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SA Fruit Trade Flow

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South Africa's diverse weather and climatic conditions enable the country to cultivate and produce a variety of fruits. The country is known globally as a producer and exporter of citrus, deciduous and subtropical fruits. The report is released on a quarterly basis by the trade unit of the markets and Economic Research Centre.

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National Agricultural Marketing Council

Promoting market access for South African agriculture

SOUTH AFRICAN FRUIT TRADE FLOW

Issue No. 34: June 2019

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1. Background

South Africa's diverse weather and climatic conditions enable the country to cultivate and produce a variety of fruits. The country is known globally as a producer and exporter of citrus, deciduous and subtropical fruits. ***This issue of the Fruit Trade Flow Report looks at deciduous fruit (cherries, pomegranates) and subtropical fruit (litchis).*** *The main focus is on the analysis of the current season's performance of these fruits, for both the export and domestic markets, in comparison with the previous season. This report also assesses the global production of these fruits, giving a perspective on South Africa's production and export rankings (as a share of global production and exports).*

2. Overview of deciduous fruit production for the 2018/19 season

Deciduous fruits consist of different fruit types, such as peaches, nectarines, plums, apples, grapes, pears, berries, cherries and pomegranates. The focus of this report is on the cherry and pomegranate production season. The global and South African previews are discussed in detail in the next section.

2.1 Preview of cherry production for the 2018/19 season

2.1.1 Preview of the global cherry production season

The cherry is a popular fruit that is consumed heavily throughout the world. Cherries are commonly grown in Southern Europe and also in North America. **Figure 1** highlights the largest producers of cherries in the world, measured in thousand tons. A total of 3.3 million tons of cherries were produced during the 2018/19 production season, which is an increase of 156 000 tons as compared to the 2017/18 season. According to United States Department of Agriculture (USDA) information, the European Union (EU) has been ranked as the principal producer of cherries over the past six production seasons. It is evident that from the 2017/18 season, the EU's production went up by 186 000 tons to 793 000 tons in the 2018/19 production season, which translates into an increase of over 30% as compared to the 2017/18 production season. Turkey was indicated as the second-largest producer of cherries with a volume of 590 000 tons, followed by the United States (US) (444 000 tons), China (340 000 tons), Russia (277 000 tons) and Ukraine (220 000 tons).

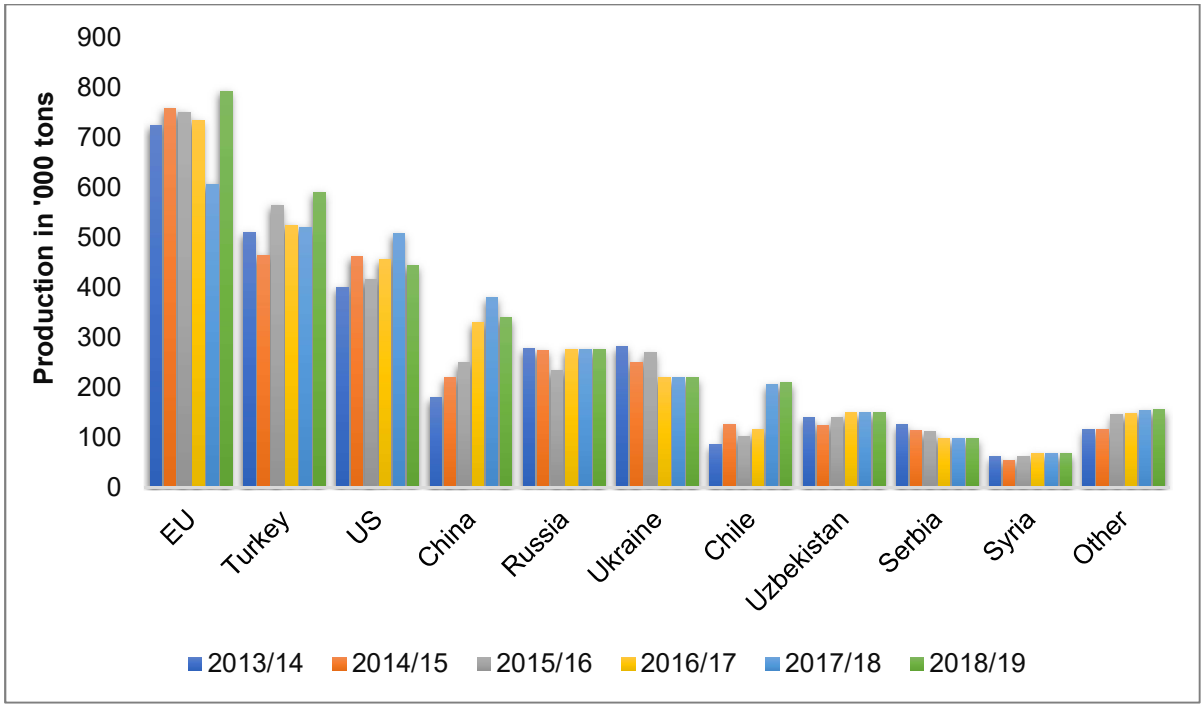

Figure 1: **Global leading producers of cherries, 2013/14 – 2018/19**
Source: USDA (2019)

Figure 2 illustrates the top 10 leading exporters of cherries (measured in thousand tons) during the 2018/19 production season. The USDA (2019) indicates that global exports of cherries increased slightly due to the availability of supplies in Chile and Turkey. It is important to state that the EU is the leading producer of cherries, and a large share of cherries is domestically consumed. Chile ranked as the leading global exporter of cherries and this was due to the high growth in production during the 2017/18 and 2018/19 seasons. During the 2018/19 season, Chile exported 190 000 tons of cherries, destined mainly for China. Other key exporters of cherries include Turkey, the US, Serbia, Uzbekistan and Azerbaijan, in descending order.

