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Promoting market access for South African agriculture

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PRODUCTION OF SELECTED NICHE CROPS IN SOUTH AFRICA AND THEIR EXPORT PERFORMANCE TO THE EUROPEAN UNION

2025/2026

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DISCLAIMER

This publication was collaboratively produced by the National Agricultural Marketing Council (NAMC), the European Union (EU) – Southern African Development Community (SADC) Economic Partnership Agreement (EPA) support programme in South Africa, and the Department of Agricultural Economics (Stellenbosch University) . Its contents do not necessarily reflect the views of the European Union and South Africa.

EXECUTIVE SUMMARY

This report assesses the production and export performance of selected niche fruits, namely: kiwi fruit, pineapples, passion fruit, figs, and pomegranates, in South Africa, with a particular focus on their competitiveness in the European Union (EU) market. The analysis is motivated by the growing global demand for high-value, health-oriented fruits and the strategic importance of niche crops in supporting export diversification, rural development, and inclusive growth within South Africa's agrifood system.

The study sets out to achieve the following objectives:

- To identify and profile the production of key exportable niche fruits by South Africa
- To assess the trade performance of the identified niche fruits,
- To profile tariff and non-tariff barriers affecting South Africa's exports of the identified niche fruits to the European Union (EU),
- To map out strategies on how South Africa can improve its competitiveness in the EU market

The report is structured as follows: the first section provides the introduction, motivation, and objectives. Section 2 provides the methodology, while the results and discussion are presented and discussed in Section 3. Conclusions and recommendations are provided in Sections 5, respectively.

KEY FINDINGS:

The production analysis reveals a dualistic structure within South Africa's niche fruit sector, where pineapples constitute a relatively mature and dominant subsector with stable and high output, while kiwi fruit, passion fruit, figs, and pomegranates remain emerging industries characterised by relatively small production areas, limited economies of scale, and, in some cases, significant volatility in output. Despite these constraints, all five crops exhibit strong growth potential due to favourable agro-climatic conditions and South Africa's counter-seasonal advantage in supplying EU

markets, although structural limitations such as fragmented production systems and limited investment continue to constrain expansion.

The domestic market analysis indicates that trade in niche fruits is highly concentrated and differentiated, with pineapples dominating both volume and revenue, accounting for approximately 78% of revenue and 94% of total traded volumes, while kiwi fruit, pomegranates, and figs command significantly higher prices per ton, positioning them within premium market segments. This pattern reflects a bifurcated market structure in which bulk commodities drive volume, whereas niche fruits offer opportunities for diversification into high-value segments, particularly within large urban fresh produce markets that account for most trade activity.

The export performance assessment reveals mixed and, in some cases, declining competitiveness in the EU market, with kiwi fruit and pineapples showing growth in export values, while passion fruit and pomegranates have experienced notable declines in export volumes over recent years. The export value of figs has been very low over the years, ranging between US$0.579 million (the highest in 2021) and US$0.184 million (the lowest in 2024). Export flows remain highly concentrated in a limited number of EU destinations, particularly the Netherlands, Germany, and France. Exports are often channeled through intermediary markets, which constrain value capture and limit direct engagement with final buyers, thereby weakening South Africa’s overall competitive positioning.

The analysis further demonstrates that non-tariff barriers constitute the primary constraint to market access, despite preferential tariff arrangements under the EU–SADC Economic Partnership Agreement (EPA). Compliance challenges related to sanitary and phytosanitary measures, maximum residue limits, private certification standards, and emerging EU sustainability requirements significantly increase production and export costs. In particular, the lengthy and costly process of registering EU-compliant agrochemicals, coupled with varying retailer-specific standards, creates substantial barriers to entry and expansion, especially for smaller producers.

Finally, the study identifies systemic structural and institutional constraints that undermine value chain competitiveness, including limited production and market intelligence, fragmented coordination among stakeholders, inadequate logistics and cold chain infrastructure, and restricted access to finance and certification support. These constraints collectively limit South Africa's ability to scale production, meet EU quality requirements consistently, and fully exploit emerging market opportunities, thereby highlighting the need for a coordinated and integrated value chain development approach.

KEY POLICY RECOMMENDATIONS:

In response to the findings, the report proposes a set of integrated policy recommendations aligned with the Agriculture and Agro-processing Master Plan (AAMP), with a focus on strengthening competitiveness across the value chain.

- Scale and modernise production systems through cultivar optimisation, cluster-based production, and climate-smart practices
- Strengthen compliance and quality infrastructure by expanding certification, traceability, and residue monitoring systems
- Improve logistics and cold chain efficiency to preserve product quality and reduce post-harvest losses
- Promote market diversification and direct market access within the EU
- Support product differentiation and value addition to enhance competitiveness in premium segments
- Facilitate inclusive participation through smallholder integration, access to finance, and capacity building
- Enhance institutional coordination and market intelligence systems

The findings underscore that South Africa's competitiveness in the EU niche fruit market is constrained not by a lack of opportunity, but by structural inefficiencies across the value chain. Addressing these challenges requires a coordinated, multidimensional policy response that aligns production, compliance, logistics, and market access within the AAMP framework. In doing so, niche fruit value chains can serve as a strategic vehicle for export diversification, rural transformation, and sustainable economic growth.

ACKNOWLEDGEMENT

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Abbreviations

AAMP	Agriculture and Agro-processing Master Plan
BFAP	Bureau for Food and Agricultural Policy
CBS	Citrus Black Spot
DAFF	Department of Agriculture, Fisheries and Forestry
DALRRD	Department of Agriculture, Land Reform and Rural Development
DoA	Department of Agriculture
EU	European Union
EU-SADC EPA	European Union - Southern African Development Community Economic Partnership Agreement
FAO	Food and Agriculture Organisation
FCM	False Codling Moth
GAP	Good agricultural practices
Global G.A.P.	Global good agricultural practices
GPV	Gross production value
ITC	International Trade Centre
JAP	Juice Products Association
NAMC	National Agricultural Marketing Council
NFPM	National Fresh Produce Market
NTBs	Non-tariff barriers
NTMs	Non-Tariff Measures
POMOSA	Pomegranate Organization of South Africa
PPECB	Perishable Products Export Board
SEDEX	Supplier Ethical Data Exchange
SPS	Sanitary and Phytosanitary measures
Stats SA	Statistics South Africa
SU	Stellenbosch University

UN	United Nations
USA	United States of America
US$	United States dollar
y/y	Year on year

1.0 Introduction

1.1 Background and rationale

South Africa is endowed with diverse climates and ecosystems that enable the production of a wide range of fruits and vegetables. Many of the fruits and vegetables are exotic to South Africa and are synonymously referred to as niche crops. Over the years, these niche crops have been increasingly gaining prominence on the domestic and international markets. These niche crops are of key significance in South Africa's agrifood system, given their nutritional value, unique flavours, and the increasing demand globally. Considering economic development, trade, food security, and sustainability, there is a need to intentionally develop value chains of these niche crops. For example, from a trade perspective, many countries in the Southern Hemisphere heavily rely on agricultural exports, and these niche crops exhibit a high demand globally. Therefore, developing their value chains is bound to boost foreign exchange earnings, improve the country's trade balance, and strengthen global trade relations.

From a global food supply and market balance viewpoint, countries in the Southern Hemisphere (e.g., South Africa in this context) produce most of these crops during the counter-season for Northern Hemisphere markets (especially the European Union (EU)). This staggered production cycle allows for a steady, year-round supply of these niche crops to meet the high global demand. If South Africa strengthens the supply of these niche crops, this fosters diversification, thereby reducing reliance on a small number of producing regions, a key factor in stabilising prices and ensuring a sustainable supply all year round. From the rural economic growth and sustainability front, niche crops present a significant export potential. Income generated through these value chains makes a significant contribution towards economic growth, job creation, and enhancing welfare in rural areas where agriculture is the major source of livelihood. Through these value chains, the burgeoning youth unemployment can be addressed. Thus, further developing the value chains of niche crops is bound to uplift people out of poverty and improve their standard(s) of living. Moreover, promoting and supporting smallholder farmers through access to technology and

global markets is bound to enable them to create more equitable growth, increase productivity, and income.

Additionally, market access support would enable smallholder farmers to meet international standards, thereby improving their competitiveness and ensuring that they benefit from the global demand for exotic fruits. Some of the international standards farmers must comply with include Sanitary and Phytosanitary (SPS) measures, Global Good Agricultural Practices (GAP), and Fair-Trade certifications, among others.

From a food security and nutrition perspective, niche crops are typically in demand for their high levels of vitamins, minerals, and antioxidants, contributing to improved nutrition. Supporting the growth and trade of these crops can promote food security in the producing regions by diversifying diets and making nutritious food more accessible. In light of sustainability and climate change, various niche crops can be adapted to sustainable farming practices that conserve water and reduce pesticide use, while promoting diversity. Moreover, climate-smart practices can drive countries to have more climate-resilient agricultural systems.

Despite the above-mentioned benefits of further developing the value chains of niche crops, limited intelligence at both production and market levels has been generated to provide a deeper and comprehensive understanding of the opportunities these crops present for South Africa. This study, therefore, seeks to assess the production and trade performance of selected niche crops in South Africa.

1.2 Objectives of the study

Overall, the study aims to gain a deeper understanding of the performance of South Africa's selected niche fruits. Specifically, the study aims to address the following objectives:

i) Identify and profile the production of key exportable niche fruits by South Africa,
ii) Assess the trade performance of the identified niche fruits,
iii) Profile tariff and non-tariff barriers affecting South Africa's exports of the identified niche fruits to the European Union (EU),
iv) Map out strategies on how South Africa can improve its competitiveness in the EU market

1.3 Structure of the report

The rest of the report is organized as follows: Section 2 describes the methodological approach used to achieve the pursued objectives, while Section 3 presents the results and discussion. The conclusion and recommendations are presented in section 4 of the report.

2. Methodology

2.1. Selection of niche fruits

South Africa produces a variety of niche crops, including both fruits and vegetables. However, in this study, the focus was on fruits, given that they are the most traded, especially for export. Moreover, private firms have also invested substantially in niche fruits to tap into the staggered production cycle to capture the lucrative EU market. Although South Africa produces various niche fruits, this study purposively focused on five. That is, kiwi fruit, figs, pineapples, passion fruit, and pomegranates. The choice of these fruits was largely driven by the consistent availability of both production and trade-related data, keen interest expressed by private firms (business entities) actively involved in these value chains, and the rising demand within the EU market.

2.2. Data

To gain a deeper understanding of the performance of the five selected niche fruits, the study used both primary and secondary data. For each fruit, secondary data entailed production data extracted from the FAOSTAT statistical database of the Food and Agriculture Organization (FAO) of the United Nations (UN). In contrast, international trade-related data was obtained from both the Perishable Products Export Board (PPECB) and the Trade Map database of the International Trade Centre (ITC). The PPECB is South Africa's official but independent service provider of quality certification and cold chain management services for producers and exporters of perishable food products. Furthermore, data related to tariff and non-tariff barriers were extracted from the Market Access Map of the International Trade Centre (ITC). For the domestic market, data about the volume and revenue generated from trading in each of the selected niche fruits was obtained from the Department of Agriculture (DoA).

On the other hand, primary data was collected through key informant interviews with six representatives of the firms involved in trading these niche fruits. Notably, all the firms were based in the Western Cape province, renowned for exotic fruit production and export. A firm was purposively selected to participate in the study if it traded in at least one of the five selected niche fruits. Furthermore, whereas more than six firms actively participate in the value chains of the selected niche fruits, the research team only focused on those that expressed interest in the study and were available for informant interviews. A questionnaire was administered during the data collection process.

2.3. Data analysis

To identify and profile the production of key exportable niche fruits by South Africa, a two-phased approach was followed. First, to identify the key exportable niche fruits, representatives of the three collaborating institutions – the National Agricultural Marketing Council (NAMC), the Department of Agricultural Economics, Stellenbosch University (SU) and the European Union - Southern African Development Community Support Programme Economic Partnership Agreement's Support Programme (EU–SADC EPA) research team held meetings during an agreed upon criteria for selecting the five niche fruits was develop. The criteria used to select the five niche fruits are as follows:

i. Availability and accessibility to consistent production- and trade- related data, at least for a minimum of 8 years,
ii. The availability and willingness of firms producing or trading in one of the nice fruits to participate in the study,
iii. Expressed keen interest from stakeholders involved in these value chains, especially exporting to the EU market.

