products | Requirements](#) 11. [Certificate of Inspection for Organic Produce | Requirements](#) 12. [Certificate of Inspection for Organic Produce | Requirements](#) 13. [Certificate of Conformity to Marketing Standards | Requirements](#) 14. [Phytosanitary Certificate | Requirements](#) 15. [Freightos](#) 16. [French Fruit and Vegetable Industry Overview](#) 17. [New brand to highlight two French production regions](#)

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