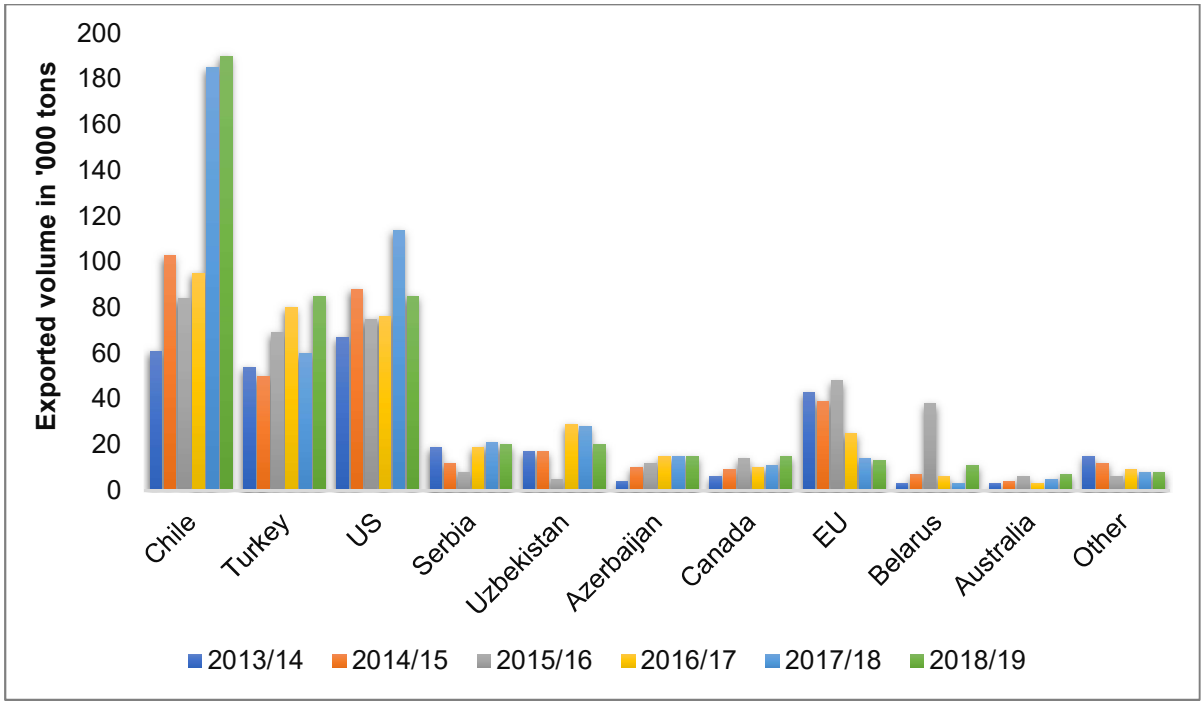

Figure 2: Global leading exporters of cherries, 2013/14 – 2018/19
Source: USDA (2019)

According to the USDA (2019), Chinese imports of cherries have declined from 192 000 tons to 170 000 tons due to fewer shipments from the US. With the continuing trade war with the US, the Chinese have included cherries on the list of US-produced commodities subject to a retaliatory tariff of 25%, effective in April, and then again on a list that imposed an additional 25% duty that became effective on July 2019. **Figure 3** highlights the leading importers of cherries, measured in thousand tons. Russia was ranked as the second-largest importer of cherries after China, with an estimated volume of 75 000 tons in the 2018/19 season. The EU ranked third with an imported volume of 55 000 tons, followed by Canada (35 000 tons), Kazakhstan (20 000 tons), South Korea (17 000 tons) and Belarus (15 000 tons).

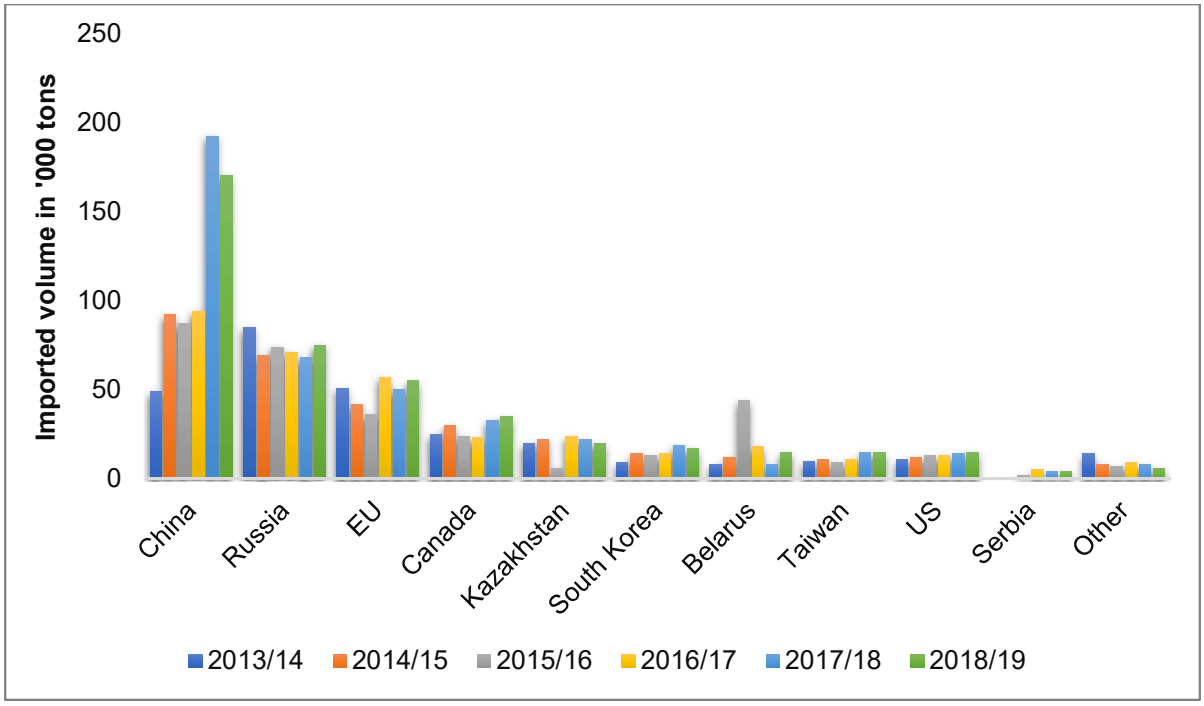

Figure 3: Global leading importers of cherries, 2013/14 – 2018/19
Source: USDA (2019)

2.1.2 Preview of the South African cherry production season

In most parts of South Africa, cherry production by commercial and small-scale farmers is still rare and is practised only in the Western Cape, Eastern Free State and KwaZulu-Natal. **Figure 4** highlights South Africa's production of cherries (measured in tons) and the year-on-year growth rate (%) over the past 11 years. It can be observed that South Africa's cherry production has fluctuated over the period under review and has been on a decline over the past two years. South Africa produced a total of 3 876 tons of cherries between 2008 and 2018, and the most significant production decline of 47% was registered between 2010 and 2011. The recent decline (2016 – 2017) in cherry production was due to the adverse climatic conditions, drought in particular, which affected the cherry industry.

