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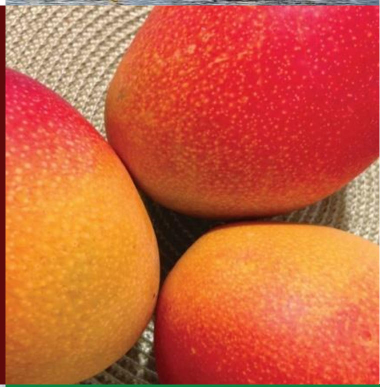

SOUTH AFRICAN FRUIT TRADE FLOW

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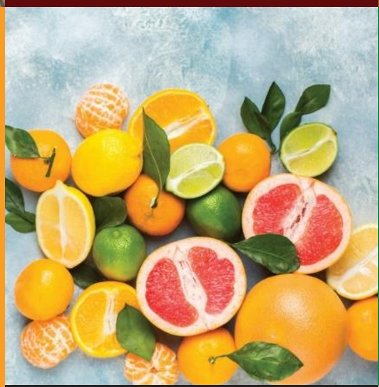

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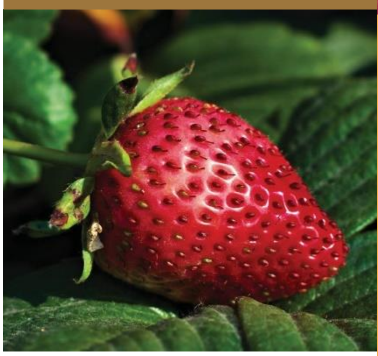

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SOUTH AFRICAN FRUIT TRADE FLOW

Issue No. 51: September 2023

Compiled by Bhekani Zondo, Naledi Radebe, Buhlebemvelo Dube, Thabile Nkunjana, and Onele Tshitiza

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1. Background

South Africa's diverse weather and climatic conditions across nine provinces enable the country to cultivate and produce a variety of fruits, vegetables, flowers, and nuts 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 focuses on pome fruits (apples and pears), citrus fruit (grapefruit and lemons) and avocados. 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 2021/2022 fruit season with the 2022/2023 season.

2. South Africa's pome fruit exports forecast to be lower in the 2023 season

By Bhekani Zondo

South Africa is one of the major players in the international trade of fruits globally. The South African fruit industry is export-oriented with fruit exports accounting for about 35% (valued over US$3.3 billion) of overall agricultural exports (FPEF, 2023). Despite being ranked fourth in terms of fruit production in the Southern Hemisphere region, South Africa is the leading fruit exporter in this region; accounting for about 44% of fruit exports. South Africa's leading fruit exports are mainly citrus fruit, pome fruit (apples and pears), stone fruits, and table grapes, respectively. According to Fruit South Africa (Fruit SA, 2023), the fruit industry exports about 60% of its fruits, while about 28% gets processed into other secondary products and 12% is consumed locally. This shows the importance of maintaining good relations with international trading partners for enhanced export revenue generation and industry growth. The focus of the article is on providing insights on the export and domestic market performance of South Africa's pome fruits between the years 2022 and 2023.

In 2022, the total area under production of fruits increased by 2% to about 203 989 hectares (ha) from 200 870 ha in 2021 (Fruit SA, 2023). Out of the total area under fruit production, apples accounted for about 12% while pears accounted for about 6%. In terms of exports, pome fruits had a share of 21% of total fruit exports (FPEF, 2023). Apples shipped for exports were estimated at 45.2 million cartoons (12.5 kg cartoons equivalent) while pears were estimated at 21.2 million cartoons in 2022 (HORTGRO, 2023a). Pome fruit exports are forecast to decline notably during the current year 2023. To a large extent, this is underpinned by unfavourable climate conditions such as severe hail storms and floods in major producing regions. According to statistics from Hortgro (2023b), apple exports are set to decline by 10% to an estimated 40.9 million cartons in contrast to the 2022 season. Similarly, pear exports are also set to decline by 19% to about 17.2 million cartons.

Table 1 below shows cumulative weekly apple export volumes by region as of week 36, 2023 compared to the same period in 2022. South African apples are mostly exported to the following regions in chronological order, these are: Africa, the Far East and Asia, the Middle East, the United Kingdom (UK), Europe, the Indian Ocean, the United States of America (USA) and Canada, and the Russian Federation.

As of week 36, of 2023, a cumulative total of about 32.6 million cartoons of South African apples were shipped for export. This is equivalent to a 2% increase from the volume observed during the same period last year. Despite the observed increase in export volumes, several exports to several regions experienced significant decreases in growth rate compared to 2022. Exports to the Russian Federation experienced the largest decline of 53% followed by Africa (8%), the UK (6%), and the Middle East (2%). On the other hand, exports to the Far East and Asia (25%), Indian Ocean (14%), USA and Canada (12%), and Europe (3%) notably increased.

Table 1: Cumulative weekly apple export volumes by region as of week 36, 2023 compared to the same period in 2022

Apples Export Cumulative volumes - YTD - week 36			
Region	**2022**	**2023**	**% Difference**
Africa	7 391 401	6 764 953	-8%
Far East & Asia	9 624 588	12 042 488	25%
Middle East	4 158 799	4 094 891	-2%
United Kingdom	5 320 644	4 998 651	-6%
Europe	2 708 218	2 797 002	3%
Indian Ocean	549 528	626 957	14%
USA & Canada	379 281	426 555	12%
Russian Federation	1 890 166	897 261	-53%
TOTAL	32 022 625	32 648 758	2%

- **YTD** (Year to Date)- Data for the current season**.**

Source: Hortgro (2023c)

Table 2 below shows cumulative weekly pear export volumes by region as of week 36, 2023 compared to the same period in 2022. As of week 36, 2023, South Africa had exported a total volume of 15.8 million cartoons of pears. Compared to the same period in 2022, this represents a decline of 7% from 17.04 million cartoons. In chronological order, South African pear exports are mainly destined for Europe, the Far East and Asia, the Middle East, the UK, Africa, the USA and Canada, the Indian Ocean, and the Russian Federation. Exports to all the major regions declined except for exports to the UK which increased by 13%. Pear exports to the Russian Federation experienced the highest rate of decline of 16%, followed by Africa (14%), Europe (10%), Indian Ocean (6%), Middle East (5%), Far East and Asia (4%), and USA and Canada (1%).