To profile the production of the identified niche fruits, simple descriptive analysis and graphical illustrations were used. Similarly, to assess the trade performance of the identified niche fruits, trend analysis at both the domestic fresh produce markets and export destinations, particularly the EU, was done. For the domestic market, data from

the 15 fresh produce markets were used, and the data relate to the volume supplied, revenue generated, and the prices of the niche fruits across markets. Markets that did not trade the selected fruits were excluded from the analysis. It is worthwhile noting that the key limitation of this analysis is that the Department of Agriculture (DoA) dataset does not include historical data for passion fruit. Data visualisation in the form of graphs was also used.

To profile tariff and non-tariff barriers affecting the five niche fruits in the EU, two approaches were used. First, ad valorem equivalents imposed on each niche fruit in the EU were compiled and compared with those of the major competing countries. Second, the non-tariff barriers were disaggregated by type, for instance, SPS regulations, technical barriers, and customs procedures, among others.

3. Results and discussion

3.1. Objective 1: Production of selected niche fruits in South Africa

3.1.1. Identified exportable niche fruits

This study identified five niche fruits that are exported to the EU, based on their export performance, market dynamics, and strategic relevance. The five niche fruits are kiwi fruit, figs, pineapples, passion fruit, and pomegranates. These fruits represent a growing segment of South Africa's horticultural export basket, characterised by relatively small export volumes but high monetary value, strong quality differentiation, and sensitivity to market access conditions. While some of these products, such as pineapples and figs, are more established in EU markets, others, including kiwi fruit, passion fruit, and pomegranates, are emerging niche fruits exhibiting rapid growth, reflecting both expanding demand and supply-side constraints. Collectively, the selected fruits capture heterogeneity in competitiveness and exposure to EU regulatory and non-tariff measures, making them particularly suitable for analyzing the opportunities and constraints shaping South Africa's niche fruit export performance in the EU market.

3.1.2. Production trend of passion fruit

Passion fruit is a valuable tropical and subtropical crop that is farmed for both fresh consumption and processing into juices, concentrates, and flavourings. Despite Passion fruit's small size in comparison to global commodities like bananas and mangoes, it plays an important part in the agricultural economy of select producing countries. Passionfruit, commonly known as granadillas, is often grown in moderate to subtropical temperatures. Passion fruit was initially cultivated in greenhouses as an ornamental plant because of its attractive flowers. By the mid-twentieth century, the crop had become naturalized across much of the tropical and subtropical world, including South Africa, Hawaii, California, Florida, Sri Lanka, and Fiji. The plant thrives in mild climates with consistent rainfall and is sensitive to temperature extremes. Frost and severe cold can permanently damage the vines, while excessively hot conditions tend to reduce fruit production (Khuwijitjaru et al, 2020). In many tropical and subtropical areas, passion fruit is grown for commercial purposes. However, databases of fruit production and trade statistics typically include passion fruit with other minor tropical fruits, making it challenging to obtain precise figures because passion fruit production is still very modest when compared to other main crops.

The Juice Products Association (JPA) estimates that at the start of the 2000s, the world produced about 640 000 tons of passion fruit (Gerbaud, 2013). Passion fruit was featured in a study on minor tropical fruit production released by the Food and Agriculture Organization (FAO) of the United Nations (Altendorf, 2018). According to the report, around 1.5 million tons of passion fruit were produced annually globally between 2015 and 2017. Brazil is unquestionably a major producer of passion fruit, but most of the fruit is sold domestically; the main exporters are Ecuador, Australia, and New Zealand. In 2017, Brazil's total output volume increased by around 3% year-on-year, reaching nearly 1 million tons. In June 2017, Brazil allowed the importation of passion fruit from Peru due to increased domestic demand. Peru has a large production area of about 12,000 ha in the highlands and jungles, making it a viable export option (FAO, 2018). Ecuador is reportedly the second-largest producer, selling mostly processed products and exporting very little fresh passion fruit. Colombia, which operates in both the fresh and processed markets, finishes in third (Gerbaud, 2013).

South Africa, Kenya, and other African countries also grow and export the fruit, but irregularly and in smaller quantities. Purple passion fruit is grown for fresh exports by most African countries. South Africa has progressively advanced the production of hybrid passion fruits, which currently account for most of the exports (Gerbaud, 2013). Data from the Agricultural Abstract presented in Figure 1 reveals that the production of passion fruits has been varying significantly year by year, with a drastic drop of 201% recorded between 2021/22 and 2023/24.

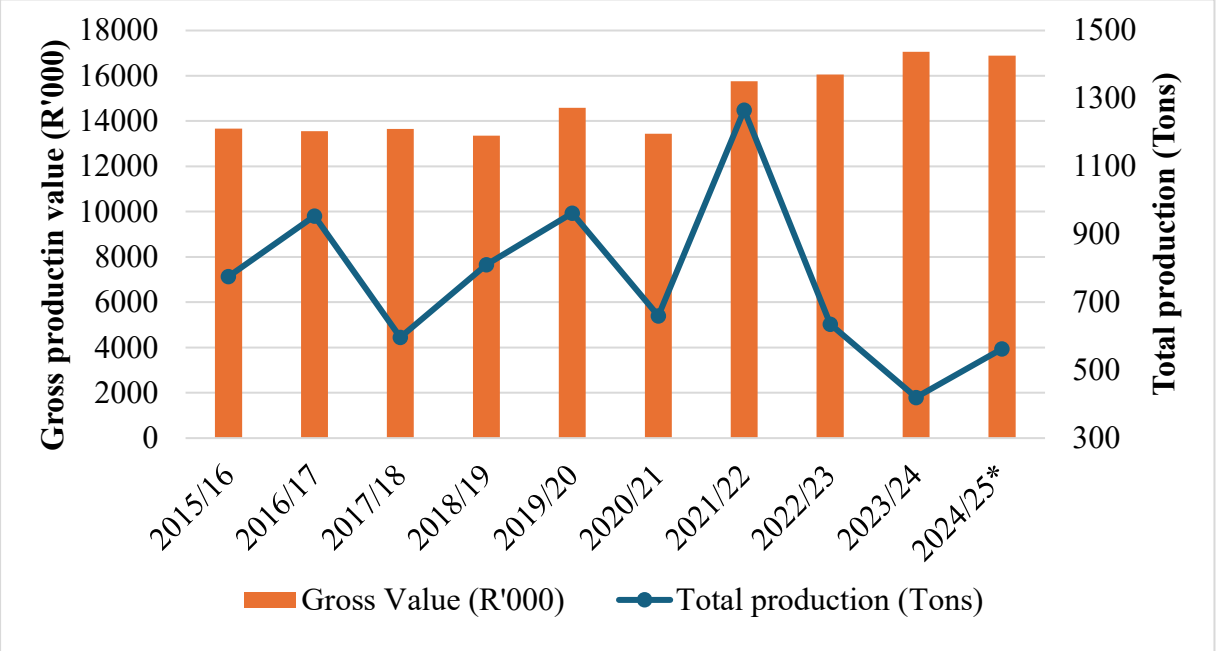

Figure 1: Passion fruit production and gross value in South Africa between 2015/16 and 2024/25 production cycles
Source: Department of Agriculture (DoA) (2026)

Despite the general decline in production, the gross production value (GPV) of passion fruits has been increasing over the years, with a maximum value of R17.06 million realized in the 2023/24 production cycle. Since 2015/16, the gross value has grown by 24%, and this is attributable to the increasing demand both locally and for export. It is important to note that data for the 2024/25 production cycle is preliminary, as reported in the abstract of agricultural statistics.

3.1.3. Production trend of pineapples

Figure 2 shows a trend analysis of South Africa's pineapple production and the GPV over the past decade from 2015 to 2024. In 2024, South Africa produced an estimated

127 102 tons of pineapples, with a GPV of approximately R525.6 million. Generally, pineapple production increased significantly by about 32% between 2015 and 2024, although in 2024, a year-on-year (y/y) decrease of approximately 5% was recorded. The observed decline may be attributable to multiple factors, including climatic stressors to which pineapples are very sensitive, the high cost of inputs, which constrain productivity, and structural and biological constraints. It is important to note that pineapples are multi-seasonal crops, implying that any output in each season depends on the prior planting cycle or any disruptions, e.g., input shortages encountered during production.

On the other hand, the GPV for pineapple has more than doubled, increasing by about 136% during the period under consideration. According to the 2017 commercial agriculture census, there are currently two provinces that dominate pineapple production, i.e., Eastern Cape and KwaZulu-Natal. In 2017, the Eastern Cape accounted for a share of approximately 83% of South Africa's pineapple production, while KwaZulu-Natal produced about 17% (Stats SA, 2017). Most of the pineapple produced in South Africa is processed, while a small portion is sold through National Fresh Produce Markets (NFPMs), and the excess produce is exported. In 2024, approximately 80% of pineapples produced in South Africa were processed, 17% sold in NFPMs, and about 14% exported (DoA, 2025).

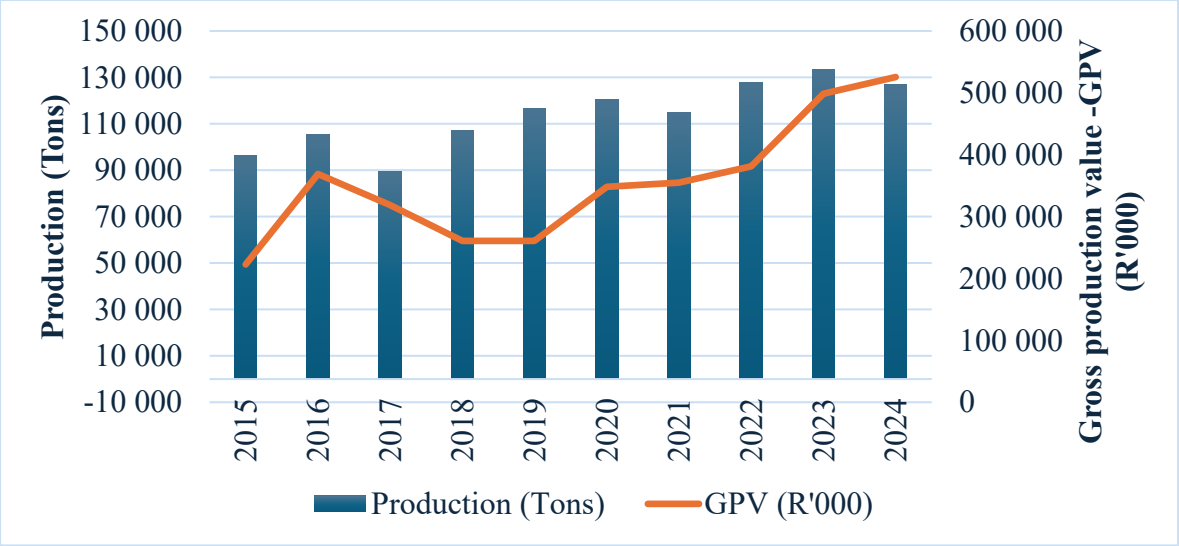

Figure 2: South Africa's pineapple production and gross production value
Source: Department of Agriculture (DoA) (2025)

3.1.4. Production trend of kiwi fruit

Climate change, a pressing global concern, poses significant challenges to agricultural systems worldwide. Among the myriad impacts of climate change, the cultivation of kiwifruit trees is faced with multifaceted challenges (Rajan et al., 2024). Recent developments in kiwi fruit production around the world have shown an increasing trend in the last decade (2013-2023), as illustrated by Figure 3. There was a slight decrease in production for the 2023 year due to several factors, including market dynamics, climatic changes, and geopolitical-tension-related issues. Approximately 4.4 million tons of kiwis were produced worldwide in 2023, of which China was the leading producer, with a share of approximately 55% of the total global production, followed by New Zealand, Italy, Greece, Iran, and Chile (FAOSTAT, 2025).

