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NAMC
Promoting market access for South African agriculture

SOUTH AFRICAN FRUIT TRADE FLOW

Issue No. 40: December 2020



Beautiful country, beautiful fruit

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1. Background

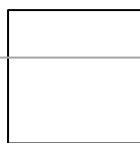
*South Africa's diverse weather and climatic conditions enable the country to cultivate and produce a variety of fruits. The country is known globally as a producer and exporter of citrus, deciduous and subtropical fruits. **This issue of the Fruit Trade Flow Report looks at citrus fruit (oranges and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

2. Overview of citrus fruit for the 2019/20 season

Citrus fruits generated the highest value foreign exchange of all fruit crops, especially in international trade. Citrus fruit is produced throughout the tropical and sub-tropical countries of the world. Citrus products play an essential role in human diets, containing high levels of vitamin C. The industry comprises four broad categories: oranges, easy peelers (soft citrus), grapefruit, lemons and limes. The next section focuses on the global overview of citrus fruit, emphasising oranges and soft citrus.

2.1 Overview of global citrus production for the 2019/20 season

Global orange production for 2019/20 is estimated to fall by 7.8 million tons from the previous year to 46.1 million as unfavourable weather leads to smaller crops in Brazil, which is down by 19 % and Mexico (down by 45 %). On the other hand, global soft citrus production is also estimated to drop by 400 000 tons for 2019/20 to 31.6 million tons, with declines in the European Union (EU), Morocco, Turkey and the United States (US) more than offsetting a larger crop in China. **Figure 1** below highlights oranges and soft citrus' global production between 2015/16 and 2019/20. Generally, oranges are produced at larger volumes in the world as compared to soft citrus, and more oranges are produced compared to soft citrus. South Africa's orange production is expected to be flat at 1.6 million tons with normal weather conditions, while soft citrus production is expected to drop by 120 000 tons as compared to the previous year.



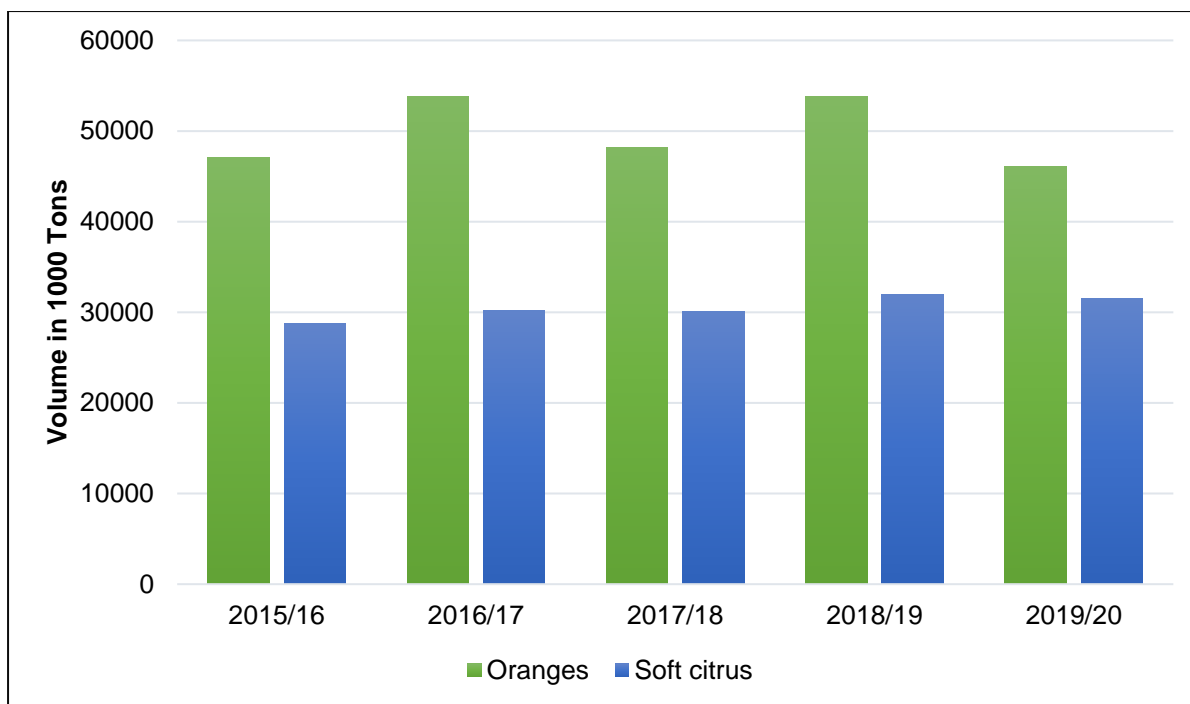


Figure 1: Global production of oranges and soft citrus, 2019/20

Source: USDA (2020)

2.1.1 Global trade in citrus for the 2015/16 – 2019/20 seasons

Global imports of oranges and soft citrus are anticipated to increase as a result of lower production. **Figure 2** highlights global imports of oranges and soft citrus between 2015/16 and 2019/20. Generally, the EU continues to be the critical market for oranges with 1 million tons imported (25 % share), followed by Russia (450 000 tons), China (448 000 tons), Saudi Arabia (415 000 tons) and Hong Kong (330 000 tons) respectively. Orange imports are expected to increase by 41 000 tons in 2019/20 as compared to the previous year (4 439 000 tons). Soft citrus imports are expected to drop by a smaller volume (4 000 tons), with Russia being a contributor to the decline. Russia was ranked as the largest importer of soft citrus at a volume of 840 000 tons, followed by EU (530 000 tons), US (310 000 tons), Ukraine (190 000 tons) and Vietnam (165 000 tons) respectively.

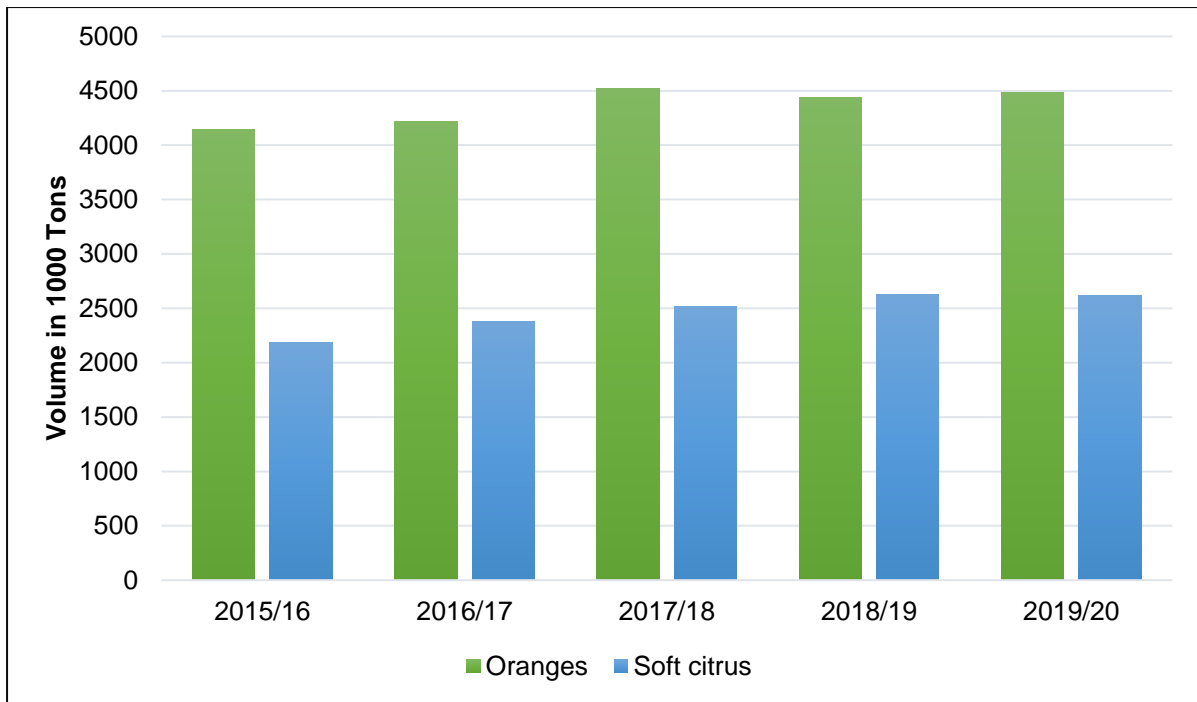
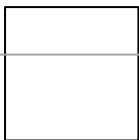


Figure 2: Global import trends of oranges and soft citrus, 2015/16 - 2019/20

Source: USDA (2020)

Global orange and soft citrus exports are expected to be lower due to a decline in production among the leading producers. In Mexico, orange exports are anticipated to remain flat with over 95 % of the exports expected to continue to be destined for the US and Egypt. Orange exports are projected to be 200 000 tons lower at 1.5 million on reduced supplies but are still anticipated to account for one-third of global trade. Top export markets are expected to continue to include the EU, Russia, Saudi Arabia and China. Soft citrus exports are expected to remain steady. Morocco and South Africa are anticipated to remain the leading suppliers to the EU market. **Figure 3** highlights oranges and soft citrus' global export performance over the past five (5) years. Orange exports are expected to drop to 4.6 million tons in 2019/20 as compared to 4.7 million tons in the previous year. Egypt was ranked as the largest exporter of oranges during 2019/20, exporting 1 500 thousand tons, followed by South Africa (1 280 thousand tons) and US (525 thousand tons), while Turkey was the main exporter of soft citrus, exporting 828 thousand tons, followed by China (710 thousand tons) and Morocco (385 thousand tons).



