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South Africa - Republic of

Fresh Deciduous Fruit Annual

Deciduous Fruit Production and Exports Expected to Decrease Due to the 2017 Drought Conditions

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Report Highlights:
The below average winter rainfall received in 2017 and the low dam levels (about thirty percent) in the drought stricken Western Cape, will severely impact the availability of irrigation water in the 2017/18 MY. As a result, the 2017/18 MY production and export of deciduous fruits is expected to decrease significantly.

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

Executive Summary

The 2017/18 MY apple production is forecast to decrease by six percent to 850,000 MT, due to the decrease in area harvested, limited irrigation water, lower yields and smaller fruit sizes. Exports of apples in the 2017/18 MY are forecast to decrease by five percent to 500,000 MT, based on the available production and some fruit not meeting the export quality standards.

Pear production in the 2017/18 MY is forecast to decrease by six percent to 405,000 MT, due to the decrease in area harvested, limited irrigation water, lower yields and smaller fruit sizes. This is expected to result in about a three percent decrease in the 2017/18 MY pear exports to 250,000 MT.

Post forecasts that the 2017/18 MY table grape production will decrease by fourteen percent to 287,000 MT, based on the decrease in area harvested and small fruit size in the Western Cape growing regions. This decrease was partially offset by the higher yielding new generation varieties, as well as normal production and growing conditions in the Orange River growing regions. This will result in a fifteen percent decrease in the 2017/18 MY table grape exports to 258,000 MT.

South Africa`s deciduous fruit industry is export-oriented and prioritizes exporting as much volume as they can before supplying the surplus fruit to the local market. As a result, the 2017/18 MY domestic consumption of apples, pears and table grapes will decrease based on the lower production.

South Africa only imports small quantities of deciduous fruits to fulfill a niche market or to satisfy domestic demand when supply is limited.

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

Sources

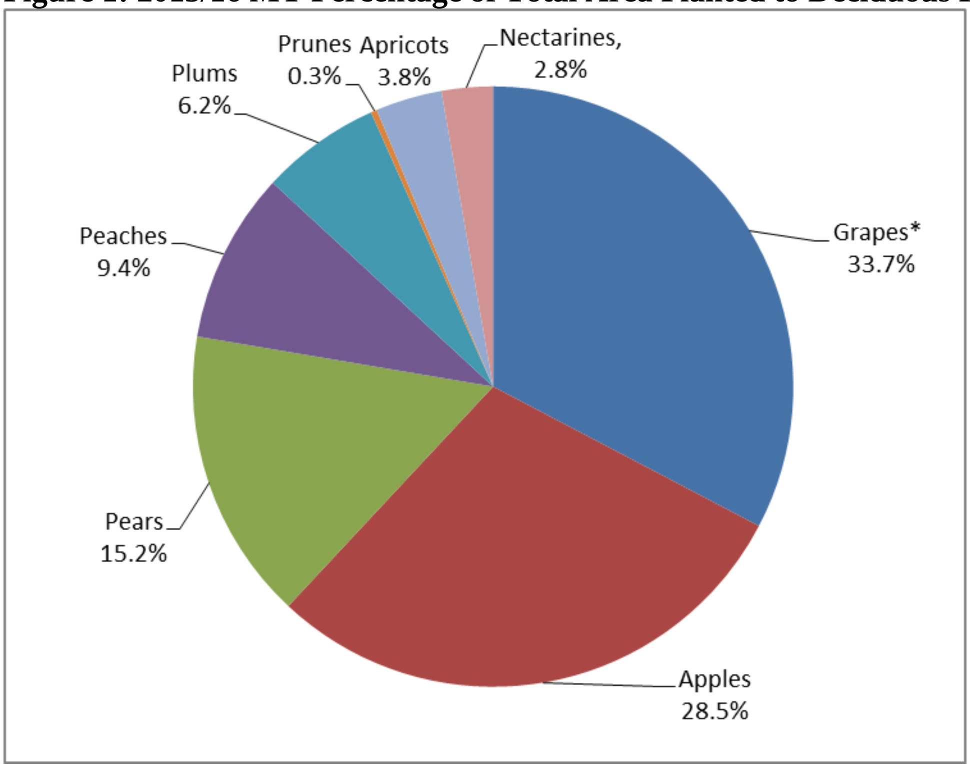
Name	**Website**
Hortgro	http://www.hortgro.co.za
South African Table Grapes Industry (SATGI)	http://www.satgi.co.za/
Global Trade Atlas (GTA)	http://www.gtis.com/gta/

Brief Background of the South African Deciduous Fruit Industry

Deciduous fruit is the largest sub-sector of the South African fruit industry in terms of area planted. In the 2015/16 MY, about 79,748 hectares (ha) were planted to deciduous fruits, down from 80,738 ha in the 2014/15 MY due to the impact of the drought. **Figure 1** shows that grapes (fresh and dried), apples and pears have the largest area planted and accounted for approximately 78 percent of the total area planted with deciduous fruit in the 2015/16 MY.

