

PHAMA

Pacific Horticultural & Agricultural Market Access Program

An Australian Government, AusAID initiative

Presentation to Pacific Value Chains Conference

Nadi, 18 April 2013



Australian Government
Aid Program

URS

KALANG

PHAMA GOAL & OBJECTIVE

GOAL

Increased exports of high value primary products, contributing to economic growth and improved rural livelihoods.

OBJECTIVE

PIC government and industry organisations working collaboratively to gain, maintain and improve access to key markets for selected high priority products.

PROGRAM BACKGROUND

- Designed to help PICs **gain and maintain access to export markets**.
- Focus on **technical/ regulatory issues** constraining primary sector exports. *Not* policy level.
- Covers Fiji, Vanuatu, Solomon Islands, Tonga, Samoa.
- Phase 1 duration early 2011 to mid 2013.
- Possible 4 yr Phase 2 through to 2017 under consideration.
- Total Phase 1 funding AUD 14m.
- Program office based in Suva. Small 1-person offices in other countries.

KEY ELEMENTS OF APPROACH

- **Practical assistance** addressing technical/ regulatory market access issues.
- **Fresh or processed/ semiprocessed exports.**
- **Targeted** approach. Focus on top priorities.
- **Industry/government partnership.**
- **Any export market** considered, not just AU and NZ.
- **Designed to complement and link** with other supply chain development activities...addresses one part of the problem.
- **Flexible, programmatic** approach.

FOUR MAIN COMPONENTS

COMPONENTS 1-3: (Implemented by URS-KALANG)

- Identification of highest priority issues.
- Preparation and processing of market access submissions
- Implementation of market access requirements
- Research and development

COMPONENT 4 (Implemented SPC)

- Regional market access support services

C1: PREPARATION OF MA SUBMISSIONS

Objective: Market access priorities identified and high quality market access submissions prepared and accepted by importing government authorities

- Market Access Working Groups (MAWGs) involving government and industry representatives established and operating effectively
- MA issues clearly prioritised, and action plans developed
- Quality MA submissions and data packages prepared
- Preliminary risk management packages prepared
- Bilateral coordination and communications enhanced

C2: IMPLEMENTATION OF MA REQUIREMENTS

Objective: Sanitary and phytosanitary measures required to establish/maintain MA for high priority products being successfully implemented by government and industry.