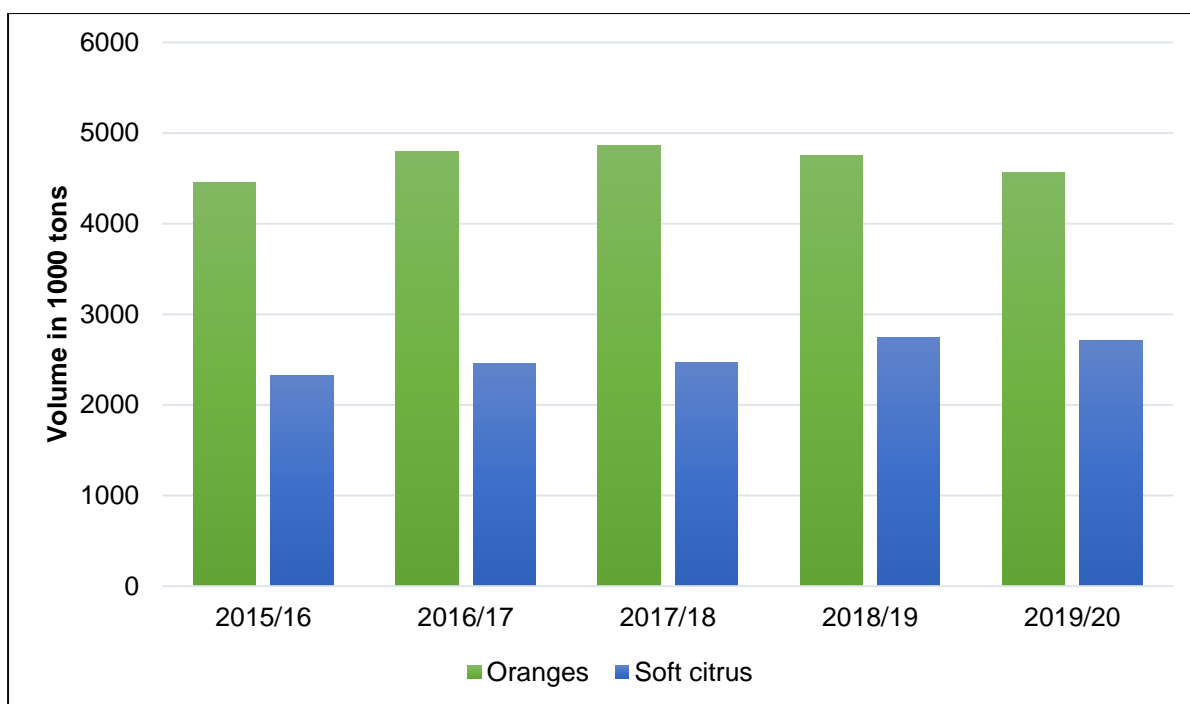


Figure 3: Global export trends of oranges and soft citrus, 2019/20

Source: USDA (2020)

2.2 Overview of South Africa's citrus production season, 2019/20

Table 1 below shows the original 2019 estimates, the actual volumes achieved, and the 2020 season estimates. Overall, the 2019 estimate was 92 % accurate. Soft citrus was estimated to be 18.3 million cartons (1 carton= 15kg) and the actual volumes for 2019 were 18.2 million cartons. The volume of soft citrus therefore showed a 0 % difference (actual vs estimated). The estimated and actual quantities of Valencia oranges passed for export had a negative difference of 12 %, from 52.9 million cartons to 46.8 million cartons, while Navel oranges also showed a negative difference of 10 % from 26.9 million cartons (estimated) to 24.3 million cartons (actual). There is an expectation that the 2020 citrus passed for exports will increase based on improved weather conditions in the country.

Table 1: South Africa's citrus fruit inspected and passed for export

| Type | 2019 Estimate | 2019 Actual | % Actual vs Estimate | 2020 Estimate |
|-------------|---------------|-------------|----------------------|---------------|
| Valencia | 52 877 400 | 46 754 423 | -12% | 50 361 673 |
| Navels | 26 856 000 | 24 287 540 | -10% | 26 527 980 |
| Soft citrus | 18 303 160 | 18 218 287 | 0% | 23 304 766 |
| Total | 98 036 560 | 89 260 250 | -0.22 | 100 194 419 |

Source: CGA (2020)

South Africa continues to be the main supplier of oranges in the global markets and its exports are estimated at a record 1.6 million tons with normal weather conditions. **Figure 4** presents South Africa's main destinations for oranges. South Africa is ranked

second after Egypt as the world's leading exporters of oranges, constituting a 28 % share of world exports. Europe remains the major destination for oranges exported from South Africa at a 34 % share, followed by Asia and Southeast Asia at 27 % and the Middle East at 18 % of total exports respectively. The UK and North America constitute a share of 6 % each.

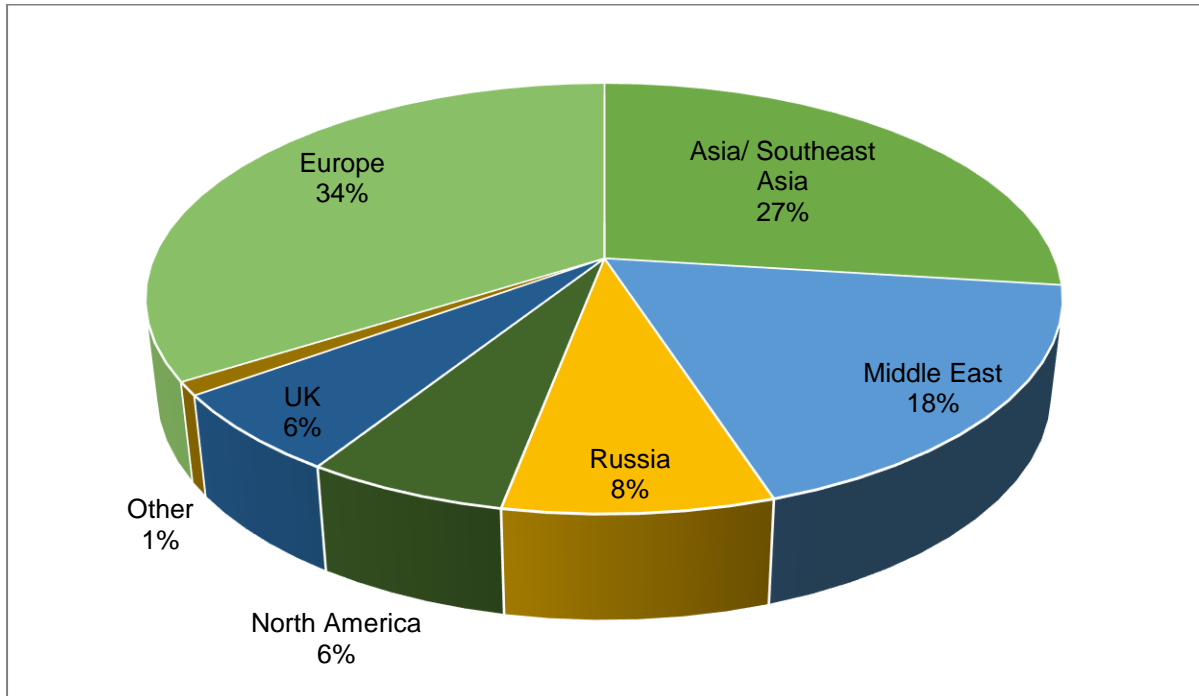


Figure 4: South Africa's main destinations for oranges
Source: CGA (2020)

Figure 5 highlights the quantity of South Africa's oranges sold in the National Fresh Produce Markets (NFPMs) in relation to the price trends for 2018, 2019 and 2020 (Jan - Oct). In 2018, about 100 267.95 tons of oranges were sold on the NFPMs, reaching the highest point in June with 20 792.45 tons. In 2019, 94 560.78 tons were sold in the NFPMs at an average price of R3 639.26 per ton, reaching a peak in July with 19 042.96 tons. In 2020 (Jan - Oct), a total of 80 294.49 tons were sold at an average price of R4 793.22 per ton. It can be noted that total volumes of oranges sold in the NFPMs have been declining while prices are increasing.