Table 2: Cumulative weekly pear export volumes by region as of week 36, 2023 compared to the same period in 2022

Pear Export Cumulative volumes - YTD - week 36			
Region	**2022**	**2023**	**% Difference**
Europe	5 561 652	5 027 519	-10%
Far East & Asia	3 483 778	3 335 302	-4%
Middle East	3 027 777	2 867 323	-5%
United Kingdom	1 032 879	1 163 357	13%
Africa	584 518	505 503	-14%
USA & Canada	524 125	516 555	-1%
Indian Ocean	207 851	194 582	-6%
Russian Federation	2 621 667	2 200 421	-16%
TOTAL	17 044 247	15 810 562	-7%

Source: HORTGRO (2023c)

Domestic market performance of pome fruits in the National Fresh Produce Markets (NFPMs)

Figure 1 and **Figure 2** illustrate the sales of apples and pears (comparing quantities and prices) in the 20 National Fresh Produce Markets (NFPMs). In 2022, a total of 154 109.45 tons of apples were sold in the NFPMs compared to a total of about 91 064.06 tons sold so far (until July) in 2023. The quantities observed as of July 2023 reflect a year-on-year increase of 2% of apples sold in NFPMs. On the other hand, a total of 51 567.28 tons of pears were sold in NFPMs in 2022, while for 2023, a total of 26 963.36 tons of pears has been sold as of July 2023. If we compare the cumulative volume observed in July 2023 and the same level in 2022, quantities of pears sold in NFPMs experienced a 13% decline.

Given the weather-related challenges that compromised production in the current year, the total volumes sold at the end of 2023 are most likely to be lower compared to 2022. Quantities of apples sold at NFPMs fluctuate monthly, but the highest average output sold in 2022 was observed in October equaling 14757.05 tons at an average price of R7829.92 per ton. For the current 2023 season, the highest output sold was observed in May, equaling 14 926.70 tons at an average price of R8266.37 per ton. Despite the higher quantity compared to the previous year, the price per ton of apples in NFPMs is higher compared to the same time in 2022. Since March 2023 prices of apples in NFPMs is following an increasing trend. Conversely, in 2022, the highest quantity sold in NFPMs was observed in April which equaled 5453.77 tons at an average price of R5271.33 per ton. For the current year, the highest output sold was in March equaling 4889.94 tons at R7192.31 per ton.

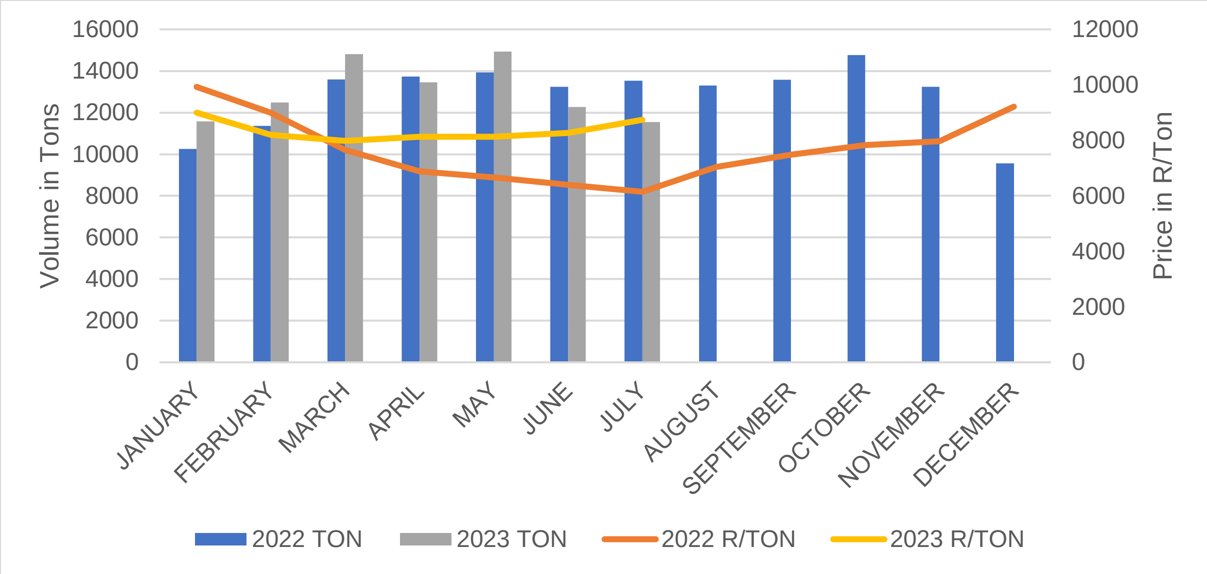


Figure 1: Sales of South African apples in NFPMs in 2022 and 2023
Source: DALRRD (2023)

