Markets and Economic Research Centre



This report is released on a quarterly basis by the Trade unit of the Markets and Economic Research Centre.

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SOUTH AFRICAN FRUIT TRADE FLOW

Issue No. 38: June 2020



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1. Background

South Africa's different weather and climatic conditions enable the country to cultivate and produce a variety of fruits. Globally, the country is known as a key producer and exporter of citrus, deciduous, and subtropical fruits. **This issue of the Fruit Trade Flow Report looks at deciduous fruit (cherries and pomegranates), exotic fruit (berries) and subtropical fruit (mangoes and litchis)**, with particular focus on the current season's performance of these fruits, for both 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 worldwide output and exports). The rest of the report is organised as follows: Section 2 provides an overview of cherry and pomegranate production, Section 3 focuses on exotic fruits, while Section 4 looks at subtropical fruits. Lastly, Section 5 provides insight into selected perspectives affecting the fruit industry.

2. Overview of cherry and pomegranate production for the 2019/20 season

The focus of this section is on cherry and pomegranate production from both a global and South African perspective.

2.1 Global preview of cherry production

The global production of cherries over the past six seasons is depicted in **Figure 1**. The global production of cherries in the 2019/20 season is expected to decline by 27 000 tons from the previous season of 3 646 000 tons to 3 619 000 tons. The decline in production is attributable to bad weather that occurred in the European Union (EU), including hail in Italy, and low temperatures, frost and drought in Poland. Noteworthy is that Poland is the largest producer of cherries in the EU (USDA, 2020). Turkey is the largest producer of cherries in the world and its production is expected to increase by 41 000 tons from the previous season's production of 824 000 tons. The increase is driven by the strong demand for exports, and producers being invested in higher-yielding varieties (USDA, 2020). Turkey is followed by the EU (648 000 tons), the United States of America (USA) (450 000 tons), China (420 000 tons) and Russia (246 000 tons). China's production is expected to increase by 24% from last season's crop (USDA, 2020).



Figure 1: Leading global producers of cherries, 2014/15 – 2019/20 Source: USDA (2019)

Global imports of cherries over the period 2014/15 to 2019/20 are shown in **Figure 2**. Imports are expected to decline by 1.1% in 2019/20 compared with 2018/19. China is the leading importer of cherries, and the demand has been on an upward trajectory since 2009/10. China's imports are expected to see an 8% increase from the previous season of 180 000 tons, while Russia's imports are anticipated to decrease by 13% from 93 000 tons. Furthermore, the EU is projected to import 17% more cherries (to 55 000 tons) and Canada 7% more (to 30 000 tons), while the US is estimated to import 18 000 tons of cherries – 50% more than the previous season.



Figure 2: Global leading importers of cherries, 2014/15 – 2019/20 Source: USDA (2019)

Figure 3 illustrates the global exports of cherries over the past six seasons. During the 2019/20 season, exports are expected to fall by 1.3% to 454 000 tons because of a 64% decline in exports from Uzbekistan from 28 000 tons. The US is also expected to experience an 8% decline in exports as it continues to face retaliatory tariffs from China, which is its third largest importer of cherries (USDA, 2020). Chile is the largest exporter of cherries, with exports expected to increase by 13% to 205 000 tons in 2019/20, followed by the USA (80 000 tons), Turkey (78 000 tons), Azerbaijan (24 000 tons) and the EU (15 000 tons).



Figure 3: Global leading exporters of cherries, 2014/15 – 2019/20 Source: USDA (2019)

2.2 Preview of the South African cherry production season 2019/20

The cherry industry in South Africa is relatively small compared to the top producing countries; however, the area planted has been increasing and new trees are coming into production. In 2018, a total of 388 hectares of cherries were planted – a 76% increase from 2013. Over 60% of the production of cherries occurs in the Western Cape, followed by the Free State (18%) and North West Province (11%). The production of cherries in South Africa amounted to about 1 024 tons in 2018/19; however, for the 2019/20 season, the production of cherries was expected to drop by 3% because of hot and dry temperatures experienced during flowering in September (FreshPlaza, 2019).

Cherry exports from South Africa are available from week 40 to about week 2 of the following year (September to January), making it a short harvesting season. **Figure 4** shows the total volumes of cherries exported in the 2018/19 and 2019/20 seasons. South Africa has exported 65 263 cartons (2.5 kg cartons) in total in 2019/20 so far, which is 9% lower than what was exported in 2018/19. South Africa exported the largest share of cherries to the United Kingdom (UK) (54%), followed by Europe (20%) and the Middle East (18%). Exports of cherries to Europe and Africa increased by 1 613 cartons (14%) and 365 cartons (19%) respectively compared to last season (2018/19), while the Middle East and the Far East & Asia dropped by 5 385 cartons (31%) and 2 176 cartons (100%) respectively due to lower demand.



