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**Report Name:** Fresh Deciduous Fruit Annual

**Country:** South Africa - Republic of

**Post:** Pretoria

**Report Category:** Fresh Deciduous Fruit

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**Report Highlights:**

The production of apples, pears and table grapes is forecast to improve in MY 2024/25 from MY 2023/24 based on the cold, wet winter of 2024 and new trees coming into production. With improved fruit quality, deciduous fruit exports are forecast to increase in spite of continued equipment shortages and breakdowns at the Port of Cape Town. South Africa imports little deciduous fruit due to sufficient domestic production. The United States does not have market access in South Africa for pears and table grapes, and has market access only for apples from areas free from *Rhagoletis pomonella*.

## **Executive Summary**

The deciduous fruit annual report provides information regarding the production, supply and distribution of apples, pears and table grapes in South Africa for MY 2022/23, MY2023/24 and MY 2024/25. The production of apples is forecast to improve by two percent to 1.32 million Metric Tons (MMT) in MY 2024/25 from MY 2023/24, due to availability of irrigation water and young trees coming into full production. Apple exports are forecast to increase by two percent to a record 710,000 MT on improved fruit quality.

The production of pears is forecast to increase by two percent to 540,000 MT in MY 2024/25, due to expected improvement in yields and availability of irrigation water. Exports of pears are forecast to increase by four percent to 290,000 MT on improved production.

The production of table grapes is forecast to increase by one percent to 360,000 MT in MY 2024/25, due to normal weather conditions and newer cultivars coming into full production. Exports of table grapes are forecast to increase by one percent on modest improvement in production.

Area under deciduous fruit production has stabilized as growers focus on replanting newer varieties to improve yields. Growers have focused investments towards putting up hail nets to improve fruit quality to boost export volumes. Inefficiencies at the Port of Cape Town remain a threat for exports due to equipment breakdowns and shortages. Growers plan on increasing exports through Port Elizabeth to alleviate pressure on the Port of Cape Town. Domestic consumption of apple and table grapes is forecast to decrease slightly due to more fruit supplied to the export market on improved quality. South Africa is forecast to continue importing low volumes of fruit due to sufficient domestic production.