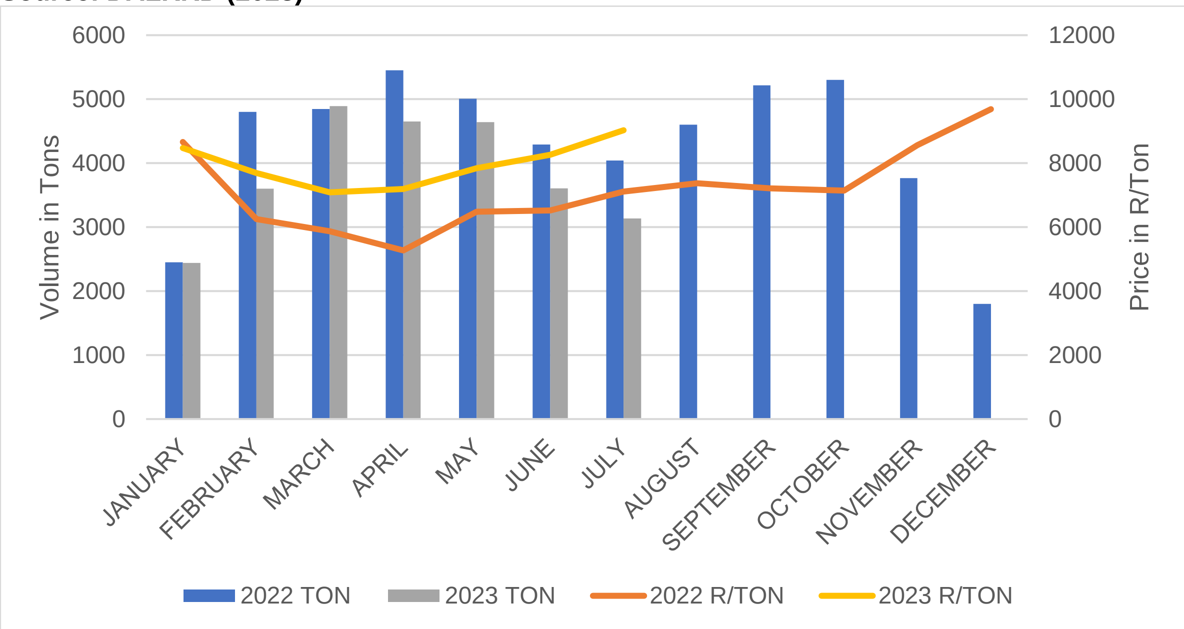


Figure 2: Sales of South African pears in NFPMs in 2022 and 2023
Source: DALRRD (2023)

Conclusion

The unfavourable climate and weather events in major production regions have compromised the performance of South Africa's pome fruits both in foreign markets and domestically in NFPMs, especially for pears. Despite the exports of apples experiencing a 2% increase as of week 36, 2023; South Africa's apples exports to major markets such as the Russian Federation, Africa, the UK, and the Middle East declined notably. In the case of pears, the overall cumulative volumes of export significantly declined, mainly underpinned by major decreases in exports to the Russian Federation Africa, Europe, the Indian Ocean, the Middle East, the Far East and Asia, and the USA and Canada. Pome fruit sales in NFPMs have shown mixed results, however, prices have been showing an increasing trend. This may be attributable to constrained supply.

3. South Africa`s grapefruit and lemon trade performance and market analysis in the 2022/23 season

By Naledi Radebe, Buhlebemvelo Dube and Onele Tshitiza

Global overview of grapefruit and lemons

The global production of grapefruit for 2022/23 marketing year is expected to reach 6.8 million metric tons, while the global production of lemons and limes is expected to amount to 9.1 million metric tons (USDA, 2023b). The global production of grapefruit and lemons (including limes) is projected to decline by 2% and 11% respectively in the 2022/23 season compared to the 2021/2022 season. The decline in grapefruit is attributable to a 20% decline in Turkey, an 11% decline in the USA and a 7% decline in the European Union (EU). The drop in production in these countries was due to unfavourable weather (USDA, 2023b). The lower production of lemons and limes is due to a decline in Argentina of 20%, the USA (19%), the EU (10%) and Turkey (12%). These countries also experienced unfavorable weather conditions which affected the production of lemons.