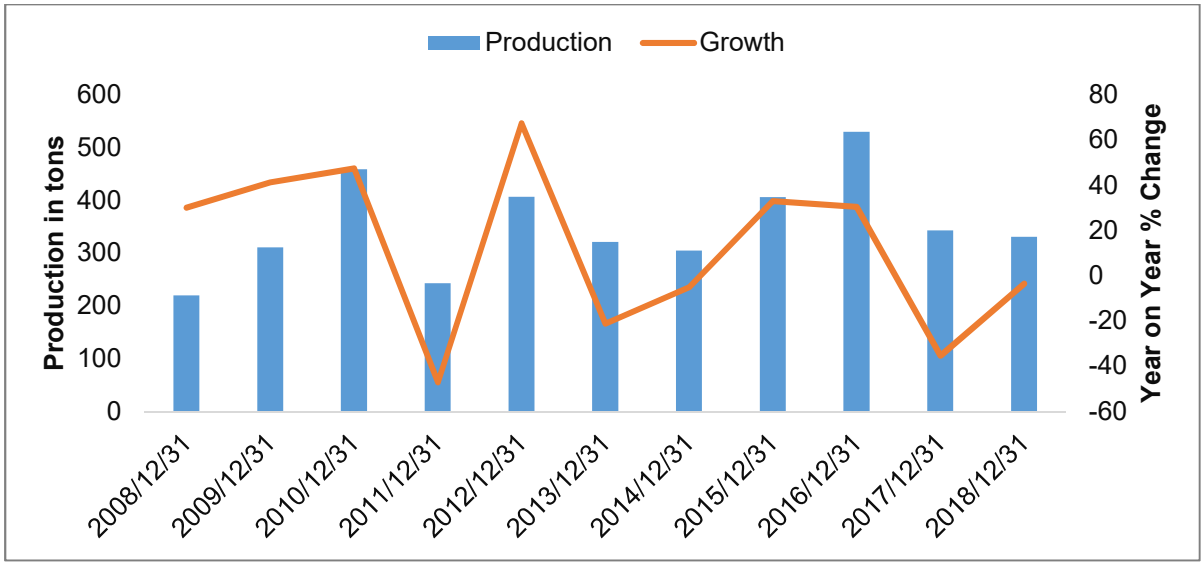

Figure 4: South Africa's production of cherries and growth rate, 2008/12 – 2018/12
Source: Quantec (2019)

Table 1 highlights the volume of South Africa's cherries (measured in kilograms) passed for export and the corresponding markets. The United Kingdom (UK) remained South Africa's main market for cherries exported during the 2018 and 2019 seasons. During these two production seasons, the UK's imports constituted a share volume of about 42% and 55% respectively, leading to a 7% growth rate. The Middle East was the second-largest export market, followed by the Indian Ocean Islands (IOI), Europe, the Far East & Asia, and lastly the African continent. South Africa has experienced a considerable export decline of 8% in both Europe and the Far East & Asia, while the Middle East has shown the highest growth of 43% of exports from South Africa.

Table 1: South Africa's markets for cherries passed for export (5 kg-equivalent cartons)

	Volume passed for export (kg)		Diff	% Diff
	2018	**2019**	**2018/19**	
UK	32573	34822	2249	7
Middle East	12166	17364	5198	43
Europe	16183	3201	-12982	-80
Indian Ocean Islands (IOI)	4364	3712	-652	-15
Far East & Asia	10704	2176	-8528	-80
Africa	1949	1884	-65	-3
Other	569	0	-569	-100
Total	**78507**	**63160**	**-15347**	**-20**

Source: Hortgro (2019)

Figure 5 shows the volume of cherries sold through the National Fresh Produce Markets (NFPMs), as well as their market price trends, from January to December (2017 & 2018) and January to May (2019). The total volume of cherries sold on the

NFPMs between January and December was 233 tons (2017) at a total price value of R66 221, and 350 tons (2018), representing an increase of 117 tons at a total price value of R62 352. In the current season so far, about 43 tons were sold between January and May 2019 at a market price of R18 607. The highest sales in fresh produce markets were experienced in December, with 122 tons in 2017 and 126 tons in 2018.

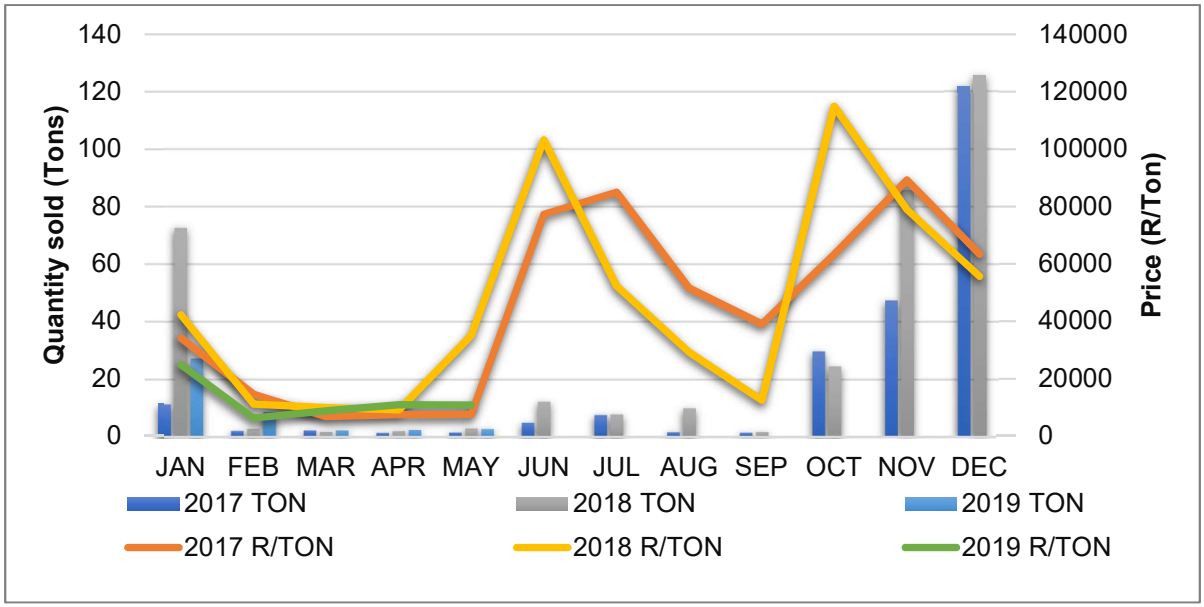

Figure 5: Sales of cherries and price per ton on the NFPMs
Source: Department of Agriculture, Forestry and Fisheries (DAFF) (2019)

2.2 Preview of South Africa's pomegranate production

The production of pomegranates has shown an upward trend over the last five years. In South Africa, pomegranates are grown mainly in the Western Cape and some parts of the Northern Cape. About 80% of South Africa's pomegranates are exported, and the rest is consumed locally. In 2018, the volume of pomegranates exported was 1 167 821 cartons (3.8 kg-equivalent cartons), 19% lower than in 2017.

