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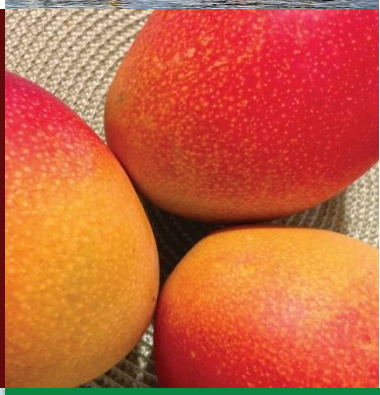

SOUTH AFRICAN FRUIT TRADE FLOW

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SOUTH AFRICAN FRUIT TRADE FLOW

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Compiled by Buhlebemvelo Dube, Thabile Nkunjana, Naledi Radebe, Nkosingiphile Duma and Bhekani Zondo

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1. Background

South Africa can cultivate and produce a wide range of fruits, vegetables, flowers, and nuts for both local and foreign markets thanks to the country's unique climate and weather patterns throughout its nine provinces. In the global fruit industry, the country is renowned for being a major producer and exporter of citrus, deciduous, and subtropical fruits. The South African Fruit Trade Flow Report's current edition is centred around figs, pineapple, and mango. To evaluates these fruits' export and production performance for the recent growing season and breaks down the elements that make South Africa a reliable supplier to both local and foreign markets. The selection of these fruits is influenced by fruit seasonality, and the research employs a trend analysis approach to compare the production, marketing, and prices for the most recent fruit seasons.

2. An analysis of South Africa's mango industry and export performance

By Nkosingiphile Duma, Bhekani Zondo and Thabile Nkunjana

The South African mango industry is mainly focused on the domestic market with only a small share of local production destined for export markets. South Africa’s mangoes are primarily processed into canned mango, mango juice, concentrated mango drinks, mango pulp, dried mangoes, mango jams, chutneys, achar and mango-applied products and are sold fresh through the National Fresh Produce Markets (NFPMs) and as well as exports. The average price of mangoes was R6 951 per ton in 2018 and R6 046 per ton in 2019, while in 2022 the average price per ton was R10 048. The trend between the quantities and average prices per ton, indicate that when there are higher quantities available in the market, the price tends to be lower and vice versa.

During the 2022/23 marketing season the total gross value of subtropical fruits in South Africa was R5.9 billion and in the same period the total gross value of mangos was R0.68 billion, representing 11.5% of the total gross value of South Africa subtropical fruits (DALRRD, 2023). The aim of this article is to analyse the domestic and export performance of the South African mango industry.

Figure 1 presents mango production from 2012/13 production season to 2022/23. Over this period South Africa’s mango production has increased by 19.8% even though remaining infrequent. During the period under review the largest mango quantity produced commercially was in 2016/17 season with 93,000 tons produced. In the 2022/23 season, South Africa produced a total of 84,357 tons of mangoes, representing a 39% increase from the 60,697 tons produced in the previous season (SAMGA, 2023b). In 2023, the South African Mango Growers Association (SAMGA) tree census (SAMGA, 2023a) reported that there were about 5,688 hectares (ha) under mango production spanning over five provinces. Limpopo is currently the largest mango producing region accounting for about 75% (4,277 ha) of land devoted for mango production in the country followed by Mpumalanga (1,278 ha), Western Cape (98 ha), KwaZulu-Natal (19 ha), North West (15 ha), and Gauteng (1 ha).