The Western Cape is the largest and traditional producer of deciduous fruits in South Africa. However, in the past two decades, the Northern Cape, Eastern Cape, and Limpopo provinces have become increasingly large producers of deciduous fruit. South Africa is ranked the fourth largest apple producer and second largest pear producer in the Southern Hemisphere.

Figure 1: 2015/16 MY Percentage of Total Area Planted to Deciduous Fruits



*Fresh and Dried.
Source: HORTGRO

<u>Apples, Fresh:</u>

Production

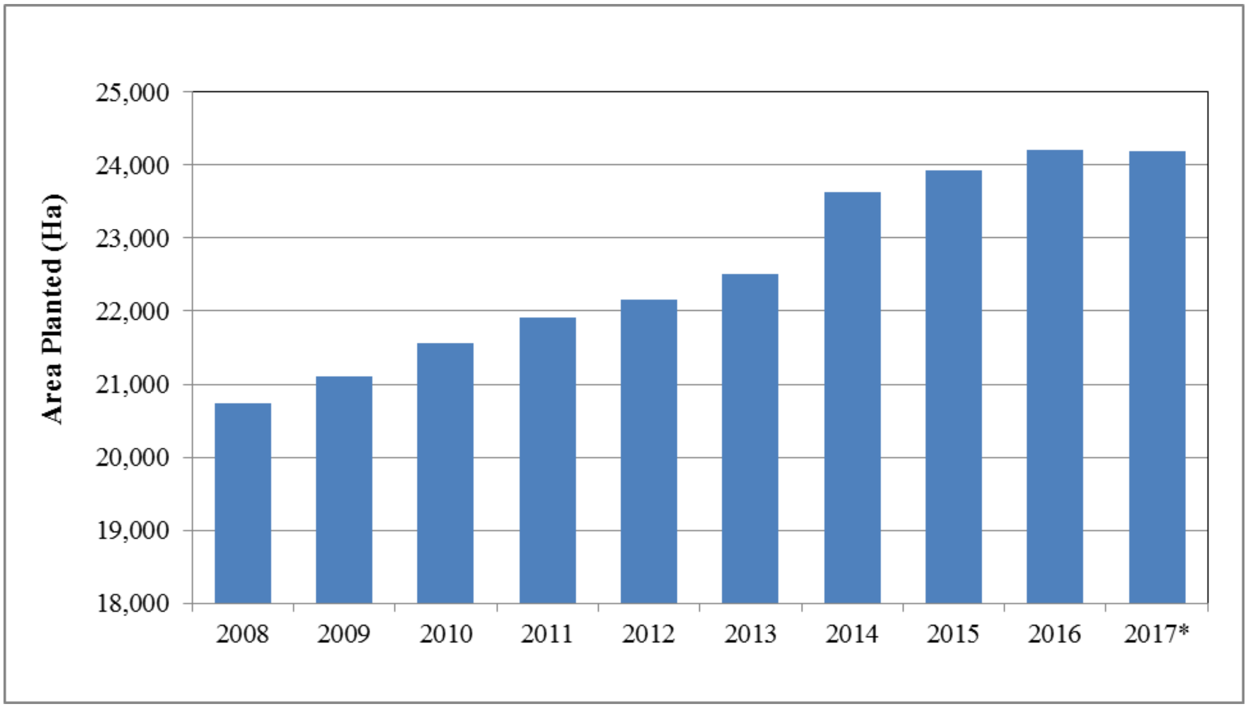
The 2017/18 MY apple production is forecast to decrease by six percent to 850,000 MT, from 902,129 MT in the 2016/17 MY, due to the decrease in area harvested, limited irrigation water, lower yields and smaller fruit sizes. About eighty percent of the apple production is from the Western Cape, which is a winter rainfall region and is currently undergoing a severe drought. The below average rainfall received in 2017 and the low dam levels (about thirty percent) will severely impact the availability of irrigation water in the 2017/18 MY. In the short term, farmers are expected to prioritize irrigation of higher yielding varieties and orchards, while the remaining orchards would be irrigated just to keep the trees alive. There are also indications that some farmers could cut down some trees to reduce costs. These measures are expected to prolong the recovery of apple production once normal rainfall and weather patterns return. The 2016/17 MY apple production was revised downwards to 902,129 MT, based on updated industry statistics and the higher than expected impact of the dry conditions to fruit sizes and quality. The quality of apples in the 2016/17 MY were severely impacted by the drought conditions, as the fruit was dry, had a shorter shelf life and in some regions the ideal color was not achieved.

The Western Cape is the heartland of deciduous fruit production, with a climate similar to the Mediterranean, which is favorable for apple production. Ceres is the largest apple growing region accounting for twenty-nine percent of the area planted, followed by Groenland (twenty-seven percent), Langkloof East (eighteen percent) and Villiersdorp (fifteen percent). Harvest for South African apples typically begins at the end of January and runs through to June, with peak harvest times falling between February and April. Since 2008, the Golden Delicious cultivar has been the most planted cultivar at about twenty four percent of the area planted, followed by the Granny Smith cultivar at eighteen percent. Other cultivars which have been growing steadily are Gala (sixteen percent), Pink Lady (ten percent) and Fuji (nine percent).