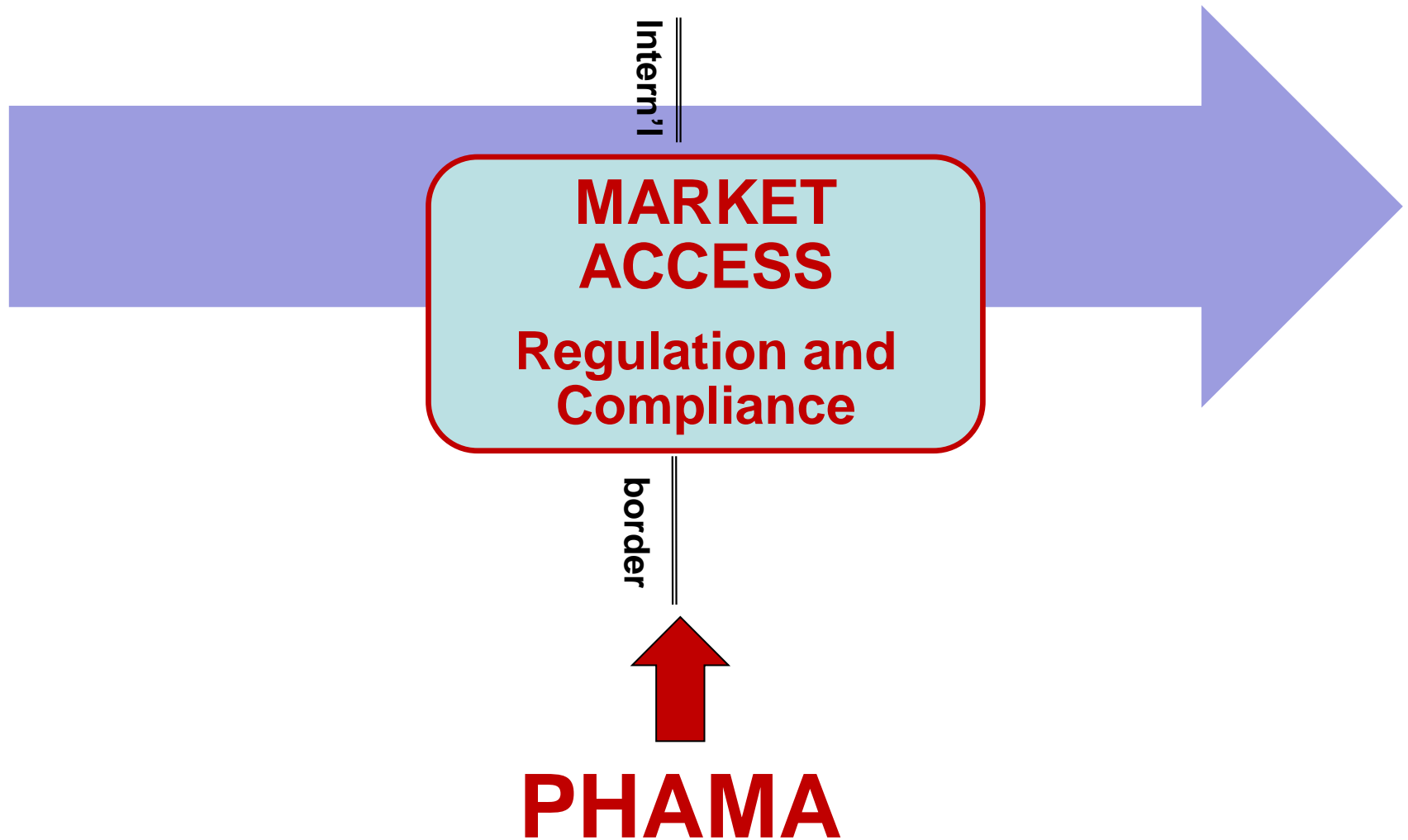
- Operational procedures required to meet sanitary and phytosanitary protocols developed
- Capacity of quarantine officers, exporters, producers and treatment facility operators to implement required procedures and meet target market quality standards improved
- SPS treatment, sanitary handling and diagnostic facilities established/upgraded and operating effectively