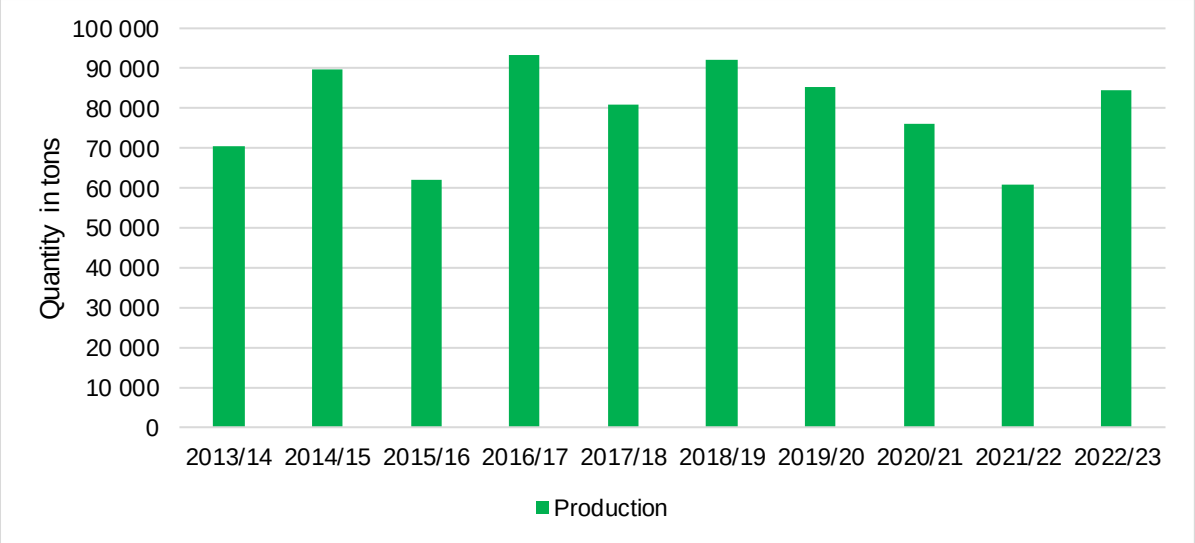

Figure 1: Mango production in South Africa between 2012/13 to 2022/23 season
Source: SAMGA (2023b)

Figure 2 below illustrates the distribution of domestic mango production into different marketing channels. Data from SAMGA (2023b) shows that over the years, processing has become an integral part of local production, with about 41% processed to archar, dried (17%), and juice (10%). Direct sales account for about 8% of local production while exports account for only about 6%. It is important to note that although exports make up only 6% of the total mango crop, they have been growing recently. Mango exports decreased to 1,500 tons in the 2012/13 season, but by the 2022/23 season, they had increased to 4,700 tons.

The NFPMs accounted for a proportion of 18% (14,910 tons) in 2023 and the volumes to the NFPMs decreased by 18.3% while exports increased by 32%, between 2022 and 2023 respectively. With Peru experiencing drastic decline in mango production in recent seasons due to adverse weather conditions and delay in the start of some seasons, a shortfall is forecasted to impact EU and Middle East regions. These developments present an opportunity for South Africa to strengthen its position in global mango market through exports (Tridge, 2023).

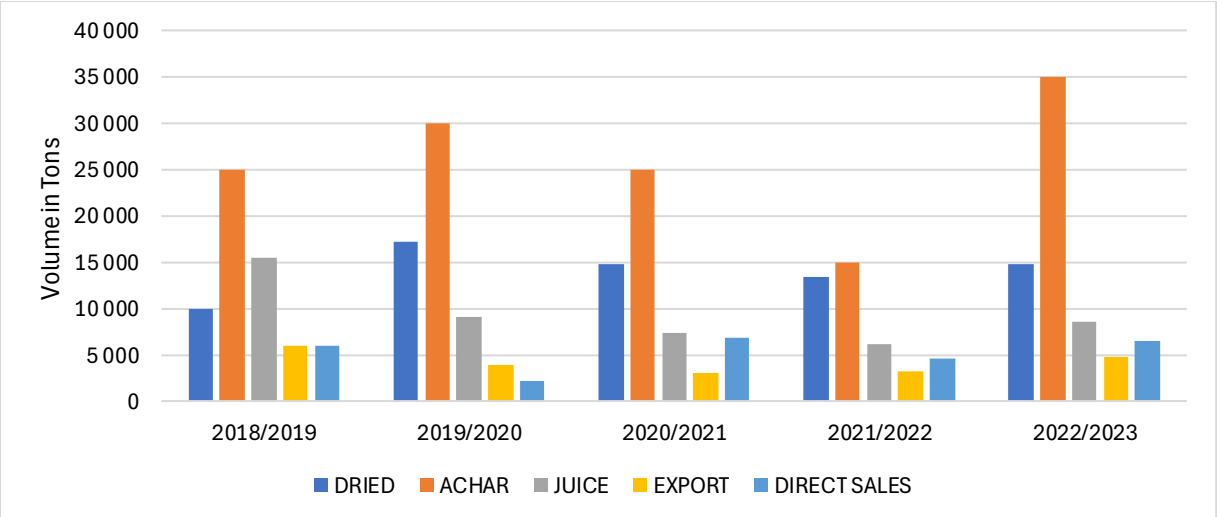

Figure 2: Mango production distribution channels in South Africa between 2018/19 to 2022/23 season
Source: SAMGA (2023b)

For the 2022/23 production season, achar accounted for 41% of total production, dried mango (17%), juice (10%), exports (5%), direct sales (8%) and the rest was accounted for by fresh produce markets. For South Africa to fully capitalize on the opportunity of the shortfall of Peru mango production in some seasons, it would need to carefully manage its crop and monitor market dynamics, invest in new high yielding cultivars, and produce beyond the local consumption to meet the global demand.

