United States Department of Agriculture
Foreign Agricultural Service

GAIN Global Agricultural Information Network

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Report Number: SF2024-0011

Report Name: Fresh Deciduous Fruit Semi-annual

Country: South Africa - Republic of

Post: Pretoria

Report Category: Fresh Deciduous Fruit

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Report Highlights:

The cold and wet winter of 2023 provided favorable conditions for deciduous fruit and aided in improved production volumes. Production is expected to grow and improve in quality from MY 2022/23 when fruit was affected by hail damage. Despite pressure on the Port of Cape Town, industry solutions including increased use of Port Elizabeth will bolster the volumes of increased export-quality fruit that is able to reach markets. Post revises MY 2023/24 production of pears and table grapes upwards, while apple production is revised slightly downward on stagnated growth in area. Pear production for MY 2022/23 is revised upwards on updated production estimates and confirmed export figures.

Commodities
Apples, Fresh
Pears, Fresh
Grapes, Table, Fresh

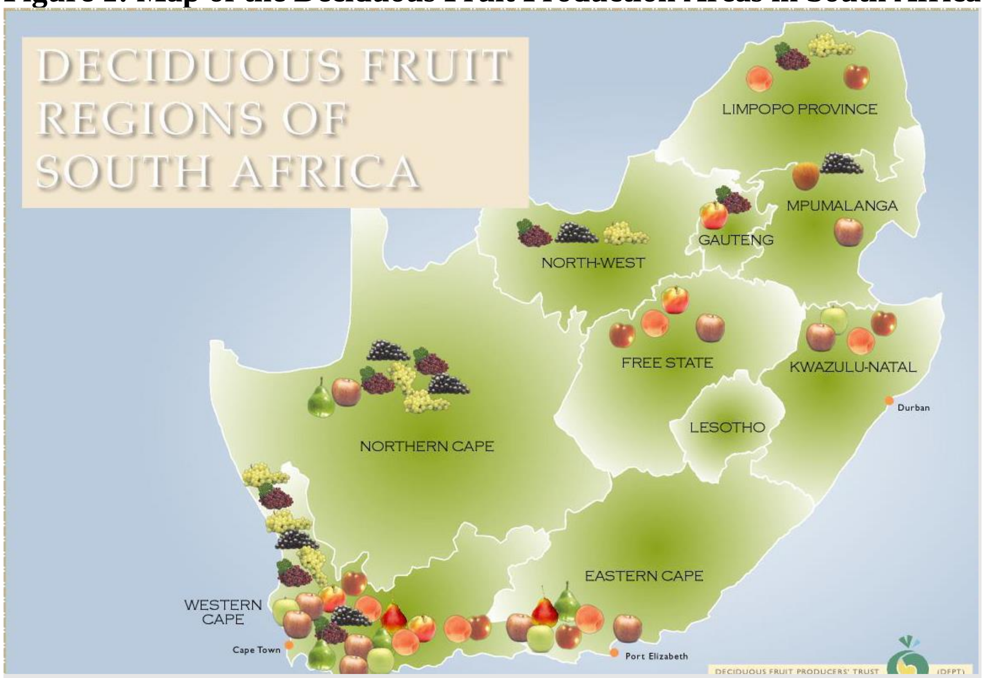
Apple and Pears Marketing Year (MY) – January – December
Table Grapes MY – October to September
MT – Metric Tons

Sources:
Hortgro - http://www.hortgro.co.za
South African Table Grapes Industry (SATGI) - http://www.satgi.co.za/
South African Revenue Services (SARS) - https://www.sars.gov.za/

Apples, Fresh

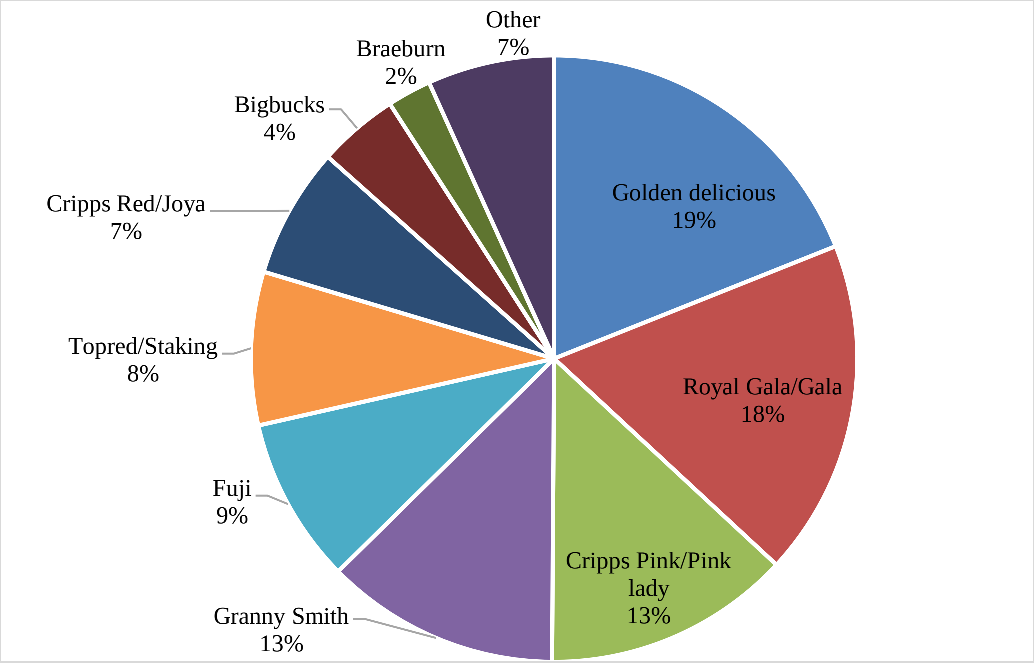
The Western Cape province is the largest apple producing area in South Africa, and together with the Eastern Cape province, accounts for more than 95 percent of the apple production (see Figure 1). Small, but growing production areas were established further north mainly in the Free State, Mpumalanga, and Limpopo Provinces. Harvest for South African apples typically begins in January and runs through May, with peak harvest times between February and April. Controlled atmosphere (CA) storage allows the industry to provide product to both the domestic and international markets year-round. Class 1 fruits, which are typically sold in the export market, are usually stored in CA for up to 9 months, then released into Regular Atmosphere (RA) storage for a shorter term (3 months).

Figure 1: Map of the Deciduous Fruit Production Areas in South Africa



Source: Hortgro

Figure 2: Planted apple varieties (Hectares)