C3: RESEARCH AND DEVELOPMENT

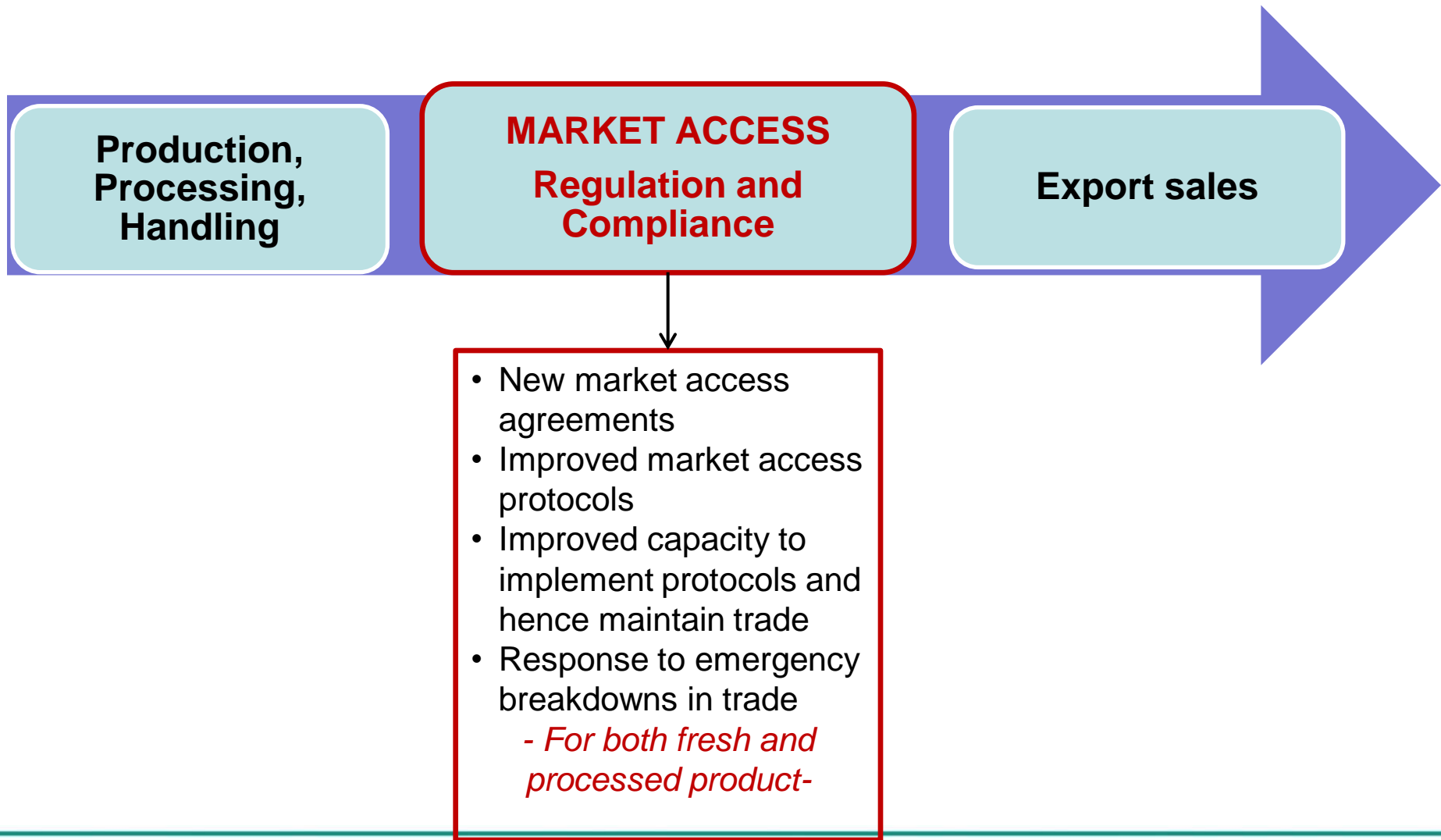
Objective: Priority R&D activities required to gain, maintain and improve MA identified and implemented.

- Export markets analysed and export feasibility studies prepared
- Pest surveys conducted and pest lists prepared
- Sanitary and phytosanitary treatment protocols developed
- Product standards developed
- Application of international zoosanitary, phytosanitary and food safety standards assessed
- Capacity of exporters to enter new markets improved