Figure 4: South Africa's cherry exports, week 40 – week 9 (year-to-date) Source: Agrihub (2020)

The quantities of cherries sold at the National Fresh Produce Markets (NFPMs) and their price per ton is depicted in **Figure 5**. Generally, 2018 saw the largest volumes supplied to the NFPMs, with 423.07 tons in total, while quantities supplied in 2019 amounted to 237.74 tons overall. Over all the years, the largest quantities of cherries are generally sold in November and December. The largest quantity sold was in November 2018, with 139 tons sold at a price of R48 741/ton. The highest price was paid in June 2019 at R125 349/ton. By the end of April 2020, the NFPMs had sold 25.15 tons of cherries – 70% and 38% lower than in 2018 and 2019 respectively. This might be due to the decline in production and the effects of the lockdown.



Figure 5: South Africa's NFPM sales of cherries and price per ton Source: DAFF (2020)

2.3 Preview of South Africa's pomegranate production

Figure 6 highlights the volumes of pomegranate fruit passed for the export market and local market between the period 2012 and 2019, measured in cartons and tons. Pomegranate production in South Africa is destined for export and the local market, while minimal volumes are processed into juice. Based on statistics from the Pomegranate Association of South Africa (POMOSA), the volume of pomegranates destined for the local market increased between 2012 and 2019. There were approximately 183 more tons in the local markets in 2019 compared to 2012.



Figure 6: Pomegranate fruit passed for export Source: POMASA (2019)

Figure 7 highlights the main export markets for pomegranates supplied by South Africa to the global markets during 2019/20. The Middle East ranked as the principal importer of South Africa's pomegranates with a share of 40%, followed by Europe (33%), the UK (15%), the Far East & Asia (7%), and both Russia and other markets (2%).



Figure 7: Main export destinations for South Africa's pomegranates

Source: POMASA (2020)

Figure 8 highlights the volumes of pomegranates sold through the NFPMs and the corresponding price trends for 2018, 2019 and 2020 (Jan-Apr). During 2018, approximately 394 tons were sold at an annual average price of R19 331 per ton, and the highest sales of 94 tons were reached in April. In 2019, about 417 tons were sold at an annual average price of R18 347 per ton, while 2020 local market sales only captured the months January to April, during which 292 tons were sold at an average price of R15 538 per ton. It is important to note that 2019 saw the highest sales of pomegranates compared to 2018 and 2020 (Jan-April).



Figure 8: Price and quantity of pomegranates sold through the NFPMs (2018 – 2019) Source: DAFF (2020)

3. Overview of exotic products passed for export for the 2018/19 – 2019/20 period

Figure 9 illustrates the variety of berries (i.e. blueberries, raspberries and blackberries) passed for export during the period 2014/15 to 2019/20. According to the figure, South Africa exports more blueberries than any other variety and this is due to the increased production. Based on industry figures, South Africa's blueberry production for 2019/20 increased to 18 000 tons from 11 700 tons in the previous year. The volume of blueberries exported increased by 4 081 tons between the 2018/19 and 2019/20 seasons, due to increased production. During the 2019/20 season, South Africa managed to export about 1 569 tons of raspberries and 193 tons of blackberries. Raspberry exports improved by more than 45% between 2018/19 and 2019/20. Generally, market access for South Africa's berries has been increasing over the period under review.



Figure 9: Berry fruits passed for export, 2014/15 – 2019/20 Source: Hortgro (2020)

Figure 10 highlights the distribution of South Africa's blueberries (tons) passed for export during 2019/20 per market. The UK remains South Africa's main market for blueberries exported during the 2019/2020 season, accounting for about 41% of all blueberries exported. Europe was the second largest export market constituting a 35% share, followed by the Middle East (18%), and the Far East & Asia (5%). The Indian Ocean Islands (IOI) consumed less than 1% of South Africa's blueberry exports.



Figure 10: Main export destinations for South Africa's blueberries Source: Hortgro (2020)

Figure 11 highlights the sales and average price trends of other berries in the NFPMs from January 2018 to April 2020. High sales of other berries occur from July towards the end of each year. A total of 634 tons (519 tons) were sold at an average price of R35 463 per ton (R74 102 per ton) during the 2018 (2019) season. In 2020 (Jan-Apr), a total of 71 tons were sold at an average price of R120 066 per ton. In 2018, the highest volume sold (156 tons) was recorded in October at a price of R27 667 per ton, while during 2019 the highest volume sold (104 tons) was also reached in October.