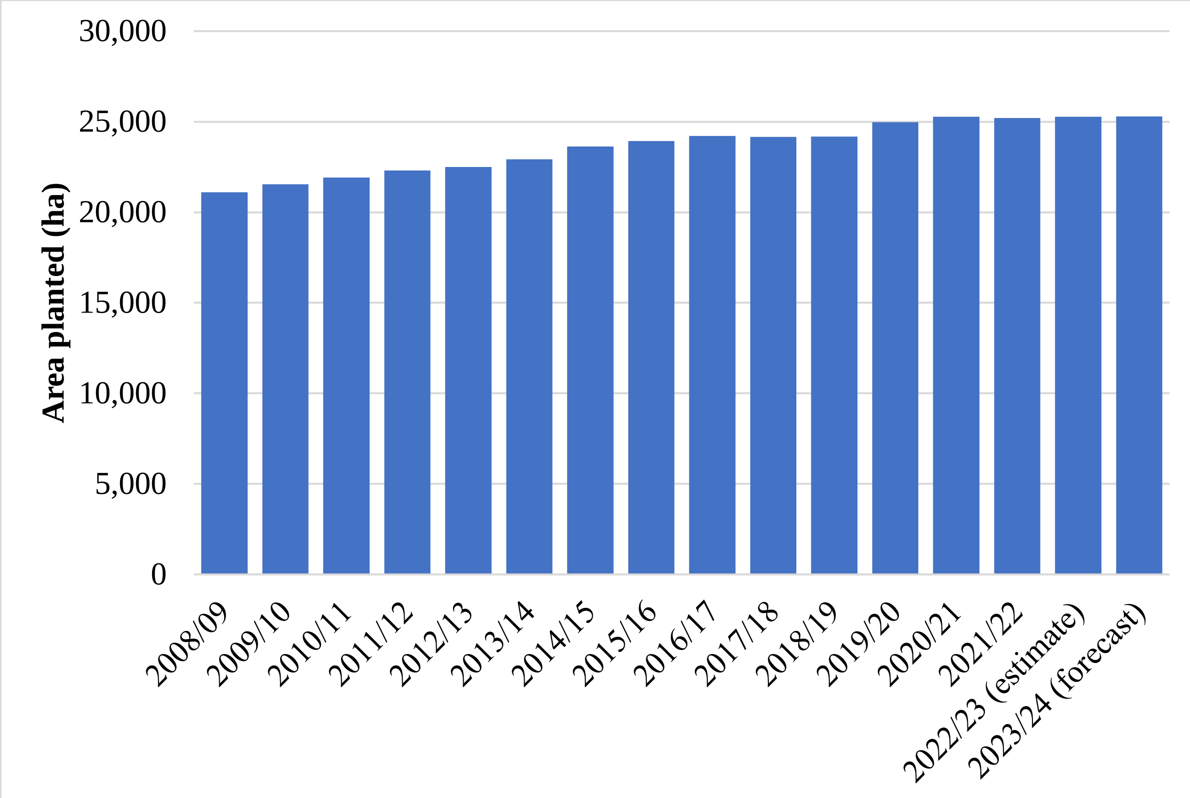
Source: Hortgro Tree Census, 2022

Six cultivars dominate apple production in South Africa and account for approximately 80 percent of area planted. The cultivars of choice are mainly determined by consumer demand in South Africa's export markets (see figure 2). However, plantings over the past five years have been driven by producers' desire to improve yields.

Area

In recent years, area under apple production in South Africa has been negatively affected by logistical challenges at the Port of Cape Town, rail underperformance, changing weather patterns, depressed domestic market, limited processing capacity, limited cold storage facilities, increased input costs and erratic electricity supply. These challenges have led to stagnated growth in area under production and is expected to stabilize at 25,300 MT in MY 2023/24 with limited new plantings and replanting of newer varieties to enhance yield (see figure 3). Growers seem to be focusing investments on hail nets, reliable sources of power and water, and vertical integration to offset high input costs. Post contact reported that nursery orders are minimal which also reflects that industry is consolidating. In MY 2023/24 area harvested is expected to rebound due to favorable weather after hailstorm damage in MY 2022/23.

Figure 3: Area Planted to Apples in South Africa



Source: Hortgro and Post estimates

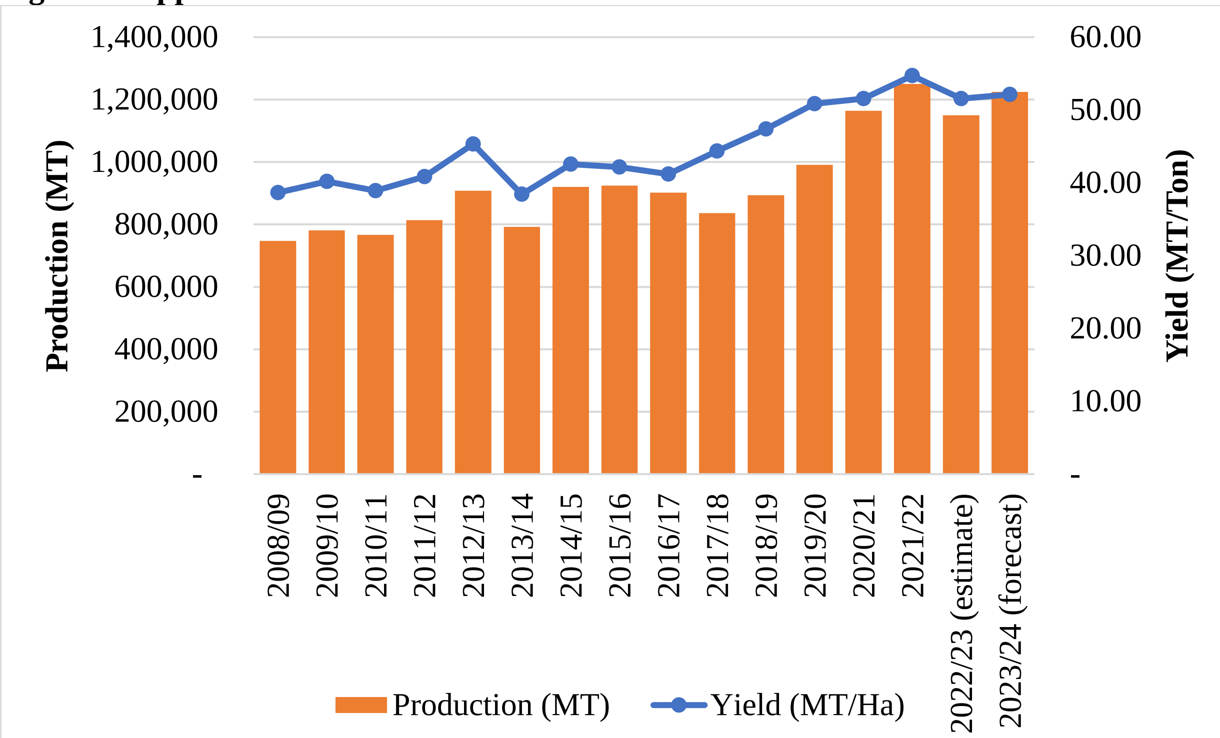
Production

Post forecasts that South African apple production in MY 2023/24 will grow by 7 percent from MY 2022/23 on improved harvested area, and favorable weather conditions. The cold and wet winter of 2023 conditions provided adequate chill hours. The weather also guaranteed enough water for irrigation and supported favorable fruit development, which bolstered overall production volumes for MY 2023/24.

Although some production regions in the Western Cape, namely, Elgin, Grabouw, Vyeboom and Villersdorp were impacted by floods in October 2023 which interrupted spray programs and pollination yields were only slightly diminished. The Western Cape also experienced storms and winds in April 2024, but industry sources report that only a small percentage of the remaining fruit was damaged or blown off by the wind. The cold weather brought on by the winds aided in color development of later red and pink apple varieties.

Production in MY 2022/23 dropped by 8 percent as apple producing regions in the Western Cape, more specifically Ceres and Langkloof regions which were affected by hail. This resulted in a decline in apple production and physical damage to the fruit. Post contacts relayed that some growers in the region left portions of their produce unharvested due hail damage and limited processing capacity. In MY 2021/22, South Africa produced a record apple crop of 1.25 MMT due to conducive weather conditions throughout the season ensuring an excellent crop and fruit quality.

Figure 4: Apple Production in South Africa



Source: Hortgro and Post estimates

Consumption

Apples are popular in South Africa and are widely consumed throughout the year. Post revises the domestic consumption of apples in MY 2023/24 slightly downwards as the quality of fruit will lead to a larger percentage destined for export markets. The portion of apples sold for processing is expected to ease in MY 2023/24 due to improved quality produce sold in the export and local market. However, despite this decline, consumption will rebound by 6 percent from MY 2022/23 when there was a production shortfall.