Table 2 reveals the export of South Africa's pomegranates per cultivar from 2013 to 2018, measured in 3.8kg (equivalent cartons). It can be noted that the most exported cultivar over all those years was Wonderful. This cultivar made up 73% of all cultivars exported in 2018 – 10% more than what was produced in 2017. Hershkowitz contributed 14% to total exports, while Acco contributed 10%. It is also worthwhile to note that no exports of the Shir cultivar were made during the 2018 season, unlike 2016 and 2017.

Table 2: Exports of pomegranates per cultivar, 2013-2018

Cultivar	2013	2014	2015	2016	2017	2018	% Contribution
Wonderful	444911	588797	691720	935087	931273	851291	73%
Hershkowitz	67049	15230	232247	258130	304066	169143	14%
Acco	34996	83352	152022	128999	181487	111496	10%
Kessari/Baghwa	14824	2361	588	5355	1676	16512	1%
Shir	3553	4145	0	2644	4145	0	0%
Other	30141	6465	21323	7783	18130	19379	2%
Total 3.8 kg-eqv. cartons	**595474**	**837250**	**1097900**	**1337998**	**1440777**	**1167821**	**100%**

Source: Pomegranate Association of South Africa (POMASA) (2019)

Figure 6 highlights the importing countries of pomegranates from South Africa in 2018. Europe remained the biggest importer of pomegranates from South Africa, commanding a share of 44% of the total volume exported. Europe was followed by the Middle East with a share of 22%, the UK with a share of 17%, the Far East & Asia (9%), Africa (5%), and Russia and Others collectively making up 3%. Compared to 2017, the percentage of European imports of South Africa's pomegranates decreased by 12% in 2018, while the Middle East registered an increase of 6%, the UK increased by 5%, while the Far East & Asia increased by 2%. On the other hand, Africa remained the same while Russia's imports decreased by 3%.

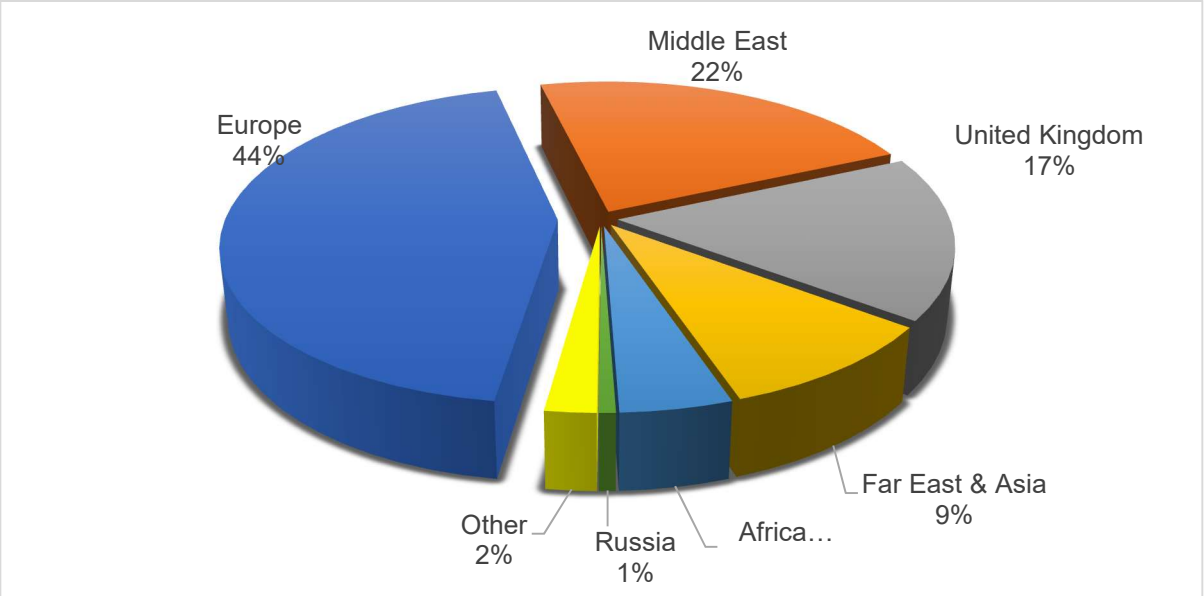

Figure 6: Importers of South Africa's pomegranates, 2018
Source: POMASA (2019)

The pomegranate harvesting season is from February to June. Quantities are at their highest and prices at their lowest in these months, as supply and demand come into play. Prices tend to be lower when there is high supply for a product in the market, bringing about competition, while prices are higher in the months when there is a low supply for the product. **Figure 7** shows the monthly volumes and prices of pomegranates sold in the NFPMs over the years under review. The largest volumes

sold were in April each year. In 2018, 94.2 tons were sold in April and the market price was R11 979 per ton. The total volume traded in 2017 was 382 tons, which increased to 392 tons in 2018. So far 312 tons have been sold in 2019 (January to May). The highest market price realised during the period under review was R101 793 per ton in December of 2018.

