

The Citrus Market in Europe

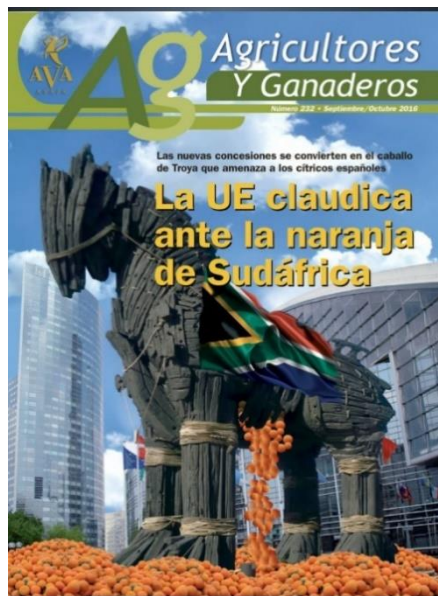


Access & a New Narrative
on CBS and FCM?



Deon Joubert
Rocco Renaldi
Gert Mulder

WHY THE PREOCCUPATION WITH SA CITRUS ?



Spanish call for action to lower imports of South African citrus - Urgent intervention formulated by deputy Joan Baldoví, because "imports from South Africa are sinking the citrus campaign."

"Valencia's citrus sector needs to modernize itself and form associations"

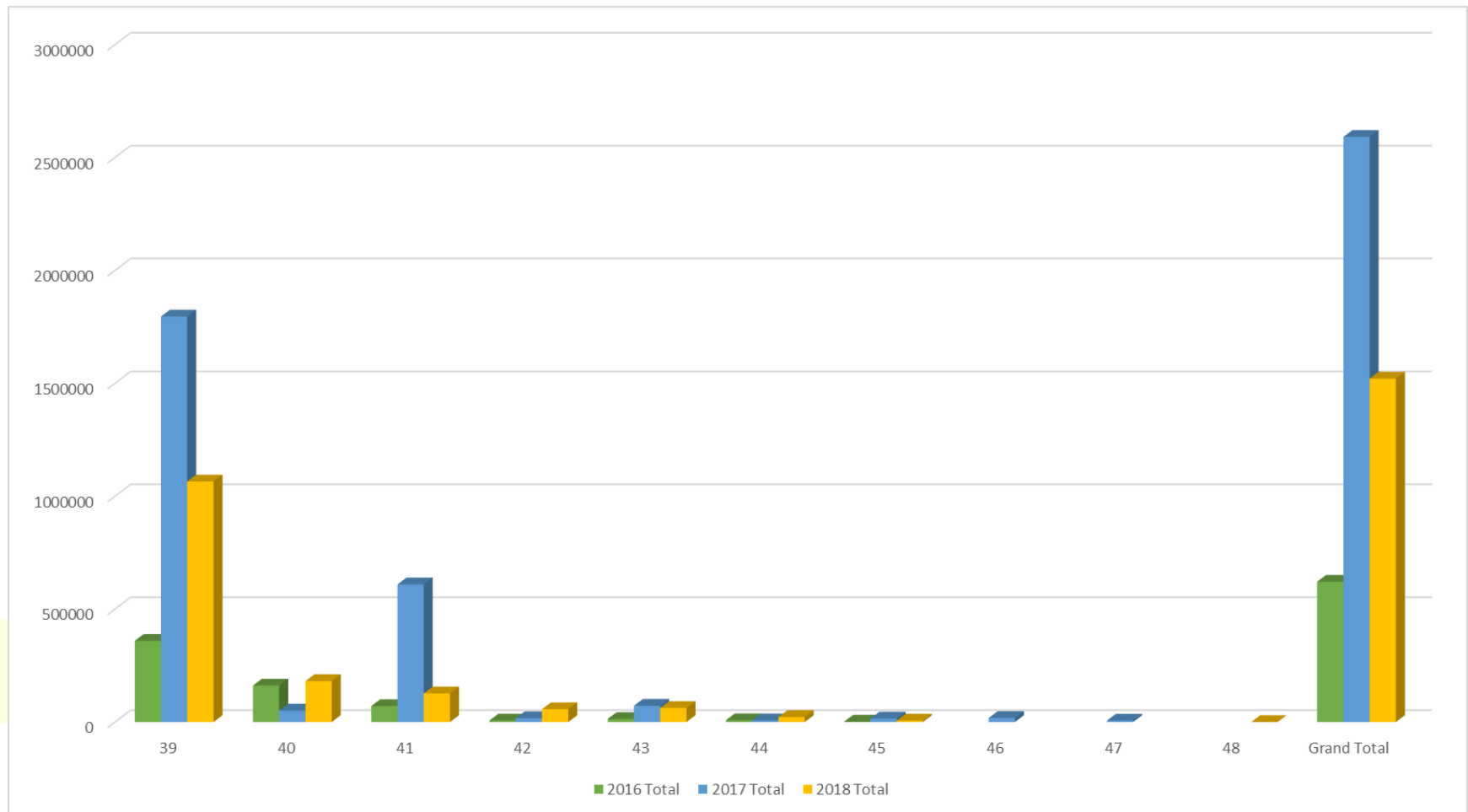
Spain: According to European data, South African oranges are not the real problem for the citrus sector Inmaculada Rodríguez-Piñero, MEP