In MY 2022/23 domestic consumption declined by 13 percent due to a decline in production. Although hailstorms in MY 2022/23 increased supply of non-export quality apples and apple juice in the local market, consumption was lower than in MY 2021/22 when a record crop and sufficient juicing capacity bolstered domestic consumption (see Figure 5). Consumption figures include fresh market sales, as well as apples destined for processing.

Exports

Post forecasts that apple exports will rebound by 7 percent in MY 2023/24 on increased production of exportable supply. Post contacts report that exports will be driven by growth in bi-red apples such as Gala, Cripps Red and Big Bucks as well as in the Pink Lady variety.

Port inefficiencies still pose an increased risk of export delays due to equipment breakdowns and wind delays. Port of Cape Town management and industry engage regularly which aid in the backlog of fruit export. Apples are traditionally shipped through the Port of Cape Town. However, due to the challenges in Cape Town, some exporters opted to truck apples for shipping through Port Elizabeth.

Exports to Africa are largely driven by growing demand (especially for Pink Lady, Gala, and Golden Delicious varieties), limited competition in these markets, and apples' ability to endure suboptimal handling conditions. However, exporting to African countries is limited by the high cost of trade and logistical challenges. South Africa has free trade agreements with both the European Union (EU) and the UK, and benefits from duty free exports in these markets.

Although African and European markets have been traditionally strong, growth is expected to be driven primarily by increasing exports to the East. South Africa's apple exports to India grew by almost 30 percent in MY 2022/23 after the government of India approved in-transit cold treatment for South African apple and pear exports.

Table 1: South African Fresh Apple Exports

Partner Country	MY 2021/22	MY 2022/23	%Δ	Jan - Mar		
				MY 2022/23	MY 2023/24	%Δ
United Kingdom	77,948	69,201	-11%	1,105	1,917	73%
Nigeria	56,937	44,628	-22%	10,191	7,193	-29%
Bangladesh	38,008	42,427	12%	18,978	17,942	-5%
Malaysia	37,413	38,969	4%	6,458	4,802	-26%
United Arab Emirates	34,791	37,283	7%	12,980	15,955	23%
Russia	26,463	11,976	-55%	863	906	5%
Vietnam	23,783	24,409	3%	3,174	3,726	17%
Senegal	22,772	20,576	-10%	3,756	4,631	23%
Netherlands	21,786	23,391	7%	341	868	155%
Kenya	17,558	18,393	5%	3,008	2,105	-30%
India	17,470	22,712	30%	6,754	17,377	157%
Zimbabwe	16,095	14,823	-8%	2,440	3,600	48%
Zambia	15,508	14,667	-5%	2,730	2,222	-19%
Botswana	14,172	13,171	-7%	3,624	3,694	2%
China	13,223	16,290	23%	3,959	2,529	-36%
Ghana	12,667	11,954	-6%	3,021	2,333	-23%
Germany	11,987	6,394	-47%	123	314	155%
Cameroon	10,784	10,808	0%	2,186	2,470	13%
Namibia	10,678	11,697	10%	2,618	2,638	1%
Others	145,060	153,487	6%	28,346	35,095	24%
Total	**625,103**	**607,256**	**-3%**	**116,655**	**132,317**	**13%**

Source: Trade Data Monitor, LLC.

Imports

South African production of apples has been increasing by an average of 7 percent annually since MY 2018/19. Production gains and improvements in storage technologies have substantially dampened import demand as the industry can now use CA storage to supply the domestic market throughout the year. Post forecasts that in MY 2023/24 imports will decline further to 30 MT based on an increase in production for local supply.

The customs duties payable on imports are indicated in Table 2. United States apple exports are subject to a four percent customs duty. The United States currently has market access for apples from areas free of Rhagoletis Pomonella (apple maggot). The protocol stipulating the phytosanitary import requirements is available on the website of the Department of Agriculture, Land Reform and Rural Development (DALRRD) (Phytosanitary import requirements for importation of Apples from USA,PNW to South Africa).

Table 2: Tariff Rates, Fresh Apples

Heading Subheading	Article Description	Rate of Duty					
		General	EU/UK	EFTA	SADC	Mercosur	AfCFTA
0808.10	Apples, fresh	4%	Free	4%	Free	4%	2.4%

Source: South African Revenue Services (SARS) Updated April 25, 2025

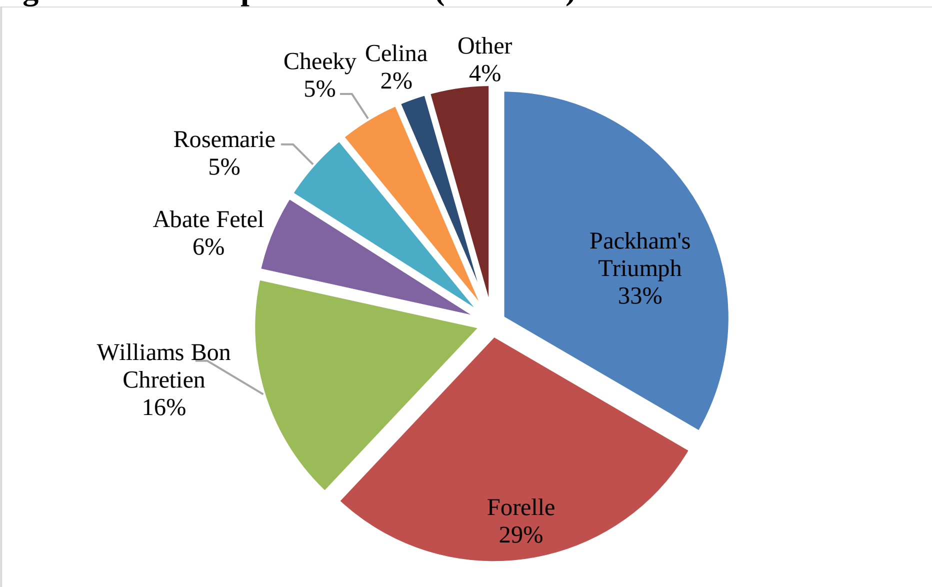
Table 3: Production, Supply and Distribution of Fresh Apples

Apples, Fresh	2021/2022		2022/2023		2023/2024	
Market Year Begins	Jan 2022		Jan 2023		Jan 2024	
South Africa	USDA Official	New Post	USDA Official	New Post	USDA Official	New Post
Area Planted (HA)	25209	25209	25400	25277	25500	25300
Area Harvested (HA)	22850	22850	22300	21500	23500	23500
Bearing Trees (1000 TREES)	33637	33637	33700	33700	33800	33800
Non-Bearing Trees (1000 TREES)	3100	3100	3000	3000	3000	2000
Total Trees (1000 TREES)	36737	36737	36700	36700	36800	35800
Commercial Production (MT)	1250000	1250000	1150000	1150000	1230000	1225000
Non-Comm. Production (MT)	0	0	0	0	0	0
Production (MT)	1250000	1250000	1150000	1150000	1230000	1225000
Imports (MT)	25	25	25	47	25	30
Total Supply (MT)	1250025	1250025	1150025	1150047	1230025	1225030
Domestic Consumption (MT)	624925	624922	555025	542791	580025	575030
Exports (MT)	625100	625103	595000	607256	650000	650000
Withdrawal From Market (MT)	0	0	0	0	0	0
Total Distribution (MT)	1250025	1250025	1150025	1150047	1230025	1225030
(HA) ,(1000 TREES) ,(MT)						

Pears, Fresh

Pears grow well in areas with moderate temperatures. Like apples, pears are predominately grown in the Western Cape province of South Africa, which receives most of its rainfall during the winter months (May to July). Collectively, the top three cultivars represent almost 80 percent of pear plantings in South Africa (see Figure 5).

