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Promoting market access for South African agriculture

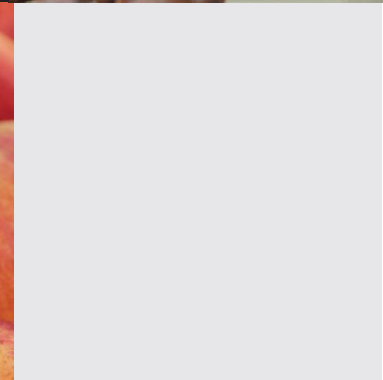


## SOUTH AFRICAN FRUIT TRADE FLOW

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# SOUTH AFRICAN FRUIT TRADE FLOW

Issue No. 44: December 2021



## Beautiful country, beautiful fruit

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Ntombela

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## 1. Background

South Africa's diverse weather and climatic conditions across provinces enable the country to cultivate and produce a variety of fruits for domestic and international markets. 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 citrus fruit, specifically oranges and soft citrus, and dried fruit, in particular raisins. The report assesses the performance of these fruits in the current season and unpacks factors that allow South Africa to successfully supply both domestic and international markets. The report follows a trend analysis approach, comparing the 2021 fruit season with the 2020 season.

## 2. Performance and repositioning of South Africa's citrus in the world markets

*by Lucius Phaleng*

Globally, the citrus world markets and trade performed relatively better as compared to the previous season. In 2021, the global production grew by 4% to reach a total of 98 million tons. Out of all citrus fruits, oranges account for half of the production followed by mandarins, lemons, and grapefruit respectively. China is the largest producer of oranges followed by Brazil and the European Union (EU). The United States of America is the fifth largest producer although production is estimated to have dropped by 11% to reach a production of 3.5 million tons. In addition, citrus area under production is down by nearly 40% which is expected to have a negative impact on global production. Global exports are estimated at 11 million tons with oranges representing over 40% and soft citrus nearly 30%.

In the global market, exports are mainly driven by soft citrus from China, South Africa, and Turkey and to a lesser extent higher lemon export from Mexico, South Africa, and Turkey. South Africa is the largest exporter of aggregate citrus, followed by Turkey and Egypt. U.S. aggregate citrus is on a decreasing trend caused by lower volumes of oranges, lemons and soft citrus in the past year.

### **A global outlook of citrus production and exports in 2021 season**

The analysis of disaggregated citrus fruit types indicates a shifting demand towards lemons and soft-citrus, however, oranges continue to be largest produced citrus fruit. Global orange production for 2020/21 season increased by 2.5 million tons to reach a total production of 48.6 million. This can be attributed to good weather conditions in South America that resulted in Brazil increasing its orange crop size by 7% and Mexico by 60%, although from low base. It must be emphasized that Brazil and Mexico are increasingly focusing on fruit production for processing purposes instead of fresh exports, like in the case of South Africa.

In the 2021 season, South Africa's production is expected to increase by 2% to reach 1.7 million tons of production owed to favourable weather, improved water management, a rise in area harvested, and new plantings of high yielding varieties. South Africa's exports are estimated to record 1.3 million tons with the EU remaining

a main destination market, accounting nearly 45% of total export share.

Looking at soft citrus, the global production is estimated to increase by 4% to a record of 33.3 million tons with growth expected in nearly every region from Americas, Europe and Africa. Fueled by the Covid-19 pandemic and demand for fruit types with immune-boosting properties, citrus products have experienced a rising consumption in the past two seasons (Citrus Growers Associations -CGA, 2021).