Apple and Pears Marketing Year (MY) January – December

Table Grapes MY – October to September

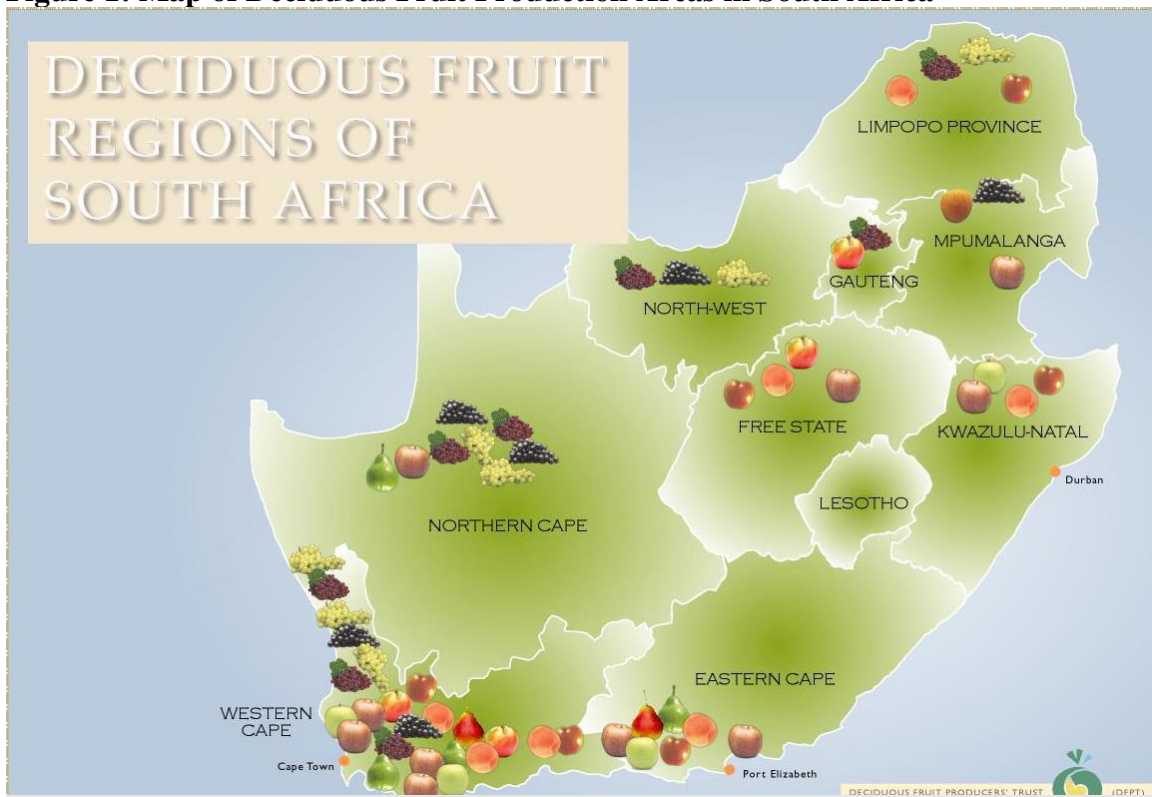
MT – Metric Tons

1 U.S. dollar = 17.592 South African rands as of October 18, 2024

## Apples, Fresh

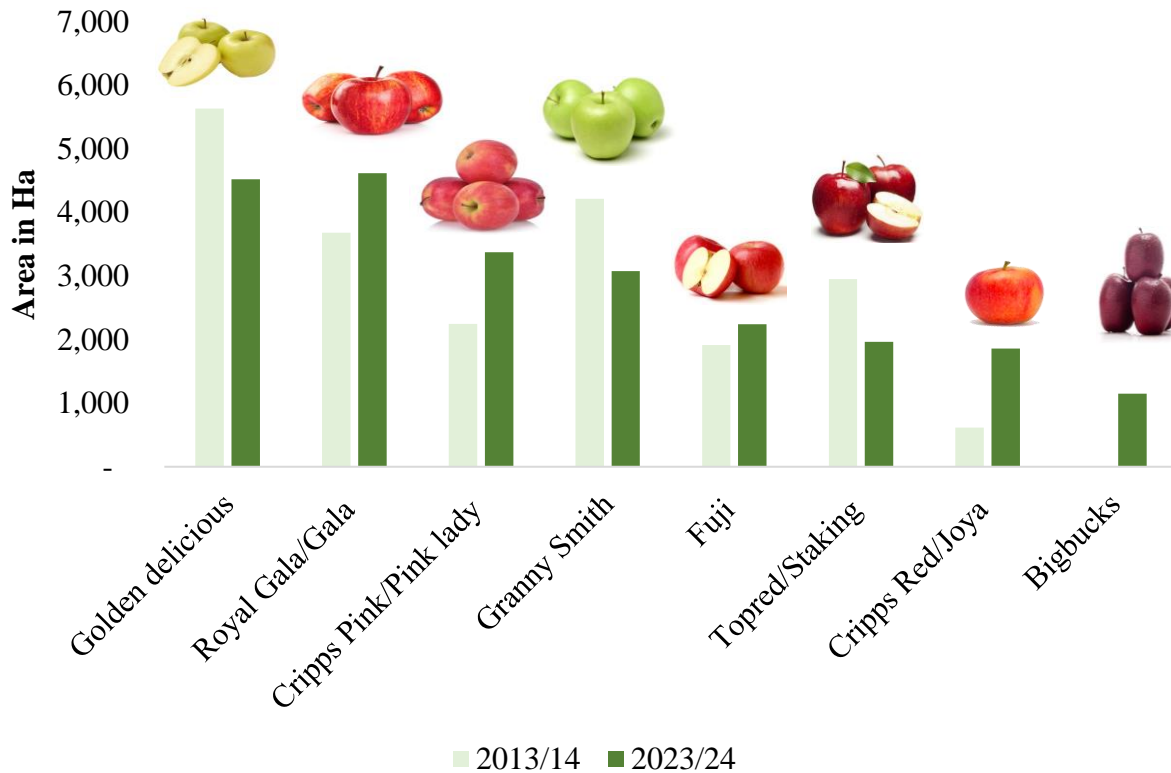
The Western Cape province is the largest apple producing area in South Africa, and together with the Eastern Cape province accounts for more than 95 percent of the apple production (see Figure 1). Production areas established further north, mainly in the Free State, Mpumalanga, and Limpopo Provinces, are small but growing. The harvest for South African apples typically begins in January and runs through May, with peak harvest times between February and April. Controlled atmosphere (CA) storage allows the industry to provide product to both the domestic and international markets year-round. “Class 1” fruits, which are typically sold in the export market, are usually stored in CA for up to nine months, then released into Regular Atmosphere (RA) storage for a shorter term (three months). Growers of apple and pears (along with stone fruits) are represented by Hortgro, an industry association which supports growers through the provision of research, market intelligence and market development, among other services.