Figure 5: Planted pear varieties (Hectares)

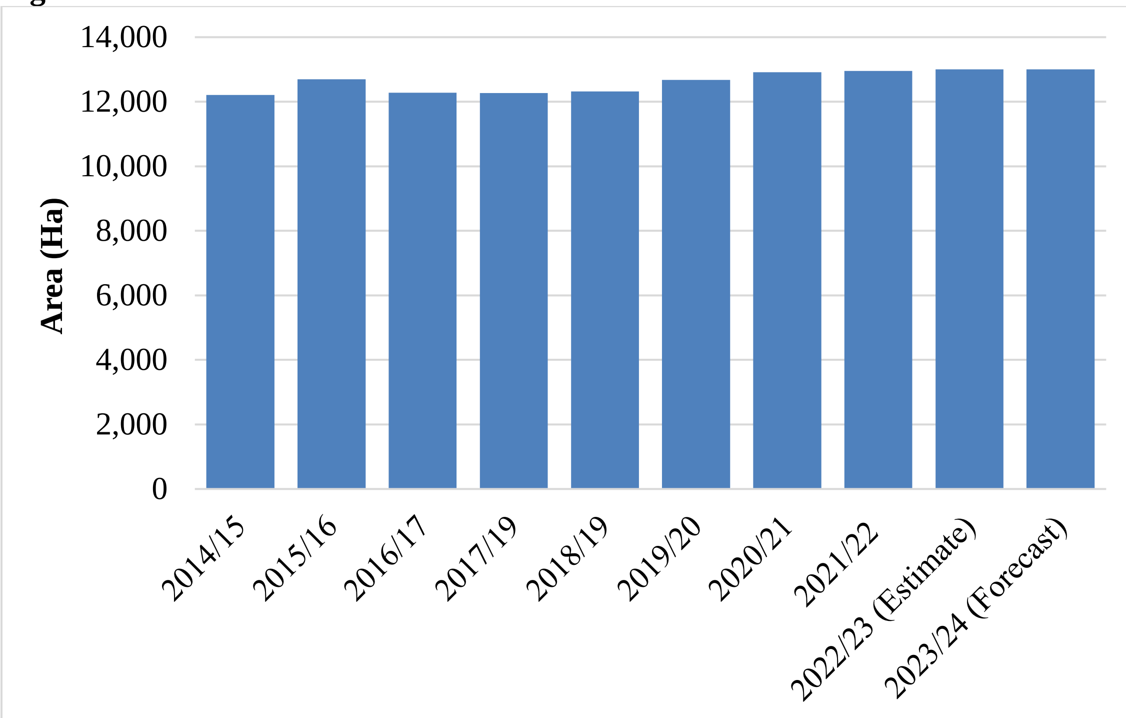


Source: Hortgro Tree Census, 2022

Area Planted

The area under pear production has increased slowly but steadily at a rate of about 1 percent per annum over the past decade, driven by relatively high earnings from export markets and sound financial returns on investments. However, accelerating farming input costs, limited processing capacity and pressure at the Port of Cape Town are diminishing the profitability of pear producers which limit continued investments in expanding area planted. Growers are observed to be putting up hail nets to increase quality of export quality fruit. Contacts have suggested that the industry is in a stage of caution due to macroeconomic factors and an uncertain future for the pear canners (See GAIN Report: South African Canned Fruit Trade). Post forecasts that expansion in area under pear production will remain unchanged in MY 2023/24 at an estimated 13,000 ha or 18 million trees in MY 2023/24 (see Figure 6).

Figure 6: Area Planted to Pears in South Africa



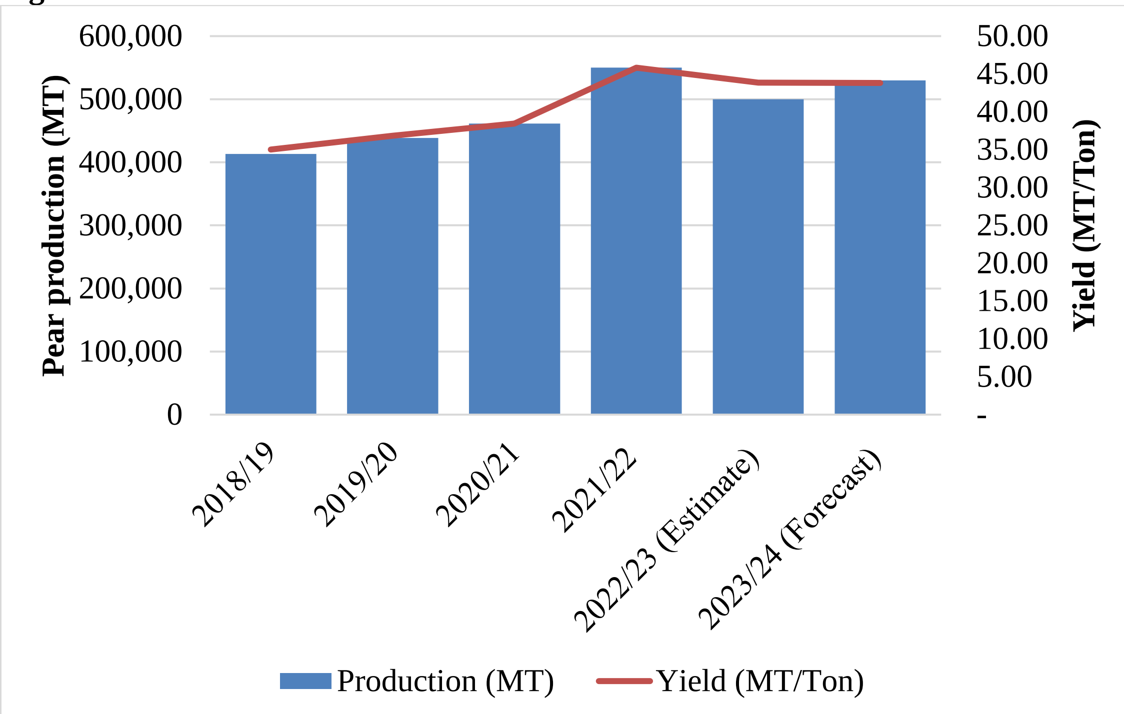
Source: Hortgro and Post estimates

Production

Post revises MY 2023/24 pear production upwards to 530,000 MT, a 6 percent boost from MY 2022/23. Growth is based on the cold and wet winter of 2023 with good chilling hours resulting in excellent fruit set and quality. Summer pears in the Ceres region are expected to be slightly affected by the early frost damage; nevertheless, production from this region is expected to swell from MY 2022/23 production. Post contacts reported that pears produced in MY 2023/24 were generally smaller in size due to a shortened growing season though overall yields were stronger than in MY 2022/23 with extensive investment in netting. Blushed pears such as Cheeky, Celina and Rosemarie are expected to boost overall production, while Abatel Fetel volumes are expected to drop slightly on earlier harvest and some frost bite.

In MY 2022/23 pear production is estimated at 500,000 MT, a 9 percent drop from record production of 550,000 MT in MY 2021/22, due to hail damage in a major pear producing region. Post revises pear production in MY 2021/22 up to by 10,000 MT following an update of industry data which indicated an even higher record crop. Pear orchards received good rain and sufficient chill hours in the winter of 2021, resulting in good quality produce (see Figure 7).

Figure 7: Pear Production in South Africa



Source: Hortgro and Post estimates

Consumption

The industry is export orientated with more than 50 percent of pear production destined for foreign markets. In South Africa, less than 25 percent of total pear demand is consumed fresh, while the majority is destined for the processing industry. Post forecasts that domestic consumption will drop by 4 percent in MY 2023/24 based on an increase in exportable supply. Furthermore, lower global demand for canned fruit is reducing demand from processors.