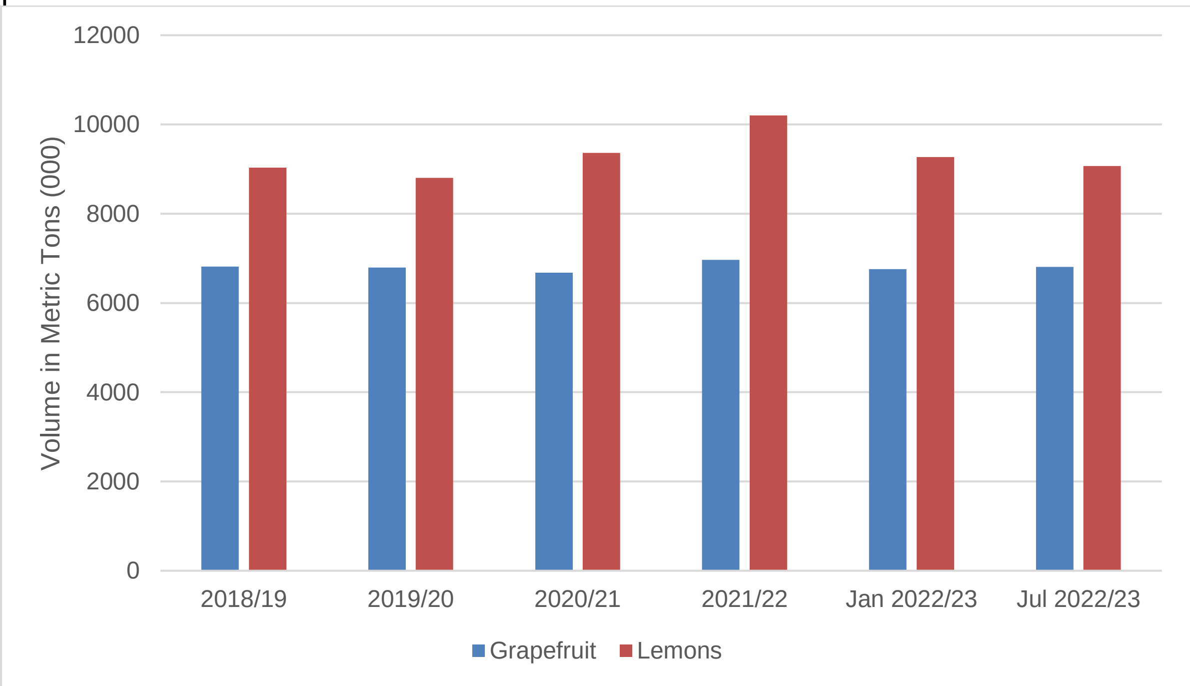


Figure 3: Global production of grapefruit and lemons & limes
Source: USDA (2023b)

The global trade performance of grapefruit is depicted in **Figure 4**. The global imports and exports of grapefruit are both expected to decrease by 6% from 2021/22 season to 2022/23 season, attributable to the lower production. Global exports for grapefruit are estimated to amount to 605 000 metric tons and imports to reach 547 000 metric tons in the 2022/23 season. Exports from the USA and Turkey will decline by 38% and 15% respectively in 2022/23. Japan, Ukraine and Hong Kong are predicted to each import 22% less grapefruit than the previous season, while imports from the USA will decline by 25% and 4% for the EU.

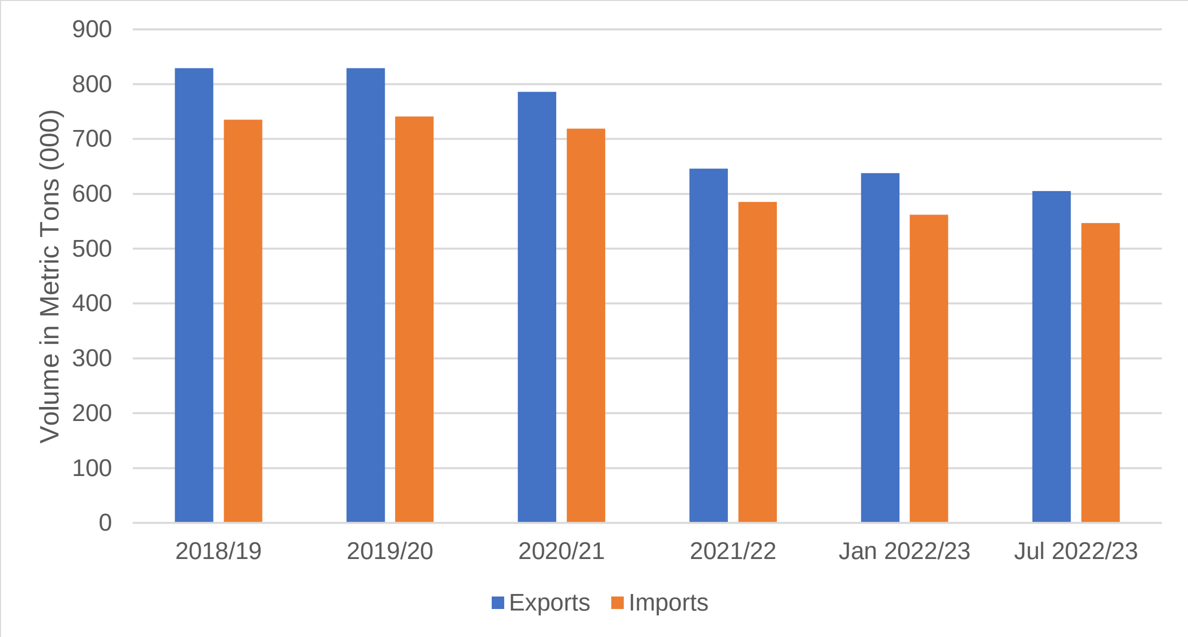


Figure 4: Global Trade performance of grapefruit
Source: USDA (2023b)

Figure 5 shows the global trade performance of lemons and limes. Exports and imports of lemons and limes in the 2022/23 season are forecast at 2.5 million metric tons and 2.3 million metric tons respectively. Exports will decline by 1%, while imports will decline by 4% from the 2021/22 season. Lower exports were expected for Argentina, the USA, the EU and Turkey due to lower production volumes.