### South Africa's citrus export performance in the global markets

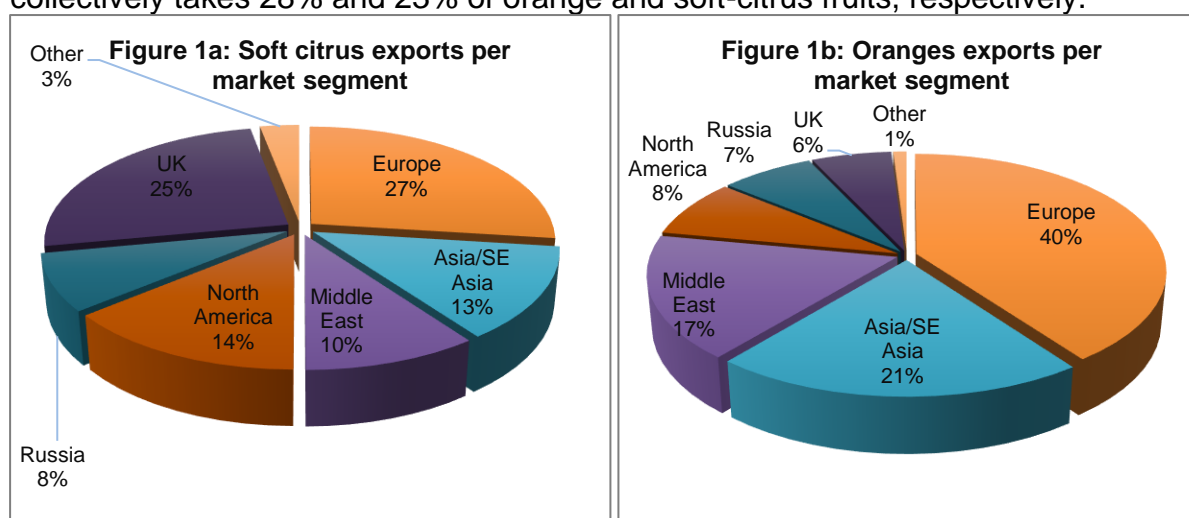
**Table 1** presents the South Africa's soft citrus and orange volumes passed for exports in the current season as well as volumes recorded in the past year. According to the latest figures from CGA, soft citrus packed and shipped approximately 18.2 million soft citrus cartons (1 carton equivalent to 15 kg) and 23.6 million cartons of oranges in 2021 season. The biggest contributing region is the Boland at 6.3 million cartons which was 19% over the initial estimated volumes.

**Table 1: Volumes passed for exports, measured in million 15kg cartons**

End of week 45	Packed		Shipped		Latest prediction 2021
	2020	2021	2020	2021	
Soft citrus	18.2 million	30.9 million	23.6 million	29.5 million	30.8 million
Navels	24.3 million	27.2 million	25.2 million	27.2 million	27.2 million
Valencia	46 million	55 million	53.1 million	55 million	55.1 million

Source: PPECB/AGRIHUB (2021)

**Figure 1a and 1b** provides the market destinations for soft citrus and oranges in the 2021 season. The European Union remains the biggest export market/export destination for citrus products, absorbing 40% of oranges and 27% of soft citrus. The United Kingdom (UK) also accounts a sizeable share of South Africa's citrus exports. Other prominent markets include South -East Asia and Middle East countries that collectively takes 28% and 23% of orange and soft-citrus fruits, respectively.

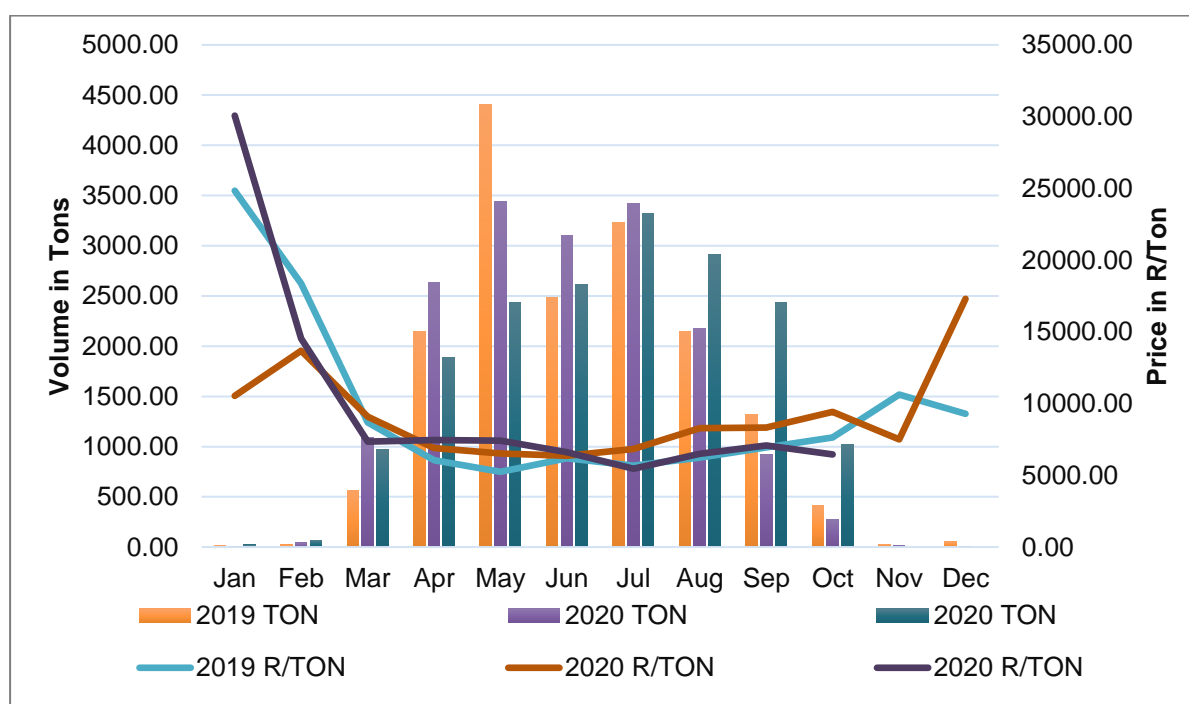


**Figure 1: South Africa's orange and soft citrus exports per market destination in 2021**

Source: CGA (2021)