Figure 11: Price and quantity of other berries sold through the NFPMs, 2018 – 2019 Source: DAFF (2020)

Raspberries are mainly produced in the Western Cape (58%), North West (12%) and Limpopo provinces (13%). **Figure 12** depicts South Africa's main export markets for raspberries during the 2019/20 season. The UK was the principal importer of raspberries with a share of 62%, followed by the Middle East (29%) and the Far East & Asia (9%).



Figure 12: Main export destinations for South Africa's raspberries Source: Hortgro (2020)

Figure 13 shows the volume of raspberries sold through the NFPMs, as well as the market price trends, from January to December (2018 & 2019) and from January to April 2020. The total volume of raspberries sold through the NFPMs between January and December was 336 tons (2018) at a total value of R10 389 874, and 142 tons (2019) valued at R10 157 092. In the current season, about 52 tons were sold between January and April 2020 at a market price of R77 028 per ton. The highest sales in the NFPMs were experienced in May 2018 and February 2019.



Figure 13: Price and quantity of raspberries sold through the NFPMs (2018 – 2020) Source: DAFF (2020)

Figure 14 illustrates the main markets for blackberries exported by South Africa during the 2019/20 season. The Middle East absorbed about 51% of the blackberries, followed by the UK (47%) and Europe (2%).



Figure 14: Main export destinations for South Africa's blackberries Source: Hortgro (2020)

4. Overview of subtropical fruit production for the 2019/20 season

The subtropical fruit industry forms part of the global fruit sector, known for income generation and job creation while earning foreign exchange. The industry is also a source of nutrition and dietary requirements for the world's growing population, particularly in low-income countries. Subtropical fruits consist of fruits such as bananas, avocados, litchis, kiwifruit and mangoes. These fruits require warmer conditions with stable temperatures. This section focuses on litchis and mangoes.

4.1 Global litchi production and trade overview

The global litchi market is projected to witness a compound annual growth rate of 3.5% during the period 2020 to 2025. China, India and Vietnam are the world's major producers of litchis. According to the International Society for Horticultural Science (ISHS, 2020), China ranked first with a production of 2 000 metric tons, followed by India and Vietnam with 677 thousand metric tons and 380 metric tons respectively in 2018. Around 98-99% of the litchis produced in India are domestically consumed. South-East Asian countries accounted for 19% of the global litchi market in 2018.

Vietnam has become the second-largest exporter of litchis despite its smaller output when compared to China and India. This is majorly due to favourable climatic conditions and seed quality, which have led to better fruit quality resulting in an increase in imports. Therefore, the country is estimated to pick 160 000 tons of litchis during this season, including 45 000 tons of early-maturing litchis and over 115 000 tons of the main fruit crop. The USA, Canadian and European markets were the major importers of litchis, which accounted for 80% of China's litchi export market in 2018. The major reason for the increase in exports of litchis is the increasing demand for Vietnam's litchis due to the better fruit quality when compared to India and China, which were the largest litchi producers in Asia during the same period. This year in China, all the production areas have already reported the promising prospect of a bumper harvest.

4.2. Preview of South Africa's litchi production for the 2013 – 2019 seasons

Litchis grow well in the hot, humid and frost-free areas of the subtropical regions of South Africa. Of South Africa's litchi production, 60% comes from the Mpumalanga Province, especially Nelspruit, Hazyview and Malelane. Furthermore, 38% comes from the Limpopo Province, with Tzaneen being the major production area (SALGA, 2019). The production trend for litchis in South Africa is illustrated in **Figure 15**. It is worth noting that production decreased by 57% from 10 402 tons in 2017/18 to 4 434 tons in the 2018/19 season. Unfavourable climatic conditions, most notably the heatwave, contributed significantly to the decline, especially in major production regions such as Malelane and Komatipoort. Hail and low rainfall also contributed to low crop volumes. The majority of litchis (2 764 tons, 49%) were exported, while only 8% of litchis were processed; 29% of the litchis were sold through the NFPMs, with 12% sold directly to consumers and 2% supplied through the informal markets.



Figure 15: Production of litchis, 2012/13 – 2018/19 Source: SALGA (2019)

4.2.1. South Africa's litchi trade

The 2018/2019 litchi export season recorded 14% less than the 2017/18 season. This equates to 2 764 tons being exported by grower members from a 2017/18 season of 3 222 tons. The litchi season in South Africa begins around mid-October in the early areas of Malelane and Komatipoort in Mpumalanga, peaks in December, and ends towards the end of February. **Figure 16** shows the quantities and prices per ton of South Africa's litchis sold through the NFPMs between 2018 and 2020. In 2020 about 175 tons of litchis were sold through the NFPMs. In December 2018 the quantity of litchis sold in the NFPMs was higher as compared to 2019. The price for litchis received in March 2020 (R296 221 per ton) showed a significant increase in comparison to the price recorded in March 2019 (R33 746 per ton). The strong price increase in 2020 can be attributed to the fact that the volumes declined as the season came to an end.