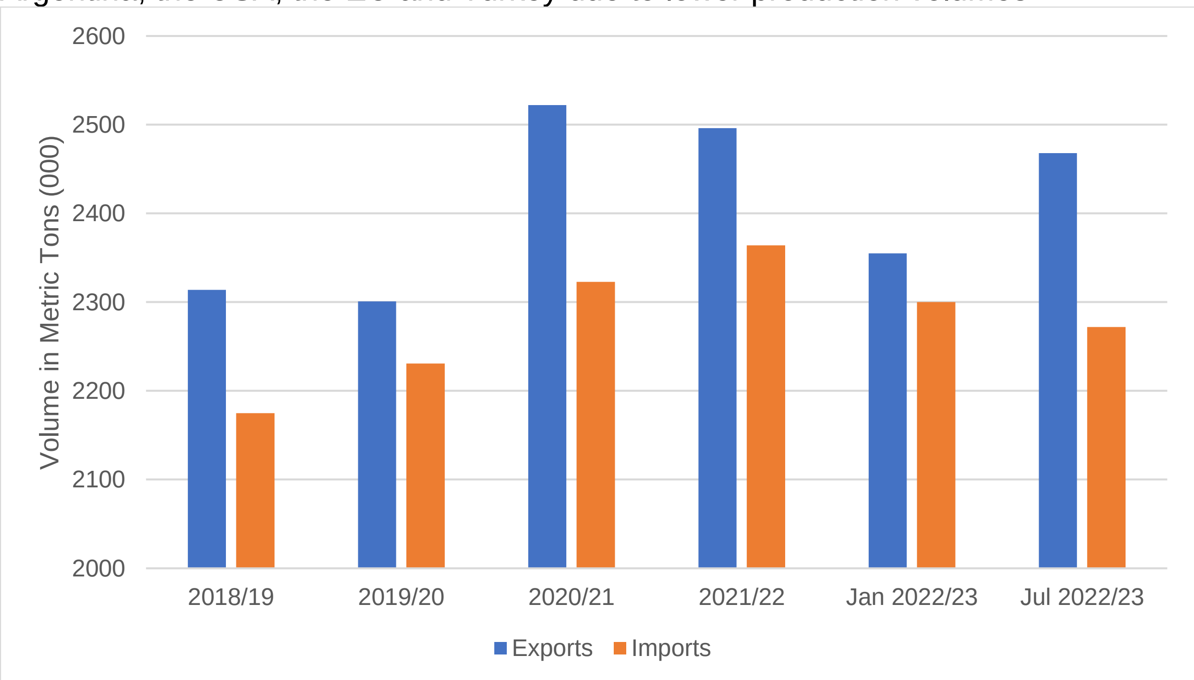


Figure 5: Global Trade performance of lemons and limes
Source: USDA (2023b)

South Africa's overview of grapefruit and lemons

South Africa's lemon production is forecast to decline by almost 13% to 653 000 metric tons in 2022/23 due to the destructive hailstorms in major producing areas and the worker protests last year that affected production (USDA, 2023a). Most production areas favour lemon cultivars most adaptive to climate, pests, diseases, and those which are competitive in the global market such as the Eureka (74%), Lisbon (8%), and the 2ph seedless (6%), and grapefruit cultivars Star ruby (88%), Marsh (8%), and others (4%) are leading cultivars in most production areas (Citrus Growers Association, 2023). Exports are expected to increase to 570 000 metric tons in 2022/23 from 557 000 metric tons in 2021/22. South Africa's grapefruit production is predicted to increase by 1% from 2021/22 to produce 420 000 metric tons in 2022/23, while exports are estimated at 220 000 tons in 2022/23 (a decline of 8%).

Table 3 shows the South African market segment distribution for grapefruit and lemons. In 2020, the total quantity of grapefruit was 344 626 tons, with only 3 383 tons destined for the local market, 100 471 tons was processed and 240 772 tons were exported. The data shows there was an increase in the total quantity of grapefruit from 2020 to 2022. In 2021 there was an estimated increase on the total quantity of grapefruit from approximately 351 043 tons, while in 2022 it increased to approximately 416 206 tons. In 2021 the quantity of grapefruit for local market and processed grapefruit showed a decrease compared to previous year (2020), while the quantity of exports increased to approximately 255 466 tons. In 2022, the total quantity of grapefruit was approximately 416 206 tons, then the quantity for local market and processed grapefruit from the total showed an increase compared to the previous year (2021). There was a decrease in the quantity of exported grapefruit for 2022 when comparing to the previous year, it was approximately 248 143 tons.

In 2020, the total quantity of lemons was 619 522 tons, with only 25 349 tons reserved for local market, 172 922 tons was processed and the 421 251 tons was exported. It can be noted that there was an increase in the total quantity of lemons from 2020 to 2022. In 2021, there was an estimated increase on the total quantity of lemons from approximately 626 791 tons, while in 2022 it increased to approximately 755 750 tons. In 2021, the quantity of lemon for local market and exported lemon showed an increase compared to the previous year (2020). In 2022, the total quantity of lemon was approximately 755 750 tons, and the quantity of exports and processed lemon showed an increase compared to the previous year (2021). There was a decrease in the quantity of lemon for local markets in 2022 when comparing to the previous year, it was approximately 24 939 tons.

Table 3: Market segment distribution for grapefruit and lemons

Year	Total (Ton)		Local (Ton)		Processed (Ton)		Exports (Ton)	
	Grapefruit	Lemon	Grapefruit	Lemon	Grapefruit	Lemon	Grapefruit	Lemon
2020	344 626	619 522	3 383	25 349	100 471	172 922	240 772	421 251
2021	351 043	626 791	3 137	26 465	92 440	138 898	255 466	461 428
2022	416 206	755 750	4 118	24 939	163 945	220 106	248 143	510 705

Source: (Citrus Growers Association, 2023)

Export analysis and Domestic market trends

The South African citrus industry is export oriented and is regarded as one of the dominant global citrus exporters after Spain. It is the top global exporter of grapefruit with a global export share exceeding 16.8% and is the third global exporter of lemons with an export market share of almost 9.4%. Lemons and grapefruits account for almost 32% of all South African citrus exports, with Valencia, Mandarins, and Navals making up 68% of exports. The industry has been facing numerous challenges that might hinder its growth, such as the EU phytosanitary restrictions, domestic challenges; including loadshedding, deteriorating infrastructure, and climate change effects (floods, pests, and new diseases). Despite these, the industry has remained resilient.