Table 1 below shows the destination of South Africa mango exports and mango imports during 2021 and 2022 season. South Africa's mango export to United Arab Emirates (UAE) and Ghana from 2021 to 2022 increased by 53% and 41%, respectively. While Namibia and United Kingdom experienced a decline of 15% and 0.7% for the same period under analysis, respectively. The imports of mangoes to South Africa from Malawi and Eswatini increased by 87% and 37% respectively, while imports from Namibia and Mozambique declined drastically by 102% and 11% for the same period under analysis, respectively.

Table 1: South Africa Mango exports destinations and imports Origin

Exports Destinations	2021	2022	Growth rate	Imports Origin	2021	2022	Growth rate
United Arab Emirates	1390	2984	53%	Mozambique	1579	1414	-11%
Botswana	1473	1477	0.3%	Eswatini	524	838	37%
Ghana	457	775	41%	Malawi	20	157	87%
United Kingdom	527	523	-0.7%	Namibia	160	79	-102%
Namibia	340	295	-15%	Brazil	67	67	0%

Source: Trade Map (2024).

Conclusion

Majority of mango produced within the country is processed into several mango related products such as achar and dried mango, while the rest is sold a fresh mangoes and juice through direct sales, exports, and in NFPMs. Although the country exports mangoes and grows enough to meet domestic need, it produces insufficient quantities to take advantage of potential in international markets. Therefore, it is important that the local industry and other key role players invest in new cultivars that are resilient to climate challenges and other issues facing the industry and expand production. The levies that are collected by the industry body of subtropical fruits can be used for transformation of mango production enterprises.

3. SOUTH AFRICA'S PINEAPPLE PRODUCTION AND MARKET ANALYSIS

By Buhlebemvelo Dube and Thabile Nkunjana

In 2022, global production for pineapples was estimated to be 29.4 million tons (Statista, 2024), which was an increase from the 15.8 million tons produced in 2002. Regardless of this growth, the industry is vulnerable to climate change as this fruit grows well in conducive climate with acidic loam soils, and reproduction is through vegetation propagation. Costa Rica, Brazil, Philippines, Thailand, and Indonesia are some of the world's leading pineapple producers. Despite the difficulties the global industry faces, creative applications for pineapple have emerged, and evolving food systems are incorporating it into diets more frequently because of its many applications in the processing industry, of which at least 70% are consumed fresh.

Figure 3 presents pineapple production in South Africa by provinces in 2020. Domestically, pineapples production is primarily in Northern KwaZulu Natal (Hluhluwe) and in the Eastern Cape (Bathurst area). Hluhluwe produces mostly the queen cultivar, which is smaller, sweeter, and mostly preferred as fresh fruit, whereas Bathurst area produces cayenne cultivar which is larger and used for processing (USDA, 2020). About 66% of pineapples are produced in Bathurst area and 33% in Hluhluwe, with less than 1% in Mpumalanga and Limpopo. Based on data by the United States Department of Agriculture (USDA) (2020), almost 18,646 ha is currently under cultivation across the country.