The Cassis de Dijon ruling is 40 years old today! The EU Court of Justice established the principle that products sold lawfully in one EU country may not be prohibited from sale in another. This was an important step towards the creation of our [#SingleMarket](#)

Spain: AVA-ASAJA and FEPAC-ASAJA to publish names of retailers importing and selling imported oranges

SA EXPORTS VALENCIAS WEEK 39 TO 48



EU trade in food

(2016)

IMPORTS:

€101 billion

Top partners:



Brazil



USA



Norway



Top partners:



USA



China



Switzerland

EXPORTS:

€84 billion

ec.europa.eu/eurostat 

Exported from the EU 2016 [€84 billion]

- Cereals wheat, spelt, barley & oats (€14 billion 17%)
- Vegetables and fruit (€12 billion, 14%)
- Meat (€11 billion, 13%)
- Dairy products and eggs (€10 billion, 12%)

Products imported [€101 billion]

- Fruit and vegetables (almost €30 billion, or 30%)
- Fish (€24 billion, 24%)
- Coffee, tea, cocoa and spices (€19 billion, 19%) from third countries

Comparatively intra-EU exports of food €283 billion



EUROPHYT 2017

EU Notification System for Plant Health Interceptions

7 719
notifications

-0.7% from 2016



1 477
Harmful organisms

↓ 18.6%



2 597
Non-compliant certificates

↑ 24.6%



3 341
Non-compliant Wood Packaging Material

↓ 11.4%



363
Banned products

↑ 91%

Found in...



1 023



206



151



58

Main pests...



FRUIT FLIES

323



WHITE FLIES

273



FALSE CODLING MOTH

141



THRIPS

92



LONGHORN BEETLE

27



VIRUSES, BACTERIA AND FUNGI

75

Health and Food Safety

2017 Specific Issues

FALL ARMYWORM PEPPERS, EGGPLANT



+69%
from 2016
22 notifications

FRUIT FLIES MANGOES



-7.8%
from 2016
178 notifications

FALSE CODLING MOTH PEPPERS, CITRUS



-3.4%
from 2016
141 notifications

WOOD PACKAGING MATERIAL

NON ISPM 15 COMPLIANT
RUSSIAN FEDERATION: 1 055

PRESENCE OF HARMFUL ORGANISMS
CHINA: 87



DECREASED INTERCEPTIONS WITH HARMFUL ORGANISMS (FRUIT AND VEGETABLES)