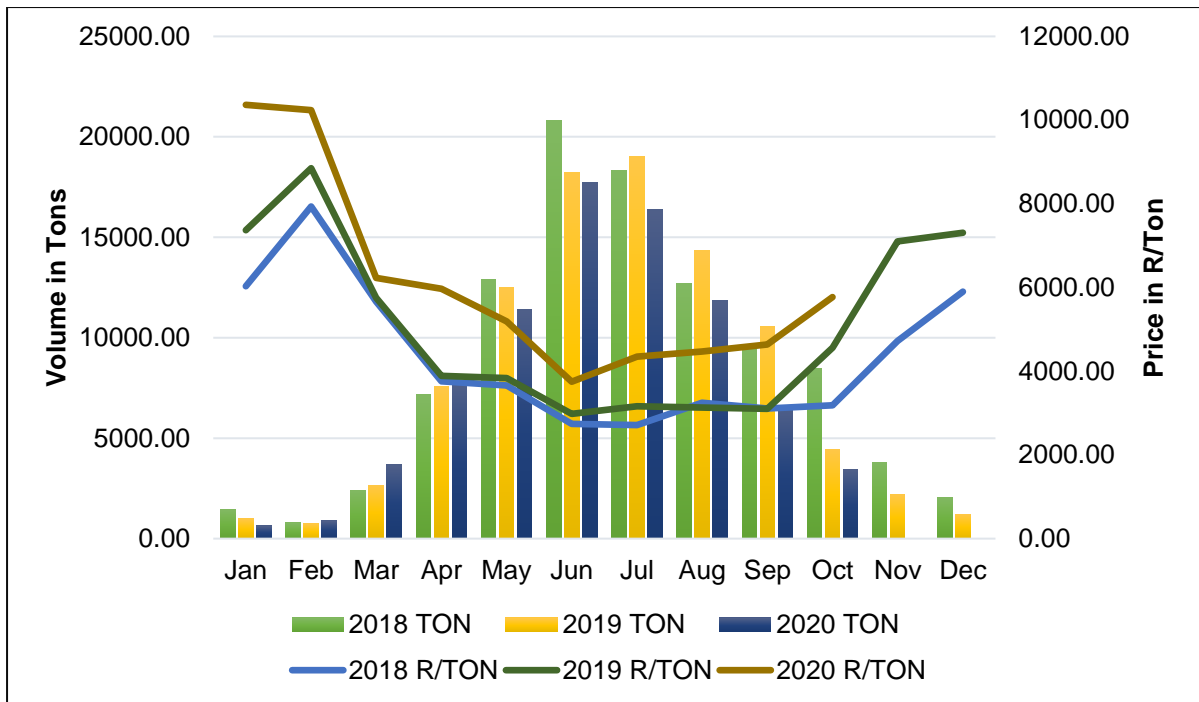
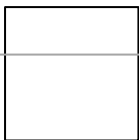


Figure 5: Oranges sold in the local market, 2018 - 2020
 Source: DALRRD (2020)



According to USDA (2020), South Africa is ranked as the fourth largest exporter of soft citrus and in 2019/20, the country exported 190 000 tons. **Figure 6** depicts the main market destinations for South Africa’s soft citrus exports. It can be noted that the UK and EU are the largest consumers of soft citrus from South Africa, representing a 26 % share of total exports each, followed by Asia/Southeast Asia, with a share of 15 %, North America (11 %), Russia (10 %) and Middle East (9 %). Generally, most of the countries importing from South Africa are also ranked as the world’s largest market destinations.

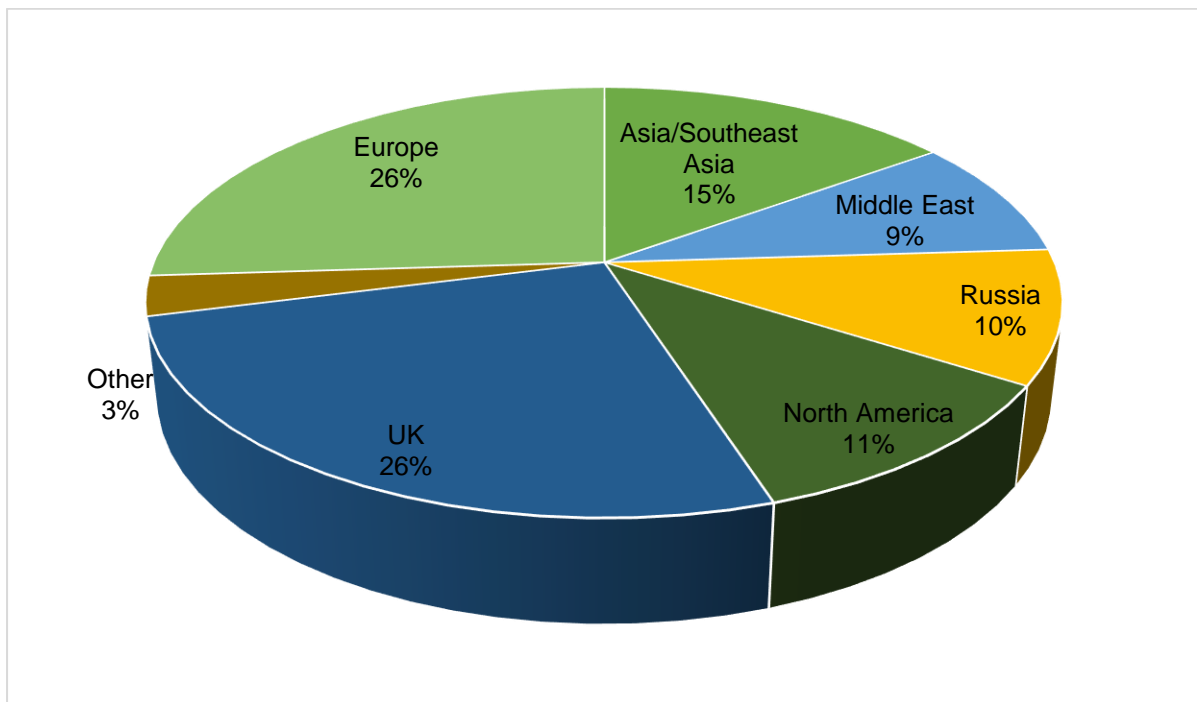


Figure 6: South Africa’s main destinations for soft citrus
Source: CGA (2020)

Figure 7 shows the domestic consumption of soft citrus in the NFPMs and the price trends for 2018, 2019, and 2020 (Jan - Oct). About 12 968.08 tons were sold in the NFPMs in 2018 at an average R5 938.64 per ton. In 2019, 16 835.64 tons were sold in the NFPMs at an average price of R6 062.91 per ton. Domestic consumption of soft citrus has been fluctuating in recent times, with sales reaching a peak of 4 405.05 tons in May 2019 at an average price of R5 243.92 per ton. In 2020 (Jan - Oct), about 17 103.61 tons of soft citrus were already in the NFPMs at an average price of R7 162.85.



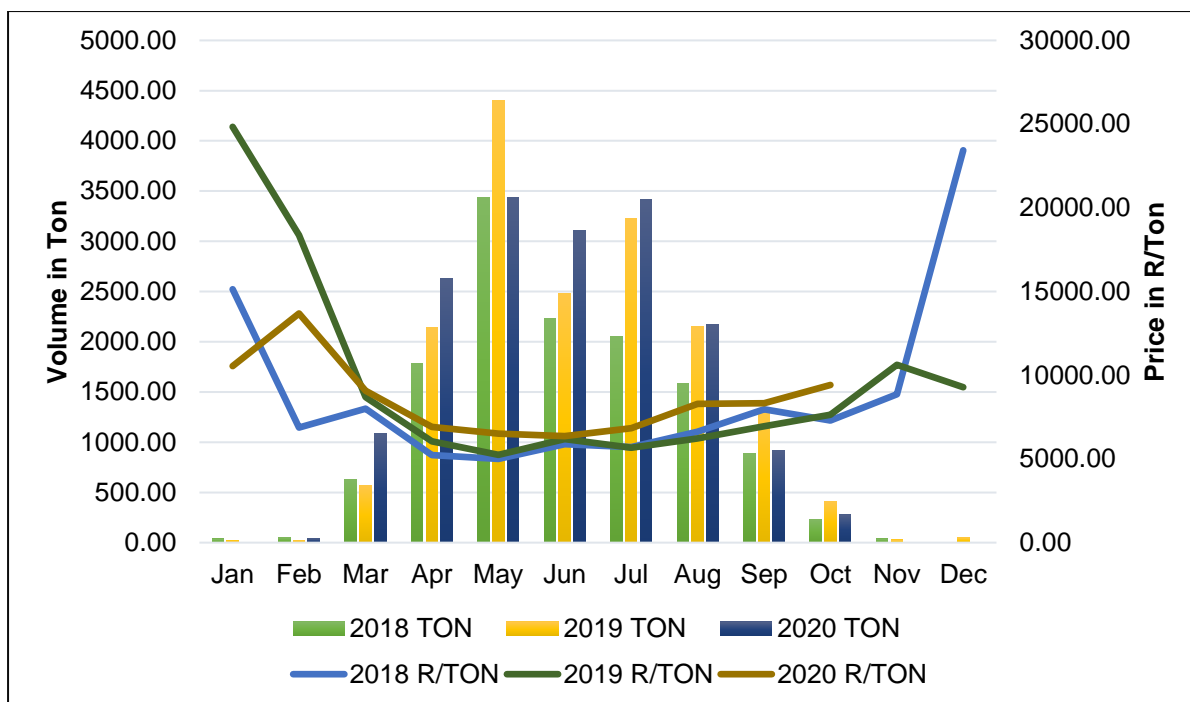


Figure 7: Soft citrus sold in the local market, 2018 - 2020
 Source: DALRRD (2020)

3. Overview of exotic fruits for the 2019/20 season

The exotic fruit industry is comprised of fruits such as figs, kiwi fruit, pomegranates, berries and cherries. The focus of this section is on strawberries.

3.1 Overview of global strawberry production for 2010 – 2019

Strawberries are cultivated worldwide and are widely consumed either fresh or dried or used in juices and other snacking products. Globally, per year, about 8.6 million tons of strawberries are produced. During 2016, global production of strawberries reached 8.04 million tons. In 2018, China was the largest producer of strawberries globally with 3.8 million tons of production, followed by the US (1.4 million tons), and Mexico, Egypt and Turkey with 468.2 thousand tons, 464.9 thousand tons, and 415.1 million tons, respectively. The global production of strawberries seems to be following an upward trend, showing an increasing demand for the fruit as people switch to healthier lifestyles.