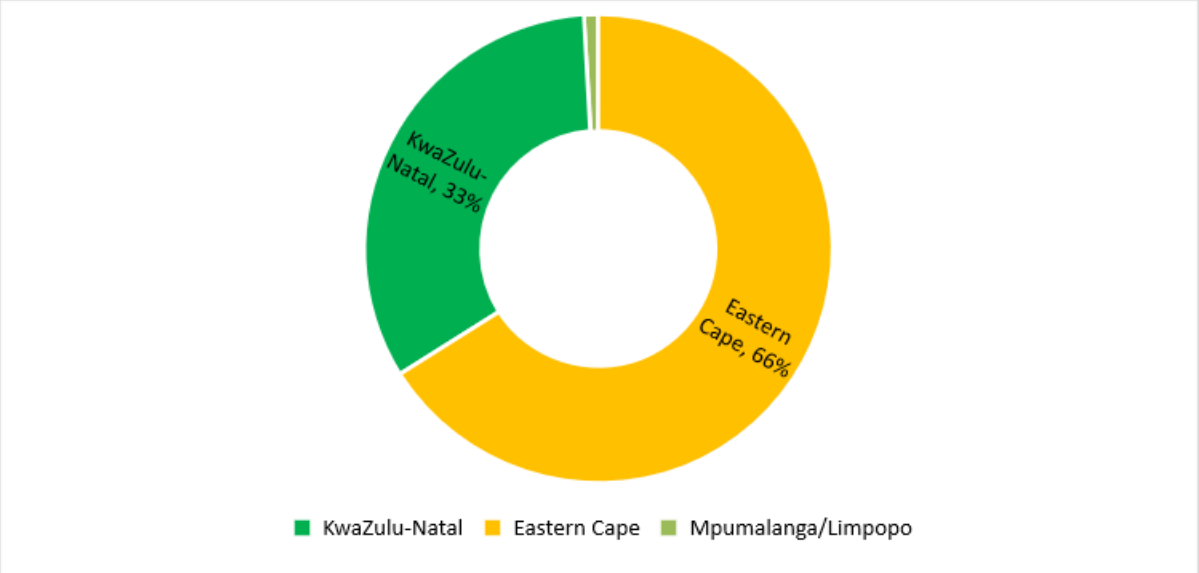

Figure 3: Pineapple-producing regions of South Africa
Source: Hluhluwe Pineapple marketing association (2024)

The United States of America (USA), China, Japan, Belgium, Netherlands, Spain, and France are the dominant importers of pineapples in the world. Moreover, there is an increasing demand from Israel and the United Arabs Emirates (UAE) in the Middle East. The global annual growth in value for pineapple exports has dropped by almost

3% per annum (p.a) in the past five years (TradeMap, 2024). Costa Rica, Philippines, Netherlands, Belgium, USA, Ecuador, and Honduras are respectively the dominant global suppliers of pineapples. Interestingly, Costa Rica has an export market share of almost 46% in the world, suggesting its formidable ability to compete in the market. **Table 2** below shows the market analysis for South African pineapples. Markets including Germany, the Netherlands, France, Botswana, the UAE, the USA, and Namibia.

Figure 2: Illustration of the export market for South Africa pineapples

Importer	Share in South Africa`s exports (%)	Quantity exported in 2022 (Tons)	Growth in exported value between 2018-2022 (%, p.a)	Growth in exported quantity between 2018-2022 (%, p.a)	Growth in exported value between 2021-2022 (%, p.a)
Germany	17.3	136	28	24	108
Netherlands	15.9	148	10	7	55
France	12.5	169	120	168	2919
Botswana	11.2	953	7	12	-16
United Arabs Emirates	8.5	266	9	-8	27
United States of America	8.4	46	-6	-25	260
Namibia	6.3	493	-2	5	3

Source: Trade Map (2024)

Although overall exports have been declining in recent years, South Africa still exports more pineapples than it imports. More pineapples were exported from South Africa in 2023—2,900 tons—than in the previous five years combined—averaging 2,700 tons. However, South Africa's exports have dropped by 9.9% during this time (Trade Map, 2024). In contrast, imports rose by 132.8%, or 373 tons, on average. 232 tons of pineapples were imported into South Africa in 2019, and by 2023, that amount had risen to 540 tons. Additionally, between 2021 and 2022, the value of exports increased by 51% annually, from R42.5 million to R71.4 million (Trade Map, 2024).

Conclusion

Over time, there has been a shifting tendency in the pineapple trade with South Africa. For example, the amount exported fell by 9.9% between 2019 and 2023. Value-wise, exports during the same period rose by 31.6% from R55.5 million to R72.9 million, in contrast to quantity exports. This could be due to several factors. Perhaps pineapples from South Africa are making their way into the market as high-end goods offered at high-end costs. In addition to the areas that South Africa now exports to, there are several other attractive international markets. These include Kuwait in the Asia-Middle East, France, which is expected to remain profitable in the EU, and prospective market destinations in Russia. As was previously noted that South Africa imports little figs with at least 480 tons of pineapple imported into South Africa from Thailand and

Mozambique in 2022. Nonetheless, during the last few years, imports have showed an increasing trend.