Area Planted

The area planted to apples has steadily increased over the past decade as shown in **Figure 2.** This was driven by increased earnings from the export market and higher returns from apple farming which attracted investment into the sector. Post estimates that the area planted to apples in the 2017/18 MY will remain flat and the area harvested will decrease due to the impact of the drought.

Figure 2: Area Planted to Apples in South Africa



*Estimate.
Source: HORTGRO

Consumption

Domestic consumption of apples is forecast to decrease by three percent to 205,000 MT in the 2017/18 MY, from 210,501 MT in the 2016/17 MY. This is due to the decrease in production and depressed consumer demand because of the challenging economic environment characterized by low economic growth and high inflation. The decrease is expected to be offset by the increase in supply of apples that will not meet the export quality standards such as the ideal color, size and the shorter shelf life.

Over the past years, growth in domestic consumption has largely been driven by the increasing preference for fresh fruit over processed fruit from a growing middle class. Apples are popular in South Africa and are widely consumed throughout the year. As a result, apples form part of the national food basket of goods monitored by the National Agricultural Marketing Council (NAMC) to track food price inflation. However, the per capita consumption of apples in South Africa is still relatively low at about 4kg, compared to other countries such as the United States (about 7kg) and Europe (about 15kg).

Exports

Exports of apples in the 2017/18 MY are forecast to decrease by five percent to 500,000 MT, from 525,000 MT in the 2016/17 MY, based on the available production, some fruit not meeting the export quality standards due to the drought conditions and a saturated global market. Post revised upwards the 2016/17 MY exports to 525,000 MT, based on updated Global Trade Atlas (GTA) data and the year to date pace of exports.

The United Kingdom is the traditional and largest single country destination for South African apple exports accounting for twenty one percent of the total exports. However, Africa is the largest regional export market accounting for about forty percent, followed by the European Union (EU) at thirty percent, and Asia at nineteen percent. Notably, South Africa has a free trade agreement with the EU. Exports to the United States are minimal due to the higher shipping costs and the challenges of maintaining the right quality and shelf life of the apples. **Table 1** shows the breakdown of the major export countries for South African apples.

Table 1: South African Fresh Apple Exports

South Africa Export Statistics					
Commodity: 080810, Apples, Fresh					
Year Ending: December					
		Quantity			
Partner Country	Unit	2014	2015	2016	2017*
World	T	381,910	465,695	510,896	425,523
United Kingdom	T	65,218	87,828	107,614	135,738
Malaysia	T	43,798	53,651	51,311	32,244
Bangladesh	T	10,275	17,778	25,081	30,683
Nigeria	T	43,624	55,396	41,120	23,063
United Arab Emirates	T	16,228	19,359	23,207	17,720
Russia	T	4,512	7,832	14,739	17,641
Netherlands	T	12,171	15,260	16,772	13,833
Kenya	T	11,170	15,483	18,167	9,706
Senegal	T	8,074	11,037	13,341	8,999
Botswana	T	8,525	11,381	13,004	7,782
Zambia	T	12,393	14,555	14,114	7,138
Singapore	T	12,083	12,743	11,356	7,114
Taiwan	T	5,390	7,128	13,496	6,920
Zimbabwe	T	12,123	13,714	13,945	6,523
Namibia	T	10,012	9,813	9,623	6,213
Ghana	T	6,257	7,358	9,257	5,766
Angola	T	16,853	12,743	8,725	5,567
France	T	4,953	4,413	4,698	5,409
Oman	T	3,618	3,815	3,959	4,844
Bosnia & Herzegovina	T	1,114	4,223	5,947	4,798
Germany	T	3,129	3,507	4,885	4,420
Mauritius	T	5,201	6,011	6,333	4,281
Swaziland	T	7,399	6,838	6,548	4,257
Cameroon	T	4,305	4,886	6,402	4,198
Mozambique	T	5,754	5,456	6,360	3,996
Cote d Ivoire	T	4,013	4,730	5,364	3,977

Canada	T	315	1,753	2,258	3,907
Saudi Arabia	T	4,169	2,537	4,659	3,402
Togo	T	2,437	2,086	2,847	3,140
Sri Lanka	T	614	830	2,744	3,029
Lesotho	T	3,214	4,366	5,170	2,427
Hong Kong	T	1,667	2,655	2,350	2,317
Gabon	T	3,319	2,827	2,900	1,923
India	T	475	987	1,447	1,633
Benin	T	5,603	5,061	3,766	1,611
Ireland	T	1,446	1,850	2,180	1,599
Congo Dem. Rep.	T	1,734	1,920	1,840	1,334
Uganda	T	1,525	1,930	1,566	1,251
Mali	T	856	874	1,335	1,057
United States	T	0	23	29	18

*Exports from January to August. Source: Global Trade Atlas (GTA)

Imports

South Africa is a net exporter of apples, and only imports apples to fulfill niche markets or satisfy domestic demand when supply is limited as shown in **Table 2**.