## South Africa's citrus performance in the National Fresh Produce Markets (NFPMs)

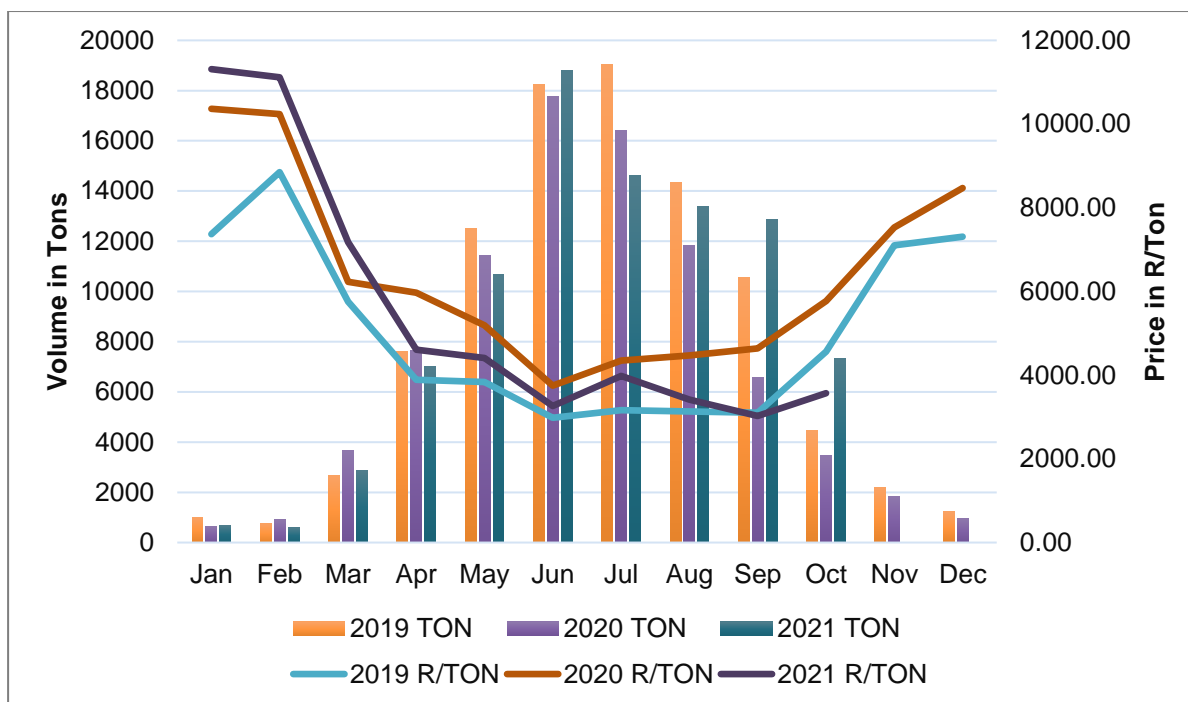
**Figure 2** illustrates the volume of soft citrus sold at the national fresh produce markets during 2019, 2020 and 2021, covering a period between January and October. According to the figure below, soft citrus is mainly sold during March and October due to the fact that they will be on season which drives supply high and prices to be lower. In 2019, about 16 835.24 tons were sold in the local markets at an average price of R6 062.91 per ton while about 17 122.88 tons of soft citrus was sold in 2020 at a value of R7 164.45 per ton. The volume sold between 2019 and 2020 has increased by 287.65 tons driven by improved production in the country. The 2021 sales covering the first ten (10) months (January – October) shows about 17 688.17 tons sold in the local markets at an average value of R6 731.58 per ton. According to Citrus Growers Association (CGA), 2021 volumes were driven by a favourable weather, improved water management, a rise in area harvested, and new plantings of high yielding varieties.



**Figure 2: Soft citrus sold in the local market, 2019 - 2021 (Jan - Oct)**  
Source: DALRRD (2021)

**Figure 3** highlights the volumes and average prices of oranges sold in the national fresh produce markets during 2019, 2020 and 2021 (January – October) period. Figure 3 shows that large volumes of oranges are mainly sold between March and October as per the figure below. In 2019, about 94 560.78 tons of oranges were sold in the local markets at an average price of R3 639. 26 per ton while 83 101.65 tons at an average price of R4 896.36 were sold in 2020. According to the figure, larger sales were experienced during 2019 period as compared to other periods and CGA indicated that this was driven by new orchards coming into fruit bearing stages.