**Figure 1: Map of Deciduous Fruit Production Areas in South Africa**



Source: *Hortgro*

**Figure 2: Planted Apple Varieties (Hectares)**



Source: FAS Pretoria based on 2013 and 2023 Hortgro Tree Census

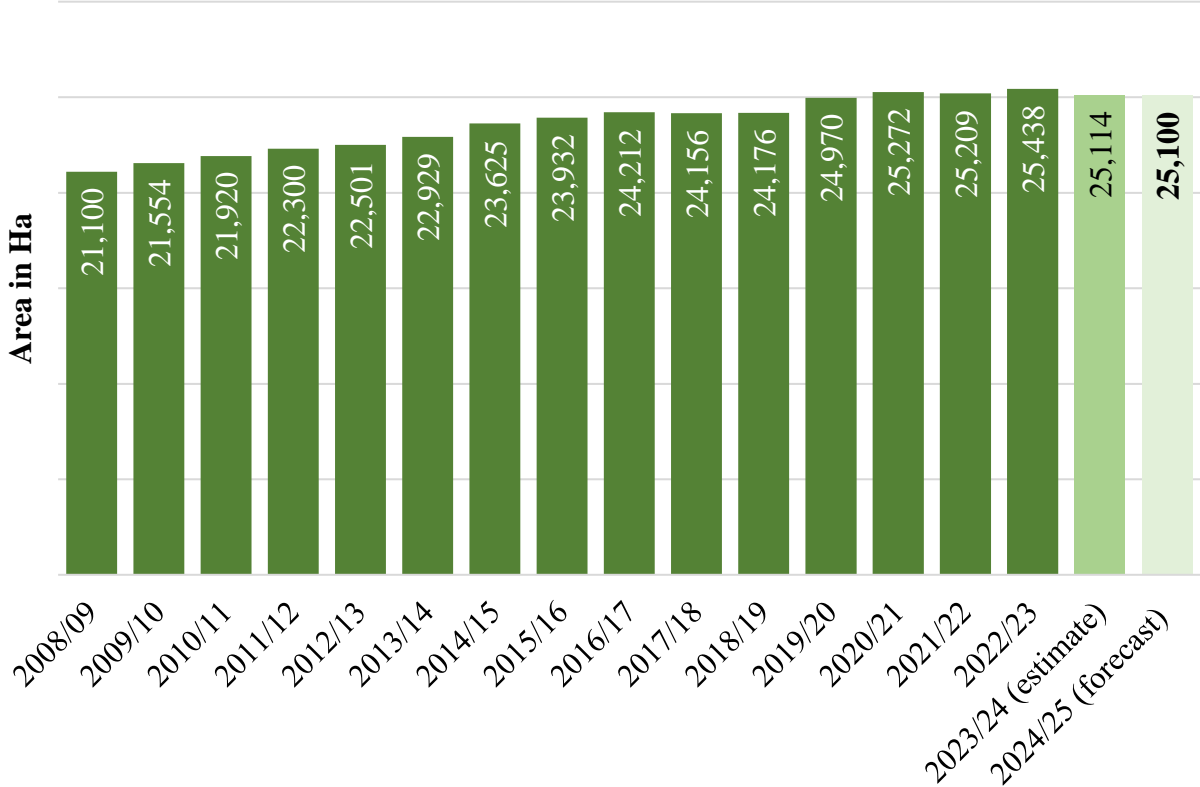
Eight cultivars dominate apple production in South Africa and account for approximately 91 percent of area planted. The cultivars of choice (see Figure 2) are mainly determined by consumer demand in South Africa’s export markets. However, plantings over the past five years have also been driven by producers’ desire to improve yields. Area under green apple has been declining over the years especially for varieties such as Golden Delicious and Granny Smith. Preference has been shifting towards Royal Gala, Cripps Pink, Fuji and Cripps Red. The Bigbucks variety has been recently a favorable new planting due to good reception from markets such as China and India.