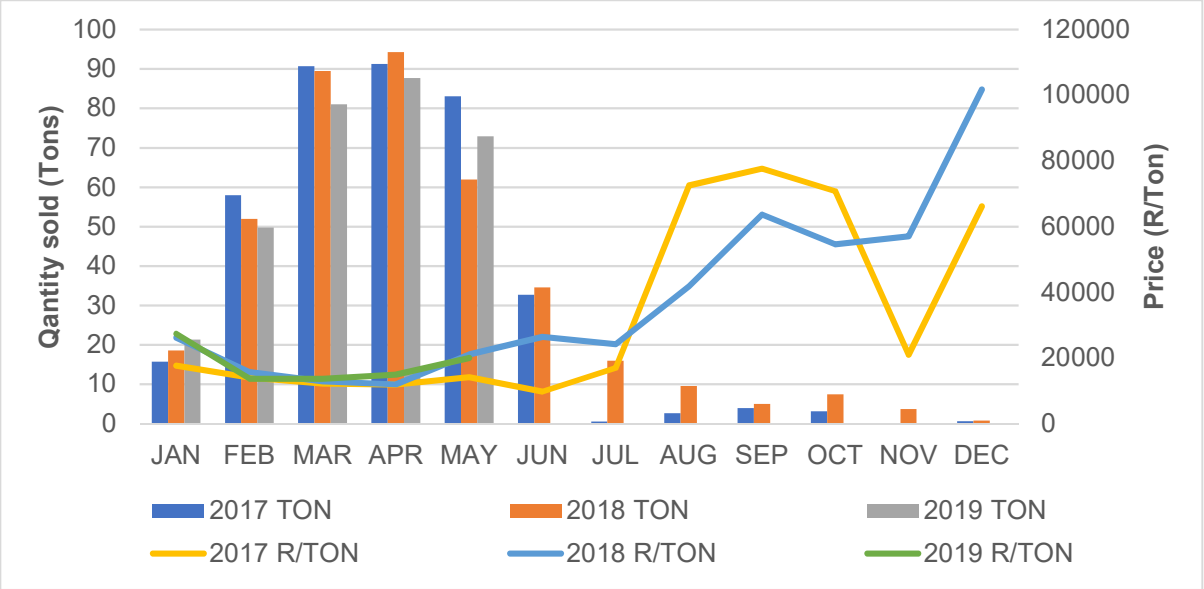

Figure 7: Local market sales of pomegranates, 2017-2019

Source: DAFF (2019)

3. Overview of subtropical fruit production for the 2018/19 season

Subtropical fruits consist of fruits such as bananas, avocados, litchis, kiwi fruit and mangoes. Subtropical fruits require warmer conditions with stable temperatures. This report will focus on litchi production. The following section will give an overview of litchi production, export markets and the volumes sold on the NFPMs.

3.1. Preview of the litchi production season 2018/19

Although still relatively small but with the potential to grow further, litchi production mainly takes place in Limpopo and Mpumalanga, with some in KwaZulu-Natal. The production of litchis (measured in tons) from the 2008/09 season to the 2018/19 season is outlined in **Figure 8**. Litchi production fluctuated over the seasons, remaining below 10 000 tons in most years. The highest production ever recorded during the period under review was in 2017/18 with an estimated volume of 10 402 tons. Production in the 2017/18 season constituted a 12.9% increase from the 2016/17 season. It is important to note that the data from 2018/19 is the data available so far and may not be the whole season's crop, as the November and December harvest has not been factored in yet. So far, 3 742 tons have been produced in the 2018/19 season.

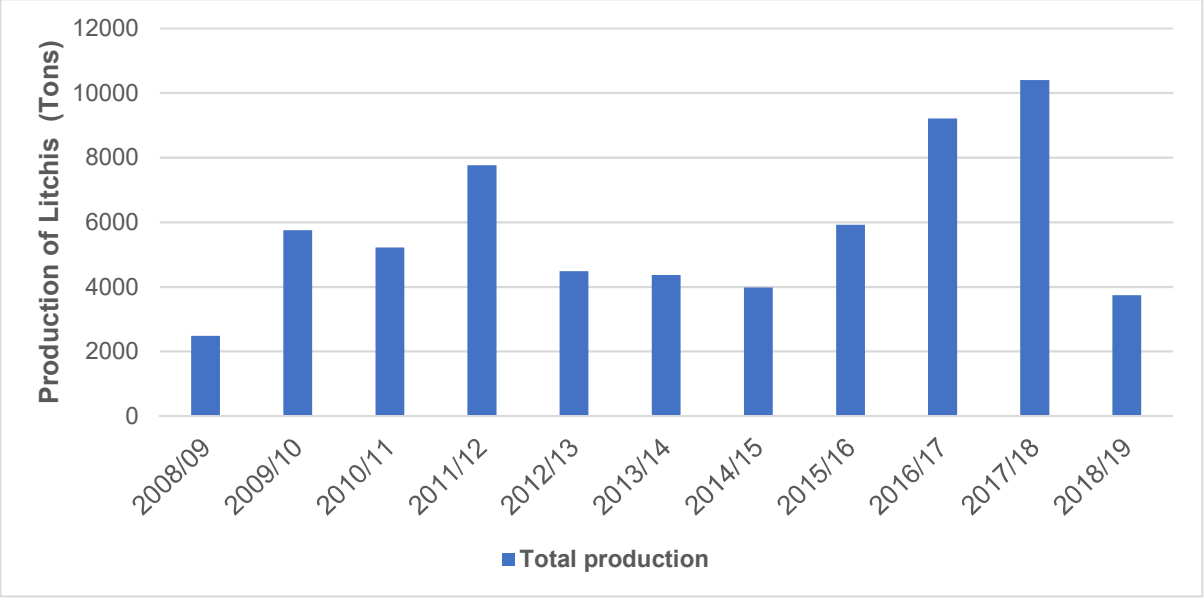

Figure 8: Production of litchis between the 2008/09 and 2018/19 seasons

Source: South African Litchi Growers' Association (SALGA) (2019)

Figure 9 provides the crop distribution of the litchis in South Africa from the 2008/09 season to the 2018/19 season. It can be noted that over the years, the highest volumes of litchis were exported, with the rest being sold in local markets and the processing market. However, in the 2017/18 season, 56% of the total production of litchis was processed, while 31% was exported and the remaining 13% was sold in the local markets. It is evident from the 2016/17 season that processing was already overtaking local sales by 2 279 tons. In the 2018/19 season, of the 3 742 tons of litchis supplied so far, 2 764 tons (74%) have been exported, 610 tons (16%) sold in local markets, and 368 tons (10%) processed.