**Figure 3: Oranges sold in the local market, 2019 – 2021 (Jan – Oct)**  
 Source: DALRRD (2021)

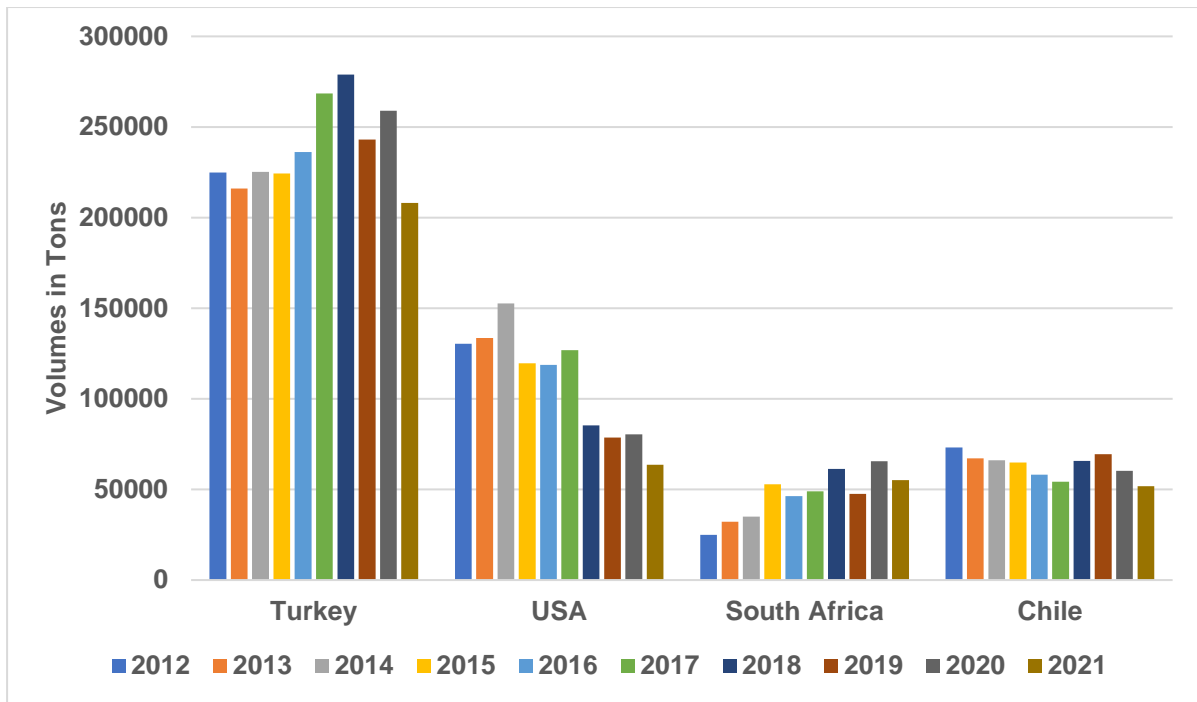
South Africa’s citrus production has been increasing over the past years and the current favourable weather, improved water management, a rise in area harvested, and new plantings of high yielding varieties present an opportunity for the industry to grow. It is evident that the improved production has an impact on the export performance of citrus and it is critical for the industry to expand its footprint in the international markets. Markets in Africa, Russia and Middle East present a great potential for South Africa due to increasing consumption in those markets. National Fresh Produce Markets should not be abandoned as they play critical role for those producers that are unable to access the international markets.