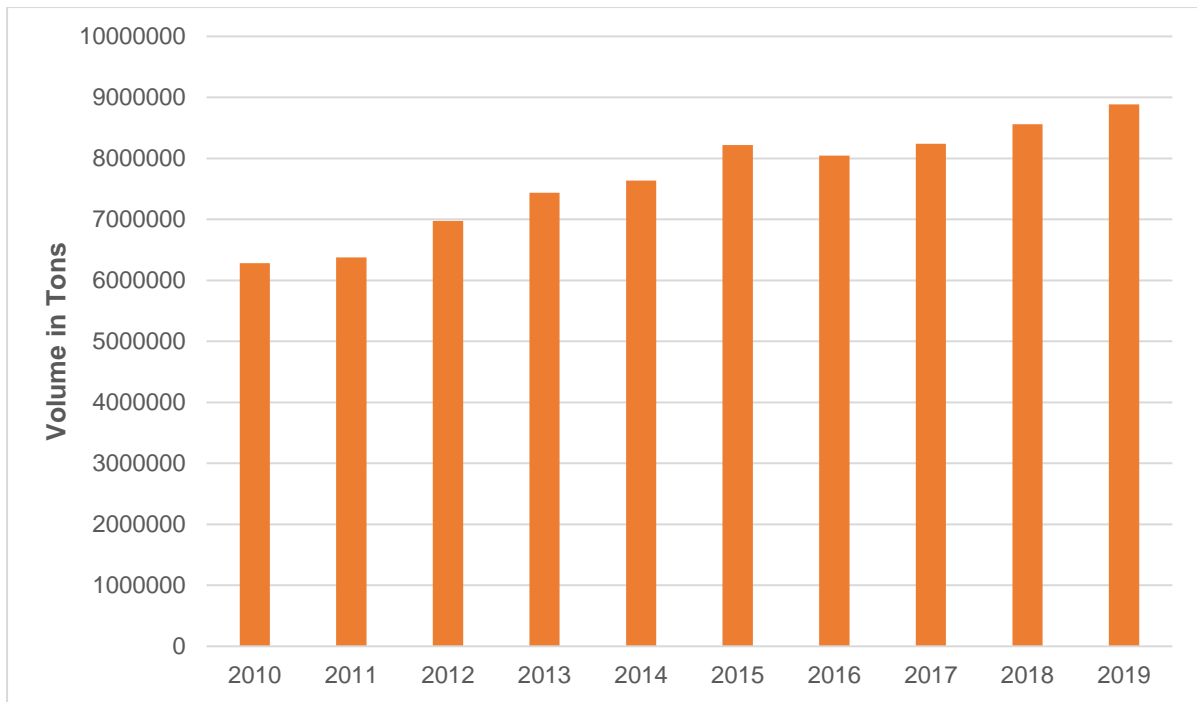
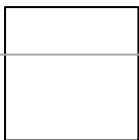


Figure 8: Global production of strawberries, 2010-2019
Source: USDA (2020)

3.1.1 Overview of global strawberry trade, 2020

Figure 9 represents global export volumes of strawberries between 2018 and 2020. As shown in the graph below, from June to December, there was a decreasing trend in global exports of strawberries as leading exporting countries went out of season, with 2020 representing lower quantities of strawberries exported to the world. In April 2019, a significant volume of 168 764 tons of strawberries was supplied to the world. Due to the COVID-19 pandemic in 2020, there was a disruption in global trade and this has led to a decline in the global trade of strawberries, resulting in lower volumes of strawberries being exported to the world.



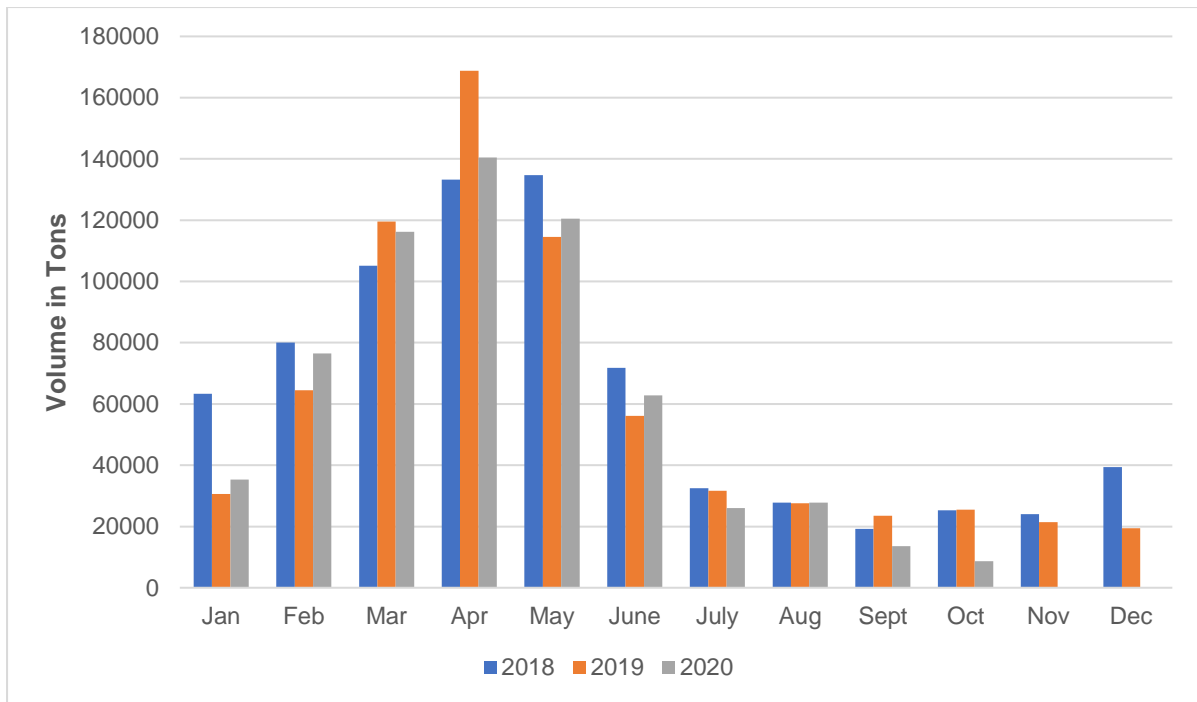


Figure 9: Global exports of strawberries, 2018-2020

Source: TradeMap (2020)

On the import side, between March and May in all the years, a high volume of strawberries was imported from the world, with April 2019 recording the highest peak of 149 256 tons of global imports. During the usual peak months of strawberry imports, 2020 recorded lower imports than other years, likely due to the corresponding peak restrictions related to the COVID-19 pandemic.

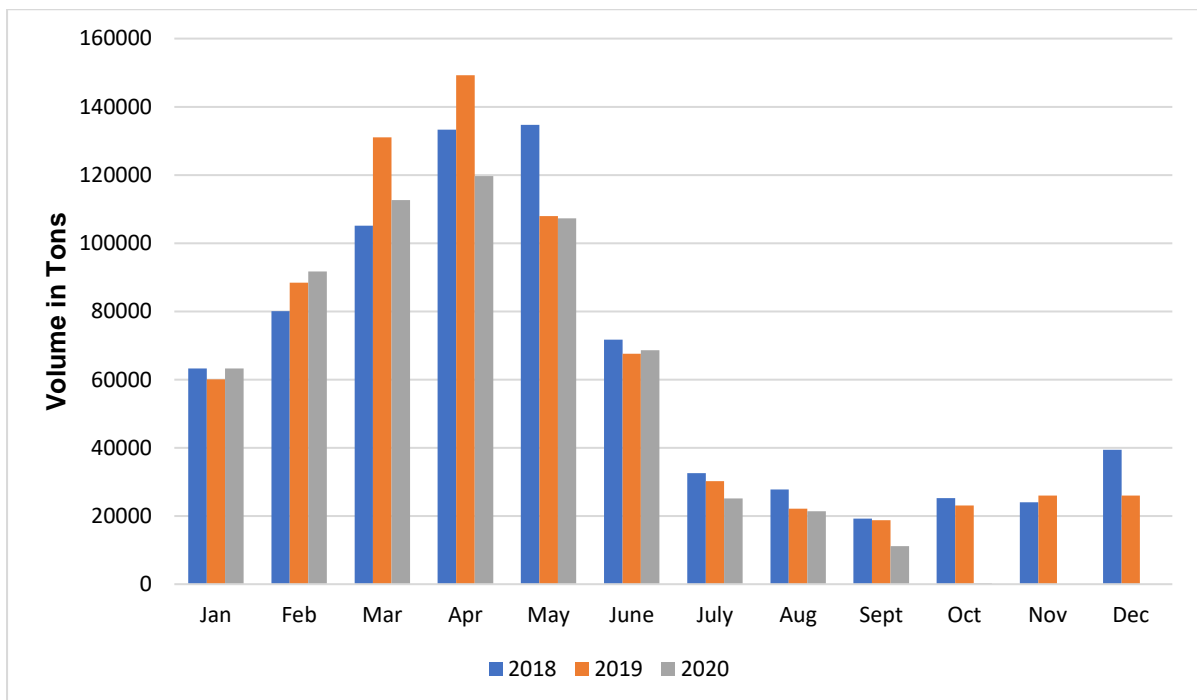
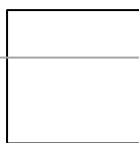


Figure 10: Global imports of strawberries, 2018-2020

Source: TradeMap (2020)



3.2 Overview of South Africa's strawberry production

In South Africa, strawberries are produced in areas with very cold winters and mild summers in the Western Cape and the Transvaal areas. The most common varieties of strawberries cultivated in South Africa are Virginia strawberries and the Chilean variety. South Africa's strawberry industry remains competitive and continues to experience a trade surplus.