Figure 9: Distribution of litchis between 2008/09 and 2018/19

Source: SALGA (2019)

Litchis produced in South Africa are destined for either the export market or the local market. Within the local market, some of the litchis undergo further value addition through processing. Of the total litchis produced thus far during the 2018/19 season, exports have accounted for about 74%. The Netherlands remains the largest importer of South Africa's litchis (see **Figure 10**), importing 81% of South Africa's litchis in the current season, which is 7% less than what the same country imported during the previous season. The UK imported 5% more litchis than what was imported in the last season, thus constituting a 14% share of all litchis imported. The Middle East imported 3% more litchis, while North America imported the remaining 1% of litchis.

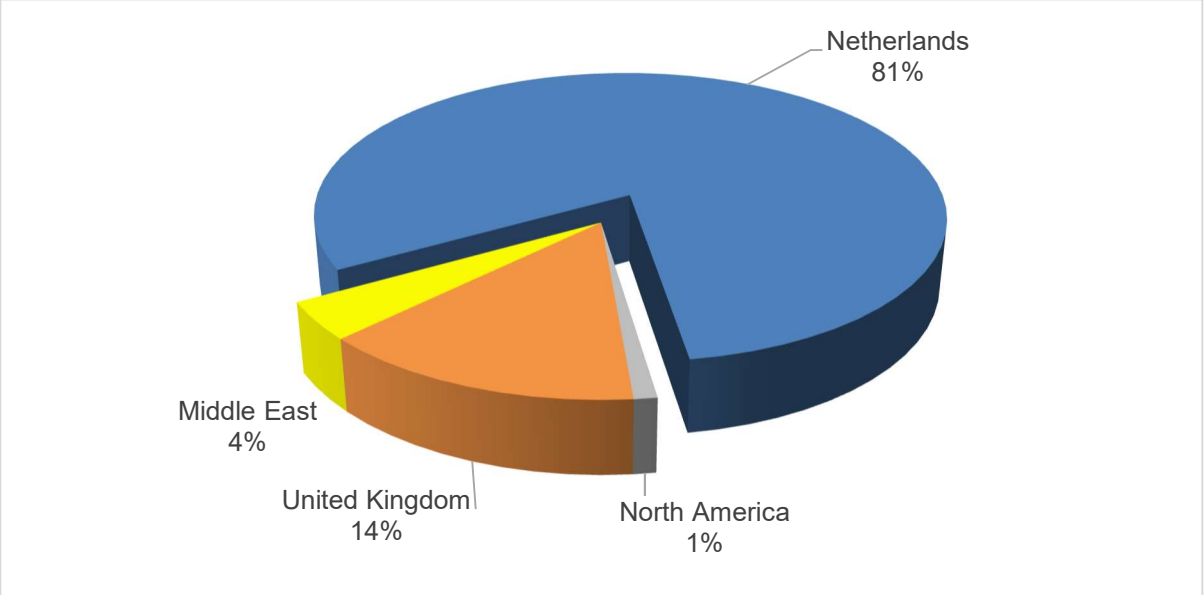

Figure 10: Importers of South Africa's litchis (2018/19 season)

Source: SALGA (2019)

Litchis are harvested from November to February each year. **Figure 11** shows the volumes and prices of litchis sold on the NFPMs from 2017 to 2019 (Jan-May). The volumes supplied in 2017 were higher than those in 2018. In 2017, the total volume of litchis sold through the NFPMs was 1 324 tons, compared to 1 249 tons in 2018. The highest volume sold through the NFPMs in the period under review was in December of 2017 when 769 tons were supplied at a price of R19 544 per ton. Litchis are at their peak supply in December, as shown in the figure. The lowest volumes sold are during the out-of-season months, with prices reaching as high as R106 059 per ton in September 2018. The average price of litchis in 2017 was R22 368 per ton, while in 2018 the average price was R25 873 per ton.

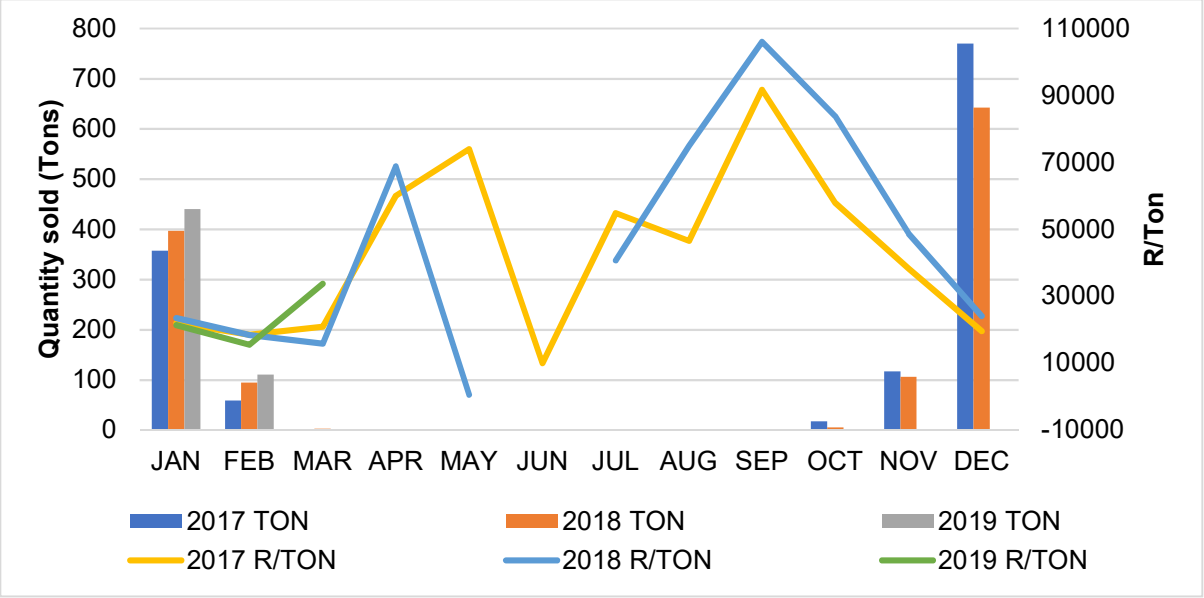

Figure 11: Local market sales of litchis, 2017-2019

Source: DAFF (2019)

4. Fruit industry perspectives

The following section focuses on current issues affecting the fruit industry and also provides an analysis of how the industry is performing in terms of addressing developmental issues and where it could improve.