Table 2: South African Fresh Apple Imports

South Africa Import Statistics					
Commodity: 080810, Apples, Fresh					
Year Ending: December					
		Quantity			
Partner Country	Unit	2014	2015	2016	2017*
World	T	21	4	62	92
Singapore	T	0	0	0	25
Sri Lanka	T	0	0	19	0
United Arab Emirates	T	0	0	23	23
United States	T	21	0	0	0
Bahrain	T	0	0	20	0
Lesotho	T	0	4	0	0
Malaysia	T	0	0	0	22
Russia	T	0	0	0	22

*Imports from January to August.
Source: GTA

Table 3: Tariff Rates, Fresh Apples

Heading / Subheading	**CD**	**Article Description**	**Statistical Unit**	**Rate of Duty**				
				General	**EU**	**EFTA**	**SADC**	**Mercosur**

0808.10	9	Apples, fresh	kg	4%	Free	4%	Free	4%

Source: South African Revenue Services (SARS)

Table 4: PSD - Apples, Fresh

Apples, Fresh	2015/2016		2016/2017		2017/2018	
Market Begin Year	Jan 2016		Jan 2017		Jan 2018	
South Africa	USDA Official	New Post	USDA Official	New Post	USDA Official	New Post
Area Planted	23932	23932	24100	24212	0	24200
Area Harvested	21919	21919	22000	21900	0	21000
Bearing Trees	26679	26679	27200	27200	0	27300
Non-Bearing Trees	3330	3330	3100	3100	0	3000
Total Trees	30009	30009	30300	30300	0	30300
Commercial Production	924160	924162	933404	902129	0	850000
Non-Comm. Production	0	0	0	0	0	0
Production	924160	924162	933404	902129	0	850000
Imports	500	62	200	130	0	130
Total Supply	924660	924224	933604	902259	0	850130
Fresh Dom. Consumption	222013	221580	224564	210501	0	205000
Exports	510900	510897	515000	525000	0	500000
For Processing	191747	191747	194040	166758	0	145130
Withdrawal From Market	0	0	0	0	0	0
Total Distribution	924660	924224	933604	902259	0	850130
(HA) ,(1000 TREES) ,(MT)						

Pears, Fresh:

Production

Pear production in the 2017/18 MY is forecast to decrease by six percent to 405,000 MT, from 431,535 MT in 2016/17 MY, due to the decrease in area harvested, limited irrigation water, lower yields and smaller fruit sizes. Similar to apples, about seventy-nine percent of the pear production is in the Western Cape, which is a winter rainfall region and is currently undergoing a severe drought. The below average rainfall received in 2017 and the low dam levels (about thirty percent) will severely impact the availability of irrigation water in the 2017/18 MY.

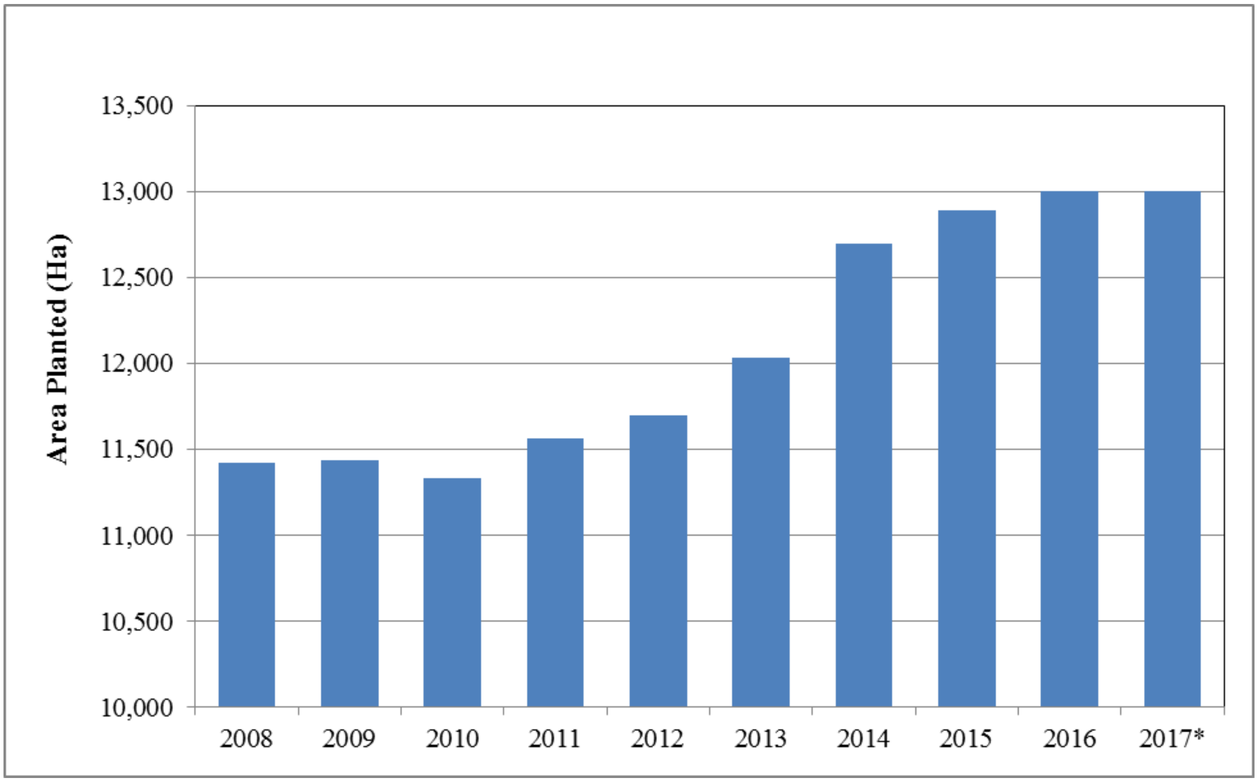
Pears grow well in areas that do not experience very high temperatures. Hence, the Western Cape is the heartland of pear production, accounting for at least seventy nine percent of the total production in South Africa. The major growing area for pears is Ceres which contributes about thirty-seven percent to the area planted, followed by Langkloof East (fourteen percent), Groenland (twelve percent), Wolseley/Tulbagh (eleven percent), Klein Karoo (nine percent) and Villiersdorp (eight percent).