Figure 11 illustrates South Africa's production of strawberries between the 2010 and 2019 production seasons. As depicted by the figure below, production follows an upward trend, showing that the industry is growing and progressing forward. During 2019, a significant volume of 9 393 tons of strawberries was produced, an increase of 4 % from 2018.

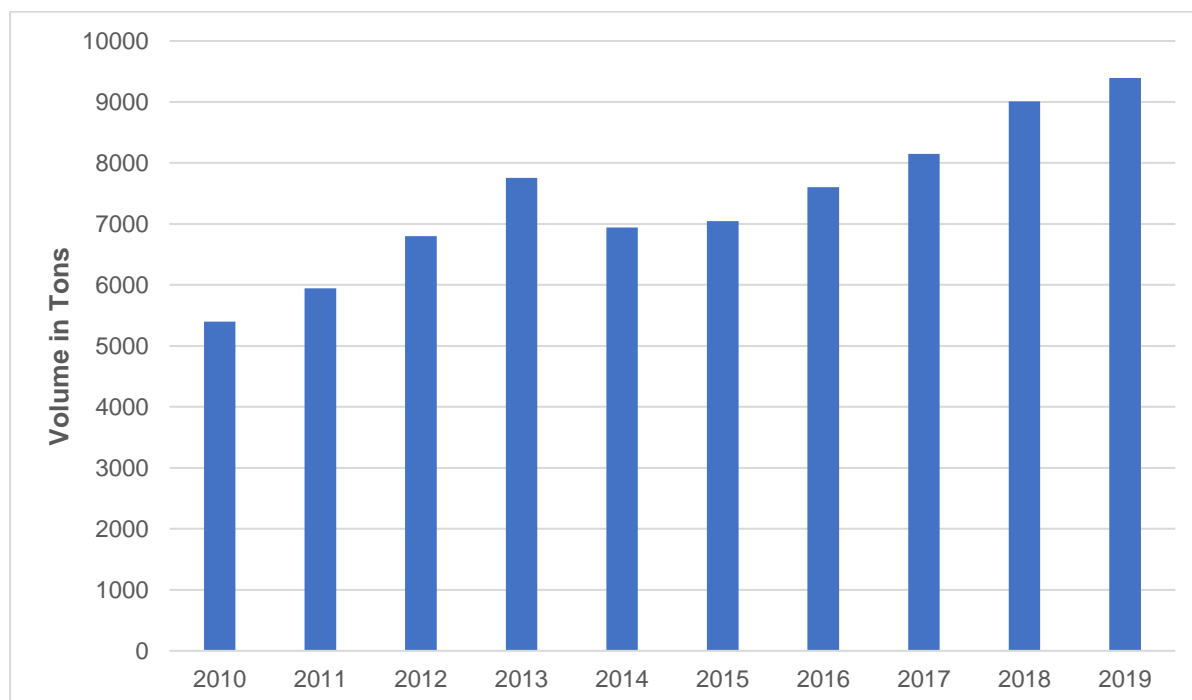


Figure 11: South Africa's production of strawberries, 2010-2019

Source: FAO (2020)

3.2.1 Overview of South Africa's strawberry trade

Figure 12 below shows South Africa's exports volume of strawberries between 2018 and 2020. Amidst the pandemic in 2020, the county's exports of strawberries were ongoing and higher volumes were exported as compared to the previous years, with September registering the highest volume of 934 971 tons.

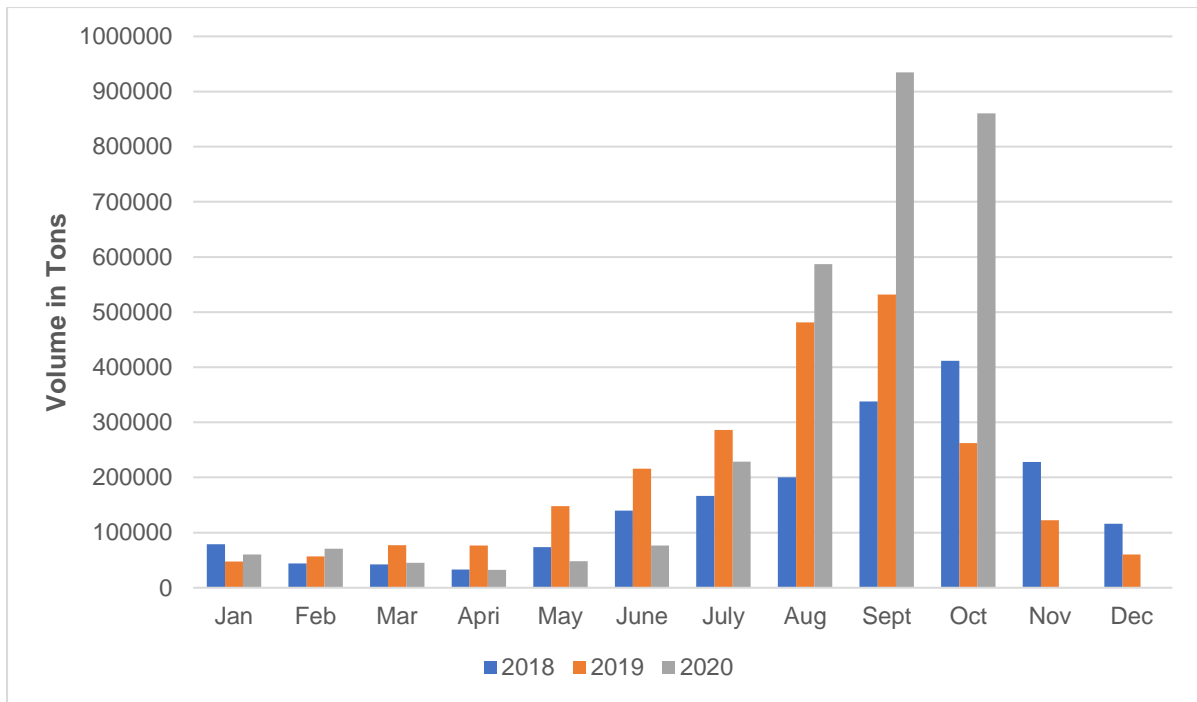


Figure 12: South Africa’s exports of strawberries, 2018-2020

Source: Trade Map (2020)

Figure 13 shows the top 10 leading importers of strawberries exported by South Africa to the world. In 2020 (Jan - Oct), a total value of R 120.9 million of strawberries was exported and the largest importer of South Africa’s strawberries was the United Arab Emirates, with a share of 65.9 %, followed by Qatar (5.4 %), Bahrain (5.2 %), Namibia (3.9 %), and the rest of other countries representing a low percentage share.

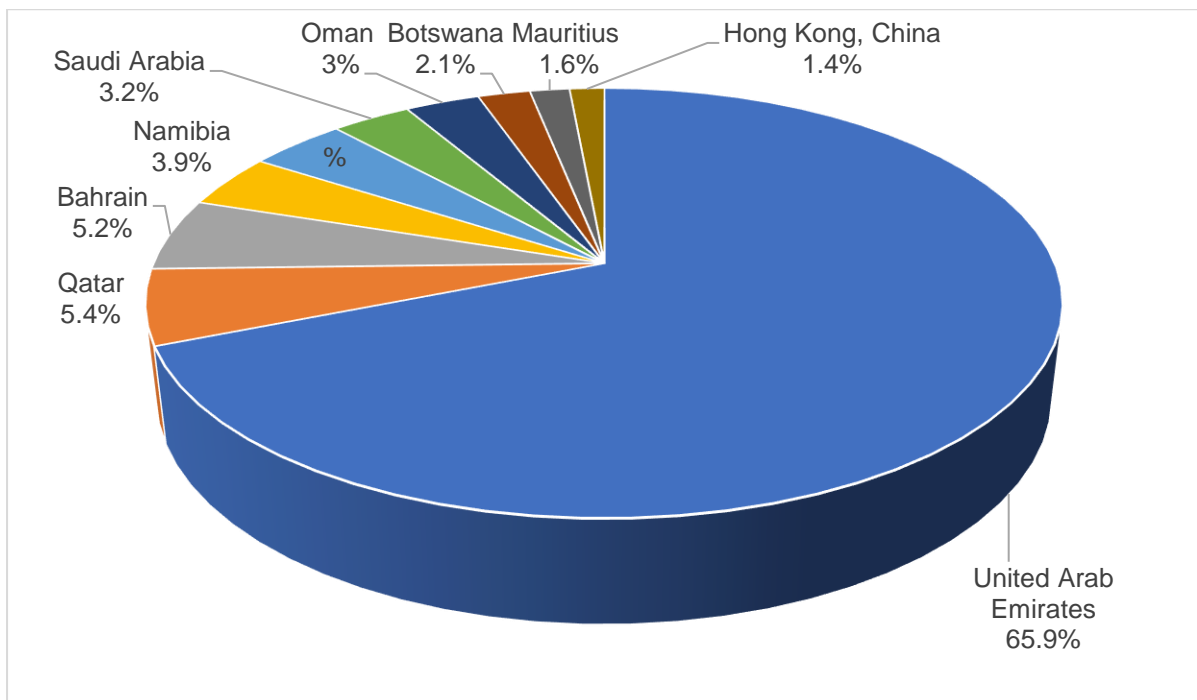
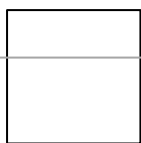


Figure 13: South Africa’s export destinations for strawberries in 2020



Source: Trade Map (2020)

Figure 14 presents the quantities of South Africa's strawberries sold in the domestic market through the NFPMs from 2018 to 2020 (Jan - Oct). During 2019, strawberries' sales were higher than other years and sold at an average price of R 34 845.29/ton at 4185.70 tons. In 2020, from July to September, the quantity of strawberries sold in the market increased because of their peak season, sold at an average price of R31 964.57/ton with 733.57 tons in September. As quantities decreased, average prices went up to R54 155.72/ton with a quantity of 444.76 tons available in October.