Figure 16: Litchis sold through the NFPMs, 2018 – 2020 Source: DAFF (2020)

4.3. Preview of the mango production season 2019/2020

The following section will give an overview of mango production, export destinations and the volumes sold through the NFPMs.

4.3.1. Preview of a global perspective on the mango season 2019/2020

In Mexico, the 2020 production volume is expected to decrease by 4.62% due to the enduring drought in the main producing counties such as Guerrero, Sinaloa and Veracruz. India is the biggest exporter of mangoes, possessing around 600 different varieties, with the most popular varieties being Alphonsos and Hapus from the Maharashtra region. India's mango production in 2019/2020 is estimated at 21.28 million metric tons, which is slightly lower than the 21.37 million metric tons produced in 2018/2019. While the production volume is moderate, it has decreased over the past two seasons due to weather disturbances in the southern region, including

unseasonal rains and thunderstorms. Export volumes for fresh mangoes were slightly higher in 2019 at 49.2 thousand metric tons from 48.5 thousand metric tons in 2018. The mango crop in the Philippines for 2020 is expected to be at a high 1 047 thousand metric tons after last year's bumper harvest, which left 2 million kilograms of oversupply. The increases are mainly due to expansions in production areas as a result of the rising local demand. The export volume for this season was expected to increase by approximately 31 thousand tons as compared to last season's volumes. However, exports are expected to be 40% lower this season due to logistical difficulties, as well as declining local demand for "luxury fruits". While Hong Kong has no import ban in place, transporting the fruit is difficult due to the nation-wide lockdown in the Philippines. Malaysia has also temporarily closed its borders, and limited movement at the ports has resulted in lower imports of the fruit.

4.3.2. Preview of South Africa's mango production for 2013 – 2019

Mango production during the 2018/2019 season increased to 93 870 tons as compared to 81 077 tons produced in the 2017/2018 season. The volume of mangoes sold through the local market was 29 622 tons while only 6 039 tons were exported. The majority of mangoes on the local market were used for processing, with an estimated 26 800 tons used for achar production, 15 547 tons processed for juice and the remaining 9 906 tons used for dried fruit, while the remaining 5 956 tons were direct sales. However, the South African Mango Association reported that due to enduring drought conditions, South Africa's mango harvest is expected to decrease by 20% in the 2019/2020 season. A total of 70 000 tons of mangoes are estimated to be realised, although the average crop size over the past five years has reached over 84 000 tons per season.



Figure 17: Mango production trends, 2012/13 – 2018/19 Source: Subtrop (2020)

4.3.3. South Africa's mango trade

The mango season has been hampered by the dry weather where only a third of the normal summer rainfall fell in 2019. South Africa's mango exports account for a very small percentage share (less than 5%) of total production. However, the 2018/2019 export season closed at 106 638 cartons in week 52. On the other hand, the 2019/2020 season looks promising and started on a good note, with 60.3 thousand cartons of mangoes having been exported in week 9.



Figure 18: Mango exports per week, 2019/2020 (4 kg cartons) Source: Subtrop (2020)

Figure 19 indicates the market destinations for South Africa's mango exports in the 2018/19 season. Of the 6 039 tons of mangoes exported, a 49% share went to the Middle East, followed by Africa with a 16% share, while the Far East consumed an 11% share. A small percentage went to other parts of the world.



Figure 19: Mango exports by destination – 2018/19 Source: Subtrop (2020)

Figure 20 shows the quantities and prices of South Africa's mangoes sold through the NFPMs between 2018 and 2020. In the 2020 season, about 15.8 thousand tons of mangoes have so far been sold, with a peak in January 2020 of about 12.2 thousand tons sold. The domestic mango price received in April 2020 (R21 520) showed a significant increase in comparison to the price recorded in April 2019 (R11 161). The sharp price increase in 2020 may be explained by the significant decline in the volume of mangoes that were available in April 2020. The volumes sold during the first four months of 2020 were by far lower than the volumes sold during the same months in 2019. This decline might also be attributed to the disruptions of the lockdown due to COVID-19.



Figure 20: Mangoes sold through the local market, 2018 – 2020 Source: DAFF (2020)

5. 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. In this issue, the focus is on the global trade in mangoes.