4. AN ANALYSIS OF SOUTH AFRICA'S FIG INDUSTRY

By Naledi Radebe and Thabile Nkunjana

Figs are produced all around the world and they Ideally thrive in warm, dry areas. Turkey and Egypt are two countries in the world that produced the most figs. The remaining countries that round out the top five (5) fig-producing countries in the world are Morocco, Algeria, and Iran. With an expected production of 321,299 tons, 227,115 tons, 135,974 tons, 111,796 tons, and 92,266 tons, the top 5 producers of fig between 2018 and 2022. Spain, the Syrian Arab Republic, the United States of America (USA), Afghanistan, and Uzbekistan are other prominent producers of figs. The Southern California region of the USA and the Mediterranean region provide ideal growing conditions for figs. Although figs may today be found all over the world, it is thought that the delicious treats first appeared in Western Asia. Figs spread around the world due to human migration, since early explorers discovered that fig trees were easy to domesticate and supplied important energy needed for lengthy travels. Figs can be consumed dry, tinned, or frozen, however many people prefer eating them fresh these days.

South Africa's fig market performance has been fluctuating for the past 3 years looking at the mass, value and average prices of figs sold on Tshwane Fresh Produce Market. When comparing the quantity of figs sold in the market between the period of 2022-2024, there was a decrease in growth with approximately -95.22%. There was a decrease in value of figs sold at the market when looking at the previous years against the most recent years. The Western Cape's orchards have benefited from higher rainfall over the past two seasons, and the fig industry is hoping that the upcoming season will bring more good weather for output in the Klein Karoo production zones, but weather patterns remain unpredictable (Hortgro, 2021).

Figure 4 presents the production in tons of fig by region from the period of 2018-2022 respectively. Between 2018 and 2022, there was a rise in the output of figs globally; it increased from roughly 562,802 tons to 626,636 tons. Global fig output by region from 2018 to 2022 is shown in **Figure 4**. With 46.6% of global fig production, Asia leads the continents in production, followed by Africa (39.2%), Europe (9.1%), and the Americas (5.1%). With a negligible share, Oceania contributed the least to the world's fig production. When looking at the production for Africa there was a decrease in production when comparing 2018 and 2022, it went from approximately 498,373 tons to 445,613 tons respectively.

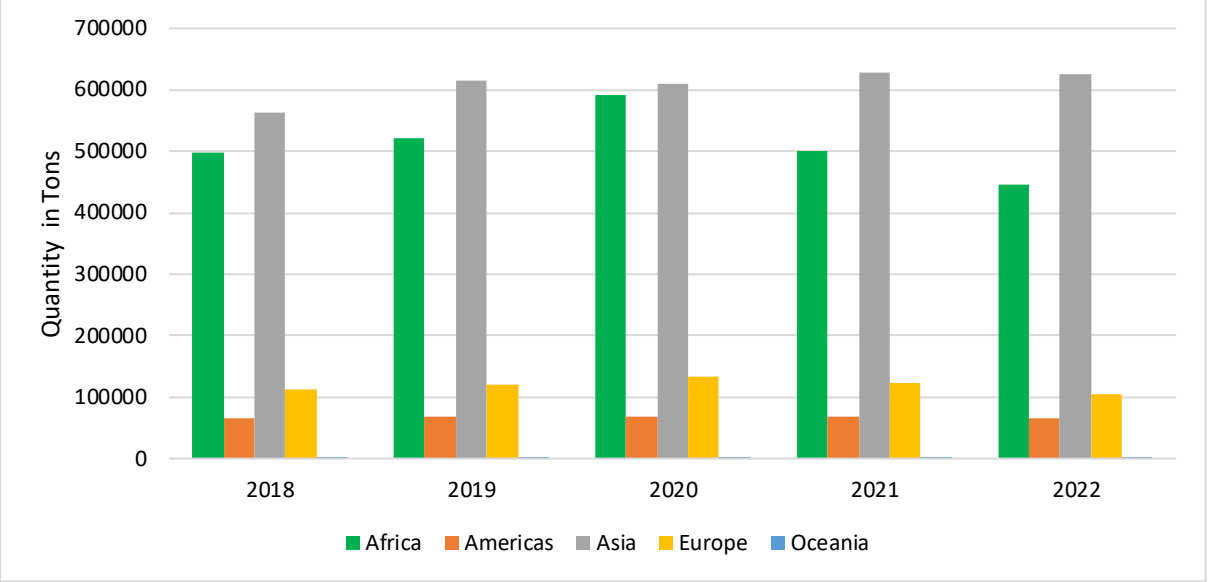

Figure 4: Global fig production by region from 2018 to 2022
Source: FAOSTAT (2024)