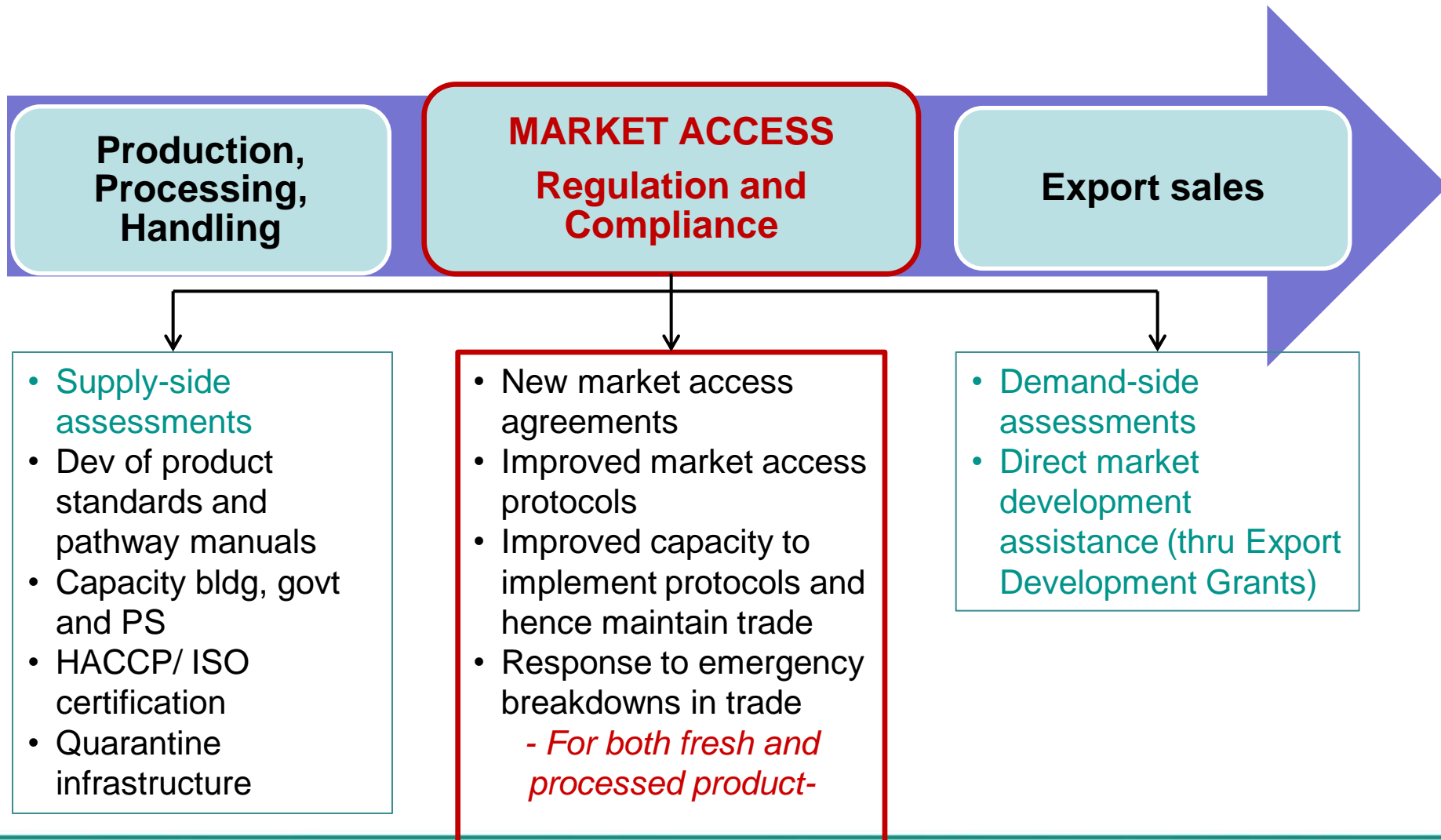
SCOPE



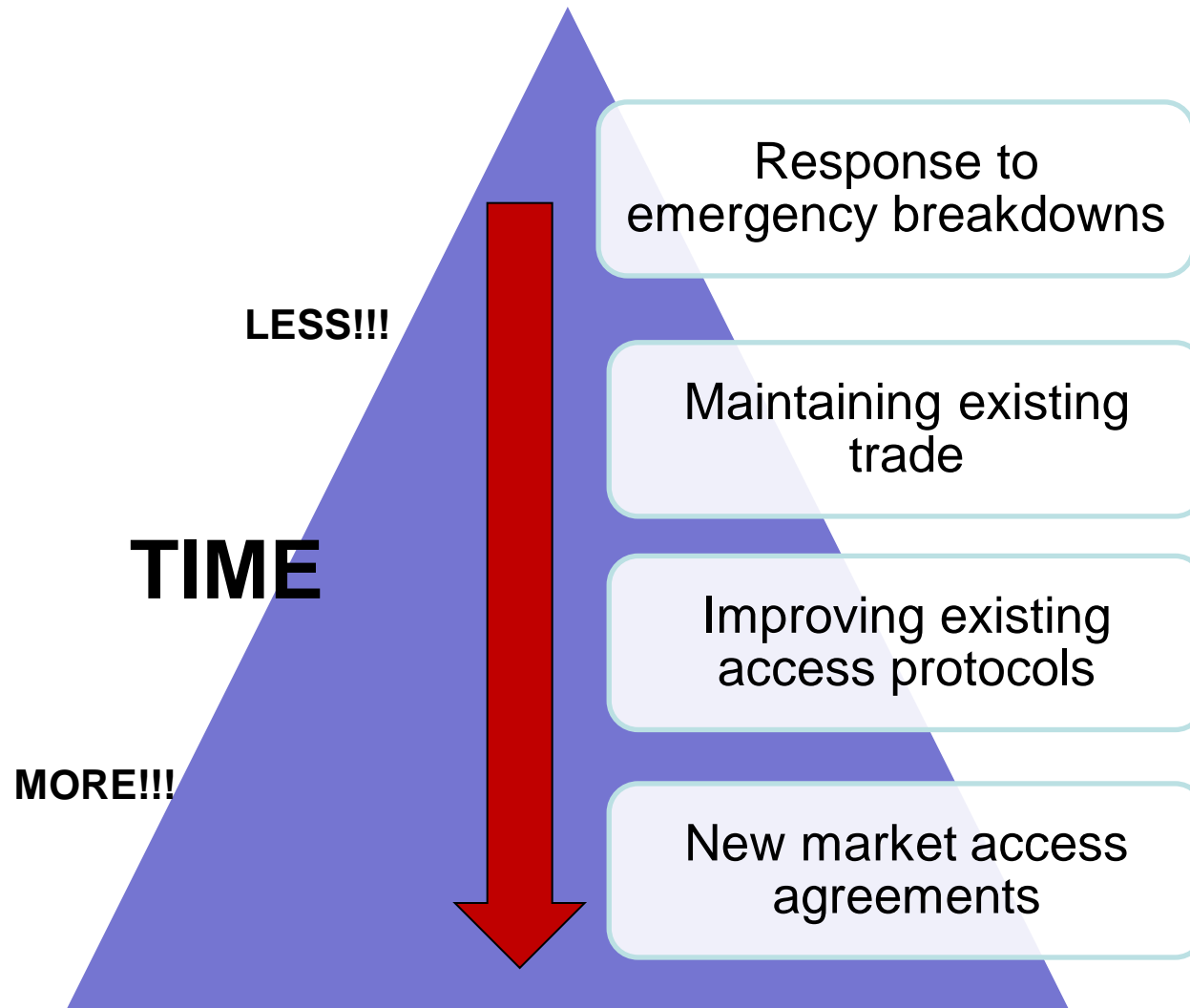
SCOPE



SCOPE



GOOD THINGS TAKE TIME....



MARKET ACCESS WORKING GROUPS DRIVE THE PROCESS....

- Small group of 8-10 persons in each country with direct responsibility/ or vested interest in progressing market access issues.
- Responsible for deciding priority market access issues where PHAMA will help.
- Govt/ private sector partnership. Robust discussion.
- Private sector reps: Exporters, producer group reps, leading exporters.
- Govt reps: Quarantine, Agriculture, Trade Departments.
- Operational level, *not* policy level.
- Role formally endorsed by Government in each country.
- Secretariat support provided by PHAMA through the National Market Access Coordinators (one per country).

MARKET ACCESS WORKING GROUPS

**THE *PROCESS* IS
WORKING ...**

- MAWGs are well established and generally performing well...
- ..but with variation between countries
- Fiji & Tonga are the strongest, followed by Samoa, SI and Vanuatu.
- Private sector/ government interaction is robust and encouraging.
- Process being considered by some countries for other economic sectors.

ACTIVITIES

- Activities **ID'ed on an annual basis**; plus 'emergency measure' activities
- **Total of around 87 activities** approved to date
 - **36 Completed**
 - **44 Active**, at various stages of implementation
 - **3 Planned**, implementation not yet started
 - **4 Cancelled** or Postponed
- Balance between **new market access vs. maintaining/ improving existing access arrangements**
- **Quality of portfolio steadily improving**
- Most activities are country-specific
- A few are regional in nature (e.g. support for a regional HoQ forum and bilateral trade discussions)

A 'TASTE' OF WORK UNDERWAY

Copra & PKE exports from SI and Samoa



Re-accreditation of copra and PKE meal export processing and handling facilities in SI and Samoa

- Worked with exporters & AQIS to get mills up to standard
- AQIS audit conducted in SI late 2012; 3 mills approved for export to Australia.
- Mills now reporting increased export sales as a result.
- Similar work proceeding with mills in Samoa.

Vanuatu beef



Various activities to maintain and grow export beef markets

- Assistance provided to maintain accreditation of BSE-free status for exports to Australia.
- Training of meat inspectors at export meat works.
- Work progressing on establishing new market access to South Korea.

