

**Required Report:** Required - Public Distribution

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**Report Name:** Fresh Deciduous Fruit Annual

**Country:** Taiwan

**Post:** Taipei

**Report Category:** Fresh Deciduous Fruit

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**Report Highlights:**

Taiwan's MY 2022/23 apple imports were 131,252 MT and are forecast at 130,000 MT for MY 2023/24. The United States remains the largest supplier of apples by volume but the market share of Japan, New Zealand, and Chile are all extremely close behind. New Zealand's tariff-free access and Japan's high reputation among consumers are gradually eroding the market share of the United States and Chile. Taiwan's domestic apple production of 1,406 MT remains small scale and accounts for one percent of total consumption.

## **Commodity: Apples**

### **Production**

In MY 2022/23, Taiwan domestic apple production was in line with previous estimates, totaling 1,406 MT.

Due to Taiwan's subtropical climate, apples can only be grown in high mountain areas, with the primary cultivation regions being the Heping District in Taichung City and the Ren'ai Township in Nantou County. However, the cultivation area in Ren'ai Township has been steadily decreasing, while the cultivation area in Heping District remains relatively stable.

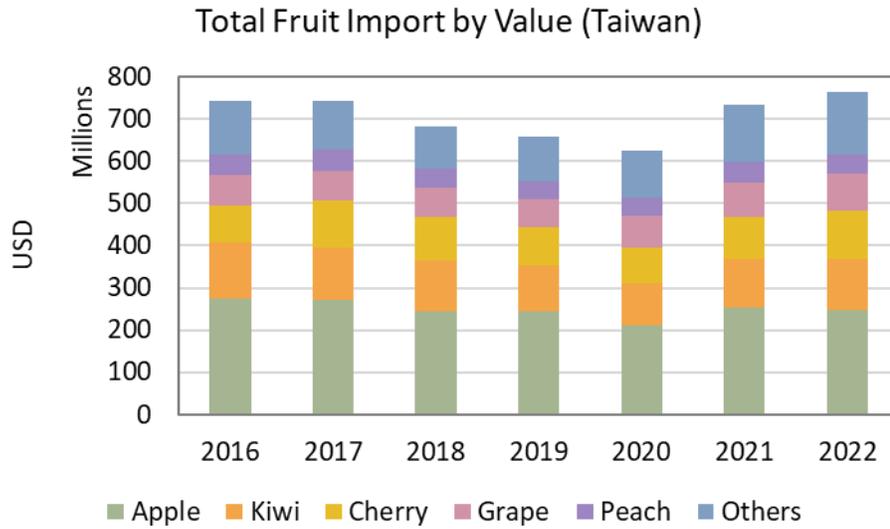
Planted area for MY 2023/24 is forecast to continue the gradual downward trend to 176 HA. Given the increasingly high average temperatures in the face of changing climate conditions, long-term apple cultivation areas are expected to continue shrinking as the land will be repurposed for other short-term crops.

MY 2023/24 production is forecast to decline to 1,350 MT, due to the 2023 drought in Taiwan during the spring and typhoons in the summer. Both the quality and size of the fruits will also be diminished.

### **Consumption and Trade**

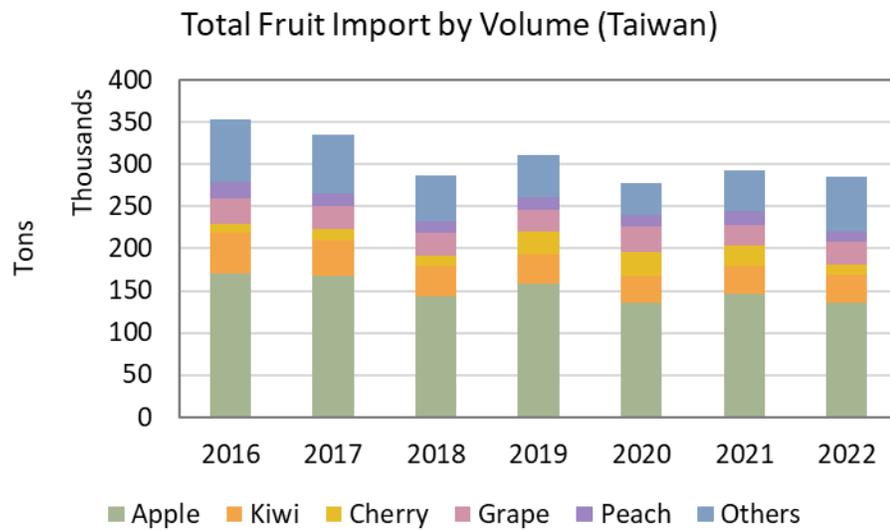
Taiwan primarily relies on imported apples, with only one percent of consumption sourced from local production. Apples are the most imported fruit in Taiwan, with a market share of approximately 37 percent by value and 48 percent by volume (see Figures 1 and 2). From 2016 to the present, while Taiwan's total import fruit value has remained relatively stable, the total import volume has seen a decrease, with a 10 percent reduction in the volume of fruit imports and a 20 percent decrease in apple volume. [Note: Calendar years are used for total fruit imports, but the marketing year (July – June) is used when discussing apple trade.]