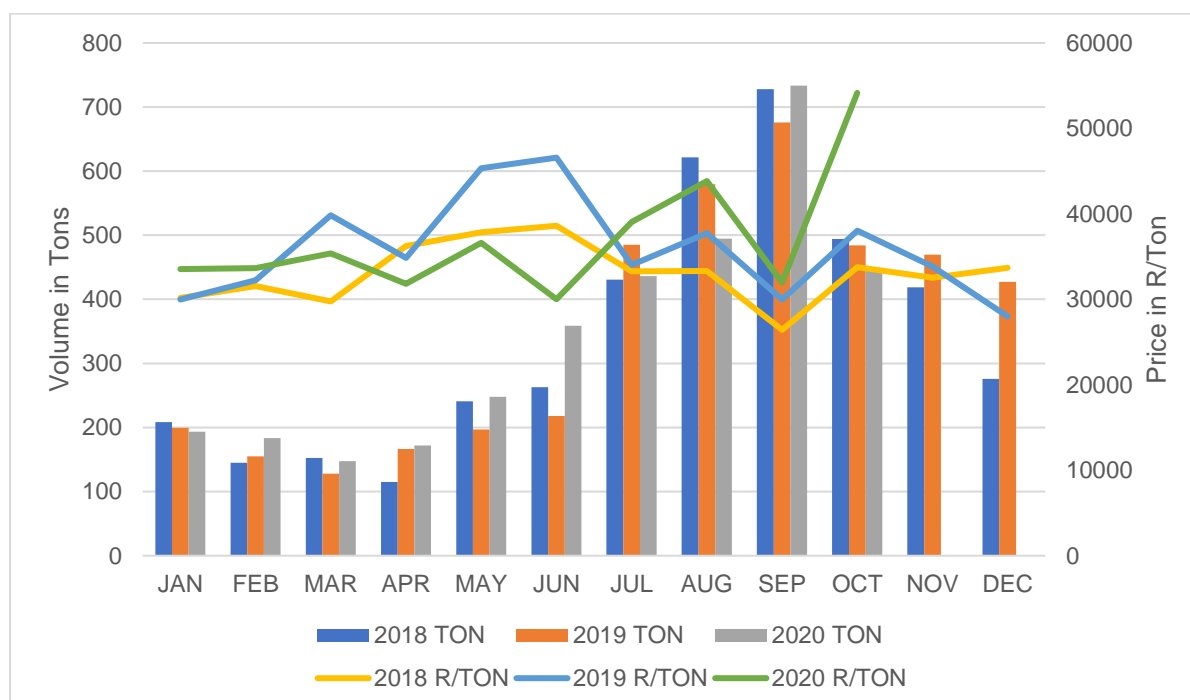


Figure 14: Local market sales of strawberries, 2018 – 2020

Source: DALRRD (2020)

4. Overview of dried fruit for the 2019/20 season

Dried fruit is one of the ways in which fresh fruit is processed, either to diversify or to preserve the fruit. This section will focus on dried grapes (raisins), analysing their production and trade performance, both globally and domestically.

4.1 Overview of global production of dried grapes (raisins) for 2013/14 – 2019/20

Raisin production is dependent on grape production – the more grapes produced, the higher the production of raisins. Typically, over the last three years, raisins made up 7-9 % of the world's total grape value chains. The global production of raisins was expected to reach 1.33 million tons, an increase of 10 % compared to the 2018/19 season. The increase was due to the recovery in grape production of 900 000 tons in 2019/20 because of China's rebound supplies and a few other countries' productions expected to rise. **Figure 15** shows that the USA was the leading producer of raisins between 2013/14 to 2015/16, until Turkey took over from 2016/17 to 2018/19, becoming the largest raisins producer. Turkey produced 280 000 tons in 2018/19,

while the US produced 263 000 tons, China 190 000 tons, Iran 150 000 tons and South Africa 73 000 tons.

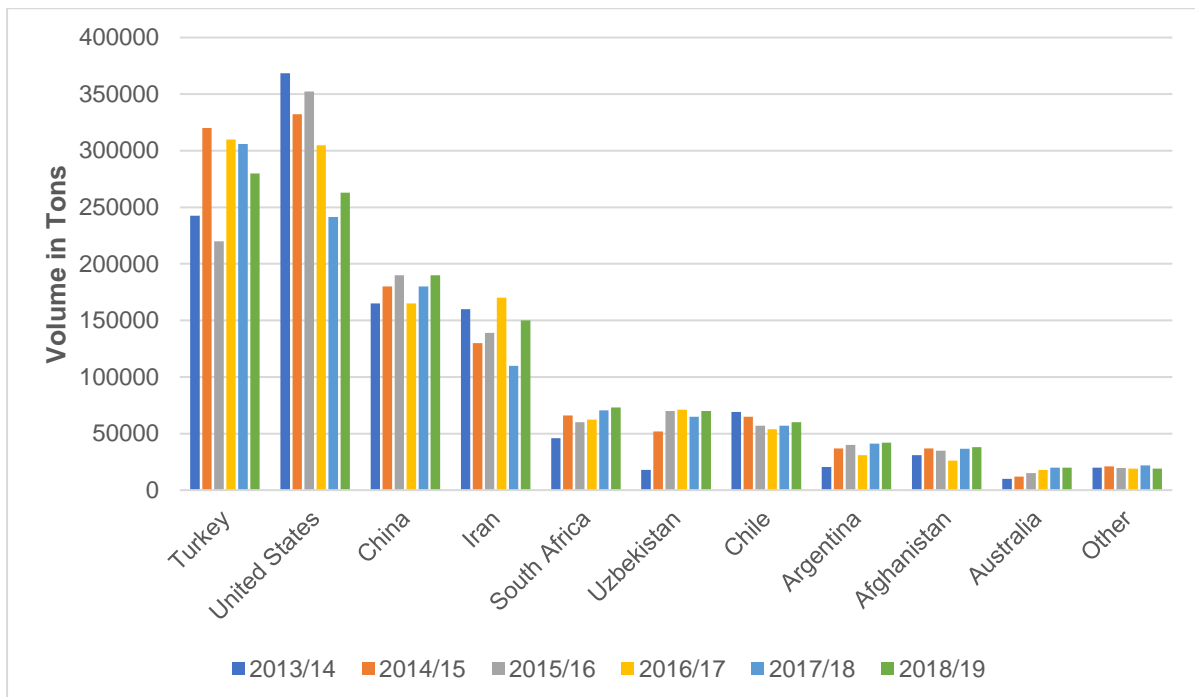


Figure 15: Global production of raisins, 2013/14 – 2018/19

Source: USDA (2020)

4.1.1 Overview of global trade of dried grapes, 2012 - 2020

The global exports of dried grapes for 2020 stood at 446 062 tons by October 2020. **Figure 16** shows the leading exporters of raisins from 2012 to 2020 (January to October). It can be noted that Turkey was the world's largest exporter of raisins throughout the years, exporting an average of 230 000 tons between the years and 212 133 tons in 2020. The USA was the second largest exporter in the same years, exporting 67 061 tons in 2020, followed by South Africa (55 308 tons) and Chile (48 226 tons). South Africa had surpassed both Chile and Iran by October 2020, whereas the country is usually among the top four leading exporters. The pandemic and the volumes might have influenced this compared to other years.