**Area**

Post forecasts that South African area planted to apples in MY 2024/25 will remain unchanged from MY 2023/24 at 25,100 ha. Growers have focused efforts towards installing alternative sources of energy due to scheduled power outages implemented in preceding marketing years (see Post report [South Africa: Load shedding and the Economic Strain on the Food Supply Chain](#)). This notable shift towards alternative energy sources seems to be limiting investments towards area expansion. Further, the national power utility, Eskom, increased the electricity tariff by 13 percent in April 2024, and proposes a further hike of 36 percent that, if approved, will be implemented in 2025. The electricity tariff increase will affect growers who still rely on the national grid to power irrigation, packing, and cooling operations. Growers are also focusing investments on hail nets to improve the quality of exportable fruit.

In MY 2023/24, area planted decreased by one percent, with limited new plantings and replanting of newer varieties to enhance yields (see Figure 3). Several factors contributed to the lower area including logistical challenges at the Port of Cape Town, rail underperformance, changing weather patterns, a depressed domestic market, and limited processing and cold storage capacity. According to the 2024 Hortgro census, areas showing the largest decline are the Eastern Cape (34 percent), the Northern Provinces (24 percent) and Pickeberg in the Western Cape (13 percent). Growers held back on expanding planted area and uprooted old orchards: trees age 0-3 years have dropped by 16 percent and those 25 years and older have dropped by two percent. The drop in area planted in trees aged 0-3 years is due to some trees entering full production and a low pace of replacement. Updated industry figures suggest the area planted in MY 2022/23 is slightly higher than earlier estimates, at 25,438 ha.