### 3. South Africa’s raisin production disrupted by heavy rains

*by Onele Tshitiza*

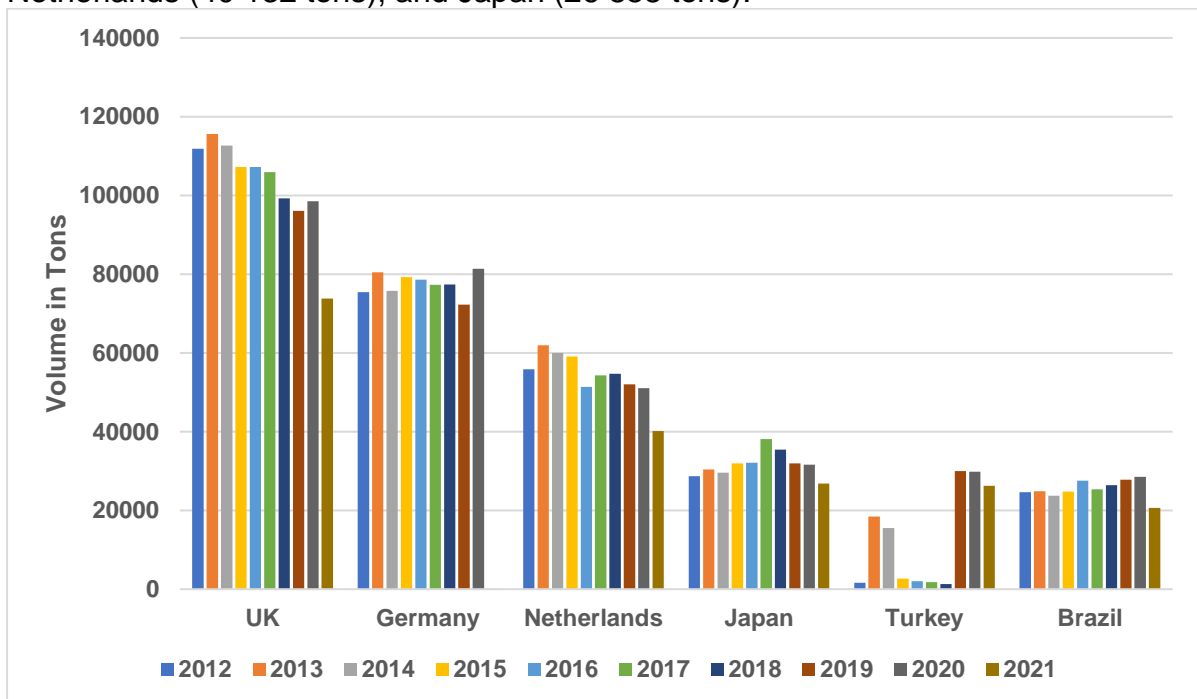
#### Global production and trade of raisins

A descriptive analysis of global raisins indicates that Turkey is a largest producer and exporter in the world, while South Africa is ranked as the fifth largest producer in the globe. Turkey is expected to remain the largest producer and exporter of raisins in 2020/21, with an estimated production of 290 000 tons, followed by Iran with 260 000 tons, China with 190 000 tons, the United States, which is expected to reach 178 888 tons in 2020/21, and South Africa coming in fifth at 76 000 tons, to mention a few. **Figure 4** shows the global exports trend of raisins from 2012 to 2021. Turkey is the world’s largest exporter of raisins, exporting 208 065 tons in 2021 so far, followed by the United States (63 676 tons), South Africa (55 144 tons) and Chile (51 867 tons).



**Figure 4: Global exporters of raisins**  
Source: Trade Map, 2021

**Figure 5** shows the global imports of raisins from 2012 to 2021 (January- October). The United Kingdom (UK) is the largest importer of raisins and imported 73 827 tons of raisins in 2021 so far. The UK is followed by Germany (81 338 tons), the Netherlands (40 132 tons), and Japan (26 858 tons).