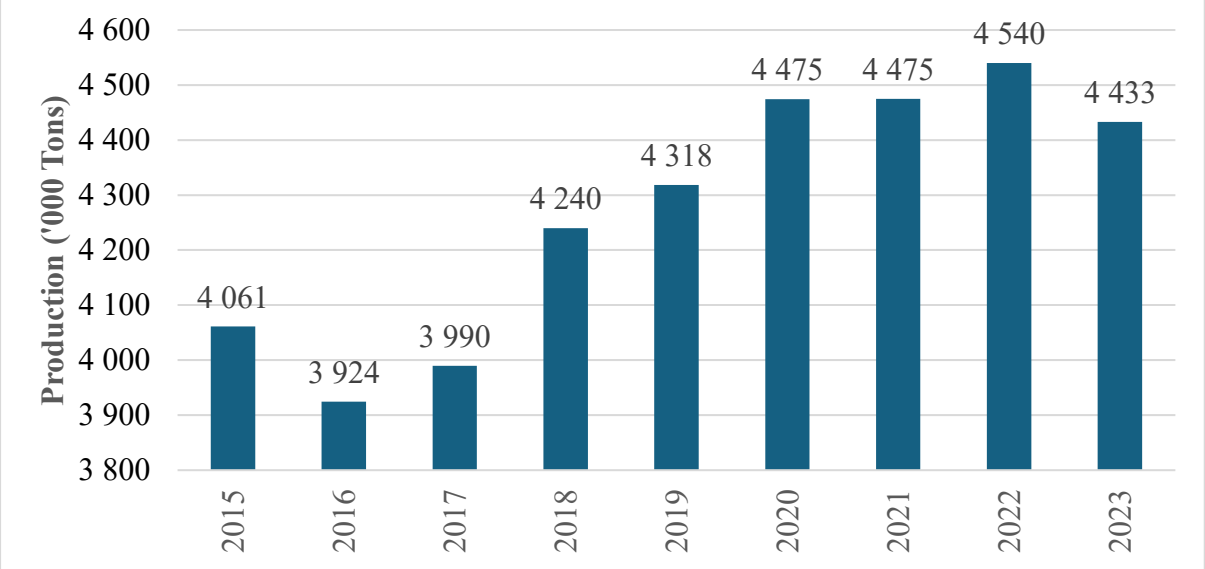

Figure 3: Global kiwi production trends
***Source**: FAOSTAT, 2025*

The observed global trend in demand from both domestic and foreign markets, along with the development of new kiwifruit cultivars that are more suited to the climate conditions, are the main drivers of this increase. Notably, South Africa's kiwifruit production industry is going through a major transition, changing from a niche farming endeavour to a more structured and competitive horticultural sector (SAKIWI, 2025). Despite its modest size of approximately 320 hectares, which is currently being

cultivated, producers and industry stakeholders are working together to increase the area's production to 1,500–2,000 hectares in the near future (SAKIWI, 2025).

Nonetheless, South Africa’s subtropical climate is especially suitable for growing kiwifruit variants with yellow and red flesh, which require less freezing than the traditional green kiwifruit cultivars (BFAP,2021). These cultivars are positioned for premium market segments worldwide due to their increased sweetness and yields (TKC, 2025). KwaZulu-Natal, Limpopo, Mpumalanga, and the Western Cape are among the provinces with cultivation areas; the latter has seen a substantial rise in new plantings recently (SAKIWI, 2025).

From an economic perspective, the South African kiwifruit sector has experienced consistent value growth averaging approximately 6.7% per annum over the past decade, with volume growth at a more moderate rate of about 1.2% (BFAP, 2021). This indicates strong potential for rapid expansion in the medium to long term, due to, but not limited to, extension of cultivation areas, and strategic exploitation of the Southern Hemisphere's harvest window from February to April. The seasonal advantage enables South Africa to supply fresh kiwifruit during periods when production in other key exporting countries is minimal.

3.1.5. Production trend of figs

The annual production of figs in South Africa during the period under review is shown in tonnes in Figure 4. The production of figs in South Africa has been declining since 2015/16 with an average of 2.003 million tons per annum. However, recent data from DoA (2026) suggest a drastic increase in fig production of about 19% from 1783 tons recorded in the 2023/24 production cycle to the preliminary volume of 2115 tons in 2024/25. However, the GPV exhibits great variations over the years, with the lowest (R53.8 million) recorded in the 2017/18 production cycle, followed by R56.7 million in 2022/23 season. The cycle with the highest GPV is so far 2024/25, estimated at R105.3 million, yet the second largest GPV (R73.6 million) was recorded in 2015/16.

Unlike other niche crops considered in this study, fig production trends do not necessarily shift with the GPV, suggesting that prices are relatively stable and possibly due to the demand for the fruit. For instance, based on basic economic theory, one would have expected to see a drastic increase in GPV between 2020/21 and 2023/24

as production greatly slumped. The rise in GPV would be driven by the high demand, translating into higher prices, but that is not the case in the case of South Africa. This implies that in South Africa, figs are not as important as the other niche fruits considered in this study.

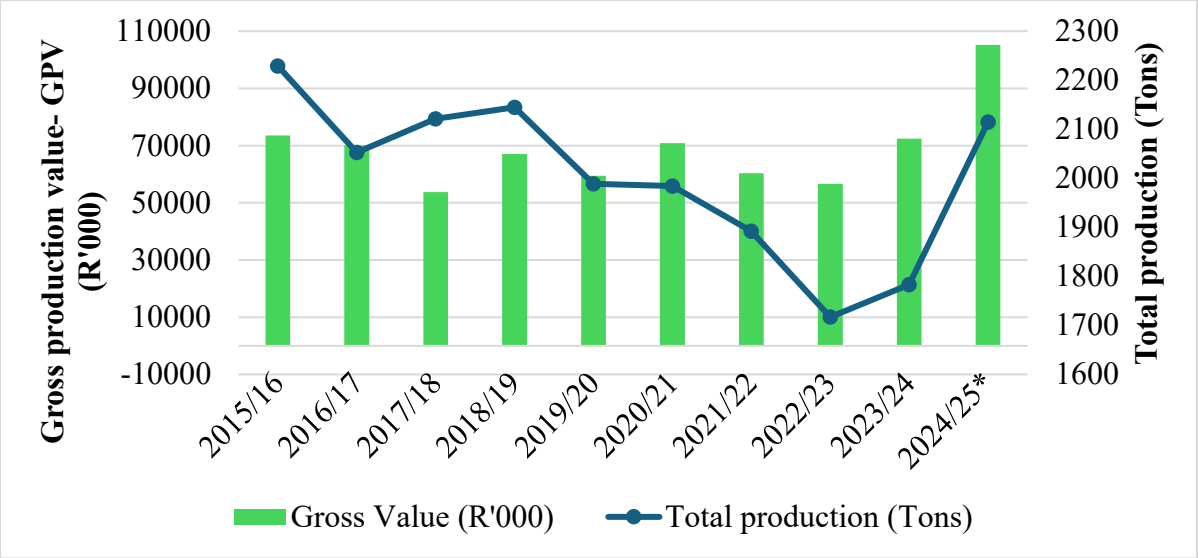

Figure 4: South Africa's fig production and gross production value
Source: *DoA, 2025*

3.1.6. Production trend of pomegranates

Currently, South Africa's pomegranate production spans over 1 167 hectares (ha) of total area planted by about 66 growers across the country (POMASA, 2024). In addition, most pomegranates are produced in the Western Cape, which accounts for 79% of total national production, followed by Northern Cape (11%), Limpopo (9%), KwaZulu-Natal (1%), and less than 1% from the Eastern Cape. South Africa's pomegranates are mainly grown for the export market, mostly processed exports, which account for about 46% of total production, while fresh pomegranate exports account for a 16% share. On the other hand, fresh pomegranates account for only 1% of the domestic market, while processed pomegranates account for approximately 27% of the domestic market. Whereas the DoA (2026) provides some production-related data for pomegranates, the data is aggregated as "other summer fruit", rendering difficult to accurately estimate the production quantities. Thus, Figure 5 shows the trends in total area planted of pomegranate in South Africa between 2015 and 2023.

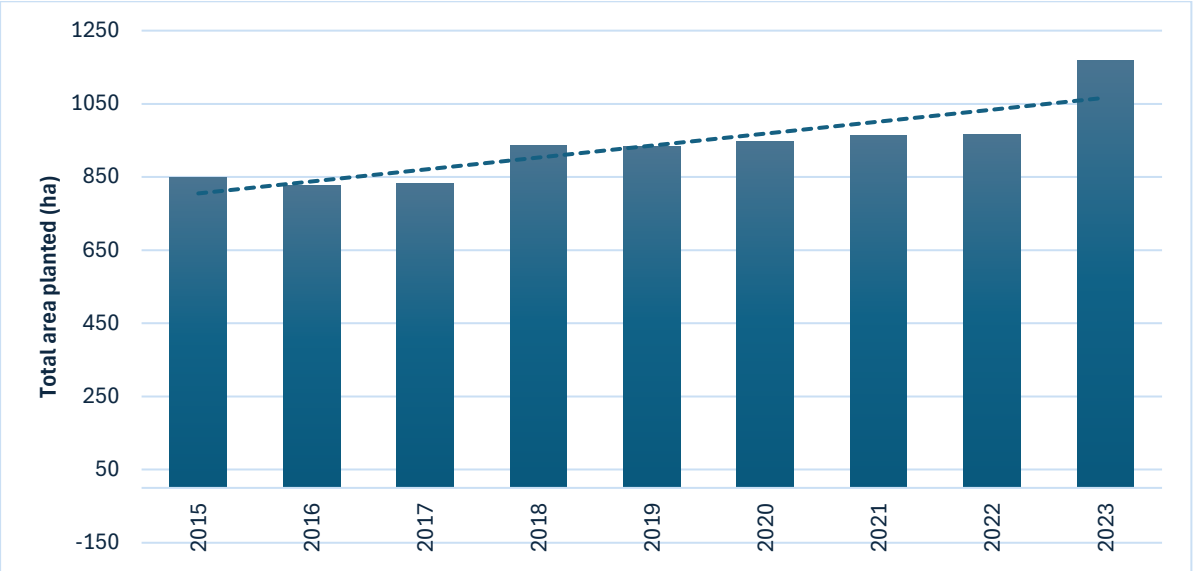

Figure 5: Total area planted of pomegranate in South Africa between 2015 and 2023
Source: POMASA, 2024

At the production phase, industry stakeholders who participated in the study reckoned that since value chains for niche crops are not accorded the needed attention in South Africa, there is a challenge of a very expensive process required to test and then register chemicals that meet EU regulations. For the few companies that undertake this task, it was reported that the process is unnecessarily long, with significant uncertainty about when the chemical(s) will be tested and registered by the relevant government office. This inherently discourages chemical companies, especially those that manufacture pesticides, from investing in registering these chemicals. Limited access to registered chemicals recognized by the EU was highlighted as a limiting factor to the competitiveness of these niche fruits in the EU.

3.2. Objective 2: Trade performance of the identified niche fruits

3.2.1. Domestic market sales by revenue and volume through fresh produce markets

This section examines trends in producer supply, revenue, and average prices over the past nine years, focusing on figs, kiwifruit, pineapples, pomegranates, and passion fruit. Due to data limitations for passion fruits, no analysis at the domestic market level was done. As shown in Table 1, the trade of the fruits in question across fresh produce markets in 2024 generated a total revenue of R287.34 million from 21 969.6 tons, with an average price of approximately R13 078 per ton. Pineapples dominated the market,

contributing 78% of revenue and 94% of total volume. At the same time, kiwifruit, pomegranates, and figs accounted for smaller shares but commanded higher prices per ton, positioning them as premium or niche fruits. Among the markets, Johannesburg, Tshwane, Cape Town, and Durban control about 93% of total revenue and volume, with Johannesburg alone accounting for more than half of the revenue. This confirms that the trading of niche fruits is concentrated in large urban fresh produce markets. Smaller markets collectively accounted for less than 5% of revenue and just over 3% of the total volume, implying that they are playing a marginal role, with pineapples being the most traded. The analysis suggests that while pineapples drive bulk supply, fruits such as kiwifruit and pomegranates offer opportunities for diversification into high-value segments, provided production and market access can be scaled up.