**Figure 3: Area Planted in Apples in South Africa**



Source: FAS Pretoria using Hortgro data

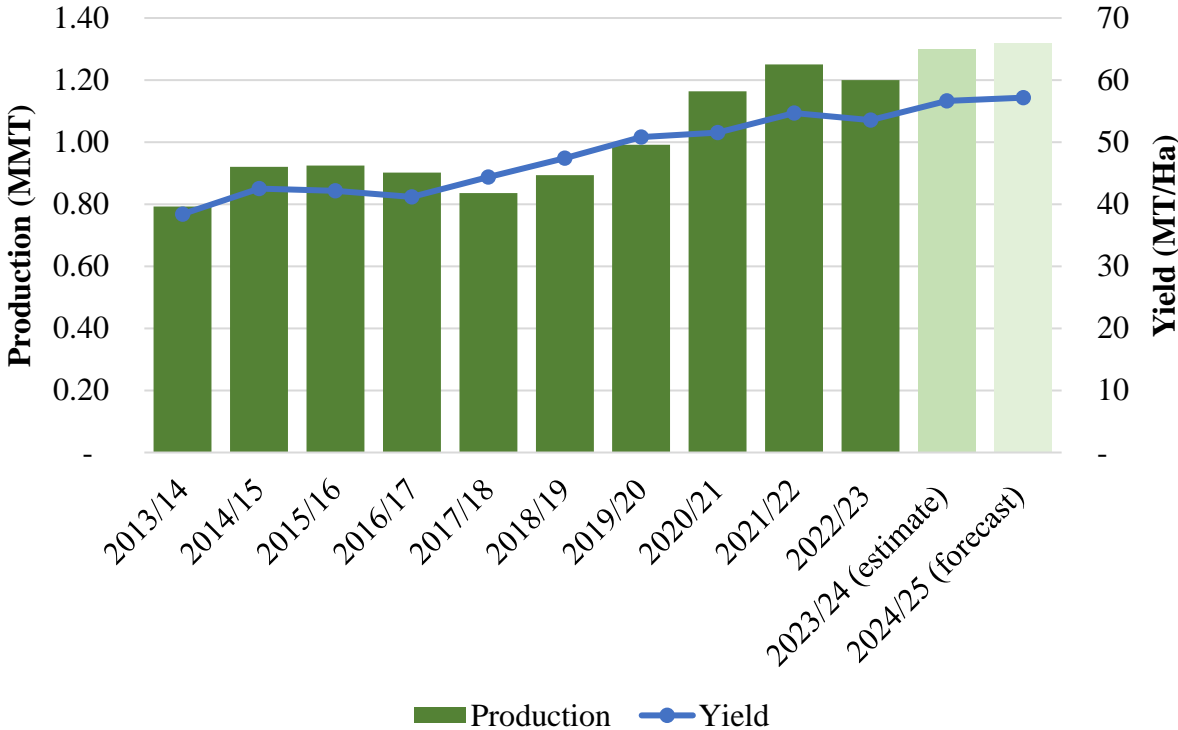
**Production**

Post forecasts that apple production in MY 2024/25 will improve by two percent from MY 2023/24. Production will be aided by the cold, wet winter months of 2024. Production regions also received sufficient winter rains, which ensure supply for irrigation during the summer months. Young trees coming into full production will also support overall production growth in MY 2024/25.

Post estimates that production in MY 2023/24 improved by eight percent following MY 2022/23 production, which was affected by hail damage. Production growth was supported by good winter conditions and young trees coming into production. The Western Cape experienced strong winds and heavy rains in early April 2024; however, most of the crop was harvested. Post contacts reported that only a small percentage of the remaining fruit was damaged or blown off by the wind. The cold weather aided in color development of later red and pink apple varieties. Post contacts further report that growth is supported by production from Bigbucks, Cripps Red and Gala varieties mirroring cultivated area trends.

Post revised MY 2022/23 production slightly upwards to 1.20 MMT to track with updated data. Production in MY 2022/23 dropped by four percent from the previous marketing year as apple producing regions in the Western Cape, specifically the Ceres and Langkloof regions, were affected by hail. This resulted in a decline in apple production and physical damage to the fruit.