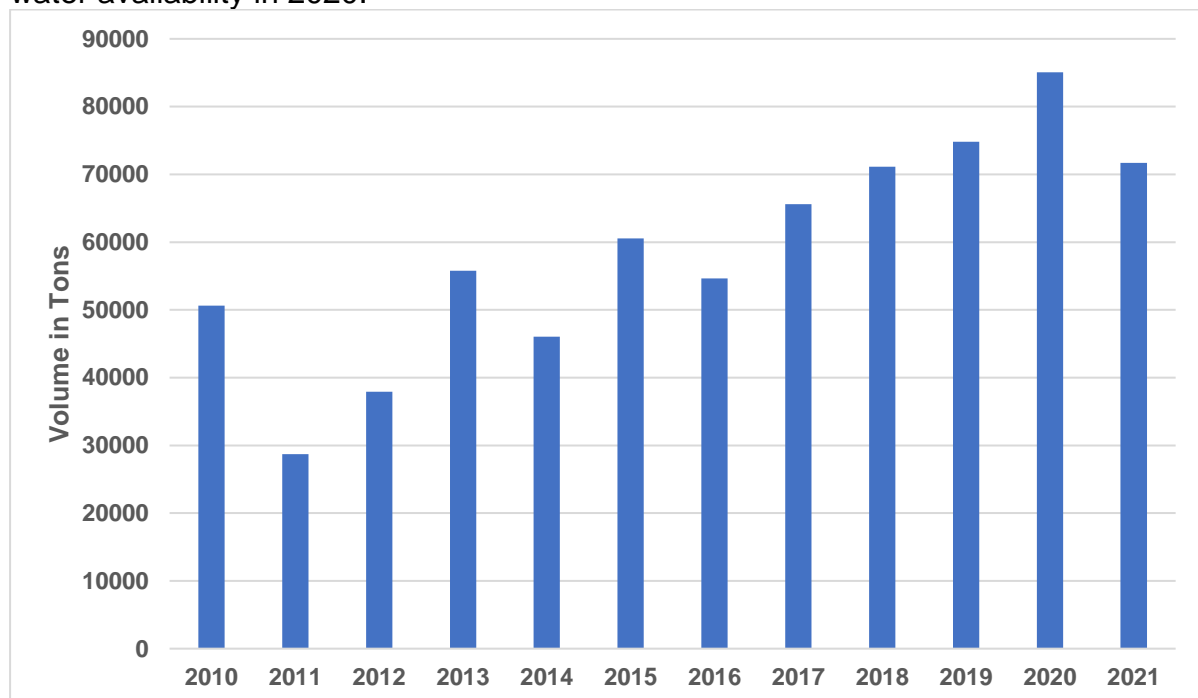


**Figure 5: Global imports of raisins**  
Source: Trade Map, 2021

### South Africa's 2021 production season of raisins

Raisins are produced largely in the Northern Cape province, making up 90% of the hectares planted (12 118 hectares of 13 462 hectares). The raisins industry is growing

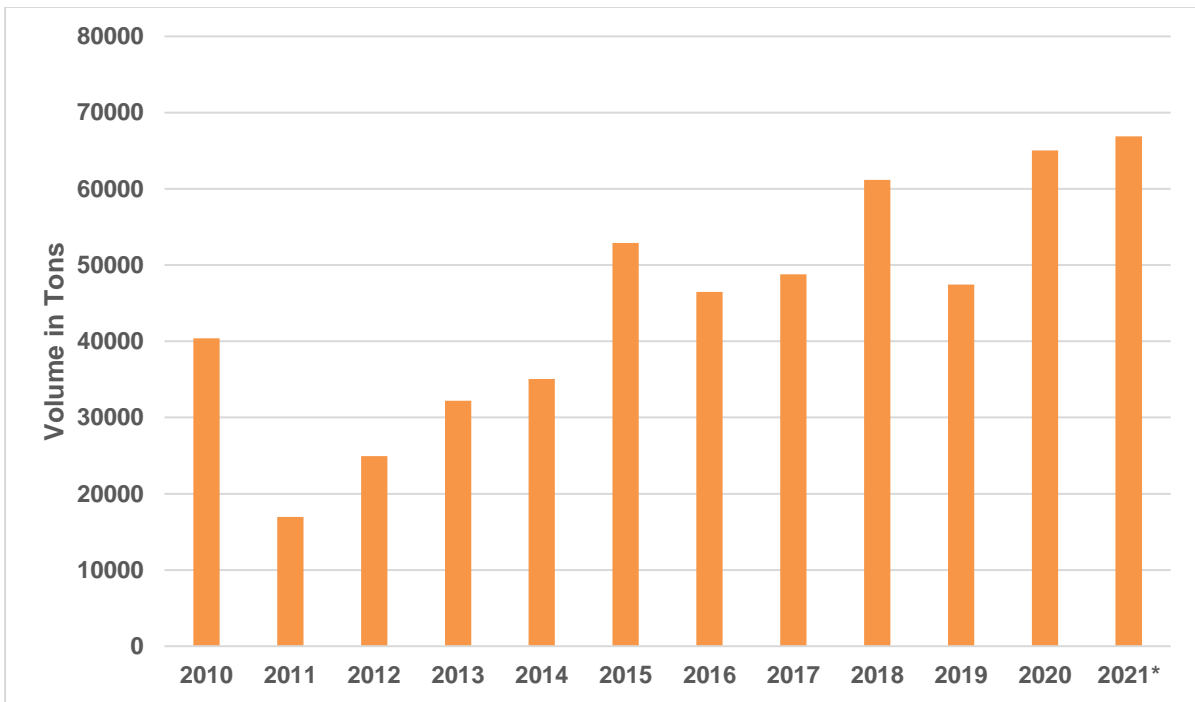
and accounted for a gross value of production of R1.5 billion in 2019/20. The production of raisins in South Africa for 2021 was 15% lower than 2020, likely due to heavy rains experienced in the Orange River region in January 2021 which led to lower volumes being packed of table grapes and sultanas (main cultivar for raisin). Although overall table grapes intake increased by 13% from 2020, this was not translated into raisins as the Orange River producing region was affected by heavy rains and raisins are largely produced along the region, however the Western Cape regions experienced higher packed volumes of table grapes due to higher yields (SATI, 2021). **Figure 6** shows the production of South Africa's raisins over the 10-year period (2010-2021) in tons. It can be noted that the production for 2021 decreased by about 15% from 85 080 tons in 2020 to 71 701 tons in 2021. The highest production was realised in 2020 compared to other years, attributed to favourable weather conditions and water availability in 2020.