LAOS
VIETNAM
UGANDA

INCREASED INTERCEPTIONS WITH HARMFUL ORGANISMS (FRUIT AND VEGETABLES)



NIGERIA
CÔTE D'IVOIRE
DOMINICAN REPUBLIC

Source Europhyt data

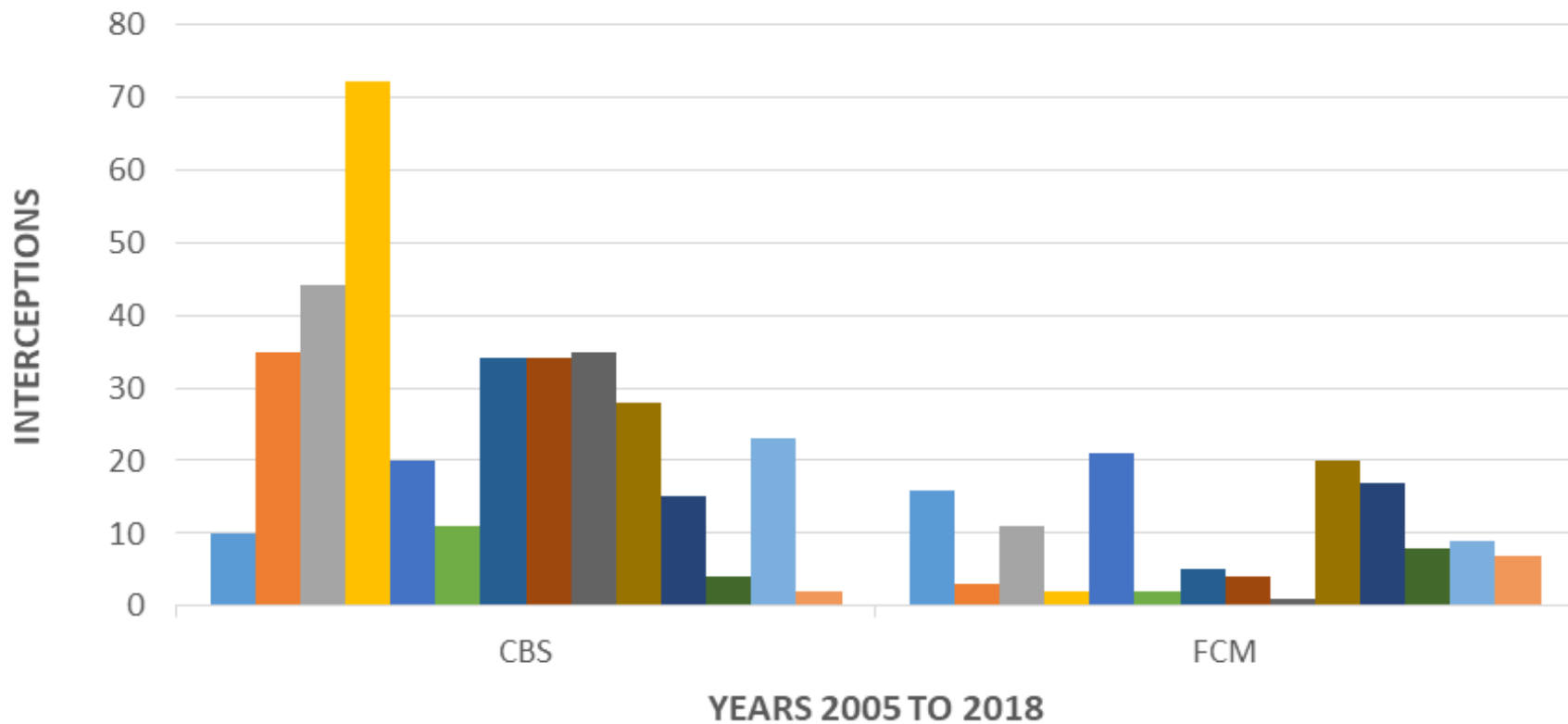
Annual report

http://ec.europa.eu/food/plant/plant_health_biosecurity/europhyt/annual_reports_en