4.1 Do the fruit and wine industries offer a real opportunity to alleviate the job crisis in South Africa?

Poverty, unemployment and inequality are arguably critical developmental issues that pose a risk to the social and economic stability of South Africa. Local scholars, entrepreneurs and leaders are attempting to find a plausible solution to rid the country of these developmental challenges. This article seeks to contribute to the current national debate by focusing on horticultural commodities. The aim is to examine and measure the contribution made by the fruit and wine industries towards reducing poverty, creating jobs and generating foreign earnings. Furthermore, the article identifies areas that can be explored to improve the contribution of these industries in reducing poverty and unemployment in the country so that the noble idea of an inclusive agricultural economy is attained. Fruits and wines are the biggest commodities within the horticultural subsector in South Africa.

How important is the horticultural subsector in South Africa's economy?

South Africa's agricultural sector experienced a real growth rate of 3.6% per annum between 1998 and 2018, which is a higher than the growth rate of 2.8% achieved by the overall economy in the same period. In absolute terms, the size of the agricultural sector is now five times larger than in 1994, implying a strong contribution from

agriculture to South Africa's economy over the past 24 years. In 2018, the gross value of agricultural production was estimated at R266.7 billion, and 28% of this value was derived from the horticultural subsector (*i.e*. fruits, vegetables, wines, and flowers). Since the deregulation of the agricultural markets in 1997, the horticultural subsector has registered an impressive growth of 11.2% per annum in production, making it the winner under the deregulation era compared to the livestock and field crops subsectors.

From a policy perspective, horticultural products, mainly fruits and wines, are praised for their potential in terms of job creation and generating foreign exchange earnings. The impact of fruits, wines and nuts was also highlighted in Chapter 6 of the National Development Plan (NDP), which encouraged investments in high-value, labour-intensive and export-oriented crops in order to attain an inclusive and export-led agricultural economy. Chapter 6 of the NDP was operationalised through the Agricultural Policy Action Plan (APAP), which is a five-year programme. The NDP and the APAP have both been in existence for five years and the first question that arises is whether targets for number and quality of jobs and growth in exports have been realised within the agricultural sector.

Have NDP expectations on high-value crops been met?

During the land seminar organised by the Mail and Guardian in March 2018, Professor Ferdi Meyer of the Bureau for Food and Agricultural Policy (BFAP) argued that while the target of one million jobs in the agricultural sector had not been realised, the NDP target for high-value and labour-intensive products had indeed been met. Prof. Meyer further stated that the majority of fruit industries had registered growth rates well above 15% average per annum on production over the past five years. The increase in production led to remarkable growth in agricultural exports, growing by an average of 19% per annum in the past five years. Trade data also shows that oranges were the top agricultural product exported by South Africa, followed by wines, table grapes, pome fruit, and sugar. The export value of fruits and wines was R59.2 billion in 2018, equivalent to 42% of total agricultural exports (including primary agriculture and manufactured foods). In terms of employment creation at primary level, nearly half of agricultural employment is derived from fruit- and wine-farming activities. Evidence on exports and jobs means that drafters of the NDP were correct in promoting investments in high-value and export-oriented crops like fruits.

Has the growth in fruits and wines assisted in mitigating poverty and inequality?

Despite a relatively good performance by the horticultural subsector over the past five years, a report produced jointly by the World Bank and the South African Department of Planning, Monitoring and Evaluation (DPME) in 2018, titled "Overcoming Poverty and Inequality in South Africa", showed that the country has somewhat regressed in addressing key developmental issues. The report states that between 2011 and 2018, the unemployment rate grew from 2% to 27% and the number of the population living under the poverty line moved from 36% to 40%. If the fruit and wine industries have

generated new jobs as well as more foreign earnings, why are unemployment, poverty and inequality continuing to rise in the country? Can the horticultural subsector do more to address these stubborn development issues that pose a risk to the social and economic stability of the country? A careful analysis of the quality of jobs and the input structure of the horticultural subsector may give some insight into the subsector's ability to contribute to development.

Focus areas for future growth

The unemployment problem in South Africa is more acute among young people, many of whom are now educated as opposed to the mostly illiterate youth of pre-1994. Graduate data from the Department of Higher Education and Training (DHET) shows that the country produced an average of 145 433 graduates per annum between 2000 and 2017. About 2% of these graduates are in the agricultural sector and it is estimated that 40% are unable to find employment, which implies a need for all subsectors in agriculture to also create highly skilled jobs in order to absorb graduates. A closer look at jobs created by the fruit industry in the past five years shows that the jobs were mostly at farm and packhouse level, thus benefiting mainly low-skilled workers and not assisting much in absorbing the unemployed agricultural graduates. In future, the sector must create opportunities for both unskilled farm workers and semi-skilled graduates. One way to create highly skilled job opportunities is to strengthen the agro-processing capacity in fruits, such as fruit juice manufacturing, in the country, to mitigate the heavy reliance on fresh fruit markets and create an alternative market for South African farmers.

Developing the agro-processing capacity could change the current weak interlinkage between horticulture and other economic sectors. At present, about 80% of the fruit industry's value is generated from the fresh market segment and nearly 90% is from export markets, implying that the domestic market has a limited role to play. This weakens the subsector's interlinkages with secondary and tertiary sectors as compared to field crops and livestock, which have stronger interlinkages with the rest of the economy. As a result of this weak interlinkage, the ability of the horticultural subsector to create jobs is somewhat limited to low-skilled jobs. One can argue that the fruit processing market offers minimal profits as compared to the fresh fruit market.

By encouraging farmers, particularly the small and medium emerging farmers, to produce specifically for the processing market, the industry will also reduce the production costs in the fruit sector. It is estimated that an average of R800 000 in capital costs and R350 000 in operational costs are required to establish and maintain one hectare of a fruit orchard for a fresh fruit market. These costs could be reduced when farming operations are set up to produce and supply for the processing market since this market does not require the strict management of fruit colour and texture appeal. The lower cost of producing for the processing market implies that more small and medium emerging farmers can enter the industry. Entry costs into the fruit and wine industries are one of the barriers limiting the meaningful participation of previously disadvantaged individuals. Currently, the private sector spends about R100

million per annum on activities that help to bring new entrants into the industry. Approximately 60% of this transformation money comes from the horticultural subsector (i.e. fruits, wines, potatoes and nuts), but it is too low to make any meaningful impact considering the high cost of establishing and maintaining just one hectare of fruit production. Government funds through the Department of Agriculture and Rural Development have a collective value of around R4 billion which is then distributed across all nine provinces, making the funds less impactful due to the number of beneficiaries (three million plus). Promoting fruit production for the processing market will offer an alternative and relatively cost-effective market for small and medium farmers that are unable to compete in the highly competitive fresh fruit market. It is crucial to realise the meaningful inclusion of small farmers in the formal value chain, especially under the regime where the government has almost eliminated all forms of subsidies and support to farmers.