South Africa is a net exporter of lemons and grapefruit. The Netherlands (21.7%), United Arabs Emirates (10.7%), United Kingdom (8.2%), Portugal (7.5%), and the Russian Federation were the major export destinations for South African lemons from the value of R5.8 billion in 2022 (Trade Map, 2023). China (25.5%), Netherlands (24.9%), Russian Federation (10%), Japan (8.2%), and the Republic of Korea (5%) were the major export destinations for the South African grapefruit in 2022 from R127.9 million (TradeMap, 2023). Imports from the world to South Africa for lemons and grapefruits and limited because the domestic industry produces enough of citrus.

Figure 6 indicates the market prices and quantities between 2021 and 2023 (January to July) for grapefruit at the National Fresh Produce Markets. The price trend for grapefruits suggests that market prices are usually high at the start of the year (February), and they become lower mid-year around July, reflecting the off-season and in-season fluctuations. The average prices of grapefruit were higher in 2021 compared to the other years, likely due to less quantities going to the local market. During the peak of the season, around May, the markets sold 409 tons of grapefruit at R 6 034/ton in 2023. The highest price observed was in February 2021, where grapefruit sold at R17 059.5/ton and only 43.6 tons were sold.

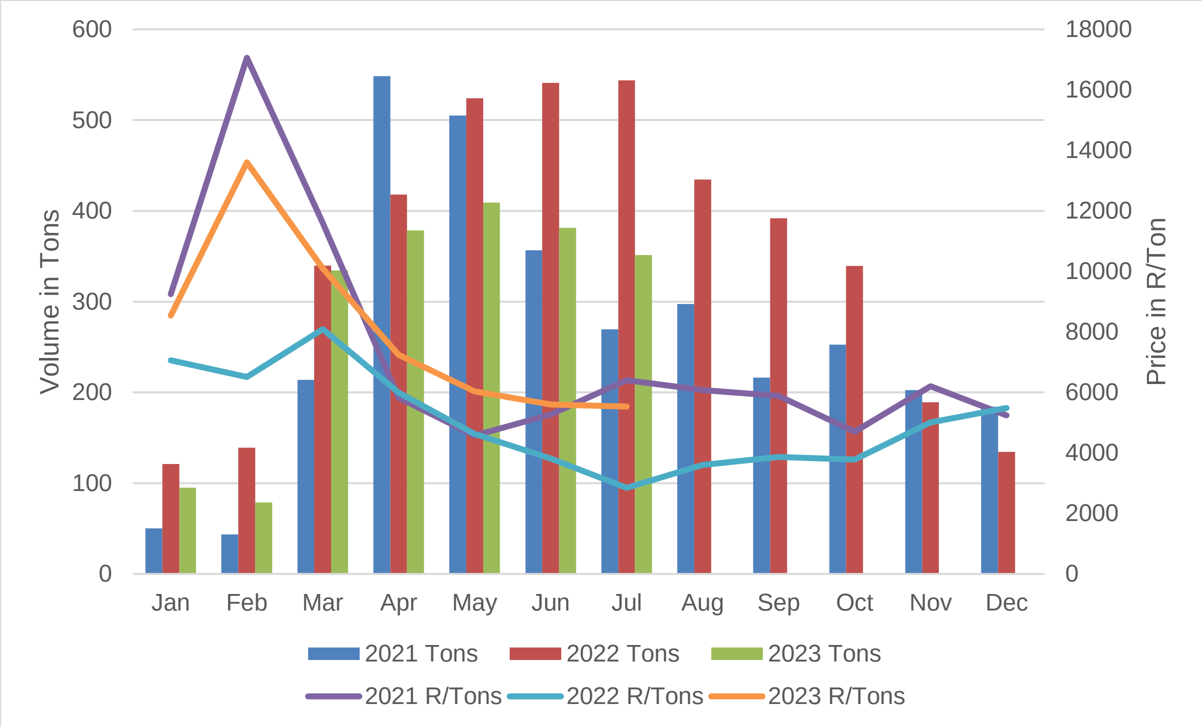


Figure 6: National Fresh Produce Market prices and quantities for grapefruit between 2021 and 2023 (January to July)
Source: DALRRD (2023)

Figure 7 shows the market prices and quantities between 2021 and 2023 (January to July) for lemons at the National Fresh Produce Markets. The lemon prices also follow a similar trend as grapefruit, where prices drop gradually from the start in January to August every year. The largest quantities sold were in August 2021 at the lowest price of R2 805.2/ton out of all the years. The lowest quantities sold were in February 2023, with 1642 tons sold at R5 443.9/ton.