**Figure 6: Production of South Africa's raisins (2010-2021)**  
**Source: Raisins South Africa, 2021**

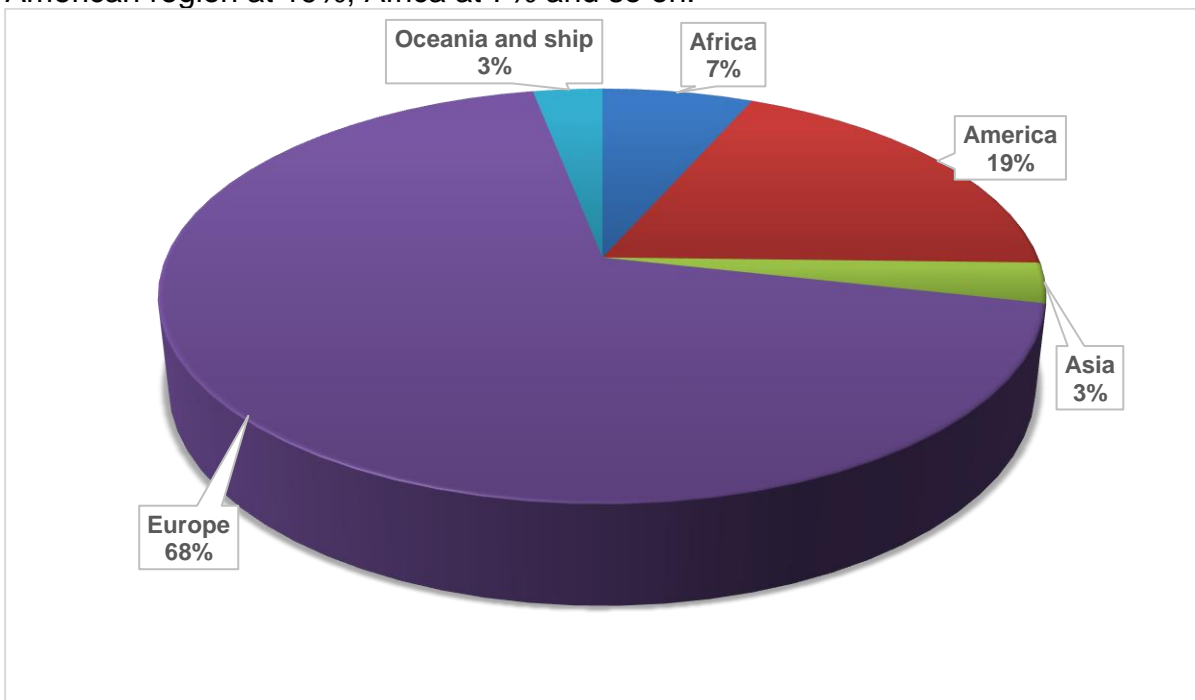
South Africa is a net exporter of raisins. **Figure 7** shows South Africa's exports of raisins from 2010 to 2021 (January- November). Although South Africa did not produce as much as in 2020, the 2021 season slightly surpassed 2020 in terms of exports. This could be that more was exported than it was sold locally.





**Figure 7: South Africa's exports of raisins, 2010- 2021 (January-November)**  
 Source: SARS, 2021

**Figure 8** shows that the European region continues to be the largest market of raisins from South Africa, where 68% of exports are directed to them, followed by the American region at 19%, Africa at 7% and so on.



**Figure 8: South Africa's export regions for raisins (2021)**  
 Source: SARS, 2021

## Conclusion

The raisins industry is a growing industry in South Africa and contributes to the creation of jobs. The 2021 season was hindered by heavy rains at the start of the season in

January 2021 which affected volumes and the drying process of raisins. Despite the disruption due to weather conditions, the industry still managed to export to their main markets such as the European Union. Having two main producing regions for raisins in South Africa assisted the raisins industry to avoid greater losses as the yields in the Western Cape regions were higher than in 2020 and minimized the losses from the Northern Cape region. However, the losses can be significant to farmers and highlights the vulnerability of the sector and the need for mitigation measures such as affordable crop insurance, especially for emerging farmers whom are vulnerable to weather and climate change shocks. There is therefore a need for state supported crop insurance to accommodate all types of farmers.

#### **4. Covid-19 as a food safety concern in fresh produce trade**

*by Moses Lubinga*

Since the declaration of Covid-19 as a pandemic during early 2020, a number of countries have put in place control measures with an aim of minimizing further spread of the virus that causes the disease. Imposed measures have been claimed to cause a number of undesirable effects including panic buying of food items and disruption of supply value chains, among others. The fear of contagion is one of the most unaccounted for impact of the outbreak, given that much more is yet unknown especially with the fast-mutating virus.

Although the available scientific evidence suggests that the coronavirus spreads mainly from person to person in respiratory droplets released when someone with the virus coughs, sneezes or talks, incidences of contaminated fresh produce consignments have been reported in some countries. This article therefore provides highlights on how food items may get contaminated with the coronavirus, instances in which COVID-19 has been identified as food safety concern, and how further spread can be avoided.