Conclusion

The development of the fruit processing market will also resolve the dependency on export markets as local and regional consumers have the potential to absorb large volumes of processed fruit juice. In 2018, South African households spent R562.7 billion on unprocessed agricultural products, and less than 11% of this expenditure was on fresh fruit and vegetable products. If the processing market is given the necessary support, such as high-yielding variety development, infrastructure, market promotion and producer training, three problems currently facing the fruit industry can be resolved, namely creating more employment opportunities, improving the interlinkages between the fruit and other economic sectors, as well as contributing to the genuine transformation of the horticultural subsector. Employment will include the creation of low-skilled jobs at farm and packhouse level, as well as semi-high-skilled jobs at agro-processing level. The development of the processing market will incentivise farmers to produce fruits that are only suitable for processing, which means they will incur lower production costs, thus enabling more farmers to enter the horticultural subsector. So, the answer to the overarching question is yes, South Africa's fruit industry has excellent potential to meaningfully contribute to employment creation and poverty alleviation and to mitigate inequality by bringing new players into the value chain.

4.2 Is the horticultural industry strategically positioned to benefit from the newly enacted African Continental Free Trade Agreement (AfCFTA)?

Without fully pre-empting in answering the above question, the author wishes to respond by saying "not fully", as explained further in the subsequent paragraphs. South Africa and many other developing economies have worked hard, and are still working hard, towards perfecting the art of exporting horticultural products to the Western world (Europe, Asia and the Middle East). There has been little focus on the possibility of tapping into the intra-Africa markets, hence the need for repositioning to

conquer markets within Africa. The horticultural industry has put in place food safety and traceability systems that are following the requirements of the Western world, and this has come at a high investment cost. Although this is a good development for the industry, it is worthwhile to recognise that the Western markets are also imposing rigorous voluntary standards (which in actuality are implemented as if they are mandatory), which change regularly, even before the farmers in most developing countries – South Africa included – have fully established compliance to that effect. This is becoming costly and unsustainable and hence perceived as a barrier to international trade.

In essence, this situation renders the horticultural industry and other African developing economies as being only takers and implementers of voluntary and non-voluntary standards that are crafted by the Western world. Africa's developing economies, which supply most of these horticultural products, have limited influence or input during the development and design of the standards. The limited influence emanates from the fact that many African economies have representatives in forums that design and develop the standards, but the representatives do not necessarily have the power to vote in cases where a decision has to be made through a vote. This jeopardises the relevance of many developing countries' participation in the process of developing and designing the standards, given that they end up being observers who have no power to influence.

How can South Africa's horticultural industry reposition itself to conquer the African market?

With the enactment of the AfCFTA, there are several opportunities for the industry to reposition itself in a bid to conquer markets on the African continent. Repositioning entails the following: Within the standards' developing and designing arena, representatives in these forums must be active, in that i) they must be eligible to vote for their country. South Africa and other developing countries must ensure that they hold full membership of these forums rather than partial membership, which deprives them of the right to vote; and ii) representatives should be at the forefront of the latest developments within the industry on the global landscape – be it technical, legal or otherwise.

For South Africa's industry, in particular, there is a critical need to understand the market dynamics of each African country/region where the horticultural industry wishes to extend its footprint. For instance, in many African countries where subsistence farming is the norm, people rely on fresh produce harvested from their gardens, which implies that, except expatriates and possibly a few middle-class households, they rarely buy fresh fruits or vegetables from retail outlets like Shoprite or Uchumi. More often than not, the middle-class families who are citizens in a given country also have farms at a small-scale level in the countryside from which they get horticultural products for their domestic consumption. A clear understanding of such basics will significantly enable South Africa's horticultural industry to ascertain the kind

of investments – most likely cost-effective ones – that will allow the industry to flourish in many markets on the African continent. The establishment of highly capital-intensive retail stores that focus on fresh horticultural products may not be the way to go. One cost-effective and proven alternative to be used in such economies would be evaporative cooling technologies (Mohammed, nd; Odesola & Onyebuchi, 2009; Wayua, Okoth & Wangoh, 2012). The horticultural industry should be working towards implementing more such technologies in various towns and cities of targeted countries as a step towards addressing the perception that established retails stores are for the rich – a perception that leads to low-income earners not buying produce from those stores. This situation has contributed to several retail stores closing down and exiting many developing countries.

Infrastructure is a burgeoning problem on the African continent and, given the high investment required, it may not be adequately addressed in the short term (2019 – 2025). In the interim, therefore, the industry needs to identify specific horticultural commodities of interest in the different African markets. Then, in partnership with stakeholders in those respective markets, the sector should co-invest in producing those very commodities in those countries, if conditions (soil, weather, politics) permit. By so doing, this would not only address the limitations of infrastructure but would also minimise the many barriers to trade while enhancing integration on the continent at large.

South Africa generally exhibits better performance in exporting processed horticultural products (especially wines and juices) rather than unprocessed horticultural products. With the enactment of the AfCFTA, South Africa may also opt for co-investing in medium to extensive agro-processing facilities in other African countries, which would not only assist in reducing the high level of post-harvest losses in many African economies but would also enhance the production of high-value products with a longer shelf life as compared to the highly perishable fresh horticultural products.

Lastly, no thorough conclusion is provided as to whether or not the horticultural industry is strategically positioned, but the above discussion provides some insights into what the horticultural industry could do in a quest to conquer the African markets.

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USEFUL LINKS

Citrus Growers' Association (CGA)	*www.cga.co.za*
Fresh Produce Exporters' Forum (FPEF)	*www.fpef.co.za*
Hortgro Services	*www.hortgro.co.za*
National Agricultural Marketing Council (NAMC)	*www.namc.co.za*
Perishable Products Export Control Board (PPECB)	*www.ppecb.com*
South African Subtropical Growers' Association (Subtrops)	*www.subtrop.co.za*
South African Table Grape Industry (SATGI)	*www.satgi.co.za*

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