Pears are normally harvested from late December to early January. Packham's Triumph which contributes about thirty four percent to the area planted is the most popular pear variety, followed by Forelle (twenty six percent), William Bon Chretien (twenty percent) and Abate Fetel (six percent).

Area Planted

Figure 3 shows that the area planted for pears has increased steadily since 2010. This was driven by increased earnings from the export market and higher returns, which attracted investment into the sector similar to apples. The area planted with pears is expected to remain flat at 13,000 hectares in the 2017/18 MY, based on the impact of the drought. However, the area harvested will decrease as farmers are expected to prioritize irrigation of higher yielding varieties and orchards, while the remaining orchards would be irrigated just to keep the trees alive. There are also indications that some farmers could cut down some trees to reduce costs.

Figure 3: South Africa Pears Area Planted



*Estimate.
Source: HORTGRO

Consumption

Domestic consumption of pears in the 2017/18 MY is forecast to decrease by seven percent to 43,000 MT, from 46,250 MT in the 2016/17 MY, based on the decrease in production and depressed consumer demand because of the challenging economic environment characterized by low economic growth and high inflation. Pears and apples are close substitutes in the domestic market. However, the per capita consumption of pears in South Africa is still relatively lower than apples at less than 1kg, and compared to other countries such as Europe whose per capita consumption is about 4kg.

Exports

The 2017/18 MY pear exports is forecast to decrease by about three percent to 250,000 MT, from 257,000 MT in the 2016/17 MY, based on the lower production. The 2016/17 MY estimate of exports was revised upwards to 257,000 MT, due to the year-to-date exports and higher than expected volume of pears that met the export quality standards. The EU is South Africa`s traditional and leading export market accounting for about forty-nine percent of total pear exports, followed by Asia (sixteen percent), Africa (eight percent) and the Middle East (five percent). Exports to the United States are low and have been stable over the past years ranging between 800 to 1,000 MT.

Table 5: South African Fresh Pears Exports

South Africa Export Statistics
Commodity: 080830, Pears, Fresh

Year Ending: December					
Partner Country	Unit	Quantity			
		2014	2015	2016	2017*
World	T	207,310	205,198	250,254	247,841
Netherlands	T	55,055	47,283	63,561	68,448
Russia	T	15,541	14,921	19,550	32,564
United Arab Emirates	T	21,295	22,022	25,169	22,328
United Kingdom	T	17,540	14,552	13,285	20,589
Germany	T	10,458	13,500	12,887	9,891
France	T	7,634	7,200	9,491	9,089
Saudi Arabia	T	4,447	5,576	8,584	7,797
Italy	T	8,292	8,707	7,843	7,757
Canada	T	3,821	3,920	8,195	7,307
India	T	4,556	6,029	7,681	6,769
Indonesia	T	4,304	3,570	7,871	6,224
Portugal	T	4,409	3,791	5,773	5,900
Malaysia	T	8,576	8,565	9,127	5,445
Hong Kong	T	7,616	7,124	8,403	4,299
Singapore	T	4,388	4,310	4,383	3,369
Oman	T	1,909	1,589	2,059	3,179
Vietnam	T	1,018	1,169	1,117	1,986
Nigeria	T	2,380	3,817	3,221	1,842
Mauritius	T	1,667	1,917	2,159	1,735
Spain	T	1,747	1,440	1,932	1,473
Bahrain	T	862	1,096	1,298	1,400
Jordan	T	476	765	670	1,354
Botswana	T	1,341	1,793	2,073	1,293
Kuwait	T	515	412	1,059	1,140
Angola	T	1,977	1,957	1,526	1,135
Greece	T	1,312	849	1,413	1,058
Ireland	T	1,076	900	1,286	985
Namibia	T	1,418	1,376	1,131	948
Senegal	T	619	595	1,149	919
United States	T	849	1,062	1,195	752

*Exports from January to August.
Source: GTA

Imports

As the second largest pear producer after Argentina in the Southern Hemisphere, South Africa only imports minimal quantities of pears mainly from China. Imports from China began after a 2007 agreement that allowed imports of Chinese pears into the South Africa market. The South Africa and China agreement is available on the following link: http://www.nda.agric.za/doaDev/sideMenu/plantHealth/docs/protocol_pear_China.pdf .