**Figure 4: Apple Production in South Africa**



Source: FAS Pretoria using Hortgro data

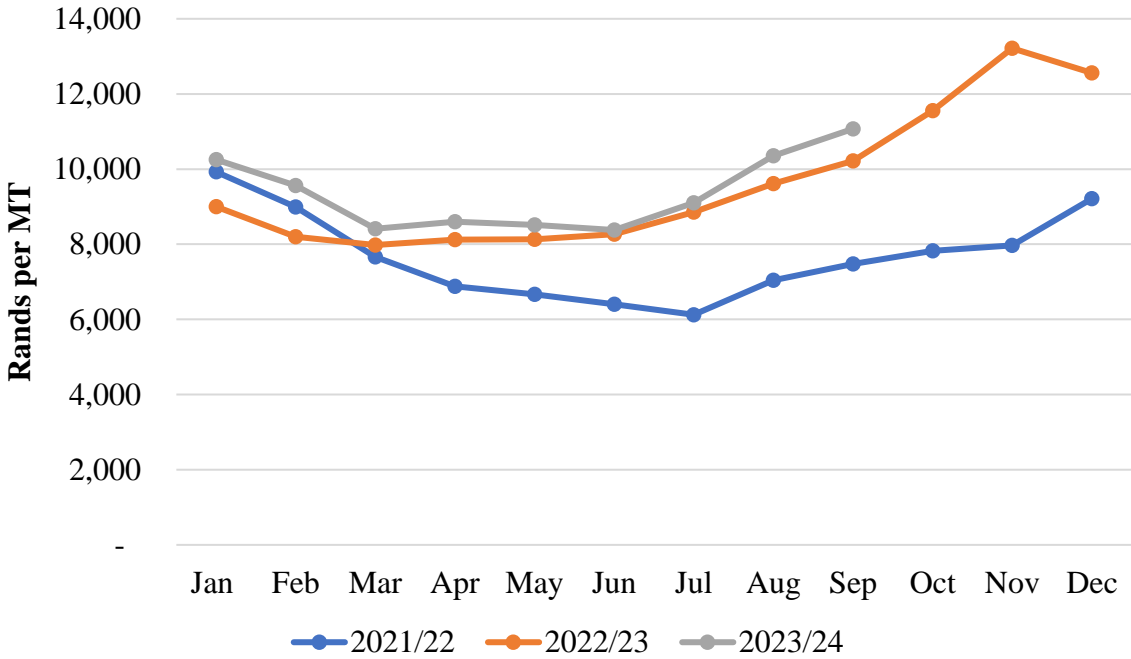
**Consumption**

Apples are popular in South Africa and are widely consumed throughout the year. Post expects that domestic consumption in the local market will decrease by two percent in MY 2024/25 due to an increase in export-quality produce. South Africa’s deciduous fruit industry is export-oriented and prioritizes exporting as much volume as possible before supplying the surplus fruit to the local market.

Domestic consumption in MY 2023/24 is estimated to have improved by five percent from MY 2022/23 on increased domestic production. Consumption figures include fresh market sales, as well as apples destined for processing. About 34 percent of apple production is processed into products such as juice and purees and about 22 percent is consumed as fresh fruit.

The apple prices indicated in Figure 5 are the average prices (Rand/MT) based on sales on the twenty-one wholesale fresh produce markets in South Africa. In MY 2022/23 price for apples in the local market were higher in comparison to MY 2021/22 due to a decrease in fresh apple volumes sold in the local market.

**Figure 5: Apple Production in South Africa**



Source: FAS Pretoria using Department of Agriculture, Land Reform and Rural Development (DALRRD) data

**Exports**

Post forecasts that apple exports will improve by two percent year-on-year to a record 710,000 MT on an increase in the production of exportable apples. Apples are traditionally shipped through the Port of Cape Town. Post contacts expect that port inefficiencies due to equipment breakdown will affect movement of fruit, especially for early varieties, but there is a replacement plan for some old equipment to be implemented by mid-2025. Industry continues to engage with port authorities to manage any risk related to the movement of fruit. South Africa exports about 53 percent of its apple production to over 95 countries.

Post estimates that exports in MY 2023/24 rebounded by 12 percent on an increase in production. Due to the challenges in Cape Town, some exporters opted to truck apples for

shipping through Port Elizabeth. Post contacts report that exports are driven by growth in bi-red apples such as Gala, Cripps Red and Bigbucks as well as in the Pink Lady variety. Exports to Africa are largely driven by growing demand (especially for Pink Lady, Gala, and Golden Delicious varieties), limited competition in these markets, and the ability of apples to endure suboptimal handling conditions. However, exporting to African countries is limited by the high cost of trade and logistical challenges. South Africa has free trade agreements with both the European Union (EU) and the UK, and benefits from duty free exports in these markets.

Although African and European markets have been traditionally strong, growth is expected to be driven primarily by increasing exports to the East. South Africa's apple exports to India grew by almost 30 percent in MY 2022/23 and 65 percent in MY 2023/24 between January and August after the government of India approved in-transit cold treatment for South African apple and pear exports. The main apple varieties exported to India are Royal Gala and Bigbucks.