Alert list

https://ec.europa.eu/food/plant/plant_health_biosecurity/non_eu_trade/alert_list_en

CBS & FCM INTERCEPTIONS BETWEEN 2005 -2018



Achievements

- How did we do? Again, remarkable.
- Interceptions
 - SA – 2
 - Other 3rd world countries:
 - Brazil – 26
 - Argentina – 18
- FCM – SA – 9
- Other 3rd countries:
 - Kenya 54
 - Uganda 46
 - Tanzania 33

SOME CONSIDERATIONS

- The EU has straightened out some inconsistencies:
 - No more 5-strike rule
 - Juicing derogation to be mainstreamed into Directive 2000/29
 - Emergency measures (Decision 2016/715) extended to include Argentina and Brazil
 - Notice that FCM from Kenya, Tanzania & Uganda to be monitored 2019
- SA can hardly do better and if current is not good enough ?
- We need another approach – another narrative – focus on successes
 - 99,989% on CBS
 - 99,952% on FCM

SOME CONSIDERATIONS

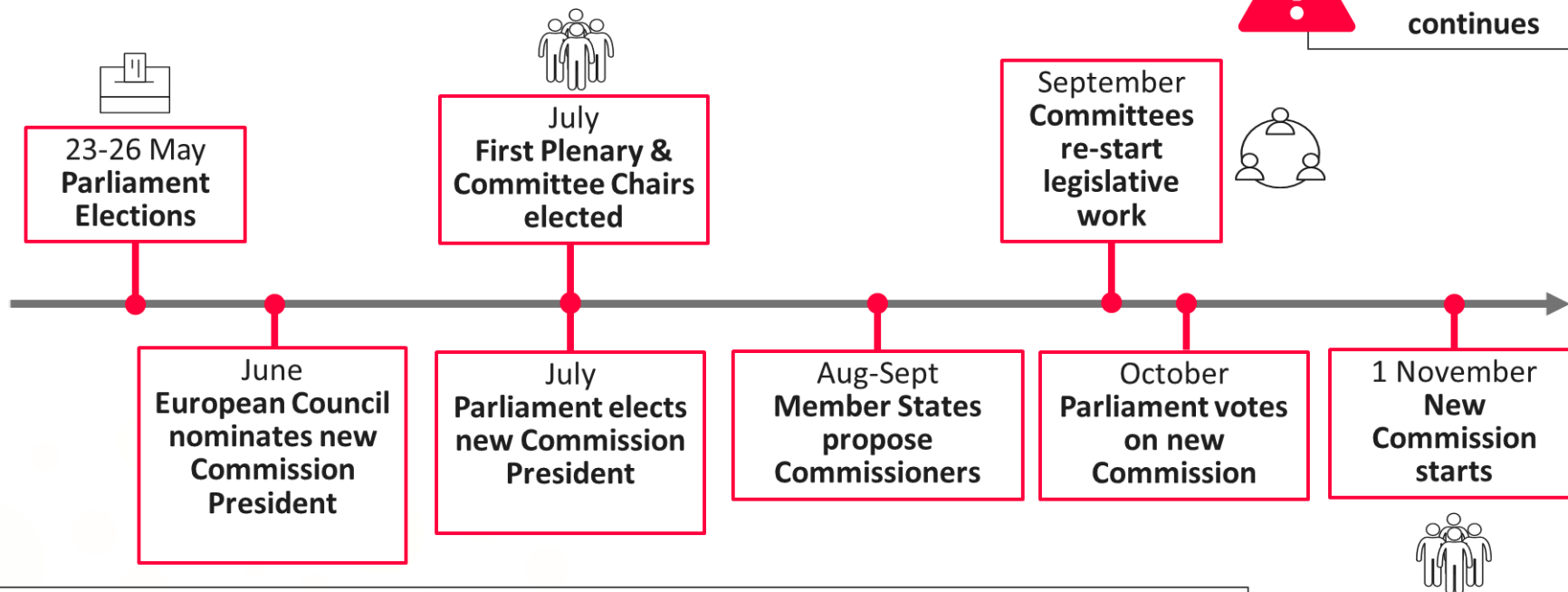
- The EU is under siege, from outside and from within
- Brussels is a soft target and an easy scapegoat
- But it's trying to fight back
 - Eurozone consolidation
 - Trailblazing legislation on big issues
 - Unity on Brexit
 - Free Trade Agreements
- ...a tough stance on plant health is part of that