Table 6: South African Fresh Pears Imports

South Africa Import Statistics					
Commodity: 080830, Pears, Fresh					
Year Ending: December					
		Quantity			
Partner Country	Unit	2014	2015	2016	2017*
World	T	44	142	88	20
China	T	44	119	64	0
Germany	T	0	24	0	0
Malaysia	T	0	0	0	20
Russia	T	0	0	24	0

*Imports from January to August. Source: GTA

Table 7: Tariff Rates, Fresh Pears

Heading / Subheading	CD	Article Description	Statistical Unit	Rate of Duty				
				General	**EU**	**EFTA**	**SADC**	**Mercosur**
0808.30	8	Pears, fresh	kg	4%	Free	4%	Free	4%

Source: SARS

Table 8: PSD - Pears, Fresh

Pears, Fresh	2015/2016		2016/2017		2017/2018	
Market Begin Year	Jan 2016		Jan 2017		Jan 2018	
South Africa	USDA Official	New Post	USDA Official	New Post	USDA Official	New Post
Area Planted	12894	12894	13000	13000	0	13000
Area Harvested	11863	11863	12000	12000	0	11600
Bearing Trees	15068	15068	15300	15300	0	15400
Non-Bearing Trees	1124	1124	1000	1000	0	800
Total Trees	16192	16192	16300	16300	0	16200
Commercial Production	429600	429582	429800	431535	0	405000
Non-Comm. Production	0	0	0	0	0	0
Production	429600	429582	429800	431535	0	405000
Imports	400	89	200	100	0	100
Total Supply	430000	429671	430000	431635	0	405100
Fresh Dom. Consumption	47538	47255	47928	46250	0	43000
Exports	250300	250254	250300	257000	0	250000
For Processing	132162	132162	131772	128385	0	112100
Withdrawal From Market	0	0	0	0	0	0
Total Distribution	430000	429671	430000	431635	0	405100
(HA) ,(1000 TREES) ,(MT)						

Table Grapes, Fresh:

Production

Post forecasts that the 2017/18 MY table grape production will decrease by fourteen percent to 287,000 MT, from 334,000 MT in the 2016/17 MY, based on the decrease in area harvested and small fruit sizes in the Western Cape growing regions. This decrease was partially offset by the higher yielding new generation varieties, as well as normal production and growing conditions in the Orange River region. Post made minor downward adjustments to the 2016/17 MY table grapes production to 334,000 MT based on final industry data. According to the industry, the medium to long term impact of the drought is expected to be less pronounced because of the climatically diverse industry, increased hectares in production, the continued shift to higher yielding new generation varieties, and the resilience and adaptation of table grape farmers.

The major growing areas for grapes are the Hex River and Berg River regions in the Western Cape Province, and the Orange River and Olifants River regions in the Northern Cape Province as shown in **Table 9**. Grapes are normally harvested from October to May. Harvest starts in week 43 (beginning of October) in the Northern Cape Region. The Hex River valley is the last region for table grapes harvesting.

Table 9: Table Grapes Area Planted per Region

Regions	2015/16	2016/17	2016/17 Percentage to Total Area Planted
Hex River	6,154	6,453	33%
Orange River	5,367	5,688	29%
Berg River	4,237	4,459	23%
Northern Provinces	1,577	1,737	8%
Olifants River	1,240	1,337	7%
Total Area Planted	**18,575**	**19,674**	**100%**

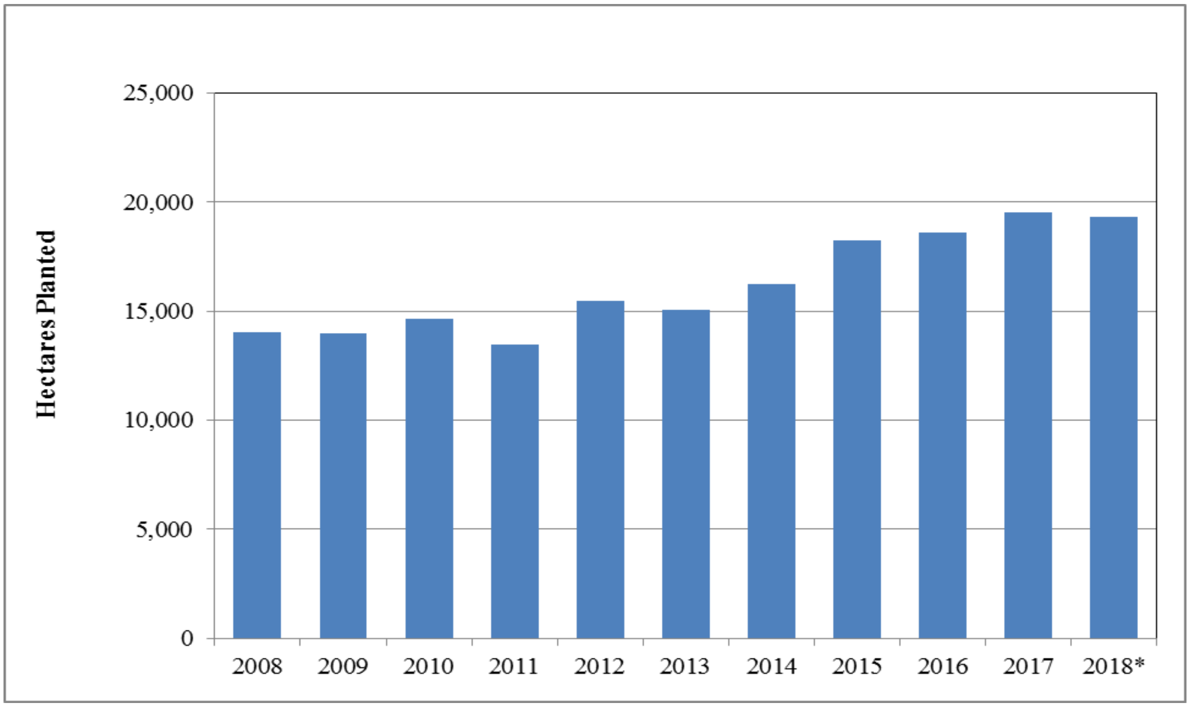
Source: South African Table Grapes Industry (SATGI)