Table 1: Revenue (Rands) and Volume (Tons) of selected fruits in 2024

Revenue (R) generated from the supply of listed fruits to different Fresh Produce Markets in					
Market	**Figs**	**Kiwifruit**	**Pineapples**	**Pomegranate**	**Total**
Johannesburg (JHB)	2 130	2 808 8201	108 831	7540812.34	146590830.
Tshwane (TSH)	1 147 943	7 820 244	42368167.87	1055582.2	52391937.1
Cape Town (CPT)	2 056 299	7 243 196	33652562.7	697270	43649327.7
Durban (DBN)	2 095 53	3 591 327	25165716	367759	29334355.0
East London (EL)	0	48 044	4705467	2400	4755911.0
Springs (SPR)	0	6 064	3445034.82	18385	3469483.8
Pietermaritzburg	0	30 928	1649757	109993	1790677.7
Klerksdorp (KDP)	0	19 075	1651645	19728	1690448.0
Welkom (WLK)	0	0	1386970	4510	1391480.0
Port Elizabeth (PE)	2190	0	1375789	0	1377979.0
Kimberley (KIM)	0	0	778495	0	778495.0
George (GRG)	0	1590	114737	5105	121432.0
Witbank (WBK)	0	0	0	400	400.0
Total	**5546333.4**	**46848668.**	**225125810.1**	**9821944.5**	**287342756.**
Volume (Ton) supplied to different Fresh Produce Markets in 2024					
Market	**Figs**	**Kiwifruit**	**Pineapples**	**Pomegranate**	**Total**
Johannesburg (JHB)	30.5	501.8	10145.7	167.9	10845.9
Tshwane (TSH)	41.9	136.6	3798.0	39.6	4016.2
Cape Town (CPT)	96.3	135.3	2641.5	42.7	2915.9
Durban (DBN)	4.6	77.7	2441.5	17.6	2541.4
East London (EL)		0.9	679.4	0.1	680.3
Springs (SPR)		0.2	291.4	1.2	292.8
Port Elizabeth (PE)	0.07		193.3		193.3
Pietermaritzburg		0.8	140.9	6.9	148.5
Klerksdorp (KDP)		1.1	1334.0	1.9	136.9
Welkom (WLK)			116.3	1.4	117.6
Kimberley (KIM)			74.3		74.3
George (GRG)		0.1	6.2	0.4	6.4
Witbank (WBK)				0.04	0.04
Total	**173.6**	**854.3**	**20662.3**	**279.4**	**21969.6**

3.2.1.1. Revenue trends

Deeper analysis of revenue trends for figs, kiwifruit, pomegranates, and pineapples across fresh produce markets between 2015 and 2024 reveals the strong dominance of pineapples. As shown in Figure 6, pineapples consistently generated the highest revenue, peaking at R241 million in 2020 and maintaining high performance with R231 million in 2024. This dominance reflects both their increasing production in volume and wide consumer demand. The sharp increase in the revenue derived from pineapples in 2020 is attributable to a massive surge in demand during the Covid-19 era, when people resorted to home-brewing of alcoholic pineapple following the government-imposed ban on selling alcoholic beverages (Farmer's Weekly, 2020; Sikuka, 2020). At the time (April), the peak price reached R250 for an 8.5kg box of 10 pineapples which was by far higher than the price range of R50 – R60 charged in 2018 and 2019. By August, pineapple prices had tripled to about R15.7/kg (Sikuka, 2020).

In comparison, kiwifruit exhibits a steady revenue growth, rising from R25 million in 2015 to over R47 million in 2024, positioning it as the second most significant contributor among the selected fruits. Pomegranates have demonstrated moderate but consistent gains, stabilising between R7 and R9 million in recent years, while figs remain the smallest contributor but have grown gradually from R2.5 million in 2015 to R5.6 million in 2024. This trend indicates that the market, which is heavily concentrated in pineapples, is becoming increasingly diversified through the growth in sales of niche fruits, such as kiwifruit and pomegranates. These shifts present an opportunity for farmers and traders to expand into higher-value fruits, in response to shifting consumer preferences. While figs remain relatively small in scale, their slow but stable upward trajectory signals potential for more gradual market development.

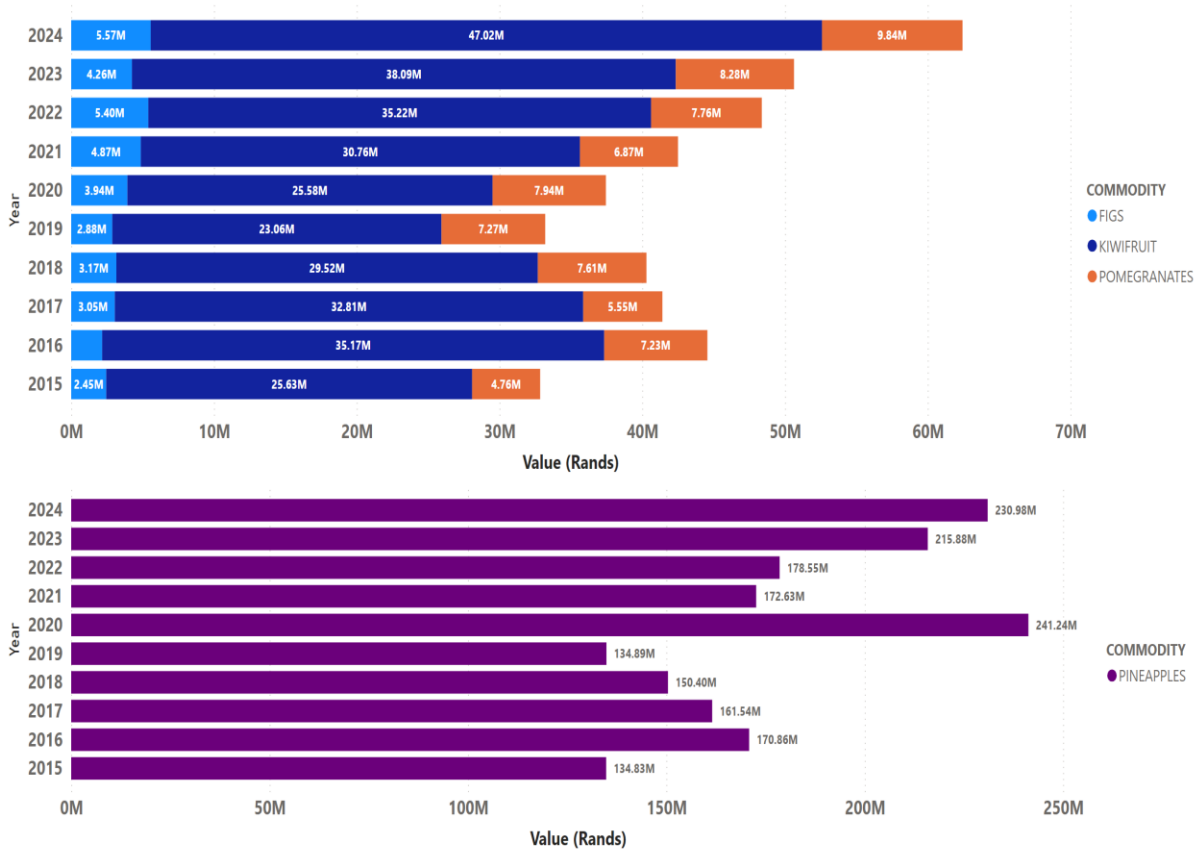

Figure 6: Revenue (Rands) generated over the years
Source: *DoA, 2025*

3.2.1.2. Volume trends

The trends in volume presented in Figure 7 show that pineapples clearly dominate the market, with the lowest quantity of about 19 900 tons traded in 2016 yet the highest was approximately 26 630 tons in 2018. In recent years, volumes have stabilised between 21 000 and 23 600 tons, reflecting a well-established supply chain and strong market demand. In contrast, niche fruits such as kiwifruit, pomegranates, and figs are traded at much smaller volumes, with annual volumes below 1 100 tons for kiwifruit, roughly 280 to 470 tons for pomegranates, and 100 to 245 tons for figs. Kiwi fruit has the largest share among these niche fruits, showing occasional peaks, notably in 2016 and 2021, while figs consistently contribute the smallest volumes.

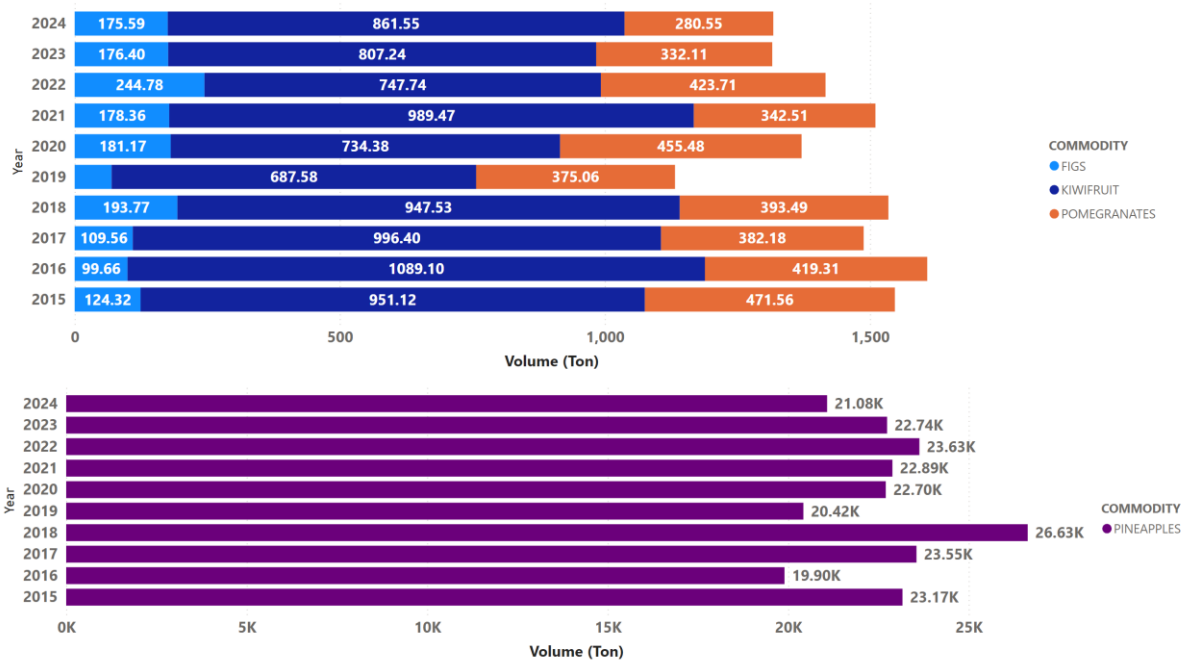

Figure 7: Volume supplied over the years
Source: *DoA, 2025*

3.2.1.3. Average price trends

As illustrated in Figure 8, kiwifruit, pineapples, and pomegranates reveal significant year-on-year price fluctuations between 2015 and 2024, without a consistent long-term trend for any single commodity. However, the total combined price peaked dramatically in 2021 and has since declined, partially recovering. Figs consistently had the highest price per ton, experiencing extreme volatility with a significant decrease in 2020 and a peak in 2021, before stabilising in recent years between R50 000 and R60 000 per ton. Kiwifruit also exhibited rapid growth, reaching a peak in 2019 before experiencing a sharp decline in the subsequent years. Notably, the price has recovered since 2022. Pineapple prices were highly erratic, with their own peak in 2021, while pomegranates maintained the most relative stability with a minor upward trend over the last four years. When the prices of pineapple, pomegranate, and kiwi are compared between 2015 and 2024, it is evident that they doubled.

The initial economic disruption caused by the COVID-19 pandemic is clear in the 2020 data. Following a peak in total prices in 2019, the market experienced a sharp downturn, with total prices plummeting. This can be attributed to the widespread global lockdowns which disrupted supply chains, reduced consumer purchasing power for non-essential items, and caused logistics challenges for perishable goods. However,

a dramatic reversal occurred in 2021, with the total price reaching an all-time high. This surge was particularly driven by a massive spike in the price of figs from R35.4 thousand per ton to R105.7 thousand per ton. representing a market rebound. This was driven by the high demand and continued supply chain bottlenecks, which created shortages, thereby hiking prices.