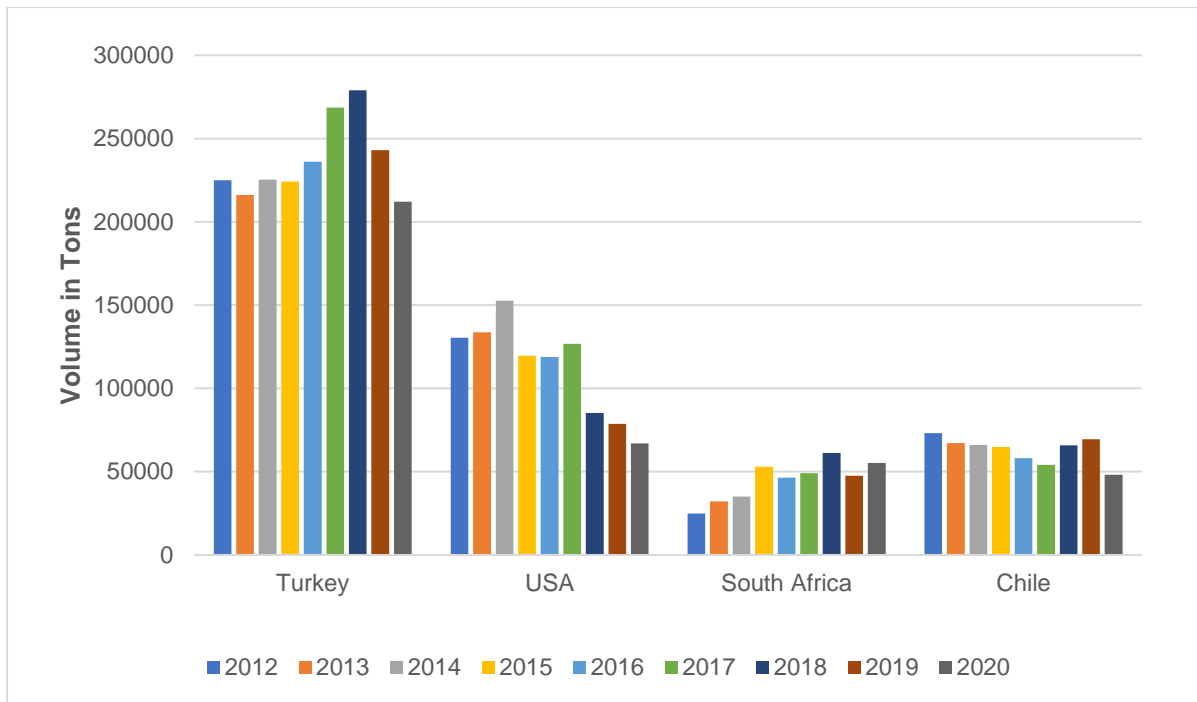


Figure 16: Global exports of raisins, 2012 – 2020

Source: Trade Map (2020)

The global imports of raisins from 2012 to 2020 (Jan - Oct) are depicted in **Figure 17**. The world imported a total of 416 531 tons of raisins in 2020, lower than the 836 440 tons imported in 2019, although the last two months are still outstanding. The UK has been consistently the largest importer of raisins in all the years under review. The UK imported about 100 000 tons on average in all the years. In 2020, the UK imported 78 491 tons. The Netherlands follows as the second largest importer of raisins in the years shown, importing 37 207 tons in 2020, followed by Japan with 26 468 tons and then Brazil with 22 337 tons being imported.

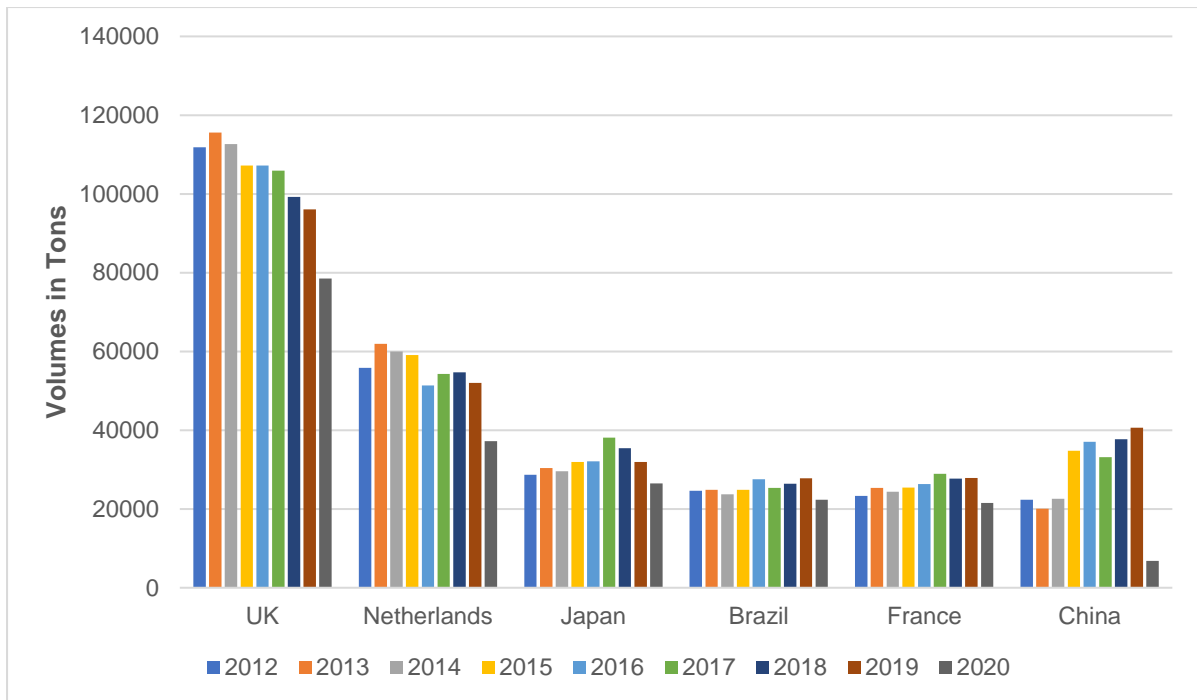
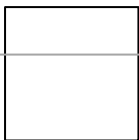


Figure 17: Global imports of raisins, 2012 – 2020

Source: Trade Map (2020)

4.2 Overview of South Africa’s dried grapes production, 2010 – 2020

Raisins in South Africa are grown along the Orange River, which provides irrigation water throughout the growing season. The industry contributes an estimated R1.79 billion to the gross domestic product in the country. South Africa’s raisins are planted on 13 462 hectares, with the Northern Cape Province making up 90.02 % of the area planted and the Western Cape 9.98 %. The Northern Cape made up 85.53% of the production of 85 080 tons in 2020, while the Western Cape made up the rest. Thompsons and Goldens are the most commonly grown raisins in South Africa, contributing 31 904 tons and 28 872 tons respectively in 2020. South Africa has experienced an upward trend in raisin production, and production for 2020 increased by 14 % compared to the 2019 season (**Figure 18**). This is related to good weather conditions, water availability, new orchards coming into production and more grapes being directed to raisins.



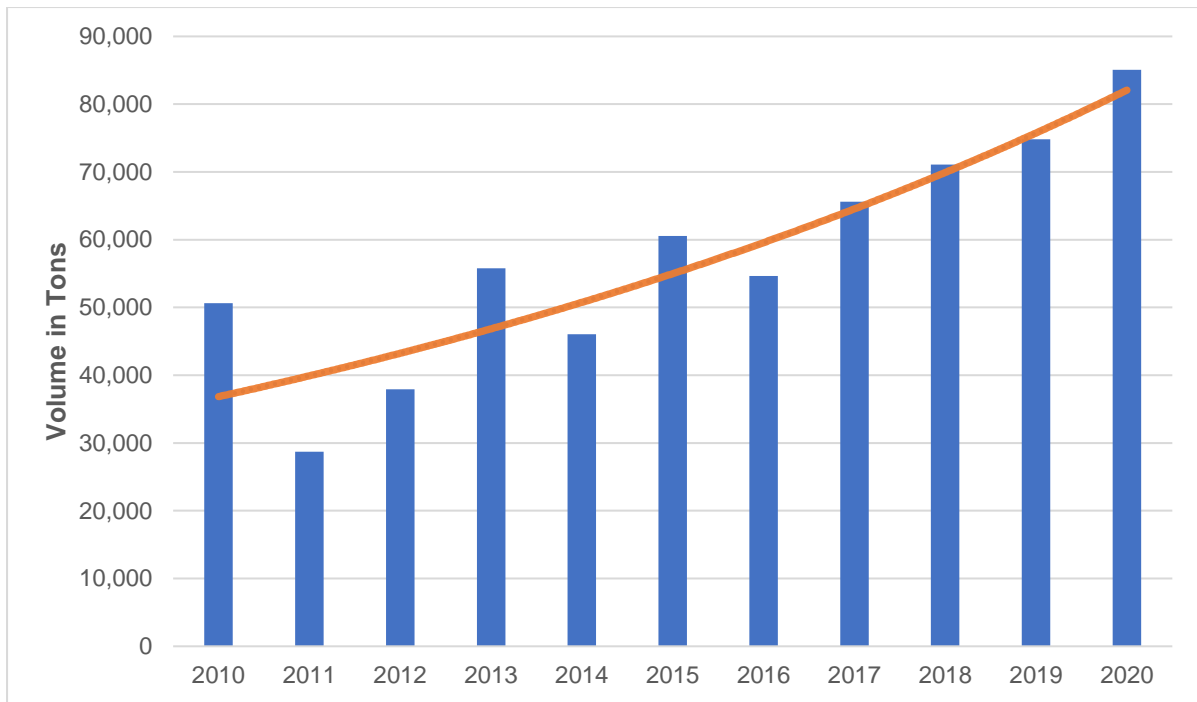


Figure 18: South Africa's production of raisins, 2010-2020

Source: RaisinsSA (2020)

4.2.1 Overview of South Africa's dried grapes trade

South Africa had exported a total of 67 093 tons of raisins by the end of November 2020, which is equivalent to about 79 % of the total production of raisins. South Africa's raisin exports grew by 41 % in 2020 compared to 2019 (**Figure 19**). This is in line with the 14 % growth in production in 2020.