The leading varieties of table grapes based on area planted are Crimson Seedless at twenty-four percent, Prime (nine percent), Thomson Seedless (eight percent), Flame Seedless (seven percent), Sugraone (six percent), Redglobe (six percent) and the Sugrathirteen (five percent). The cultivar profile in South Africa has changed in the past decade. Seeded cultivars are declining as consumers prefer seedless grapes, while the production of black and red seedless table grapes varieties has increased. The popularity of seedless cultivars stems from their characteristics such as large berry size (with elongated or oval berry shapes), favorable texture (crunchiness) and good eating qualities.

Area Planted

The area planted to table grapes is forecast to decrease to 19,400 hectares in the 2017/18 MY, from 19,500 hectares in 2016/17 MY, based on the impact of the drought conditions. **Figure 4** shows that the area planted to table grapes has been increasing steadily since 2008. This increase is correlated to the weakening of the rand and increased revenues received as the industry is export-oriented.

Figure 4: Area Planted to Table Grapes in South Africa



Forecast.* Source:** SATGI

Consumption

Domestic consumption of table grapes is forecast to decrease by two percent to 35,000 MT in the 2017/18 MY, from 35,701 MT in the 2016/17 MY, due to the decrease in production. This will be partially offset by the supply of table grapes that will not meet export quality standards. The supply of table grapes to the domestic market and consequently consumption in South Africa is dependent on the export market. Table grapes that cannot be sold on the export market, including those that do not meet export quality standards, are sold to the domestic market.

Exports

The 2017/18 MY table grape exports is forecast to decrease by fifteen percent to 258,000 MT, from 304,000 MT in the 2016/17 MY, based on the decrease in production and small fruit sizes. The EU is the leading historical export market for South African table grapes, accounting for at least seventy five percent of table grape exports. South Africa benefits from a shorter shipping distance than other Southern Hemisphere competitors, strong demand for seedless varieties, and a free trade agreement with the EU. Exports to Asia (twelve percent), the Middle East (six percent) and Africa (four percent) also have strong growth potential and are increasingly becoming a core focus for South Africa. Export volumes to the United States and Canada have significantly grown over the past years as well, but are still low at about 12,000 MT and accounted for about three percent of the total exports in the 2016/17 MY.

In November 2016, China relaxed its cold treatment protocols to address False Coddling Moth (FCM) for South African table grapes. The new protocol was changed from -0.6°C for 22 days to +0.8°C for a minimum of 20 days. Post contacts indicated that there are high possibilities that in the future, South

Africa could submit a similar request for the United States to relax its cold treatment protocols for South African table grapes.

Table 10: South African Fresh Table Grapes Exports

Season (Oct. - Sept.)	Exports (MT)
2004/2005	210,823
2005/2006	230,896
2006/2007	227,265
2007/2008	224,123
2008/2009	217,875
2009/2010	234,579
2010/2011	202,500
2011/2012	245,797
2012/2013	234,463
2013/2014	226,401
2014/2015	263,452
2015/2016	254,969
2016/2017*	304,000
2017/2018**	252,000

***Estimate. ****Forecast. Source: South African Table Grapes Industry

Imports

South Africa is a net exporter of table grapes, and imports are mainly to fulfill the gap when South Africa is out of the season or has low volumes from around July to November. Spain, Namibia and Egypt are the primary suppliers as shown in **Table 11**.