In MY 2022/23, domestic consumption of pears is revised upwards to 259,512 MT, on increased availability of pears in the local market due to a hail-induced drop in export quality produce bringing it in line with MY 2021/22 consumption levels. Consumption figures include fresh market sales, as well as pears destined for processing.

Exports

Post forecasts pear exports will rise by 16 percent to 280,000 MT in MY 2023/24 on increased production of exportable supply, a weaker Rand exchange rate and easing of freight costs. The harvest season started about 7-10 days earlier than normal, with summer pear variety, Celina entering relatively empty markets due to lower than normal production in the northern hemisphere. Exports in MY 2022/23 dropped by 16 percent on a decline in exportable supply due to the hailstorm damage. In MY 2021/22 pear exports increased by 16 percent to 287,411 MT on record production.

India approved in-transit cold treatment for South African pears in August 2022 where South African remains the leading supplier. South Africa's pear exports to the United States are minimal at less than a 1,000 MT per annum. As a result of new market access to China, South Africa's inaugural pear shipment arrived in China in September 2022. Industry expects growth in the China market to be driven by Forelle, Cheeky, Packham's Triumph, Abate Fetel, and Celina.

Table 4: South African Fresh Pear Exports (Values in MT)

Partner Country	MY 2021/22	MY 2022/23	%Δ	Jan - Mar		
				MY 2022/23	MY 2023/24	%Δ
Netherlands	50,806	37,792	-26%	17,906	33,293	86%
Russia	51,868	34,819	-33%	14,408	14,773	3%
United Arab Emirates	28,224	25,481	-10%	9,654	11,352	18%
India	28,507	22,850	-20%	6,910	6,656	-4%
United Kingdom	13,754	15,708	14%	4,528	3,976	-12%
Indonesia	9,957	9,865	-1%	2,514	3,308	32%
Portugal	4,309	7,580	76%	2,381	5,000	110%
Saudi Arabia	7,402	7,275	-2%	2,186	2,573	18%
Malaysia	8,618	7,251	-16%	2,059	2,183	6%
Canada	6,920	6,648	-4%	3,645	4,197	15%
Italy	7,718	5,471	-29%	4,660	5,388	16%
Singapore	4,821	4,612	-4%	1,344	1,071	-20%
Hong Kong	3,023	4,229	40%	1,280	1,375	7%
Nigeria	4,394	3,823	-13%	1,042	727	-30%
China	558	3,405	510%	826	710	-14%
Germany	5,470	3,168	-42%	689	1,441	109%
France	4,674	3,100	-34%	1,689	3,203	90%
Botswana	3,036	2,794	-8%	643	662	3%
Oman	3,211	2,581	-20%	1,091	1,202	10%
Qatar	3,230	2,030	-37%	556	897	61%
Vietnam	4,902	1,867	-62%	309	511	65%
Senegal	2,452	1,821	-26%	480	697	45%
Mauritius	1,360	1,652	21%	416	507	22%
Others	*28,197*	*24,709*	*-12%*	*7,379*	*9,559*	*30%*
Total	**287,411**	**240,531**	**-16%**	**88,595**	**115,261**	**30%**

Source: Trade Data Monitor, LLC

Imports

As the second largest pear producer in the Southern Hemisphere after Argentina, South Africa imports minimal quantities of pears mainly from China. Post forecasts pear imports in MY 2023/24 at 30 MT based on increased supply of pears in the domestic market, and continued depressed demand, based upon the rate of import decline over the past few marketing years. In MY 2022/23 South Africa imported 43 MT of pears on sufficient supply of pears in the domestic market.

The United States does not have market access for pear exports to South Africa. In July 2010, the United States requested market access for pears, however progress on this request stalled and the process has not been finalized. If South Africa grants access, United States exports of pears would be subject to a four percent customs duty as indicated in Table 5.

Table 5: Tariff Rates, Fresh Pears

Heading Subheading	Article Description	Rate of Duty					
		General	EU/UK	EFTA	SADC	Mercosur	AfCFTA
0808.30	Pears, fresh	4%	Free	4%	Free	4%	2.4%

Source: SARS Updated April 25, 2024

Table 6: Production, Supply and Distribution of Fresh Pears

Pears, Fresh	2021/2022		2022/2023		2023/2024	
Market Year Begins	Jan 2022		Jan 2023		Jan 2024	
South Africa	USDA Official	New Post	USDA Official	New Post	USDA Official	New Post
Area Planted (HA)	12950	12950	13000	13000	13100	13000
Area Harvested (HA)	12000	12000	11800	11400	12100	12100
Bearing Trees (1000 TREES)	16970	16970	17230	17230	17350	17350
Non-Bearing Trees (1000 TREES)	1045	1045	900	900	850	800
Total Trees (1000 TREES)	18015	18015	18130	18130	18200	18150
Commercial Production (MT)	540000	550000	490000	500000	500000	530000
Non-Comm. Production (MT)	0	0	0	0	0	0
Production (MT)	540000	550000	490000	500000	500000	530000
Imports (MT)	200	172	50	43	50	30
Total Supply (MT)	540200	550172	490050	500043	500050	530030
Domestic Consumption (MT)	252800	262761	245050	259512	220050	250030
Exports (MT)	287400	287411	245000	240531	280000	280000
Withdrawal From Market (MT)	0	0	0	0	0	0
Total Distribution (MT)	540200	550172	490050	500043	500050	530030
(HA) ,(1000 TREES) ,(MT)						
OFFICIAL DATA CAN BE ACCESSED AT: PSD Online Advanced Query						

Apple and pear prices

The apple and pear prices indicated in Table 7 are the average prices (Rand/MT) earned in the respective markets. In MY 2021/22 price for apples and pears in the local market decreased due to increased production and volumes sold in the local market. Local prices are based on sales on the twenty-one wholesale fresh produce markets in South Africa, while prices for the export market typically reflect higher quality fruit. Export prices for both apples and pears increased in MY 2021/22 and remains lucrative in comparison to the local and processed markets.

Table 7: Local and Export Price of Apples and Pears

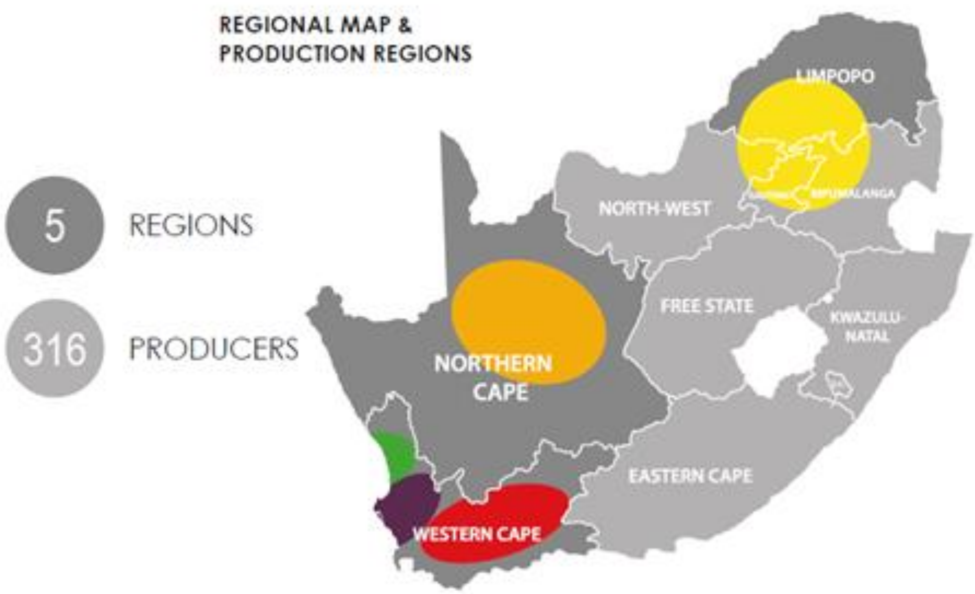
	APPLES			PEARS		
	Local Market	Export Market	Processed Market	Local Market	Export Market	Processed Market
Marketing years	(R/MT)	(R/MT)	(R/MT)	(R/MT)	(R/MT)	(R/MT)
2019/20	7,454.00	15,905.29	2,020.66	7,127	13,468	1,894
2020/21	7,590.00	14,403.42	1,614.44	7,192	12,331	1,930
2021/22	7,421.00	14,574.09	1,925.99	7,078	13,081	2,006

Source: Department of Agriculture, Land Reform and Rural Development

Table Grapes, Fresh

South Africa's major growing areas for table grapes, include the Hex River which accounts for 32 percent, the Berg River Valley (23 percent), Olifants River (6 percent) in the Western Cape province, the Orange River in the Northern Cape province (29 percent), and Limpopo province (10 percent) in northeastern South Africa (see Figure 8).