**Figure 1: Taiwan Total Fruit Import by Value, 2016 - 2022**



Source: Trade Data Monitor (TDM)

**Figure 2: Taiwan Total Fruit Import by Volume, 2016-2022**



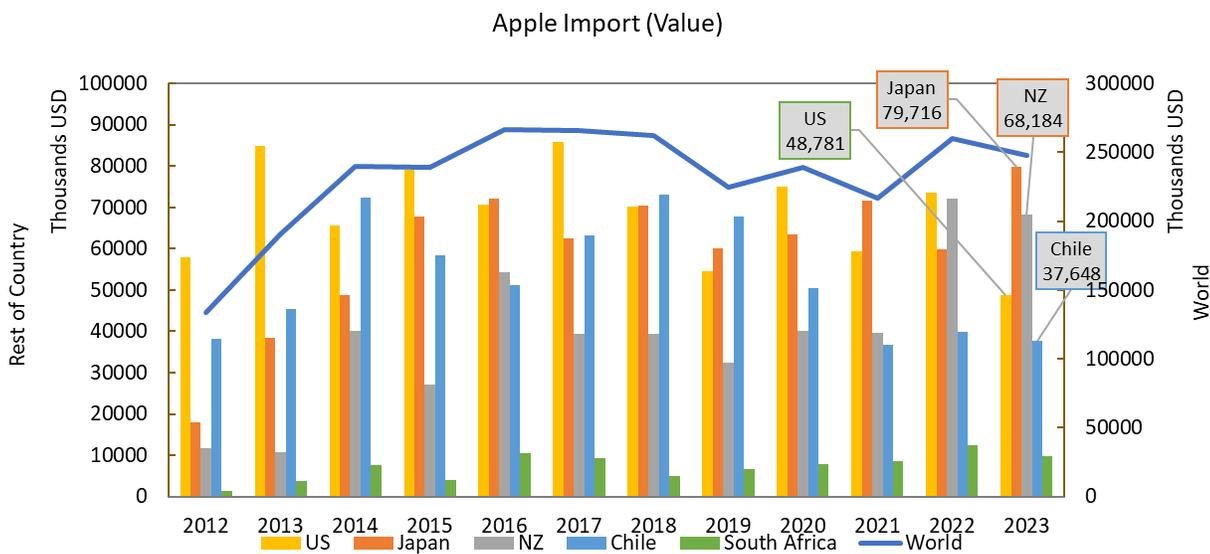
Source: TDM

MY 2022/23 apple import volume was 131,252 MT, about 12 percent higher than previous estimates. MY 2023/24 apple imports are forecast stable at 130,000. In MY 2022/23, the United States supplied 31,966 MT, representing a market share of around 24 percent. The import volumes from the United States, Japan, New Zealand, and Chile were very close, with market shares ranging from 22 - 24 percent (see Figure 4).

Over the past decade, the imported apple market in Taiwan has gradually begun to shift away from the two biggest historical suppliers. In MY 2012/13, the United States held a 42 percent market share by volume with Chile at 37 percent. Since then, New Zealand and Japan have made significant gains in supply volume and value. In market share by value, the United States fell to 19 percent in MY 2022/2023, while Chile was down to 15 percent (see Figure 3). Japan now takes the lead with 32 percent value market share by value MY2022/2023 with New Zealand following at 27 percent. For comparison, New Zealand had a market share of less than ten percent in 2012 while Japan was at 13 percent.

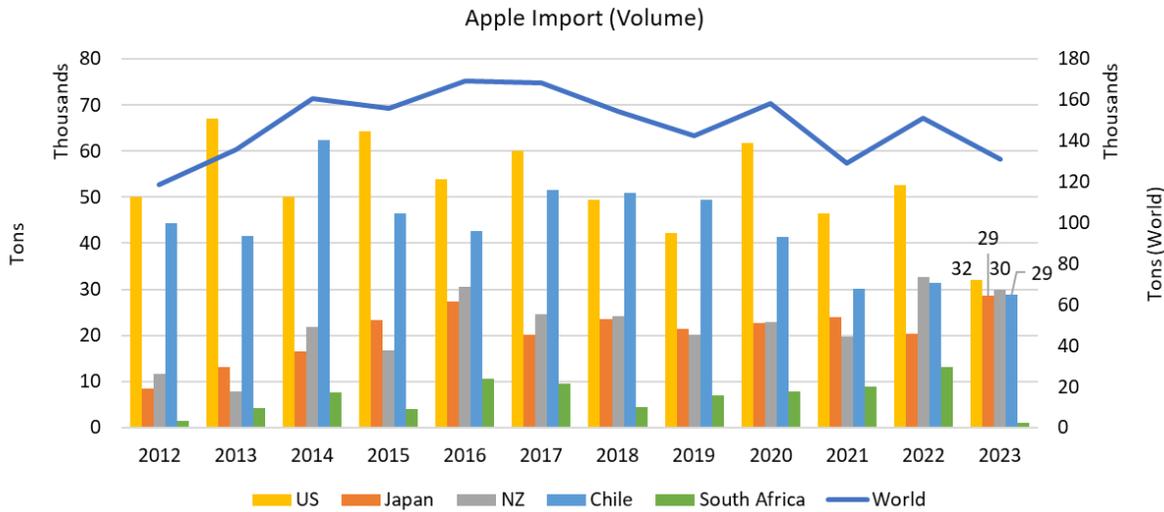
Multiple factors have contributed to this shift, including the strong U.S. dollar, weak Japanese yen, reduced production volume in the United States, and New Zealand's tariff advantage under the ANZTEC agreement with Taiwan. Chilean apples have also faced challenges due to ongoing pesticide residue issues at border inspection.