5.1 Highlights of current issues affecting the mango industry globally

There is a growing demand for fresh mangoes and their derived products globally. The market size of processed mango products alone is projected to grow by a cumulative annual growth rate (CAGR) of 6.4% by 2025 (Grand View Research, 2019). Consumers' preference for naturally sweet fruit-based ingredients, together with the increased consumption of fresh mangoes and mango-based products, are the key driving factors behind the projected growth. While some of South Africa's mangoes are consumed domestically, a great proportion is destined for export into the EU, mostly to the UK (16.7%), the Netherlands (9.3%) and Spain (8.5%) among others. Some mangoes are exported to the Far East and the Americas, while some are also exported within Africa – mostly to Togo (5.9% of South Africa's exports).

The major concern in the mango industry is the over-use of chemicals during the production phase, which scientists contend affects the quality of pulp and concentrates that are used in the manufacturing of other products. This is a food safety matter which has led to the imposition of stringent food regulations relating to maximum residue levels (MRLs) of chemicals on the harvested mangoes. This, therefore, calls for farmers in the industry to adhere to the food safety standards; otherwise, contaminated

mango consignments are bound to be intercepted in the various markets, thereby compromising the demand for South Africa's mangoes.

Besides the global concern about the use of chemicals in the industry, some renowned mango-producing countries are battling with the recurrence of pests and diseases. For example, mango production in Ghana is threatened by the ongoing outbreak of black bacterial spot (BBS), while in Mexico, pests and diseases have caused severe devastation to the extent that if not contained early enough, this summer, mango production and exports – mainly destined for the USA and Canada – are foreseen to plummet by almost 8% (Tridge, 2020a). In the Philippines, the lack of advanced Research and Development (R&D) technologies like cold chain management and packaging is deterring growth in mango exports (Jang, 2020). Unpredictable climatic conditions are also a major problem affecting the industry. The effects of unreliable rainfall on mango production have already been witnessed in South Africa.

Despite the 14.6% increase in the global price of mangoes observed in the second quarter of 2020 as compared to the previous quarter (Tridge, 2020b), major producers of mangoes like India, China and the USA have registered significant declines (**see Figure 21**) due to a number of factors highlighted in the subsequent paragraphs. Brazil, Ireland (73.7%), Ukraine (46.4%), Turkey (64.6%) and Chile (49.4%) are the key driving markets for the observed increase in the global price of mangoes.



** denotes that the price change for South Africa is not on a q-o-q basis, but on the most recent data as of April 27.

Figure 21: Changes in the price of mangoes in global markets in the second quarter of 2020 in comparison with the first quarter of 2020

Source: Tridge (2020c)

The negative trend in countries like India, China and the USA is attributable to the ongoing harvesting season, rendering high availability of mangoes on the market. In the USA, the decline in the price was also associated with consumers' shift to panic buying of other household grocery items due to the COVID-19 pandemic, but with the

normalising situation, prices are starting to pick up with hopes of stabilising by later June or early July. In India, lower prices were due to labour shortages in the harvesting and processing stages along the value chain as a result of the nation-wide lockdown. With mangoes being a highly perishable produce, selling at lower prices was the only way in which to minimise losses. In Mexico, for instance, farmers were not able to harvest 50% of their produce, coupled with the fact that many traders cancelled purchase orders due to the COVID-19 pandemic, thereby slumping exports to the USA by about 43%.

Conclusion

The issues presented above affecting the global mango industry provide insight into further areas in which South Africa's industry should work towards strengthening. Of critical importance is more investment in R&D technologies through which problems of food safety, pests and diseases, irrigation, as well as cold chain management and packaging should be addressed. For instance, South Africa may consider investing in ultra-high-density cultivation technologies to further boost production to meet the growing demand. In addition, technologies that take cognisance of food safety, cold chain management and packaging are bound to foster South Africa's mangoes to encounter fewer market access barriers as witnessed in other countries (e.g. the Philippines where only 5% of their production is exported).

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USEFUL LINKS

Bureau for Food and Agricultural Policy (BFAP) Citrus Growers' Association (CGA)	<u>www.bfap.co.za</u> <u>www.cga.co.za</u>
Department of Agriculture, Forestry and Fisheries (DAFF)	<u>www.daff.gov.za</u>
Food and Agriculture Organisation (FAO)	www.fao.org/docrep/
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
Quantec Easy Data	www.quantec.co.za
South African Subtropical Growers' Association (Subtrop)	www.subtrop.co.za
South African Table Grape Industry (SATGI)	www.satgi.co.za

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