Figure 8: Map of Table Grape Production Areas in South Africa

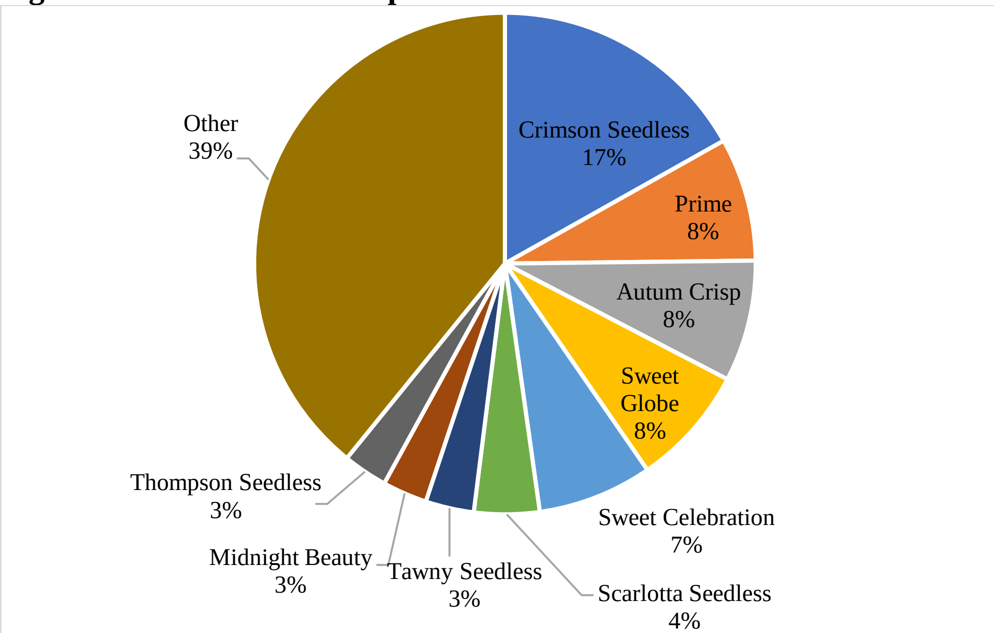


Northern Provinces **Orange River** **Olifants River** **Berg River** **Hex River**

Source: SATI

According to SATI Tree Census (2023), area planted to table grapes was mostly covered with vines aged between 3-9 years (53 percent), followed by vines aged 10-15 years (20 percent), and new vines younger than 2 years (15 percent). The cultivar profile of table grapes in South Africa has changed significantly over the past decade. Consumers prefer seedless grapes, and, as a result, seeded cultivars are declining while the production of seedless table grapes varieties are growing. Less than 8 percent of current vineyards are still seeded table grapes. New plantings heavily favor three varietals: Autumn Crisp, Sweet Celebration, and Sweet Globe.

Figure 9: Planted Table Grape Varieties



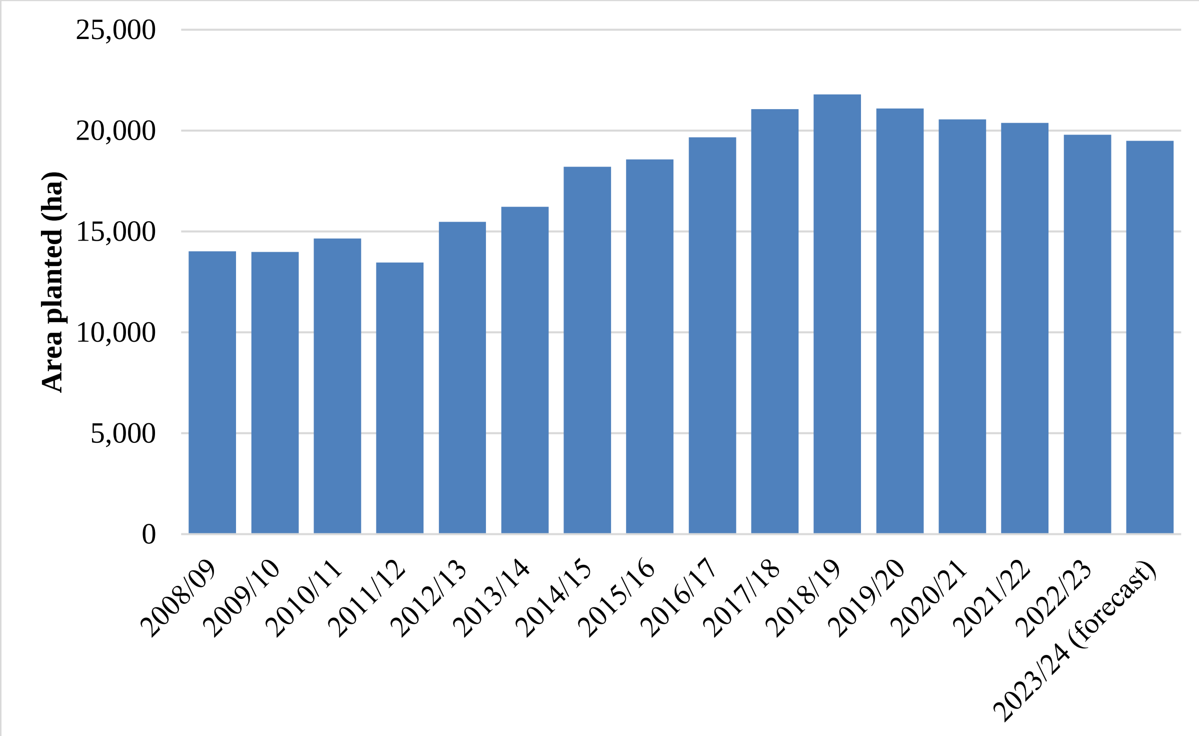
Source: 2023 SATI Tree Census

Area Planted

Post forecasts that area under table grape production in MY 2023/24 will decline slightly to around 19,500 ha. Stagnation in area planted follows a sharp increase in table grape area from 2012 to 2019 (see Figure 10), mainly driven by growing export earnings. Inefficient port operations, deteriorating road networks, and frequent disruptions to the electricity supply are diminishing the profitability of table grape producers in South Africa and limiting new investments in the industry.

Producers saw increased input costs in MY 2023/24 particularly for fuel, electricity, and labor. Cost of fertilizer and chemicals have eased but remain above price levels prior to the Russia-Ukraine conflict. According to the industry association, the biggest direct cost component for producers is labor cost, which makes up almost 55 percent of total direct cost. The South African Department of Employment and Labor published a new national minimum wage of R27,58 ($1.48) per hour as of March 1, 2024, an 8 percent increase from R25,42 ($1.36) in 2023. However, Post contact confirm that labor cost in relation to total costs have gone down over the years.