**Figure 3: Taiwan Apple Imports by Value, 2012 - 2023**



Source: TDM

**Figure 4: Taiwan Apple Imports by Volume, 2012 - 2023**



Source: TDM

For MY 2023/24, Taiwan total apple consumption is forecast down slightly to 131,350 MT as supply from the United States and New Zealand decreases. It is expected that U.S. apple prices will remain relatively high due to climate challenges and strong domestic demand. Taiwan is one of the top export destinations for New Zealand apples. New Zealand apple price are expected to go up as well, but the supply is still sufficient. Local industry sources report that they expect New Zealand apples to be more price competitive relative to U.S. apples.

*Other Marketing Factors*

In October, which is already the prime season for U.S. apples, New Zealand apples can still be found on the shelves of chain supermarkets in Taiwan. From trade data, it appears that the supply season for New Zealand apples is showing a tendency to extend, which will add to their competitiveness overall.

In recent years, Japanese apples have been prominently displayed in key retail outlets, effectively capturing customers' attention. Although their prices are relatively higher compared to U.S. apples, the high-quality image of Japanese fruit among Taiwan consumers has contributed to the increasing trade volume of Japanese apples.

**Figure 5: Apples in Taiwan Retail Markets (October 2023)**



*Source: Author Photos*

## Apples, Fresh: Production, Supply, and Distribution

Apples, Fresh	2021/2022		2022/2023		2023/2024	
	Jul 2021		Jul 2022		Jul 2023	
Taiwan	USDA Official	New Post	USDA Official	New Post	USDA Official	New Post
Area Planted (HA)	186	186	182	181	0	176
Area Harvested (HA)	186	186	182	181	0	176
Bearing Trees (1000 TREES)	67	67	66	64	0	62
Non-Bearing Trees (1000 TREES)	0	0	0	0	0	0
Total Trees (1000 TREES)	67	67	66	64	0	62
Commercial Production (MT)	1458	1458	1400	1406	0	1350
Non-Comm. Production (MT)	0	0	0	0	0	0
Production (MT)	1458	1458	1400	1406	0	1350
Imports (MT)	151300	151260	125000	131252	0	130000
Total Supply (MT)	152758	152718	126400	132658	0	131350
Domestic Consumption (MT)	152758	152718	126400	132658	0	131350
Exports (MT)	0	0	0	0	0	0
Withdrawal From Market (MT)	0	0	0	0	0	0
Total Distribution (MT)	152758	152718	126400	132658	0	131350
(HA) ,(1000 TREES) ,(MT)						

## Policy

**Import Tariff:** (HS 080810 / fresh apple)

Most major apple exporters to Taiwan face a 20 percent tariff, except for New Zealand which has duty free access under ANZTEC since 2013.

**Table 1: Taiwan Apple Tariffs, by Exporting Country**

Country	Tariff
United States, Chile, Japan, South Africa	20%
New Zealand	0%

### **Import Phytosanitary Regulations:**

Fresh food is regulated by TFDA and APHIA. Fresh apples from the United States are regulated under APHIA's [Quarantine Requirements for the importation of Fresh apples from The United States \(2019.10.29 version\)](#) and must be accompanied by an APHIS-issued phytosanitary certificate (PPQ form 577). A phytosanitary certificate can be issued by designated APHIS personnel or APHIS-authorized State and County authorities. Other phytosanitary certificates for shipments of U.S.-origin fresh fruit are no longer accepted by Taiwan plant health regulatory authorities. According to Article 5.6, if the pest list for quarantine requirement has changed, the updated list can be found on [the website](#).

TFDA is the competent authority responsible for border inspection. Taiwan uses the positive list system Pesticide Residue Limit in Food. The latest version is [here](#) (updated June 15, 2023; or on [the integrated website](#)). Standards for heavy metals are listed in TFDA's [Sanitation Standard for Contaminants and Toxins in Food](#).

### **Attachments:**

No Attachments