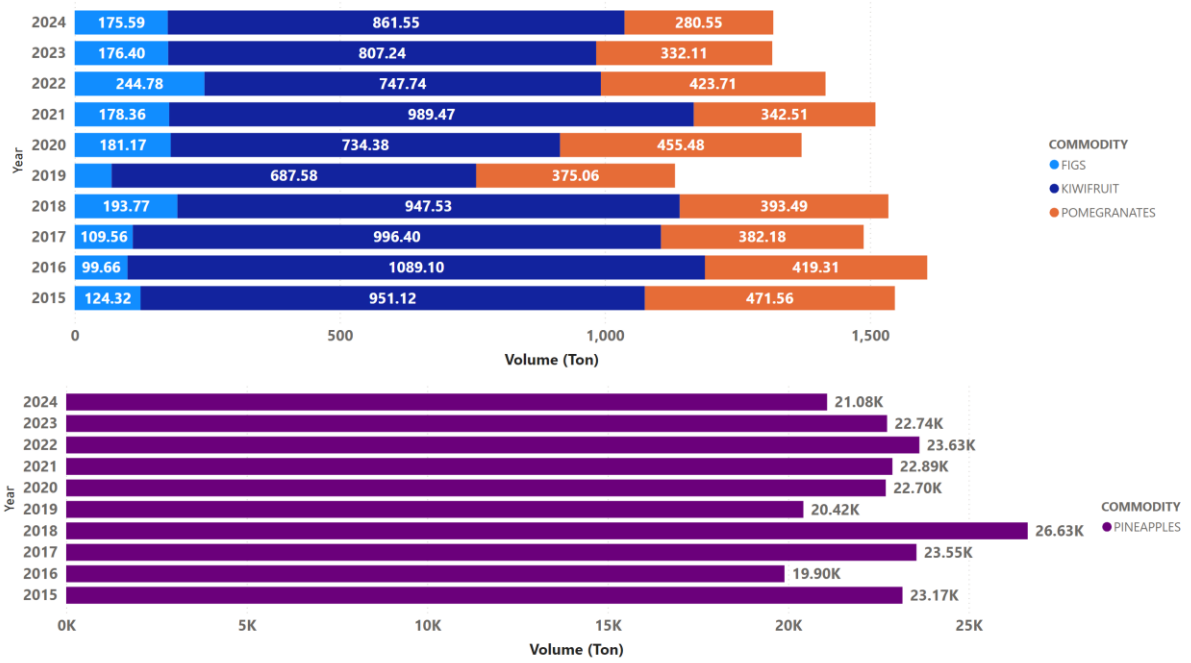

Figure 8: Average prices (Rand/Ton) of selected fruits over the years at the fresh produce markets
Source: *DoA, 2025*

3.2.2. Exports destined for the EU

Figure 9 shows that the export of kiwi fruit and pineapples to the EU has grown significantly since 2015, with kiwi fruit exports increasing from US$3 000 in 2015 to US$3.5 million in 2024.

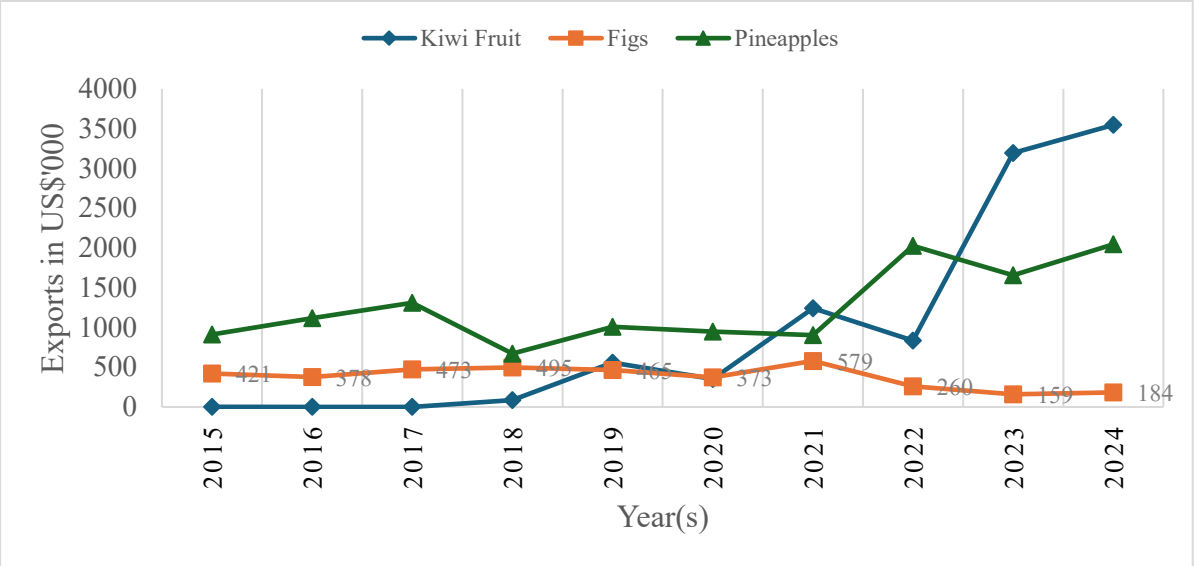

Figure 9: Export volumes of kiwi fruit, figs, and pineapples exported to the EU
Source: *Trade Map, 2026*

Similarly, pineapple exports also grew from US$912 000 to US$2.05 million during this period. On the contrary, exports of figs to the EU remained relatively low and further declined in value by approximately 51% to US$184 000 in 2024.

Figure 10 shows South Africa's export volumes of passion fruit and pomegranates to the EU between 2020 and 2024. Both passion fruit and pomegranate exports declined significantly during this period, by 46% and 94%, respectively. In 2020, South Africa exported approximately 500.1 tons of passion fruit and a maximum of about 1052.3 tons in 2022 before decreasing to 268.2tons in 2024. On the other hand, pomegranate export volumes declined sharply between 2020 and 2021 to about 2.1 tons and declined further to 1.7tons in 2024.

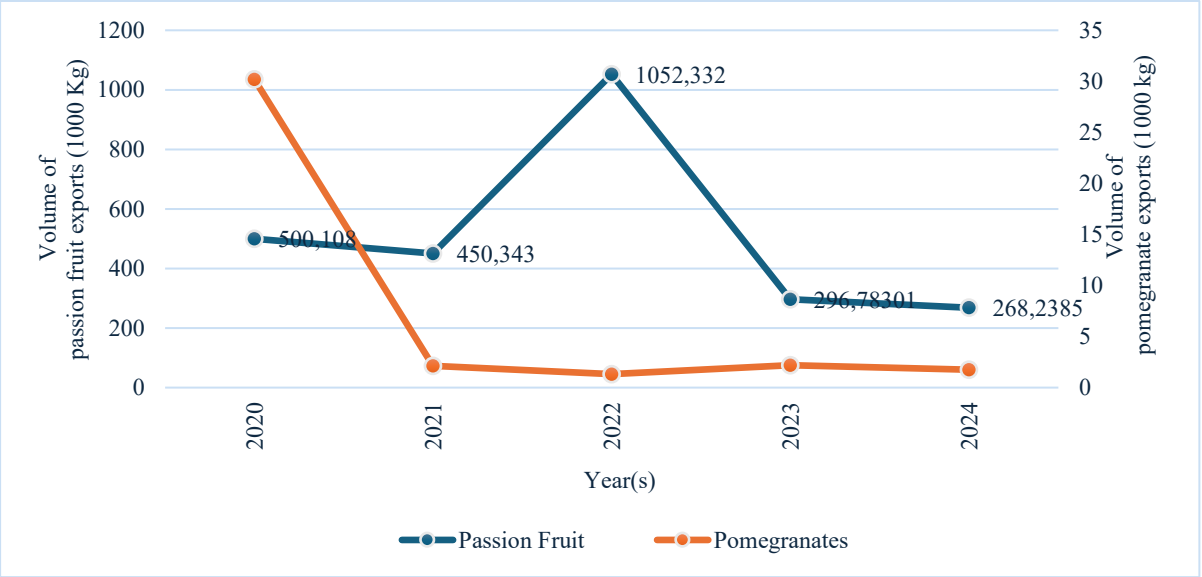

Figure 10: Export volumes of selected niche fruits exported to the EU
Source: *PPECB, 2025*

Based on the informant discussions, for example, with the Pomegranate Organization of South Africa (POMOSA), the decline in exports to the EU is attributable to the stringent sanitary and Phytosanitary (SPS) measures, which both producers and exporters struggle to meet, given the exorbitantly high associated costs. In detail, it was reported that since value chains for niche crops are not accorded much attention in South Africa, the biggest challenge is the lengthy and very expensive process required to test and then register chemicals that meet EU regulations. For the few companies that endeavour to take on this task, the process is unnecessarily long, and in many cases, there is much uncertainty when the testing and registration of the chemical(s) would be finalized by the concerned government office. This inherently discourages chemical companies, especially those that manufacture pesticides, from investing in registering these chemicals. Furthermore, compliance with the EU green deal requirements was also noted as a big bottleneck to access this lucrative market. For the passion fruits, it was reported that the different retailers have varying maximum residue requirements (MRLs), which makes it challenging for exports to a diversity of options within the same market.

3.2.2.1. Key export destinations for the selected products within the EU

Table 2 presents the key EU destinations for selected niche fruit exports, expressed as percentage shares of total export value or volume in 2024. The Netherlands and Germany are currently the dominant export destinations for the five niche fruits

exported to the EU. According to Trade Map (2026), South Africa exported kiwi fruits worth about US$3.55 million in 2024, followed by pineapples (about US$2.05 million), and figs (about US$184 000). Kiwi fruit exports destined for the EU mostly went to the Netherlands, which accounts for about 82% a share of total kiwi fruit exports, followed by France (10%), Italy (7%), and Spain (1%).

For figs, the Netherlands also emerged as a major destination in 2024, accounting for a share of 48%, followed by France (30%), Germany (16%), and Lithuania (5%). Pineapples are mostly destined for Germany (49%), followed by the Netherlands (30%), France (21%), while Greece and Italy each command a share of less than 1%.

Table 2: Key export destinations for the selected products within the EU in 2024

Kiwi Fruit	% Share	Figs	% Share	Pineapples	% Share	Pomegranates	% Share	Passion Fruit	% Share
Netherlands	82%	Netherlands	48%	Germany	49%	Netherlands	44%	Germany	87%
France	10%	France	30%	Netherlands	30%	Germany	30%	Netherlands	5%
Italy	7%	Germany	16%	France	21%	Spain	22%	Belgium	3%
Spain	1%	Lithuania	5%	Greece	<1%	Portugal	2%	Spain	2%
				Italy	<1%	France	1%	France	1%
								Switzerland	1%

Source: Trade Map, 2026; PPECB, 2025

Data from Perishable Products Export Control Board (PPECB) shows that South Africa exported approximately 268.24 tons of passion fruits and approximately 1.75tons of pomegranates. For pomegranates, the Netherlands also prevails as the major market for South African exports, accounting for a share of 44%, followed by Germany (30%), Spain (22%), Portugal (2%), and France (1%). For passion fruit, Germany is the dominant market with a share of 87%, followed by the Netherlands (5%), Belgium (3%), and Spain (2%). France and Switzerland each account to a share of about 1% of the total export volumes destined for the EU.

3.2.2.2. Market share in the EU and competitor analysis

This section presents the market share and competitor analysis of the top two selected South African markets in the EU for three fruits (Kiwi, figs, and pineapples). According to Trade Map, data for pomegranates and passion fruits is aggregated with other tropical fruits, rendering it difficult to establish product-specific competitors in the

Netherlands and Germany. Therefore, competitor analysis for pomegranates and passion fruits is excluded from this section.

Table 3 illustrates the market share and competitor analysis of kiwi exporters to the Netherlands and France. The competitor landscape for South Africa's kiwi exports differs markedly between the Netherlands and France. In the Netherlands, the market is dominated by Belgium, which accounts for nearly 58% of the Netherlands' total imports, followed by Chile and Germany, each accounting for 14.1% of the market share. Although South Africa's market share remains marginal (0.6%), its exports to the Netherlands recorded a strong growth rate of 68% between 2020 and 2024, indicating emerging competitiveness in a market characterized by zero tariffs despite relatively high non-tariff measures (NTMs).