Fiji taro



Development of taro production and packhouse standards



- Pathway reviewed in second half 2011 to identify issues.
- Draft quality standards developed together with BAF and industry in late 2011.
- Pathway manual and training materials completed early 2012.
- Training of industry and government reps now underway.
- Dramatic decrease in intercepts being already reported by AQIS and NZMPI.
- Work also underway looking at the nematode/ mandatory fumigation issue.



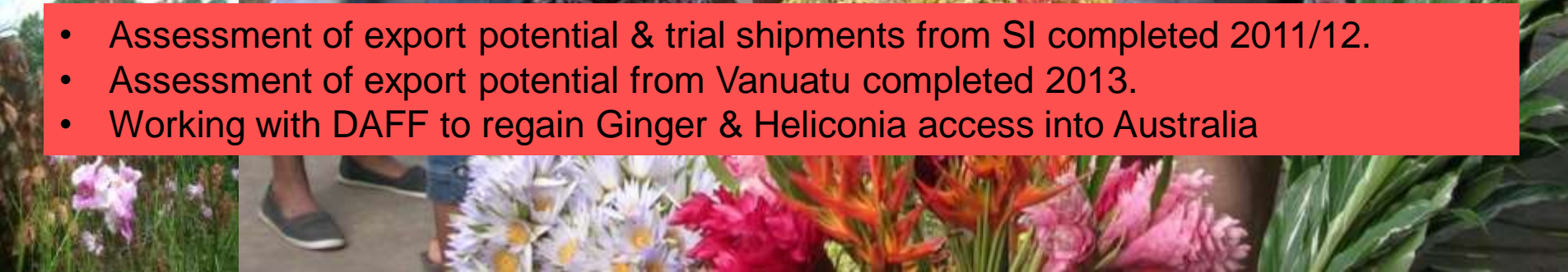
SI and Vanuatu cut flowers



Review of the potential for cut flower & foliage exports to NZ and Australia



- Assessment of export potential & trial shipments from SI completed 2011/12.
- Assessment of export potential from Vanuatu completed 2013.
- Working with DAFF to regain Ginger & Heliconia access into Australia



Tonga watermelons

Improvements to the watermelon export pathway to NZ



- Pathway review completed mid 2012.
- Remedial work undertaken. NZMPI audit successful.
- Continuing support with development of pathway manuals, inspection training etc.
- Lobbying by working group has also resulted in improved shipping service Tonga-AkInd.
- 275 mt exported in 2012. 4-500 mt forward orders for 2013.
- Upgrading of fumigation facilities and fumigation training

Samoa breadfruit



Export of heat-treated breadfruit to NZ/AU



- Decision reached on use of centralised commercial cooking facility
- Cooking trials completed and draft submission prepared for DAFF and NZMPI late 2011.
- Policy established by DAFF in May 2012, clearing the way for exports.
- Finalisation by NZ pending.
- Now working on extending the protocol to also include commercial consignments.

Fiji fresh ginger

Opening up fresh ginger exports to Australia



- New Import Policy announced by AU Jan 2013.
- Operational procedures reqd to meet AU quarantine reqts under development.
- Training to follow.
- First shipments planned for Sept/Oct 2013.
- Possible future work to remove fumo reqt.

SI fish exports

Fish testing and inspection capacity

- Major export earner....AUD64 m /annum.
- Continued access to export markets totally reliant on inspection and testing capacity.
- Upgrading fish inspection procedures and skills.
- Upgrading local lab testing capacity.
- Financing testing by international lab as interim measure.



Fiji pineapples

Establishing trade to NZ and possibly Australia



- Export protocol to NZ clarified; trial shipments proceeding.
- AU market feasibility conducted indicating good potential.
- New market access request to AU in pipeline, once current request for chillies completed.



Bilateral technical discussions

Funding for bilateral technical quarantine discussions with trading partners



- Fiji-Australia bilateral meeting held in Suva, November 2011.
- 2 regional meetings supported in 2012.
- Concrete trade outcomes being achieved.

Vinaka

Malo

Faafetai lava

Tank yu tumas

Tank yu lo evriwan

Thanks!!!