2019: THE ONCE-EVERY-5-YEARS CHANGE FOR THE EU

European Parliament: Election campaign means minimal activity after March

Council: work continues



European Commission: Policy options and routine business only March to October

WHAT'S IN STORE FOR US?



A difficult European context

- European unease
- Struggling producers
- Imbalances in the value chain
- Struggle to reform



Limited room for manoeuvre

- The EC as the voice of reason: *"We need your fruit!"*
- But cannot be perceived to compromise on safety
- And anyway, *"It's the Member States, stupid!"*



We're stuck in the middle

- Don't expect much from new EC & EP
- Brexit = loss of pragmatic heavyweight
- So, we might be right (CBS science) and we might be doing well (CBS & FCM) – but we will still be caught in the middle

THE WAY FORWARD

1. Continue seeking resolution of the fundamental disagreement

2. Perform to the best of our abilities on compliance

3. Pursue mutually beneficial, pragmatic technical solutions

Fresh approach, better results



- Gert Mulder
- CEO Fresh Produce Centre (NL)
- March 13th 2019
- Citrus Summit Port Elizabeth (SA)

Why do we need a new approach



- International Fruit Trade is a highly organised business with specialist companies on both ends of the supply chain;
- The supply chain controls many requirements dictated by the market and public health;
- To meet these requirements companies invested in dedicated supply chain management by:
 - *Smart or precision farming;*
 - *Sophisticated storage, sorting, grading, packing;*
 - *Cool chain logistics;*
 - *Tracking and tracing;*
 - *Ripening, just in time delivery, shelf life, food waste,.*
- The whole process is managed for continuity

Why do we need a new approach

Phytosanitary legislation is based on the age old concept of:

- Setting the standards
- Government to government communication;
- Control systems with generalized thinking;
- Inspections by government officials.

In essence its a system aimed at countries, whatever the size, with an simplified approach.



Why do we need a new approach

Govmnt to Govmnt
Generalisation
Snapshot inspections
Government control

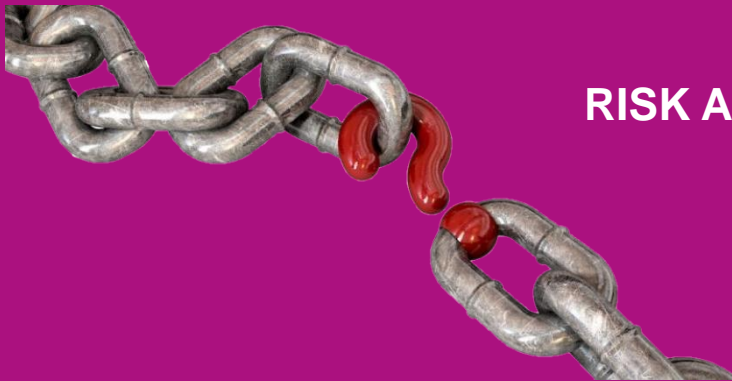


Smart Farming
Dedicated supply chains
Constant monitoring
Business responsibility

Disruptive
Collateral
damage/punish



Continuity
Investment and reward



RISK ASSESSMENT TOOL



Developing Clean Corridors



A cooperation between

Research

Wageningen University and Citrus Research International



Industry support

Fresh Produce Centre NL and CGA and FPEF