In contrast, the French market is dominated by New Zealand, accounting for 59.2% share, despite being subjected to an 8.8% tariff rate, while Italy and Greece serve as key intra-EU suppliers. South Africa holds a 1.6% market share in France, but with an exceptionally rapid growth of 108% between 2020 and 2024. This suggests that there is increasing market penetration, albeit from a low base, in a competitive environment dominated by well-established producers from the Southern Hemisphere and the EU, subjected to the same NTM requirements as all the other suppliers.

Table 3: Market share and competitor analysis of kiwi exporters to the Netherlands and France

Exporters of kiwi to Netherlands					Exporters of kiwi to France				
Key suppliers	**% Share in 2024**	**% Growth 2020-2024**	**Ave tariff**	**NTMs**	**Key suppliers**	**% Share in 2024**	**% Growth 2020-2024**	**Ave tariff**	**NTMs**
Belgium	57.9	-1	0	40	New Zealand	59.2	2	8.8	40
Chile	14.1	6	0	40	Italy	18.1	-1	0	40
Germany	14.1	8	0	40	Greece	3.4	5	0	40
Greece	5.6	22	0	40	Chile	3.3	-1	0	40
Italy	5.4	-2	0	40	Portugal	2.8	15	0	40
France	0.8	15	0	40	Belgium	2.3	-2	0	40
South Africa	0.6	68	0	40	South Africa	1.6	108	0	40

Source: Trade Map, 2026

The competitive structure of fig exports to the Netherlands and France is dominated by Türkiye, which accounts for a large share of imports by both markets (see Table 4). In the Netherlands, Türkiye accounts for 44.5% of imports, followed by Brazil (16.4%) and Germany (11.4%), indicating a mix of non-EU and intra-EU suppliers. While most suppliers face zero tariffs, Brazil is subject to a 6.8% tariff rate, suggesting some degree of preference erosion relative to competitors whose produce is duty-free. South Africa's footprint for the fig market in the Netherlands is minimal (0.3%) and has declined by 17% over the 2020–2024 period. The observed trend suggests that South Africa's figs exhibit limited competitiveness in the Netherlands relative to rapidly expanding suppliers such as Austria, which has seen growth of approximately 70% over the past five years.

Table 4: Market share and competitor analysis of kiwi exporters to the Netherlands and France

Exporters of Figs to the Netherlands					Exporters of Figs to France				
	% Share in 2024	% Growth 2020-2024	Ave tariff	NTMs		% Share in 2024	% Growth 2020-2024	Ave tariff	NTMs
Türkiye	44.5	5	0	37	Türkiye	71.3	-1	0	37
Brazil	16.4	8	6,8	37	Spain	18.8	-3	0	37
Germany	11.4	2	0	37	Italy	5.6	-12	0	37
Peru	10.8	4	0	37	Peru	1.3	4	0	37
Spain	6.5	13	0	37	Germany	0.5	-21	0	37
Austria	4.9	70	0	37	Greece	0.4	-10	0	37
South Africa	0,3	-17	0	37	South Africa	0.1	-28	0	37

Source: Trade Map, 2026

In France, the market is highly concentrated, with Türkiye supplying over 71% of fig imports, underscoring its strong comparative advantage and established market position. Spain (18.8%) and Italy (5.6%) follow as key intra-EU competitors with South Africa, although most suppliers have experienced negative growth over the period. South Africa's share in France's figs imports remains negligible (0.1%) and has contracted sharply between 2020 and 2024 by 28%, despite being subjected to a zero-tariff rate (duty-free) as opposed to other competitors. Overall, the analysis suggests that South Africa faces intense competition predominantly from Mediterranean

producers, particularly Türkiye. Thus, South Africa remains weakly positioned in both markets, highlighting structural competitiveness and market access challenges into the EU for figs.

Table 5 illustrates the market share and competitor analysis of pineapple exports to Germany and the Netherlands. Both Germany and the Netherlands are dominated by Costa Rica, which supplied over 70% of total imports to each country in 2024. This reflects Costa Rica's strong comparative advantage and existing supply relationships within the EU market.

Table 5: Market share and competitor analysis of pineapple exporters to Germany and the Netherlands

Exporters of Pineapples to Germany					Exporters of Pineapples to the Netherlands				
	% Share in 2024	% Growth 2020-2024	Ave tariff	NTMs		% Share in 2024	% Growth 2020-2024	Ave tariff	NTMs
Costa Rica	70.3	6	0	40	Costa Rica	71	-4	0	40
Netherlands	11.9	4	0	40	Belgium	7.7	-4	0	40
Austria	2.7	126	0	40	Germany	7.7	18	0	40
USA	2.4	167	5.8	40	France	4.1	40	0	40
Ecuador	2.3	-11	0	40	Ecuador	2.8	1	0	40
Ghana	2.1	-1	0	40	Spain	2.0	10	0	40
South Africa	0.9	-10	0	40	South Africa	0.4	3	0	40

Source: Trade Map, 2026

In Germany, secondary suppliers include the Netherlands (11.9%) and a few rapidly growing suppliers such as Austria and the USA, although their market shares are still small. Notably, despite facing a relatively high tariff rate of 5.8%, unlike the other suppliers to Germany, the USA exhibits a significant growth in pineapple exports of 167% between 2020 and 2024. South Africa's market share in Germany remains small (0.9%) and has declined by 10% over the 2020–2024 period, suggesting weakening competitiveness relative to both the dominant and new but fast-growing suppliers (Austria & the USA).

A similar structure is observed in the Netherlands, where Costa Rica again accounts for 71% of imports. Belgium and Germany follow as key intra-EU suppliers, while France shows relatively strong growth from a smaller base. South Africa's presence in the Netherlands market is marginal (0.4% market share), although exports recorded

a modest growth of 3% over the 2020-2024 period. Overall, despite the duty-free access (zero tariffs) for most suppliers of pineapples, the uniformly high NTMs (40) imposed, and the entrenched dominance of Costa Rica, suggest that South Africa faces significant competitive constraints in the EU's pineapple market, with limited scope for expansion without targeted competitiveness and market access interventions.

3.2.2.3. Export-related challenges

One of the most pervasive challenges undermining the ability of South Africa's niche crops to effectively compete in the EU is the stringent Sanitary and Phytosanitary (SPS) measures and other non-tariff barriers (NTBs) enforced by the EU. While these measures originate from legitimate policy objectives, such as protecting human and plant health, their cumulative effect is to erect significant trade barriers when exporters are required to implement complex, resource-intensive compliance mechanisms without corresponding support systems at the production end. This is particularly problematic for perishable niche crops with narrow quality margins, limited production volumes, and small exporter capacity.

The EU's SPS regime incorporates rigorous requirements regarding food safety, plant health, pesticide residues (including Maximum Residue Limits), and environmental sustainability, often extending beyond basic product safety to complex certification protocols, pre-shipment inspections, cold treatments, detailed traceability documentation, and frequent audits by European authorities. Compliance with these standards frequently necessitates substantial investments in technology, testing infrastructure, regulatory compliance expertise, and documentation systems, which constitute costs that are disproportionately borne by small or emerging exporting firms that characterize several niche fruit value chains.

When exporters fail to meet the EU criteria, shipments can be rejected at the point of entry, detained for additional testing, or subjected to costly remedial treatments, resulting in quality deterioration of highly perishable fruits such as figs and passion fruit. These challenges elevate both fixed and variable export costs and reduce price competitiveness. Literature on agricultural trade and non-tariff measures consistently

highlights that SPS and technical barriers to trade function as trade barriers when they are complex, unpredictable, or disproportionately difficult for exporters in developing countries to satisfy. Non-tariff measures translate into high costs that significantly deter export entry and can reduce trade efficiency. Studies suggest that NTMs can have greater distortionary effects on agricultural trade than tariffs historically have had, especially in sectors where tariffs have been substantially liberalized, yet regulatory compliance remains costly and procedural.

A striking illustration of how SPS measures can restrict trade is found in the ongoing dispute between South African producers and the EU, regarding phytosanitary controls for pests such as False Codling Moth (FCM) and Citrus Black Spot (CBS). Although this specific dispute relates directly to citrus, it is one of South Africa's most significant agricultural exports to Europe, illustrating broader structural issues that niche crop exporters also face. The citrus case underscores broader dynamics that also affect other horticultural exports, including the high compliance costs associated with SPS measures, technical trade barriers, and the asymmetric regulatory burden. While tariffs have largely been reduced under agreements such as the SADC-EU Economic Partnership Agreement (EPA), which grants preferential access to EU markets, NTMs such as quality standards, labelling requirements, inspection procedures, and other SPS measures remain pervasive and costly to navigate.

These barriers are particularly onerous for exporters of niche crops because they often lack scale, formal quality assurance systems, and financial buffers when compared to larger sectors. This means that compliance costs represent a larger proportion of total export revenue. Additionally, the cost burden and inefficiency associated with NTMs often result in slower growth, hindering new market entrants and suppressing the diversification of export flows, particularly when exporters are concentrated in regions of the EU with lower growth in import demand. Without strategic diversification into higher-growth EU markets or competitive product differentiation, South African exporters risk stagnation in traditional market destinations while forfeiting opportunities in the evolving consumption of niche fruits within the EU bloc.

Even after compliance is achieved, South African niche fruit exporters are confronted with intense global competition. Producers within the EU benefit from subsidy regimes, advancing cold chain infrastructure, and geographical proximity to EU consumers, enabling lower transport costs and stronger brand recognition. Southern Hemisphere competitors, such as Australia, Chile, and Latin American producers, have also developed efficient export logistics and established market networks, exerting further competitive pressure on South African produce. Small niche fruit value chains, such as figs and passion fruit, must therefore not only meet regulatory thresholds but also match or exceed the scale, consistency, and marketing sophistication offered by well-entrenched competitors.

Moreover, industry stakeholders who participated in the study also reckoned that the testing and registering of chemicals is very costly, and currently, there is no designated approved list of chemicals as per the EU regulations. This creates big SPS compliance issues, translating into rejection of consignments destined for the EU. It was confessed that in 2025, a pomegranate consignment of approximately 2 tons was rejected due to high MRLs associated with some of the chemicals being used, although they may not necessarily be on the designated list, but are effective in controlling pests. In addition, it was reported that for the few companies that dare to test and register such chemicals, the process is unnecessarily cumbersome, with uncertainty about when the relevant government office would finalize the registration of the chemical(s). Thus, the limited access to registered chemicals recognized by the EU is a critical limiting factor derailing the competitiveness of niche fruits in the EU.

At the agro-processing phase, packhouse operators expressed that there is limited access to data and information about production and markets, particularly for these niche crops. This constrains effective planning by the role players involved in these value chains. Moreover, even within the EU, various traders (wholesalers and retailers) apply varying MRL requirements. In part, this has benefited some exporters, given that once a consignment is rejected by one wholesaler due to stringent requirements, it can be diverted to other buyers who might be less strict, but this also comes at some compromise in the pricing structure.

In addition, industry stakeholders who participated in the study noted that SIZA requirements, particularly the social and environmental requirements, mismatch with what the EU market wants, and the SIZA requirements change regularly. SIZA is a voluntary, industry-led compliance programme designed to ensure that agricultural producers in South Africa adhere to ethical, social, and environmental sustainability standards, particularly for export markets. SIZA aligns with many international benchmarks, including Global Good Agricultural Practices (GlobalG.A.P.), and Supplier Ethical Data Exchange (SEDEX), among others. Other highlighted challenges affecting the trade performance of niche fruits include logistical limitations at the harbours, and there is a limited number of certified auditors to regularly and timely visit producers' farmers

3.3. Objective 3: Tariff and non-tariff barriers affecting South Africa's identified niche fruits exports to the EU

Table 6 below presents the summary of non-tariff barriers faced by the selected niche crops exports in the EU. Across all 5 niche fruit products, the same handful of non-tariff measures recur, indicating that these measures operate together as a coherent compliance regime that the EU applies to fresh fruit imports. Exporters of figs, kiwi fruit, pineapples, passion fruit, and pomegranates face very similar regulatory hurdles, even though the fruits differ biologically/commercially. The above-mentioned fruits are consumed fresh or minimally processed, so pesticide residues, mycotoxins (in some fruit), and microbial contamination are of utmost concern. Therefore, the EU checks pesticide Maximum Residue Limits (MRLs) and applies food-safety controls uniformly. Different fruit types are vulnerable to pests, such as fruit flies, mealybugs, false codling moth, etc. Due to these shared plant-health threats, the EU requires all fruit imports to comply with strict phytosanitary measures – including inspections, phytosanitary certificates, and in some cases approved quarantine treatments.

