

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 imports over 135,000 MT apples annually with domestic supply less than one percent. Post expects that MY 2024/2025 Taiwan apple imports will return to 145,000 MT with domestic supply stable at 1250 MT. The United States and New Zealand are the primary suppliers, followed by Japan and Chile. In MY 2023/2024, the United States gained a 46 percent market share (64,694 MT), largely due to a temporary suspension in South African exports caused by apple moth quarantine issue and American apples are still price competitive.

Production

In the 2023/2024 season, apple production is expected to be even lower than previously anticipated due to a decrease in average yield per hectare. The average yield in the main production area, Taichung, has dropped by 20 percent, primarily due to excessively high temperature and drought, resulting in a total output of 1189 MT. For the 2024/2025 season, production is projected to be around 1250 MT, mainly because there have been no significant natural disasters (such as heavy rain, typhoons, or droughts) in 2024, allowing for a slight recovery in yield.

Although the overall apple cultivation area in Taiwan has remained unchanged at 180 hectares over the past two years, the general trend indicates that the total cultivation area is expected to stabilize or gradually decline. High-mountain profit crop such as vegetables (cabbage) and tea continue to compete for planting area with apples. Taiwanese imports pear scions from Japan (grafting), allowing oriental pear to be grown in lower-altitude regions; however, apples have not adopted this method, which limits variety updates. Under climate change, the cultivation of temperate fruits in Taiwan is becoming increasingly challenging due to shifts in suitable planting areas. With rising average temperatures, the expected yield for Taiwanese apples may hover around 7 MT/hectare.



Figure 1: Apple field in Wuling Farm (2024 May, Taichung) Photo Credit: Arthor

Consumption and Trade

According to the Taiwan Ministry of Agriculture Agricultural Statistics Yearbook 2023, the average fruit consumption per person in Taiwan is 115 kg/year, with the total national fruit consumption around 2.7 million MT, approximately 20 percent of which is supplied through imports. Apples are the most imported fruit in Taiwan; according to Trade Data Monitor (TDM), Taiwan imports at least 135,000 MT of apples annually. In calendar year (CY) 2023, apple imports amounted to 137,330 MT, making up over 50 percent of total fruit imports. Other major imported fruits include kiwifruit, grapes, oranges, cherries, pears (primarily oriental pears), and peaches (primarily nectarines) with each having import volumes exceeding 10,000 MT annually.

The United States is Taiwan's largest fruit supplier, exporting over 90,000 MT of fruit to Taiwan in CY 2023, of which apple exports accounted for about 60 percent of the total, far surpassing the export volumes of other fruits such as grapes, oranges, and cherries.

[Note: CY is used for total fruit imports, but MY (July-June) is used when discussing apple trade.]

For MY 2023/2024, Taiwan's apple import volume was 137,727 MT. The United States regained market share from South Africa and Japan, with U.S. apple exports reaching 64,694 MT, accounting for 46 percent of the market share. This shift is mainly due to South Africa being found with apple moth in May 2023, which led to a temporary suspension of imports to Taiwan, with imports only resuming in May 2024. For MY 2023/2024, South African apple supply is almost zero, and the United States has filled this supply gap.