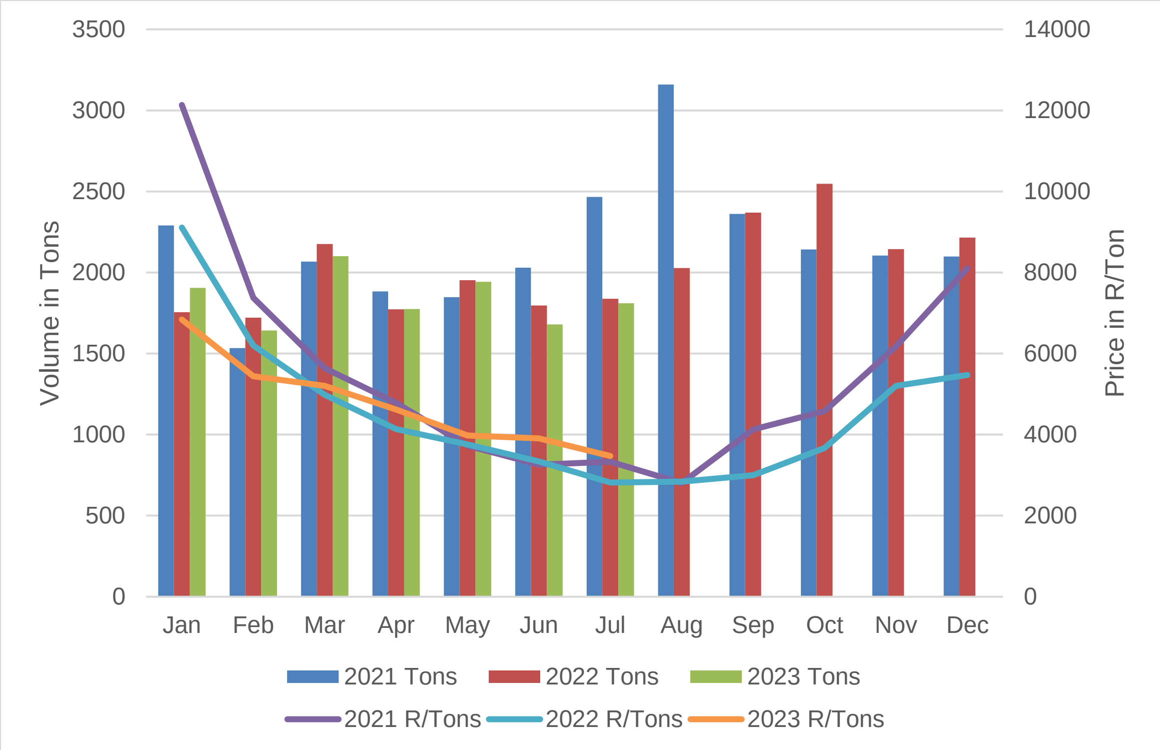


Figure 7: National Fresh Produce Market prices and quantities for lemons between 2021 and 2023 (January to July)
Source: DALRRD (2023)

Conclusion
The citrus industry's is robustly engaging EU through WTO (World Trade Organization) to ease off phytosanitary regulations, primarily for the False Coddling Moth (FCM) and Citrus Black Spot (CBS) as these regulations have negatively affected the industry since the EU is a major export destination for South Africa's citrus. Despite these regulations, citrus continues to be export oriented, with the industry looking at other markets for opportunities. South Africa is expected to retain its membership in the African Growth Opportunity Act (AGOA) forum, with the USA being a global importer of citrus, which bodes well for the country's exports. The expansion of BRICS and stronger bilateral agreements ensures continued citrus exports to trade partners and with the African Continental Free Trade Area (AfCFTA) agreement officially operating, the industry will have access to more markets. Recent domestic developments such as the government grant for farmers, and promises of reduced loadshedding levels, the industry is expected to get a boost and remain resilient towards global competition.

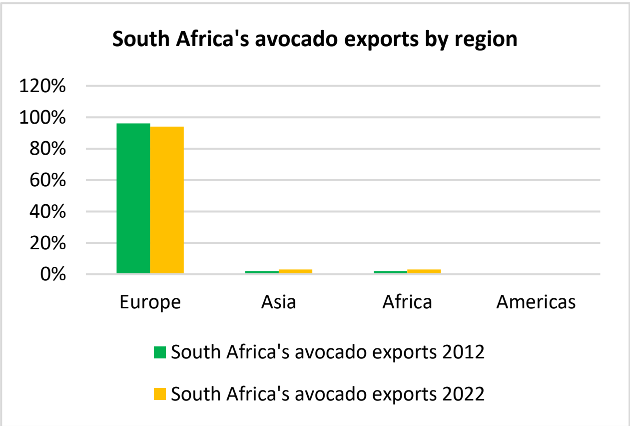
4. South Africa's avocado industry must diversify its exports to remain competitive globally

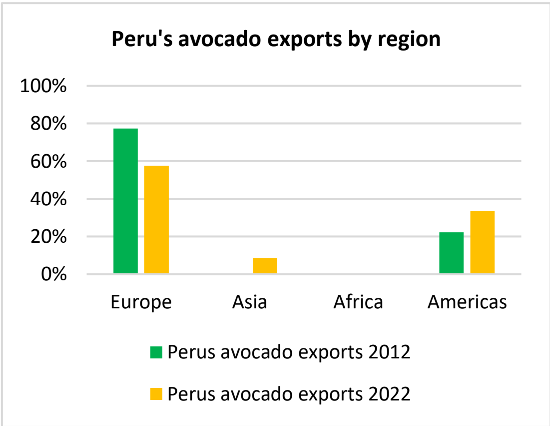
By Thabile Nkunjana

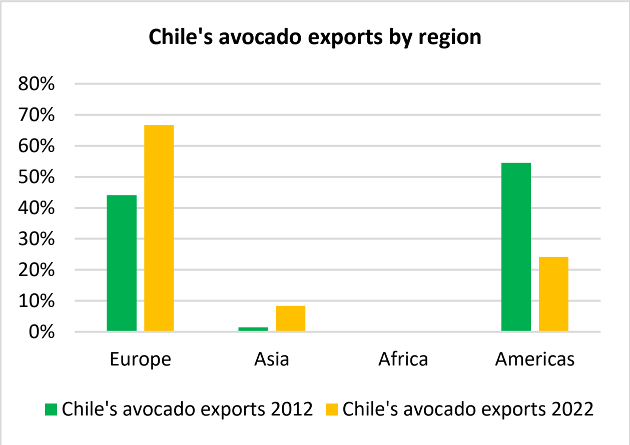
Exporting countries must try to remain relevant and competitive in today's highly competitive global market if they are to grow and maintain their current market share. To do this, produce volumes must increase, and the country must be progressive in technology adoption, innovative, and have efficient labour in comparison to its competitors (Petersen, 2021). Furthermore, locally manufactured products must be of high quality in order to be appealing to importing countries. As a result, consumers in the importing countries are more inclined to pay higher price for high-quality products. South Africa's agricultural products are noted for their high quality, which has contributed to the country's global competitiveness.