Figure 10: Area Planted to Table Grapes in South Africa



Source: South African Table Grape Industry (SATGI) and Post estimate

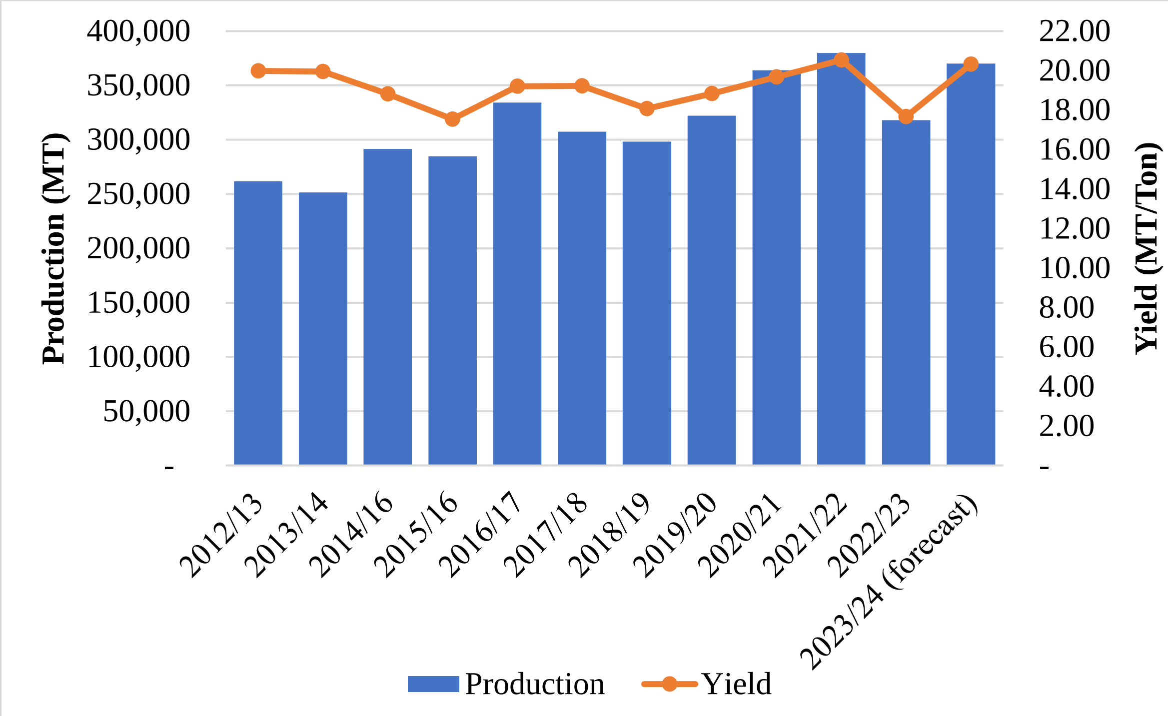
In MY 2022/23, the area under production declined by 3 percent to 19,788 ha. The Northern Cape region recorded the largest decline in area planted due to changing weather condition and increases in production costs.

Production

Post revises table grape production in South Africa upwards to 370,000 MT in MY 2023/24, a 16 percent hike following low yields in MY 2022/23 due to unfavorable weather conditions. The winter in 2023 (for MY 2023/24 production) in table grape producing regions was characterized by low temperatures, which is ideal during the dormancy cycle and aided in good berry size, coloring, and quality. These conditions also lowered pest pressure. Although localized hail was reported in the Hex River production region, it did not significantly affect national table grape production. Additionally, production volumes were supported by newer cultivars coming into production. The production season in MY 2023/24 ended about 2 weeks earlier than usual, due to changing weather patterns and rains received in the Hex River production region during mid-late season. This led to lighter than usual production on late cultivars.

In MY 2022/23, table grape production dropped by 16 percent to 318,000 MT after a record crop of 380,000 MT produced in MY 2021/22 (see Figure 11). This is based on a marginal reduction in production area and adverse weather conditions, particularly in the Orange River area. Although table grape production areas consolidated, in MY 2021/22 record crop was achieved by new higher yielding cultivars coming into full production and favorable weather conditions during the season.

Figure 11: Table Grape Production in South Africa



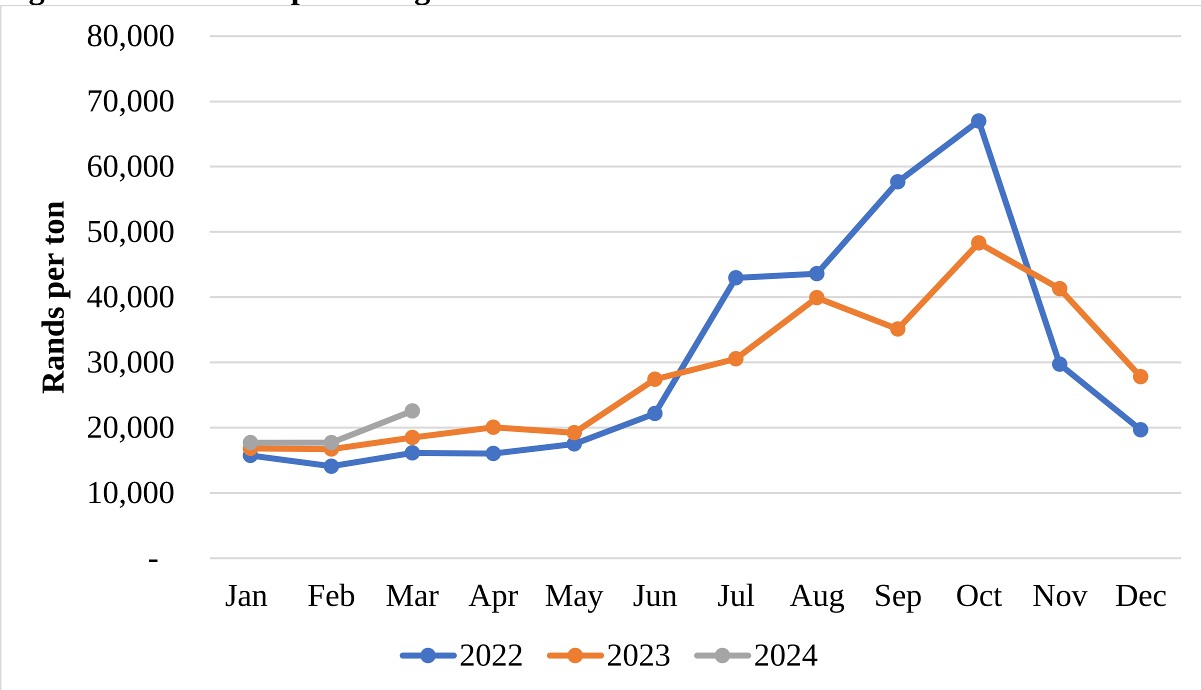
Source: USDA, SATGI, and Post forecast

Consumption

South Africa's table grape industry is mainly export-orientated, with more than 85 percent of production destined for foreign markets. The supply of table grapes to the domestic market is dependent on exports, with table grapes that do not meet export quality standards being sold to the domestic fresh produce market or supplied to processors. As a result, for MY 2023/24, Post forecasts revises domestic consumption downwards to 39,000 MT, decreasing by 15 percent compared to MY 2022/23 based on increased exportable supply. Additionally, table grapes are mainly consumed by upper middle-income and affluent consumers. Increased exports are putting downward pressure on local table grape consumption.