Table 11: South African Fresh Table Grapes Imports

South Africa Import Statistics

Commodity: 080610, Grapes, Fresh					
Year Ending: December					
		Quantity			
Partner Country	Unit	2013/14	2014/15	2015/16	2016/17*
World	T	4688	5582	5969	4751
Spain	T	2832	2873	2800	1412
Egypt	T	1462	1220	1758	2071
Namibia	T	332	1324	1102	930
Zambia	T	17	96	196	126
Germany	T	0	0	19	15
Hong Kong	T	0	0	0	19
Israel	T	41	22	0	18
Norway	T	0	0	27	0
Russia	T	0	0	0	56
Saudi Arabia	T	0	0	20	20
Singapore	T	0	0	0	29
Turkey	T	0	0	20	20
United Arab Emirates	T	0	0	20	35

*Imports from January to August. Source: GTA

Table 12: Tariff Rates, Fresh Table Grapes

Heading / Subheading	CD	Article Description	Statistical Unit	Rate of Duty				
				General	**EU**	**EFTA**	**SADC**	**Mercosur**
0806.10	1	Grapes, fresh	kg	4%	Free	4%	Free	4%

Source: SARS

Table 13: PSD; Table Grapes, Fresh

Grapes, Fresh	2015/2016		2016/2017		2017/2018	
Market Begin Year	Oct 2015		Oct 2016		Oct 2017	
South Africa	USDA Official	New Post	USDA Official	New Post	USDA Official	New Post
Area Planted	18575	18575	19500	19500	0	19300
Area Harvested	16229	16229	17200	17200	0	16500
Commercial Production	284739	284739	335000	334000	0	287000
Non-Comm. Production	0	0	0	0	0	0
Production	284739	284739	335000	334000	0	287000
Imports	6300	5969	6000	5701	0	6000
Total Supply	291039	290708	341000	339701	0	293000
Fresh Dom. Consumption	32839	35739	36000	35701	0	35000
Exports	258200	254969	305000	304000	0	258000
Withdrawal From Market	0	0	0	0	0	0
Total Distribution	291039	290708	341000	339701	0	293000
(HA) ,(MT)						

Policy:

Table 14 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 14: List of Key Legislations and Regulations

Policy	**Link**
Agriculture Product Standards Act No 119 of 1990	http://www.nda.agric.za/doaDev/sideMenu/Food percent20Import percent20& percent20Export percent20Standard/docs/Agric percent20Product percent20Standards percent20Act percent20No percent20119 percent20 percent20of percent201990.pdf
Agricultural Pests, Act, 36 of 1983	**Agricultural Pests Amendment Act, 9 of 1992** http://www.nda.agric.za/doaDev/sideMenu/APIS/doc/Agricultural percent20Pests percent20Act.pdf
Foodstuffs, cosmetics and disinfectants Act 54 of 1972	http://www.nda.agric.za/vetweb/Legislation/Other percent20acts/Act percent20- percent20Foodstuffs, percent20Cosmetics percent20and percent20Disinfectants percent20Act-54 percent20of percent201972.pdf
Procedures for exporting to South Africa	http://www.nda.agric.za/doaDev/sideMenu/plantHealth/docs/importProcedure.pdf.
Maximum Residue Limits	http://www.daff.gov.za/daffweb3/Branches/Agricultural-Production-Health-Food-Safety/Food-Safety-Quality-Assurance/Maximum-Residue-Limits
Regulations relating to standards, grading, packing and marking	**Apples** http://www.nda.agric.za/doaDev/sideMenu/foodSafety/doc/localImportRegulations/Apples_regulations.pdf **Pears** http://www.nda.agric.za/doaDev/sideMenu/foodSafety/doc/localImportRegulations/Pears_regulations.pdf **Grapes** http://www.nda.agric.za/doaDev/sideMenu/foodSafety/doc/localImportRegulations/gg35395 percent20nn422 percent20APS percent20table percent20grapes.pdf

Source: South African Department of Agriculture Fisheries and Forestry (DAFF)

Prices

The apple and pear prices shown in **Table 15** are the average prices (Rand/Ton) earned in the respective markets. The increase in apple and pear export prices is mainly due to the depreciation of the rand. The export market for pears and apples remains lucrative from a price perspective in comparison to the local and processed markets.

Table 15: Price of Apples and Pears

	APLES			PEARS		
	Local Market	Export Market	Processed Market	Local Market	Export Market	Processed Market
Season	(R/Ton)	(R/Ton)	(R/Ton)	(R/Ton)	(R/Ton)	(R/Ton)
2003/2004	2,109	3,794	336	1,977	4,059	495
2004/2005	2,310	3,638	341	2,128	3,861	491
2005/2006	2,580	3,791	373	2,304	3,786	573
2006/2007	2,799	4,363	447	2,664	4,680	715
2007/2008	3,618	5,419	1,071	3,222	5,704	973
2008/2009	3,568	5,834	786	3,452	6,336	1,035
2009/2010	3,656	5,881	534	3,454	6,144	810
2010/2011	4,326	6,210	737	3,856	6,612	896
2011/2012	4,470	6,531	1,146	4,191	6,803	1,115
2012/2013	4,845	8,658	1,137	4,650	8,835	1,316
2013/2014	4,944	10,136	1,141	4,815	9,900	1,376
2014/2015	5,024	10,689	1,142	5,164	9,977	1,561
2015/2016	5,556	10,815	1,431	5,605	11,157	1,861

Source: HORTGRO