##### **How food items may get contaminated**

Though not so common as compared to person-to-person transmission, there is no evidence to support transmission of COVID-19 associated with food or food packaging (Food standards Australia New Zealand, 2021; International Commission on Microbiological Specifications for Food (ICMSF), 2021). However, the virus can be spread from infected persons to surfaces, and two possible sources of contamination have been noted (Marshall, 2021).

- In grocery stores, the virus might stay on produce (fruits and vegetables) if handled by someone contaminated by virus. However, more evidence is still pending on whether this could make one sick of COVID-19.
- Food containers and packaging. According to Marshall (2021) touching food containers and food packaging that have been touched by an infected person might increase the spread of the virus but no substantive evidence has been available so far.

Notably, the Centre for Disease Control and Prevention (CDC) (2020) reports that there is likely very low risk of spread from food products or packaging given that the poor survivability of the coronavirus(es) on such surfaces.

## Reported incidences of coronavirus on food products or packaging

Whereas the CDC reported a low risk of spread of the virus through food products or packaging, incidences were detected in some parts of the world and in some instances resulting into suspension of consignments of produce. For instance, during early September 2021, China temporarily suspended dragon fruit imports from Vietnam following a positive detection of coronavirus on packaging boxes. Customs in China (at the Pontoon bridge) seem to be committed to suspending consignments of produce that have traces of the coronavirus given that temporarily halting of fruit imports had been reported at other border crossings and ports.

In October 2021, the outer packaging of durians originating from Thailand into China tested positive for traces of the virus that causes Covid-19. The good news is that none of those that had been in contact with the durians contracted the virus (Emily, 2021). Although other occurrence had been registered, China did not suspend imports of durians from Thailand despite the fact that their guidelines stipulate that if the virus is detected more than once, imports are bound to be suspended for one week, and for one month (4 weeks) if the virus is detected a third time. On September 22, 2021 a batch of kiwifruit destined for China from New Zealand also tested positive for the virus. In response, authorities in China immediately removed the fruit from shelves in supermarkets while also making contact tracing of consumers who had purchased from the contaminated batch of the consignment, among other measures.

## Conclusion

Whereas scientific evidence suggests that the virus may be detected on surfaces of fresh food items and packaging for a few hours to several weeks depending on a number of factors, there are no known cases of transmission of COVID-19 from food or food packaging. The ICMSF concludes that there is a very low risk of being infected with COVID-19 from contaminated food or food packaging. With the aforementioned statement in mind, consumers should practice the basic food safety guidelines, i.e., to always wash fresh fruits and vegetables with clean running water before eating them. For produce with a rind or thick skin, one may consider scrubbing with a clean produce brush. For reusable bags – these must be cleaned and disinfected each time one returns from a grocery store. Individuals must wash hands with soap whenever they are coming from grocery stores. In addition, to counter the risk of transmission, there is a need to consider using no-contact takeout and delivery of food items to clients.

Despite the implementation of the above stated measures and the evidence that there is a very low risk of transmission from food or food packaging, there is a concern that some countries might use this avenue to ban imports of fresh produce from other trading partners as has been exhibited by China. Therefore, there is a need for industries to be on vigilant and look out for such unwarranted behaviour (non-tariff barrier) that is bound to jeopardise the smooth flow of trade.

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## Useful Links

Agrihub

[www.agrihub.co.za](http://www.agrihub.co.za)


Bureau for Food and Agricultural Policy (BFAP)	<a href="http://www.bfap.co.za">www.bfap.co.za</a>
Citrus Growers' Association (CGA)	<a href="http://www.cga.co.za">www.cga.co.za</a>
Department of Agriculture, Forestry and Fisheries (DAFF)	<a href="http://www.daff.gov.za">www.daff.gov.za</a>
Food and Agriculture Organisation (FAO)	<a href="http://www.fao.org/docrep/">www.fao.org/docrep/</a>
Fresh Produce Exporters' Forum (FPEF)	<a href="http://www.fpef.co.za">www.fpef.co.za</a>
Hortgro Services	<a href="http://www.hortgro.co.za">www.hortgro.co.za</a>
National Agricultural Marketing Council (NAMC)	<a href="http://www.namc.co.za">www.namc.co.za</a>
Perishable Products Export Control Board (PPECB)	<a href="http://www.ppecb.com">www.ppecb.com</a>
Quantec Easy Data	<a href="http://www.quantec.co.za">www.quantec.co.za</a>
South African Subtropical Growers' Association (Subtrops)	<a href="http://www.subtrop.co.za">www.subtrop.co.za</a>
South African Table Grape Industry (SATGI)	<a href="http://www.satgi.co.za">www.satgi.co.za</a>





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