Figure 12 shows average price of table grape in 16 wholesale fresh produce markets across South Africa. Price trend mirrors seasonality, as prices remain elevated during the off-season due to relatively lower supply in the market.

Figure 12: Table Grape Average Price trend



Source: South African Department of Agriculture, Land Reform and Rural Development

In MY 2022/23 domestic consumption is estimated to have dropped by 15 percent based on a dip in production coupled with domestic inflationary pressure. As a result, consumers substituted higher-cost exotic fruits for lower-priced fruit "staples" such as apples.

Exports

Post revises MY 2023/24 table grapes exports upwards to 340,000 MT, showing a 20 percent hike on expected improvement in export quality production. Exports are also supported by a weaker exchange rate against the U.S. dollar and lower freight costs compared to MY 2022/23.

Traditionally approximately 90 percent of South Africa's table grapes exports move through the Port of Cape Town, and 6 percent through the Port of Durban. Port of Cape Town experienced some wind and fog delays including 2 significant delays experienced during the MY 2023/24 export season that impacted over 20,000 MT. Port inefficiency present a significant threat to table grape exports as significant delays for the highly perishable product were reported. While these delays did not have a significant impact on volumes exported in MY 2023/24, they impacted profit margins in cases of quality claims, inability to capture early season premiums, and contractual failure on timely deliveries.

As a means to remedy the port crisis, port management, government and the fruit industry engaged on a regular basis to review readiness throughout the export season, port productivity, and implement any remedial action when necessary. In MY 2023/24, some shipping lines diverted vessels from the Port of Cape Town to Port Elizabeth to reduce some pressure. Post contact confirm that about 10.6 percent of table grape exports were shipping through Port Elizabeth. Shipping lanes reported to have been sailing weekly conventional vessels particularly to the EU and UK market, as an additional means to relieve pressure at the Port of Cape Town. Namibian exporters who traditionally export through the Port of Cape Town, shipped about 21 percent of table grape exports through Walvis Bay Port. The topmost exported cultivars in MY 2023/24 are Crimson Seedless, Sweet Globe, Sweet Celebration, Prime and Autumn Crisp mirroring overall production.

In MY 2022/23, table grape exports are revised downwards slightly to 283,255 MT, showing a 16 percent drop compared MY 2021/22. A drop is exports is due to a decline in production and challenges at the port. Inefficiencies at the Port of Cape Town and high reefer container prices placed significant pressure on the industry. In February 2023, during the peak of the table grape export season, the Cape Town harbor was closed for about 240 hours due to strong winds, which significantly disrupted operations for this highly perishable product.

Europe is the leading export market for South African table grapes, accounting for about 75 percent of total table grape exports in MY 2022/23. The Netherlands, as the entry point to the European market, is the largest export market for South Africa's table grapes, accounting for more than 40 percent of total exports. South Africa benefits from a shorter shipping distance to Europe than other Southern Hemisphere competitors, and preferential trade agreements with the EU and United Kingdom. Exports to Asia, the Middle East, and Africa also have strong growth potential and are a core focus for the South African table grape industry. Export volumes to the United States have grown significantly over the past five years, but volumes are still below 6,000 MT, accounting for less than 2 percent of total table grape exports. The main varieties exported to the United States includes Autumn Crisp, Red Seedless, and Adora Seedless.

Table 8: South Africa's Table Grape Exports

Export destinations	MY 2021/22 (MT)	MY 2022/23 (MT)	MY 2023/24* (MT)
European Union	179,554	154,406	189,929
United Kingdom	75,027	57,557	65,170
Middle East	17,945	20,320	11,117
Canada	20,152	14,441	20,430
Southeast Asia	15,839	14,169	10,537
China & Hong Kong	11,290	8,153	6,162
Africa	5,957	4,171	3,892
Russia	3,452	3,728	6,683
United States	3,719	3,460	5,997
Indian Ocean Island	1,690	1,407	2,022
All others	1,123	1,445	7,272
Unknown	-	-	2,017
Total	**335,750**	**283,255**	**331,230**

Source: SATI
*Volumes up until week 15 of MY 2023/24. Exports typically conclude by week 20.

Imports

South Africa is a net exporter of table grapes. Imports primarily fill the off-season demand from around July to November. Namibia, Egypt, and Spain are the primary suppliers (see Table 9), with both Namibian and Spanish grapes entering the market duty-free. Namibian table grape season starts a few weeks earlier than South Africa's, and exports are mainly between October and January. Post revises MY 2023/24 imports downwards to 9,000 MT, decreasing by 17 percent from MY 2022/23 due to improved production and expected lower demand by South African consumers. In MY 2022/23, table grape imports increased by 12 percent based on a decline in domestic production.

Table 9: South Africa's Table Grape Imports

Partner Country	Unit: Tons		
	2020/21	2021/22	2022/23
World	**9,053**	**9,712**	**10,906**
Namibia	2,474	2,051	4,140
Egypt	3,203	3,750	3,628
Spain	3,299	3,887	3,139

Source: Trade Data Monitor, LLC.

The United States does not have market access for table grapes into South Africa. However, if access were granted, exports would be subject to a 4 percent customs duty, as shown in Table 10.

Table 10: Tariff Rates, Grapes Fresh

Heading / Subheading	Article Description	Rate of Duty					
		General	EU/UK	EFTA	SADC	Mercosur	AfCFTA
0806.10	Grapes, fresh	4%	Free	4%	Free	4%	2.4%

Source: SARS (Updated April 23, 2024)

Table 11: Production, Supply and Distribution of Table Grapes

Grapes, Fresh Table	2021/2022		2022/2023		2023/2024	
Market Year Begins	Oct 2021		Oct 2022		Oct 2023	
South Africa	USDA Official	New Post	USDA Official	New Post	USDA Official	New Post
Area Planted (HA)	20379	20379	19788	19788	19500	19500
Area Harvested (HA)	18500	18500	18000	18000	18000	18200
Commercial Production (MT)	380000	380000	318000	318000	342000	370000
Non-Comm. Production (MT)	0	0	0	0	0	0
Production (MT)	380000	380000	318000	318000	342000	370000
Imports (MT)	9700	9700	10900	10907	10000	9000
Total Supply (MT)	389700	389700	328900	328907	352000	379000
Fresh Dom. Consumption (MT)	53900	53900	43900	45652	42000	39000
Exports (MT)	335800	335800	285000	283255	310000	340000
Withdrawal From Market (MT)	0	0	0	0	0	0
Total Distribution (MT)	389700	389700	328900	328907	352000	379000
(HA) ,(MT)						

Policies and Regulations

Table 12 provides a list of the regulations applicable to apples, pears, and table grapes in South Africa. Exporters should also be aware that an importer may request additional certifications over and above the minimum legislation and regulations indicated in this section.

Table 12: List of Key Legislations and Regulations

Policy or Regulation	**Website Links**
Agriculture Product Standards Act No 119 of 1990	Agricultural Product Standard Act
Agricultural Pests, Act, 36 of 1983	Agricultural Pests Act
Foodstuffs, cosmetics, and disinfectants Act 54 of 1972	Foodstuffs, cosmetics and disinfectants act
Procedures for exporting to South Africa	Plant Health (Import into SA)
Maximum Residue Limits	Maximum Residue Limits Apples Pears Table grapes
Regulations relating to standards, grading, packing, and marking	Apples Local Import Regulations - Apples Pears Local Import Regulations - Pears Table Grapes Local Import Regulations - Table grapes
Import Protocols	Phytosanitary import requirements for importation of Apples from China to South Africa Phytosanitary import requirements for importation of Apples from Netherlands to South Africa Phytosanitary import requirements for importation of Pears from China to South Africa Phytosanitary import requirements for importation of Apples from USA, PNW to South Africa

Source: DALRRD

Attachments:

No Attachments