Table 6: Non-Tariff Barriers against the five niche fruits in the EU Market

Region	SPS regulations	Technical standards & certification	Labelling & packaging requirements	Customs procedures & import licensing
Kiwi fruit (HS 081050)	• Control of pesticide residues in plants, and animal products intended for human consumption • Plant health control • EU's overview of import procedures	• EU's overview of import procedures • Marketing standards for fresh fruits & vegetables • Plant health control	• Health control of foodstuffs of non-animal origin • Labelling for foodstuffs • Traceability, compliance, and responsibility • Products from organic production	• Health control of Genetically Modified (GM) food and novel food • Products from organic production • EU's overview of import procedures
Pineapples (HS 080430)	• Control of pesticide residues in plant and animal products intended for human consumption • Plant health control	• EU"s overview of import procedures. • Marketing standards for fresh fruit & vegetables • Plant health control	• Health control of foodstuffs of non-animal origin • Labelling for foodstuffs • Products from organic production	• Health control of Genetically Modified (GM) food and novel food • Products from organic production
Fresh figs (HS 080420)	• Control of pesticide residues in plant & animal products intended for human consumption • Health control of foodstuffs of non-animal origin • Plant health control	• EU: Overview for import procedures • Marketing standards for fresh fruit & vegetables • Plant health control	• Health control of foodstuffs of non-animal origin • Labelling for foodstuffs • Traceability, compliance, and responsibility in food & feed	• EU: Overview of import procedures • Health control of Genetically Modified (GM) food & novel food • Products from organic production
Other fruit (incl. passion fruit and pomegranate) (HS 081090)	• Control of pesticides residues in plant and animal products intended for human consumption • Health control of foodstuffs of non-animal origin & Plant health control	• EU's overview of import procedures • Plant health control •	• Health control of foodstuffs of non-animal origin • Labelling for foodstuff. • Traceability, compliance, and responsibility in food and feed	• Products from organic production • Health control of Genetically Modified (GM) food and novel food

The EU emphasizes traceability, labelling, and responsibility in food/feed to be applied at the commodity level (in this instance, fresh fruit), not per species. Labelling and traceability obligations are required for all fruit imports. EU marketing rules for fresh fruit and vegetables set common quality and presentation criteria, such as grade(s), packaging, and size, that exporters must meet across fruit and vegetable types. Pesticide MRL enforcement, to a certain extent, is fixed across fruit types, whereby, when residues are above the MRL threshold, the consignment is rejected. This is a primary NTB in practice because regimes' zero tolerance for certain substances can render consignments unsellable in the EU markets.

The requirement that organic imports may require special authorizations that are not automatically granted increases the administrative risk and can render trade friction beyond ordinary customs processing. Incorrect packaging or labelling format can also result in market access refusal or costly relabelling. Therefore, as the market grows, it is imperative for exporters to understand the health, safety, and nutritional requirements attached to these products. Exporters must therefore ensure that the varieties or ingredients utilized are not classified as novel foods subject to additional regulatory controls. Novel foods refer to the evolving food industry, shaped by changing consumer preferences, technological innovations, and evolving regulations. Products from organic production: organic claims require documentary proof that production and supply chain meet EU organic rules. The EU restricts which third-country organic regimes it recognizes and may require prior equivalence or authorization. Hence, imports labelled “organic” are subject to special checks.

Trade restrictions could potentially arise through non-automatic licensing. When authorizations are non-automatic, exporters face administrative discretion, lengthened lead time, and a higher probability of arbitrary refusals or additional document burdens. For perishable products such as fresh fruit, this can be economically detrimental to both producers and exporters.

3.4. Objective 4: Strategies for enhancing competitiveness in the EU market

The EU remains a key lucrative market, although it is generally highly regulated for horticultural exports. For South Africa, the export of niche fruits considered in this study presents a strategic opportunity to diversify its agricultural export basket, thereby bolstering foreign exchange earnings and promoting inclusive rural development. However, based on the preceding analysis, it is evident that South Africa's competitiveness in these value chains is compromised by several bottlenecks related to the scale of production, compliance with stringent EU standards, inefficiencies in logistics, and high market concentration. Therefore, the following strategies, aligned with the Agriculture and Agro-processing Master Plan (AAMP) are bound to foster South Africa's competitiveness in the EU. It is important to note that AAMP puts emphasis on competitiveness of the agricultural sector, inclusivity, export growth and agro-industrial development.

3.4.1. Upgrading and expansion of production systems

One of the key identified constraints limiting South Africa's export competitiveness in the selected niche fruits lies in the small economies of scale and variability of production. While some fruits, such as pineapples, exhibit a relatively well-established production base, others, such as kiwi fruit and passion fruit, remain underdeveloped and characterized by inconsistent output. Therefore, there is a need to strategically expand the production system, particularly focusing on high-value cultivars that align with consumers' preferences within the EU and other targeted markets. Moreover, production should be spatially organized through cluster-based approaches that integrate farmers, input suppliers, extension services, and post-harvest infrastructure within specific production zones. In so doing, economies of scale can easily be achieved, through well-coordinated supply, coupled with reduced transaction costs. In addition, climate-smart production practices must be embraced within the production system to mitigate the climate variability associated risks, which have detrimental effects on several niche crops in general.

3.4.2. Strengthening quality compliance and certification systems

Accessing the EU market is strongly controlled through compliance with the stringent SPS measures, MRLs and private certification standards. In this study, findings affirm that non-compliance, for instance, with pesticide residue levels (MRLs), product uniformity and post-harvest handling are critical barriers to sustained market access. To improve South Africa's competitiveness, there is a need to establish a robust, nationally coordinated compliance system. This entails expanding access to internationally recognized certification programmes such as GlobalG.A.P., Fairtrade, and organic standards. Much focus must be given to emerging and small-holder producers who are constrained by the exorbitantly high certification costs. This should be complemented by developing residue monitoring systems and strengthening the capacity of pre-export testing facilities (e.g., at PPECB) to minimize the risk of consignment interceptions and rejections at EU customs entry points. Furthermore, there is a need to integrate digital traceability systems across the value chains, i.e., from farm production to export logistics, to enhance transparency, strengthen buyer confidence, and align South African exports with the fast-evolving food safety and sustainability requirements in the EU.

Considering the challenge relating to the testing and registering of chemical products that meet the EU's regulation requirements, study participants proposed that to minimize the unnecessarily long process, chemical products that have been known to work on other closely related fruits should be considered in this regard, with close consultation with producers who use these chemicals. In addition, it was emphasized that the registration process should be streamlined and clearly communicated by the concerned government officials to both producers and chemical industries, which undertake the testing and registration process. Furthermore, producers requested that the cost of SPS compliance be subsidized based on farm size; most producers of niche fruits do not operate expansive farms. Under the SIZA initiatives, small-scale producers should be granted an opportunity to use the multi-site approach during audits, particularly under Global G.A.P. 2.0. This umbrella or group arrangement will greatly minimize the associated compliance costs incurred by small producers while also enabling the harmonization of the auditing and certification processes. Furthermore, the public-private partnership arrangement is a fundamental strategy to explore, especially in building infrastructure such as testing laboratories and digital

documentation platforms that enable producers and exporters to share resources, coupled with subsidized certification programs, that will foster the achievement of economies of scale.

3.4.3. Market diversification and export expansion

The current export trend reveals high market concentration for niche fruits, presenting a risk for South Africa, since exporters are exposed to demand shocks, coupled with limited growth potential. However, the EU market is becoming more diversified with a rising demand for exotic fruits in both established and emerging markets. Thus, to capitalize on this trend, exporters should pursue deliberate market diversification strategies targeting underpenetrated regions, including Eastern and Southern Europe. These markets present growth opportunities, since consumer preferences are drifting towards more diverse and health-oriented diets. Tailored market intelligence, consumer mapping, and exporter-buying matchmaking initiatives can help unlock these opportunities.

Additionally, exporters should strengthen direct links with EU retailers, wholesalers, and specialized fruit distributors to secure stable demand and better pricing arrangements. Leveraging South Africa's advantage in counter-seasonal production, export strategies should align with the seasonal demand patterns in the EU, especially when domestic supply is limited. Beyond the EU, export diversification to the Middle East was also suggested by study participants as one of the avenues to minimize the effect of stringent SPS measures imposed by the EU on South Africa's niche fruits. A call was also made to the government to support facilitating the opening of new markets, given the observed increasing growth.

3.4.4. Logistics and cold chain optimization

The perishability of niche fruits requires highly efficient logistics and cold chain systems. Inadequate temperature management, poor packaging, and transport delays significantly compromise product quality by the time the consignment arrives in the EU, thereby constraining competitiveness. Thus, it is essential to strategically invest in cold chain infrastructure, including packhouses, refrigerated storage, and reefer

transport systems. This must go hand in hand with improvements in port efficiency, and export logistics need to be prioritized to reduce transit times and minimize post-harvest losses. The fundamental dimension of this strategy lies in the reduction of the excessive reliance on intermediary export hubs, in this case the Netherlands, which currently functions as the major transit point for South Africa's niche fruit exports. Even if such intermediary hubs play a critical role in aggregation and distribution, increased direct access to end markets like France, Germany and Italy is bound to generate greater value and strengthen long-term market position for South Africa's niche fruits

3.4.5. Product differentiation and value addition

Given the dominance of large-scale producers in the global fruit markets, South Africa's competitiveness in niche fruits must be anchored in product differentiation rather than cost-based competition. This would entail positioning South Africa's niche fruits as premium products characterized by superior flavour, quality, and sustainability attributes. Therefore, branding strategies emphasizing origin, quality, and production practices are bound to enhance market visibility and consumer appeal in the EU. Moreover, the development of geographical indicators (GIs) from region-specific products may further strengthen differentiation in the long term. Value addition through agro-processing also presents a critical channel to foster competitiveness in the EU. The processing of surplus or lower-grade fruits into juices, concentrates, dried products, or other value-added forms reduces post-harvest losses, stabilizes incomes, and expands market opportunities beyond fresh produce channels. Currently, this is relevant and applicable to pineapples and passion fruits, for which processing industries are to some extent established in the country.

3.4.6. Inclusive value chain integration

The central objective of the AAMP is to promote inclusive growth by integrating smallholder- and emerging- producers into commercial value chains. Thus, niche fruit value chains also require a deliberate design in which production and marketing systems are inclusive. This can be achieved through outgrower schemes, cooperative models and aggregation platforms through which value chain actors can access inputs, technical support, and markets. Importantly, inclusion must be accompanied

by customized capacity building, especially in the areas of quality compliance, post-harvest handling, and farm management. Moreover, access to finance was noted by study participants to be a critical limiting factor. Therefore, emerging and smallholder producers should be provided with the required financial support to invest in orchard establishment, certification, and infrastructure, all of which are prerequisites for participation in export markets.

3.4.7. Market intelligence and institutional coordination

Study findings in the preceding section highlight that South Africa is constrained by data availability, particularly on production trends and market dynamics in the EU. However, the effectiveness of the proposed strategies depends on access to reliable market intelligence and strong institutional coordination. Therefore, the development of integrated market intelligence systems that provide real-time information on the EU's demand trends, pricing, competitor behaviour, and regulatory changes needs to be prioritized. This should be complemented with improved coordination among key stakeholders, including government departments, industry bodies, exporters, and research institutions, which is essential in this instance to ensure coherent policy implementation. In this regard, study participants noted that there is a need to have an independent technical official(s) designated to service niche value chains (synonymously referred to as the niche fruits industry). Through this technical expert(s), role players involved in niche fruit value chains would be able to exchange information and learn from globally leading producers and exporters of these fruits, like Peru.