South Africa is the world's eighth largest avocado exporter as of 2022, trailing Mexico, Peru, the Netherlands, Spain, Chile, Kenya, and Colombia (Trade map, 2022). This follows Kenya and Colombia, which overcame South Africa in 2016 and now rank sixth and seventh, respectively. This is despite an increase in the number of avocado orchards in South Africa and the number of countries to which South Africa is currently exporting avocados. According to the South African Avocado Growers Association (SAAGA) (2022), the industry's avocado orchards have expanded to around 15 439ha in 2021. Between the production years 2020 and 2021, total plantings grew by 747ha. **Figure 8** presents the world's leading avocado exporters from the Southern Hemisphere. Peru, Chile, Kenya, South Africa, New Zealand, Tanzania, and Australia are among them. While South Africa's avocado production has increased, positively affecting exports over the years, when compared to major Southern Hemisphere avocado exporters, South Africa's avocado exports have increased the least. According to trade map data, Peru is by far the greatest avocado exporter, with exports increasing by 500% (from 83 215 tonnes to 583 215 tonnes) between 2012 and 2022. Peru was followed by Kenya, which increased its exports by at least 290% (from 26 107 tonnes to 103 240 tonnes), and Chile (19.5%) (from 91 419 tonnes to 109 287 tonnes) during the same period. South African avocado exports, on the other hand, increased by 14.3% during the same time, from 55 120 to 62 985 tonnes. (2023 trade map).

South African avocados were exported to 28 countries in 2012, increasing to 35 nations by 2022, a 25% increase (Trade map, 2023). During the same time period, from 2012 and 2022, the number of countries to which Kenya exported avocados increased by 100%, from 25 to 50. Peru increased by 80% from 20 to 36 countries, while Chile expanded by 25% from 16 to 20 countries (Trade map, 2023).
South Africa's avocado exports remain nearly unchanged by region during the period under review. For example, the EU accounted for 96% of South Africa's avocado exports in 2012, while accounting for 94% in 2022. **Figure 8** shows that exports to Africa and Asia increased by 1%, from 2% in 2012 to 3% in 2022. **Figure 8** shows that Peru, Chile, and Kenya are making some gains in other regional markets. Avocado exports from Peru to the Asian market, for example, increased by at least 1000% between 2012 and 2022, while Chile and Kenya increased by 500% and 400%, respectively (Trade map, 2023). South Africa, on the other hand, had an 80% rise. While the 80% growth may appear to be significant, South Africa's avocado exports have increased from a mere 924 tonnes in 2012 to 1 685 tonnes in 2022.







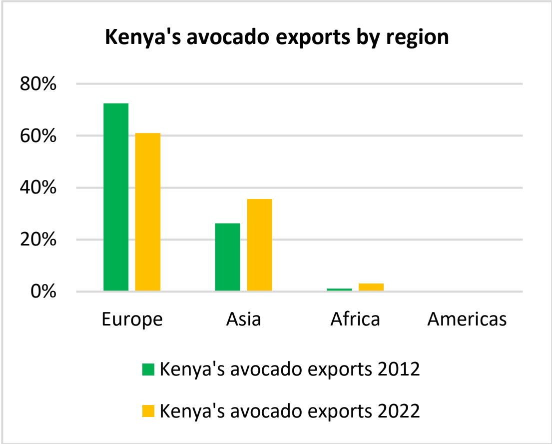


Figure 8: Southern Hemisphere leading avocado exporters by region
Source: Trade Map (2023)

Conclusion

South African avocado exports increased 14.3% from 2012 to 2022, but this increase was smaller than that of South Africa's biggest competitors. This could be attributable to several factors, including South Africa's avocado exports being overly concentrated in one region, the EU. Even when one gets observe data within the EU market for South Africa you will realise that few countries/markets dominate. The Netherlands, for example can account for at least 50% of South Africa's avocados at a given time followed by the United Kingdom, and Russia. However, because South Africa's avocados are ready for market at the same time as its main competitors in the Southern Hemisphere, the EU market is very competitive, which may be why South Africa's market share to the EU has slightly decreased from 96% in 2012 to 94% in 2022. Countries such as Peru, Kenya, and Chile have grown, and their marketplaces are diversified and expanding across regions. This could be owing to trade agreements, particularly with Kenya and Tanzania. Close proximity to markets in the Americas is expected to be important for Chile and Peru, while trade accords assist South Africa's Asian competitors.

Trade agreements, such as the one South Africa just signed with China during the BRICS meeting 2023, will be critical for South Africa to compete in areas where other Southern Hemisphere competitors sell. Despite some major advances, there have been long-standing negotiations with the United States to export avocados. While production expansion will be critical in the country's efforts to be competitive in other regions and thus globally, having trade agreements will be equally important, given that South Africa's competitors have trade agreements that have allowed them to expand at the rate seen during the review period.

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Useful Links

Agrihub	*www.agrihub.co.za*
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 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 (Subtrops)	*www.subtrop.co.za*
South African Table Grape Industry (SATGI)	*www.satgi.co.za*

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