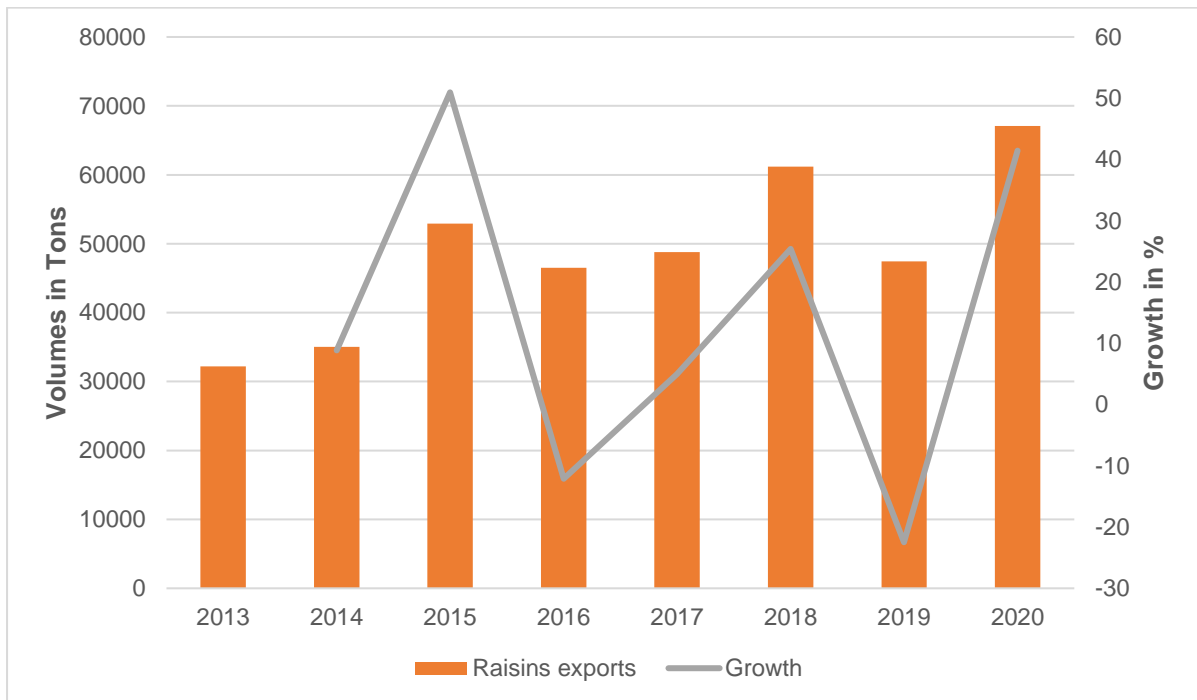
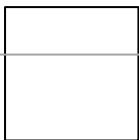


Figure 19: South Africa's exports of raisins, 2013 – 2020



Source: SARS (2020)

Figure 20 shows the markets for South Africa's raisins exports in 2020. The EU received the majority of the raisins at a share of 67 %, followed by the Americas at 19 %, with Africa taking up a share of 9 %, Asia 2 % and Oceana 3%.

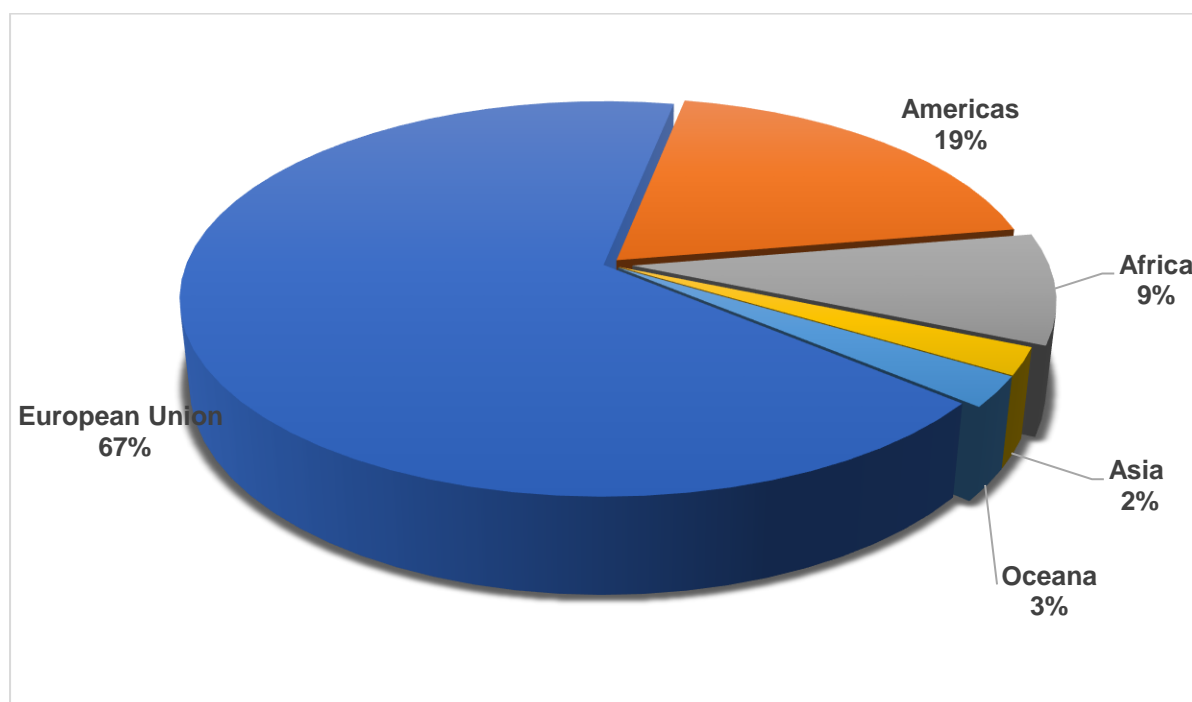


Figure 20: South Africa's export markets for raisins, 2020

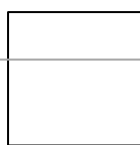
Source: SARS (2020)

5. Fruit industry perspectives

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

5.1 Is South Africa benefiting from trade wars elsewhere? The case of the wine industry

There are ongoing trade wars between countries that are perceived to be influencers of global trade trends. By definition, a trade war refers to an economic conflict between countries culminating in extreme protectionism through the imposition of exorbitantly high tariffs or quotas on imports and other trade barriers against one another. In most cases, trade wars have been noted to arise when a nation tries to protect its domestic industry in a bid to create jobs. Currently, countries on the battlefield include China & Australia and China & the United States (US). In this section, the focus is on the China-Australia trade war to provide insight into the possibility of South Africa's wine industry taking advantage of the wine trade distortions to increase their footprint in the Chinese market.



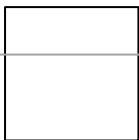
The China-Australia trade war

The trade war arose when China accused Australia of dumping barley on the Chinese market, thereby spurring high tariffs' imposition, among other trade-restrictive measures on several products between the two countries. China also alleged that Australia has been dumping wine on their market, a conflict that has culminated in China imposing tariffs ranging from 107 % to 200 % on Australian wine imports (Stitt, 2020). It is feared that the new tariffs might close a \$1.2 billion market for Australian wine producers. It is worth noting that only a 1 % share of China's wine exports is destined for Australia, while a 39 % share of Australia's wine exports goes to China. This a clear indication that China's imposed tariffs bear serious implications for Australia's wine industry. The trade war is bound to expose Australia to more competition from top wine producers like Chile, whose 17.2 % share of wine destined for China is duty-free, while other countries like South Africa, Italy, France and the USA are subjected to duties ranging between 14 % and 19 %.

Amidst this fracas, without forgetting that China is also battling another trade war with the US, South Africa's wine industry must work towards positioning itself to increase the footprint of its wine in China, which will bolster the industry to tap into the fast-growing wine-consuming culture in the Chinese market, largely driven by the increasing middle class. However, despite the fact that the quality of South Africa's wines is highly acknowledged and appreciated in a number of markets globally, increasing the footprint in the Chinese market may not be easily realised given that all the other major competitors in this market (Italy, France, Spain, USA) have protected wine geographical indications (GIs) in China. This implies that consumers in China have established credibility in wine with GIs protected over the long-term. This is exhibited in the unit values of wines imported by China from different countries. For instance, in 2019, the global average unit price of wine was US\$ 4 008 per ton, but Australia's wine in China averaged at US\$5 897 per ton while that of South Africa was at US\$ 3 272 per ton. Except for Chile and Argentina, average unit prices of all the top exporters of wine to China were more than that paid for South Africa's wines, and all these countries have protected wine GIs in China.

Conclusion

The excessive tariffs imposed on Australia's wines due to the ongoing trade war between China and Australia will negatively affect Australia's wine industry. Although this could be an opportunity for South African wines to increase their footprint in the Chinese market, it may only be realised later rather than sooner, considering the footprint exhibited by other suppliers of wine to China. The distortion of Australia's wine market in China would have possibly yielded better prospects for South Africa's wine than the other top producers, but South Africa's wines are not recognised as protected GIs in China, unlike most European wines. Thus, South Africa's wine industry should consider protecting GIs beyond the European Union; after all, China also has a very well-developed GI system.



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USEFUL LINKS

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| Bureau for Food and Agricultural Policy (BFAP) | www.bfap.co.za |
| Citrus Growers' Association (CGA) | www.cga.co.za |
| Department of Agriculture, Forestry and Fisheries (DAFF) | www.daff.gov.za |
| Food and Agriculture Organization (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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