3.4.8. Leveraging trade agreements and market access frameworks

South Africa's preferential access to the EU market under the EU-SADC Economic Partnership Agreements (EPA) provides a strategic advantage that the exporters must fully utilize. However, to benefit from the tariff preference, it is incumbent upon exporters to comply with the rules of origin and other administrative requirements. In that regard, capacity-building programs aimed at empowering exporters in understanding trade regulations, documentation processes, and market entry requirements are critical. Enhancing the utilization of the EPA framework will not only

improve market access but also strengthen South Africa's position relative to competing exporters.

3.4.9. Sustainability and climate resilience

Sustainability considerations are increasingly shaping market access and competitiveness in the EU, whereby consumers and regulators are putting much emphasis on environmentally responsible production, ethical labour practices, and reduced carbon footprints. South Africa should therefore integrate sustainability into niche fruit value chains through the adoption of climate-smart agricultural practices, efficient water use, and responsible pesticide management. These practices not only enhance environmental resilience but also contribute to product differentiation in premium EU markets.

All in all, improving South Africa's competitiveness in the EU niche fruit market requires a well-coordinated multi-dimensional strategy that addresses constraints across the entire value chain. The above-mentioned strategies reveal that competitiveness in the EU does not solely depend on production capacity but is contingent upon the alignment of production systems, compliance with quality requirements, logistics, market access, and institutional support. The proposed framework (Strategy matrix is presented in Appendix 1: Table 7) is anchored in the pillars of the AAMP and provides a pathway for transforming South Africa's niche fruit sector into a dynamic, inclusive, and export-oriented component of the national agrifood system.

4. Conclusion and policy implications

4.1. Conclusion

This study set out to assess the production and trade performance of selected niche fruits, namely: kiwi fruit, pineapples, passion fruit, figs, and pomegranates, in South Africa, with a specific focus on their export competitiveness in the EU market. The analysis was guided by four specific objectives, findings of which provide a coherent basis for targeted policy and value chain interventions.

Regarding the profiling of South Africa's niche fruit production, the analysis revealed that the level of development is heterogeneous. Pineapples represent a relatively

mature industry with stable production volumes, albeit largely oriented towards processing rather than export diversification. On the contrary, kiwi fruit, passion fruit, figs, and pomegranates remain emerging value chains, characterized by relatively small production areas, limited economies of scale, and in some cases high output variability. Despite these constraints, all five niche fruits exhibit strong potential for expansion, supported by favourable agro-climatic conditions and increasing global demand for exotic and health-oriented fruits. The findings further highlight that production constraints are not solely agronomic but also structural, linked to limited investment, inadequate technical support, and fragmented production systems.

For trade performance, findings indicate that South Africa's performance in the EU niche fruit market is modest, in comparison to the leading global suppliers. South Africa's market shares remain low across most of the products, with exports often concentrated in a few EU entry points, particularly the Netherlands, Germany, and France. Moreover, South Africa's exports are routed through intermediary markets, thereby limiting value capture and direct engagement with final buyers. Competitive pressures from dominant exporters like Costa Rica in pineapples underscore the challenges of competing on volume and price alone. Additionally, findings reveal that there are untapped opportunities, particularly in underpenetrated EU markets and premium product segments, where demand for differentiated, high-quality, and sustainably produced fruits is increasing.

Concerning tariff and non-tariff barriers, the study finds that while South Africa benefits from preferential tariff access under the EU-SADC Economic Partnership Agreement (EPA), non-tariff barriers (NTBs), particularly sanitary and phytosanitary (SPS) measures, maximum residue limits (MRLs), and private certification standards, constitute the primary constraints to market access. Compliance challenges related to product quality, traceability, and post-harvest handling significantly affect export performance. Consignment rejections due to pesticide residues, inconsistent quality, and inadequate cold chain management highlight the need for systematic improvements across the value chain. These findings confirm that competitiveness in the EU market is quality-driven rather than tariff-driven. This necessitates a strategic focus on compliance and standards.

Regarding strategies required to improve competitiveness, the study identifies a set of interrelated strategies to bolster South Africa's competitiveness in the EU niche fruit market. These strategies collectively underscore the need for upgrading the entire niche fruit value chain in a well-coordinated manner. These strategies include:

i. strengthening compliance systems such as certification, traceability, and residue monitoring.
ii. Upgrading production systems through climate-smart practices and cultivar optimization.
iii. diversifying export markets and strengthening direct market access.
iv. improving logistics and cold chain efficiency to preserve product quality.
v. promoting product differentiation and value addition.
vi. enhancing inclusion of smallholder producers through integrated value chain participation.
vii. Strengthening market intelligence and institutional coordination systems

4.2. Policy implications

Based on the findings, the following policy recommendations are proposed, in accordance with the Agriculture and Agro-processing Master Plan (AAMP):

4.2.1. Enhance production capacity and structural transformation

Policy initiatives should prioritise the expansion and modernization of niche fruit production systems, with a focus on high-value cultivars suited to the consumers' demand in the EU market. These initiatives include supporting orchard establishment through blended finance mechanisms, promoting cluster-based production systems to improve coordination and economies of scale, and investing in climate-resilient and resource-efficient agricultural practices. Such interventions are bound to improve the consistency in supply and position South Africa as a reliable exporter.

4.2.2. Strengthening compliance and quality assurance systems

Given the significance of non-tariff barriers, there is a need to a nationally coordinated compliance framework that:

- expands access to GlobalG.A.P. and other certifications, particularly for smallholder producers.

- Establishes residue monitoring and testing systems to complement work done by the PPECB. This will ensure compliance with EU MRLs.
- Develop digital traceability systems to enhance transparency and buyer confidence.

All in all, these measures are bound to reduce rejection rates and facilitate sustained market access.

4.2.3. Invest in logistics and cold chain infrastructure

Improving competitiveness requires targeted investments in post-harvest and logistics infrastructure, including:

- Expansion of cold storage and packhouse facilities
- Enhancing port efficiency and export logistics systems
- Supporting access to refrigerated transport and shipping capacity

These interventions are bound to minimize post-harvest losses and maintain product quality throughout the export process.

4.2.4. Promote market diversification and export expansion

To reduce market concentration risks, the policy should support:

- Market intelligence systems to identify emerging opportunities within the EU
- Export promotion initiatives targeting underpenetrated EU markets
- Strengthening direct linkages between exporters and EU retailers.

This is bound to broaden South Africa's market footprint and improve export resilience

4.2.5. Support product differentiation and value addition

South Africa should adopt a differentiation-led export strategy, focusing on:

- Branding niche fruits based on quality, origin, and sustainability attributes
- Developing value-added products such as juices, concentrates, and dried fruits
- Exploring geographical indications (GIs).

This approach is bound to enhance value capture, thereby reducing reliance on price-based competition.

4.2.6. Facilitate inclusive value chain participation

To align with transformation objectives, policy interventions must ensure that smallholder producers are integrated into export-oriented value chains through outgrower schemes and aggregation models, targeted capacity building in compliance and production practices, and improved access to finance and infrastructure. These are bound to spur inclusive growth and rural development.

4.2.7. Strengthening institutional coordination and governance

Improving competitiveness requires well-coordinated institutional action, entailing: the strengthening of collaboration between government, industry, and research institutions; developing integrated market intelligence and data systems; and enhancing utilization of trade agreements, particularly the EU-SADC-EPA. This will foster coherent policy implementation and improved responsiveness to market dynamics.

5. Study limitations and areas for further research

This study does not fully cover the EU's consumers' tastes and preferences. Further granular consumer research covering both consumers, retailers and wholesalers in the EU will be fundamental in getting a deeper understanding of EU market dynamics, a basis upon which South Africa's role players in the niche fruits value chains would make fruit-specific strategies to spur competitiveness within the EU niche market.

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Appendix: Table 7: Strategy Matrix for Enhancing South Africa's Competitiveness in the EU Niche Fruit Market

Strategy	Rationale	AAMP Linkage	Responsible Institutions	Expected Outcomes
1. Production system upgrading and expansion	Limited scale and inconsistent production constrain a reliable EU supply; niche crops remain underdeveloped despite strong demand	Pillar: Productivity, Competitiveness & Growth	DALRRD; Provincial Departments of Agriculture; NAMC; Industry bodies (e.g. SAKIWI)	Increased production volumes; improved supply consistency; enhanced export readiness
2. Cultivar optimisation and diversification	EU markets demand specific cultivars (e.g., premium kiwi, hybrid passion fruit); a mismatch reduces competitiveness	Pillar: Innovation and Sector Competitiveness	ARC; Universities; Private breeders; Industry associations	Improved product-market fit; higher value realisation; access to premium segments
3. Cluster-based production systems	Fragmented production limits economies of scale and coordinated export supply	Pillar: Spatial Development & Inclusive Growth	DALRRD; Municipalities; Land Bank; Commodity organisations	Reduced transaction costs; improved coordination; enhanced participation of smallholders
4. Quality compliance and certification strengthening	EU market access is governed by SPS, MRLs, and private standards; non-compliance leads to rejection	Pillar: Market Access & Trade Facilitation	PPECB; DALRRD; SAMIC; Certification bodies	Reduced rejection rates; improved compliance; expanded market access
5. Residue monitoring and traceability systems	Increasing EU demand for traceability and food safety transparency	Pillar: Food Safety & Quality Infrastructure	PPECB; DALRRD; IT systems providers; Exporters	Enhanced buyer confidence; improved regulatory compliance; reduced export risk
6. Cold chain and logistics optimisation	Product quality deterioration during transit reduces competitiveness; perishability is critical	Pillar: Infrastructure & Efficiency	Transnet; PPECB; Private logistics firms; Ports Authority	Reduced post-harvest losses; improved shelf life; enhanced export quality
7. Direct market access and reduced intermediary dependence	Over-reliance on transit hubs (e.g., the Netherlands) limits value capture	Pillar: Export Expansion & Trade Competitiveness	DTIC; NAMC; Export councils; Trade missions	Increased margins; stronger buyer relationships; improved market positioning
8. Market diversification within the EU	Export concentration increases vulnerability; demand is expanding across EU regions	Pillar: Export Market Development	DTIC; NAMC; Export Promotion Agencies	Expanded market footprint; reduced risk; increased export volumes
9. Product differentiation and premium branding	Competing on volume is not viable; differentiation (quality, flavour, sustainability) is key	Pillar: Agro processing & Value Addition	DTIC; NAMC; Industry associations; Marketing agencies	Higher export prices; improved brand recognition; entry into niche premium markets
10. Agro-processing and value addition	High post-harvest losses and limited processing reduce value capture; pineapples are largely processed already	Pillar: Agro-industrialisation	DTIC; DALRRD; Private processors; IDC	Increased value addition; reduced waste; diversified revenue streams

Strategy	Rationale	AAMP Linkage	Responsible Institutions	Expected Outcomes
11. Inclusive value chain integration (smallholders)	Smallholder exclusion due to certification, finance, and infrastructure barriers	Pillar: Transformation & Inclusion	DALRRD; Land Bank; NGOs; Commodity groups	Increased participation of emerging farmers; job creation, and rural development
12. Access to blended finance and investment support	High capital requirements (orchards, certification, infrastructure) limit expansion	Pillar: Investment & Financing Mechanisms	Land Bank; IDC; Commercial banks; DALRRD	Increased investment in niche crops; expanded production capacity
13. Institutional coordination and governance strengthening	Fragmentation across stakeholders reduces policy effectiveness and market responsiveness	Pillar: Sector Coordination & Governance	NAMC; DALRRD; PPECB; Industry bodies	Improved policy coherence; coordinated value chain development; enhanced efficiency
14. Market intelligence and data systems development	Limited intelligence constrains strategic decision-making	Pillar: Digitalisation & Information Systems	NAMC; DALRRD; Stats SA; IT providers	Improved decision-making; real-time market insights; proactive export strategies
15. EPA utilisation and trade facilitation	Underutilisation of preferential access reduces competitiveness	Pillar: Trade Facilitation & Export Growth	DTIC; SARS Customs; Export councils	Increased utilisation of trade preferences; reduced trade barriers
16. Sustainability and climate resilience integration	EU markets increasingly require sustainable production; climate variability affects yields	Pillar: Sustainability & Climate Resilience	DALRRD; ARC; Environmental agencies; Producers	Climate-resilient production; compliance with EU sustainability standards; long-term competitiveness

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