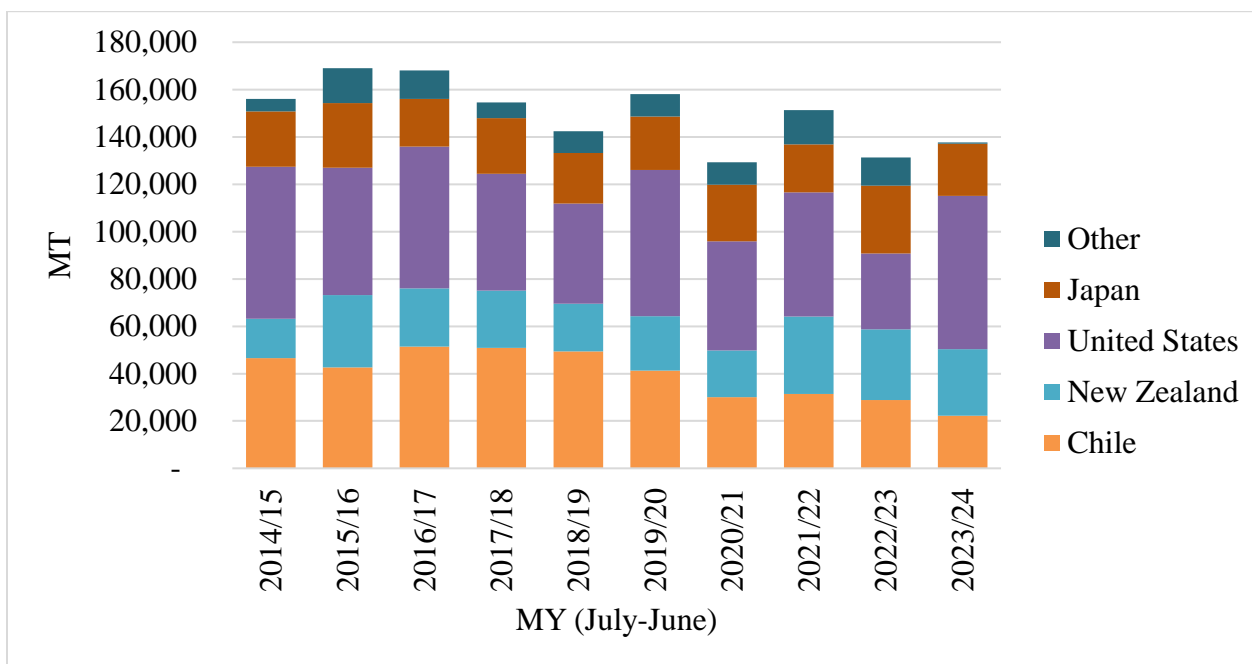


Figure 2: Taiwan Import from World

We expect that apple imports for MY 2024 may reach 145,000 MT. Although Taiwan offers a wide variety of fruits and there has been a slight decline in apple imports over the past decade, apples remain an important fruit in daily life in Taiwan. Apples usually display in the first row of supermarket shelves. For example, in October, it is common to see apples from the United States, New Zealand, and Japan all available at the same time for consumers to choose from.



Figure 3: Apple display in Carrefour (October 2024) Photo credit: Author

Table 1: Taiwan Apple Import from World

Value (1000USD)	MY2021/22	MY2022/23	MY2023/24	MY2023/24 Market share	2022/2023 variation
World	260,238	247,977	244,770		-1%
US	73,480	48,781	92,664	38%	90%
New Zealand	72,052	68,184	64,267	26%	-6%
Japan	59,855	79,716	57,493	23%	-28%
Chile	39,904	37,648	29,396	12%	-22%
South Africa	12,461	9,681	20	0%	-100%

Volume (MT)	MY2021/22	MY2022/23	MY2023/24	MY2023/24 Market share	2022/2023 variation
World	151,260	131,253	137,726		5%
US	52,562	31,996	64,693	47%	102%
New Zealand	32,671	29,872	28,077	20%	-6%
Japan	20,257	28,601	22,050	16%	-23%
Chile	31,405	28,892	22,256	16%	-23%
South Africa	13,097	9,794	22	0%	-100%

Data source: TDM

Price

U.S. apples and New Zealand apples are the main suppliers in different seasons. While U.S. apples maintain a higher advantage in import prices, their retail prices are quite like those of New Zealand apples. At the beginning of the new season, the new variety Cosmic Crisp is priced higher (45-50 NTD per piece), but towards the end of the season, the price can drop to 29 NTD per piece. Before Japanese apples are stocked in large quantities at chain supermarkets, their prices can be 2-3 times higher than those of U.S. apples, making them one of the more expensive options currently available in the market.

	United States	New Zealand	Japan	Chile	South Africa
CIF (USD/kg) #	1.4	2.2	2.6	1.3	0.9
Retail price (supermarket)	20-25 NTD/ per 200g Fuji *	20-25 NTD/per 200g Fuji*	55-59/ per piece Toki @	N/A	

#CIF unit price from TDM

*Price from https://price.ndc.gov.tw/p/zh_tw/index

@Price from Carrefour supermarket

Note: 1 USD=32 NTD (October 2024)

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.

Taiwan Apple Tariffs, by Exporting Country

Country	Tariff
U.S., Chile, Japan, South Africa	20%
New Zealand	0%

Import Phytosanitary Regulations

Fresh food is regulated by Taiwan Food and Drug Administration (TFDA) and Animal Plant Health Inspection Agency (APHIA). Fresh apples from the United States are regulated under APHIA's [Quarantine Requirements for the importation of Fresh apples from The United States \(2024.7.31 version\)](#) 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 March 29, 2024; or on [the integrated website](#)). Standards for heavy metals are listed in TFDA's [Sanitation Standard for Contaminants and Toxins in Food](#).

Apples, Fresh Market Year Begins Taiwan	2022/2023		2023/2024		2024/2025	
	Jul 2022		Jul 2023		Jul 2024	
	USDA Official	New Post	USDA Official	New Post	USDA Official	New Post
Area Planted (HA)	181	181	176	180	0	179
Area Harvested (HA)	181	180	176	180	0	179
Bearing Trees (1000 TREES)	64	64	62	64	0	64
Non-Bearing Trees (1000 TREES)	0	0	0	0	0	0
Total Trees (1000 TREES)	64	64	62	64	0	64
Commercial Production (MT)	1406	1406	1350	1189	0	1250
Non-Comm. Production (MT)	0	0	0	0	0	0
Production (MT)	1406	1406	1350	1189	0	1250
Imports (MT)	131300	131253	155000	137727	0	145000
Total Supply (MT)	132706	132659	156350	138916	0	146250
Domestic Consumption (MT)	132706	132659	156350	138916	0	146250
Exports (MT)	0	0	0	0	0	0
Withdrawal From Market (MT)	0	0	0	0	0	0
Total Distribution (MT)	132706	132659	156350	138916	0	146250
(HA) ,(1000 TREES) ,(MT)						
OFFICIAL DATA CAN BE ACCESSED AT: PSD Online Advanced Query						

Attachments:

No Attachments