South Africa Fig Exports and Import

Figure 5 below presents South Africa's fig imports and exports for the period of 2018-2022. Figs from South Africa are marketed mostly to the Northern Hemisphere at a price point commensurate with their exceptional eating quality. The only means of transportation to the market has always been air freight for exports, which posed a significant problem when planes were grounded throughout our numerous lockdown phases both domestically and internationally and in 2021 (Hortgro, 2021). South Africa exported a quantity of approximately 539 tons of figs in 2019, which is less than the previous season (2018), the decrease in export market of figs from South Africa declined ever more for 2020, 2021 and 2022. The growth percentage on exports market for fig in South Africa between the period of 2018-2022 was estimated to approximately -85.38%. Hong Kong, China, United Kingdom (UK), Botswana, Netherlands, Singapore are the top 5 export destination for the fig market in South Africa during the period of 2018-2022.

South Africa imported approximately 85 tons of figs in 2020 which is extremely low imports when being compared with 2018 and 2019 season. Türkiye, Afghanistan, Jordan, Portugal, and India being the top exporters of fig to South Africa during the period of 2018-2022 respectively. The imports of figs in South Africa declined with approximately -231.1% respectively during the given period in **Figure 5** which is lower than the quantity exported.

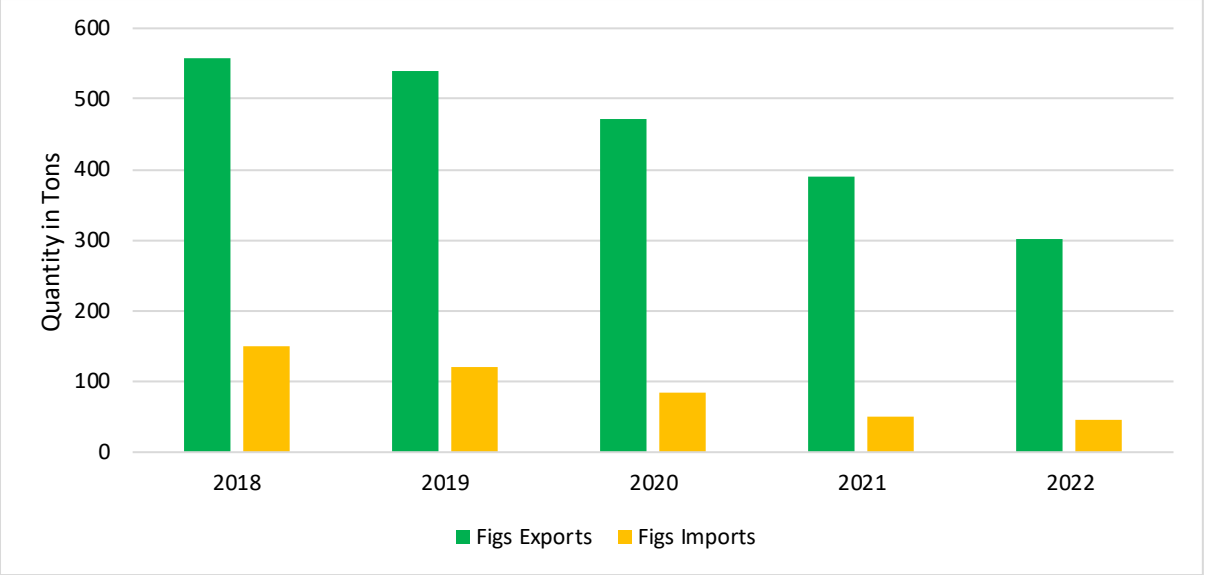

Figure 5: South Africa's fig trade
Source: Trade Map (2024)

Conclusion

Global fig production peaked in 2020 with a total of 1.4 million tons produced, although it started off extremely low in 2018 with only 1.2 million tons produced worldwide. The production of figs decreased globally in 2022, reaching about 1.2 million tons, after starting to decline in 2021. Both supply and demand for South African figs need to increase for the country's fig industry to become more competitive hence commercially viable. It is essential to be able to extend and reclaim these retail marketplaces within these trade zones. Compared to pre-Covid export levels, the established markets in the EU and the Far East have shown stability, albeit underserved. It is crucial to concentrate on these new rising markets.

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6. 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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