**Table 1: South African Fresh Apple Exports**

Rank	Partner Country	Jan - Dec				January-August		
		2021/22 (MT)	2022/23 (MT)	2022/23 Market share	%Δ 2022/23	2022/23 (MT)	2023/24 (MT)	%Δ 2024/23
1	United Kingdom	77,948	69,201	11%	-11%	63,627	72,642	14%
2	Nigeria	56,937	44,628	7%	-22%	28,518	24,038	-16%
3	Bangladesh	38,008	42,427	7%	12%	39,449	34,143	-13%
4	Malaysia	37,413	38,969	6%	4%	26,432	23,891	-10%
5	United Arab Emirates	34,791	37,283	6%	7%	35,258	40,555	15%
6	Vietnam	23,783	24,409	4%	3%	17,448	17,460	0%
7	Netherlands	21,786	23,391	4%	7%	21,377	27,390	28%
8	India	17,470	22,712	4%	30%	22,502	37,119	65%
9	Senegal	22,772	20,576	3%	-10%	13,399	13,682	2%
10	Kenya	17,558	18,393	3%	5%	11,147	14,078	26%
11	China	13,223	16,290	3%	23%	15,161	14,654	-3%
...62	United States	112	482	0%	330%	464	241	-48%
	Others	263,302	248,493	41%	-6%	180,418	222,277	23%
	<b>World</b>	<b>625,102</b>	<b>607,256</b>	<b>100%</b>	<b>-3%</b>	<b>475,200</b>	<b>542,170</b>	<b>14%</b>

**Source:** FAS Pretoria using Trade Data Monitor, LLC data

## Imports

Imports of apples in South Africa are generally negligible as production gains and improvements in storage technologies have substantially dampened import demand as the industry can now use CA storage to supply the domestic market throughout the year. South Africa only imports small quantities of deciduous fruits to fulfill a niche market or to satisfy domestic demand when supply is limited. Post forecasts that in MY 2024/25 imports will decrease to 50 MT from MY 2023/24



based on an increase in production for local supply. Imports in MY 2023/24 are revised upwards to 55 MT as imports between January and August 2024 are already at 48 MT.

The customs duties payable on imports are indicated in Table 2. Apple exports from the United States are subject to a four percent customs duty. The United States currently has market access for apples from areas free of Rhagoletis Pomonella (apple maggot). The protocol stipulating the phytosanitary import requirements is available on the website of the Department of Agriculture, Land Reform and Rural Development (DALRRD) ([Phytosanitary import requirements for importation of Apples from USA,PNW to South Africa](#)).

**Table 2: Tariff Rates, Fresh Apples**

Heading Subheading	Article Description	Rate of Duty					
		General	EU/UK	EFTA	SADC	Mercosur	AfCFTA
0808.10	Apples, fresh	4%	Free	4%	Free	4%	2.4%

**Source:** South African Revenue Services (SARS)

Updated October 16, 2024

**Table 3: Production, Supply and Distribution of Fresh Apples**

Apples, Fresh Market Year Begins South Africa	2022/2023		2023/2024		2024/2025	
	Jan 2023		Jan 2024		Jan 2024	
	USDA Official	New Post	USDA Official	New Post	USDA Official	New Post
Area Planted (HA)	25277	25438	25300	25114	0	25100
Area Harvested (HA)	21500	22400	23500	22950	0	23090
Bearing Trees (1000 TREES)	33700	33900	33800	33500	0	33400
Non-Bearing Trees (1000 TREES)	3000	2920	2000	2000	0	1990
Total Trees (1000 TREES)	36700	36820	35800	35500	0	35390
Commercial Production (MT)	1150000	1200000	1225000	1300000	0	1320000
Non-Comm. Production (MT)	0	0	0	0	0	0
Production (MT)	1150000	1200000	1225000	1300000	0	1320000
Imports (MT)	50	47	30	55	0	50
Total Supply (MT)	1150050	1200047	1225030	1300055	0	1320050
Domestic Consumption (MT)	542750	592791	575030	620055	0	610050
Exports (MT)	607300	607256	650000	680000	0	710000
Withdrawal From Market (MT)	0	0	0	0	0	0
Total Distribution (MT)	1150050	1200047	1225030	1300055	0	1320050

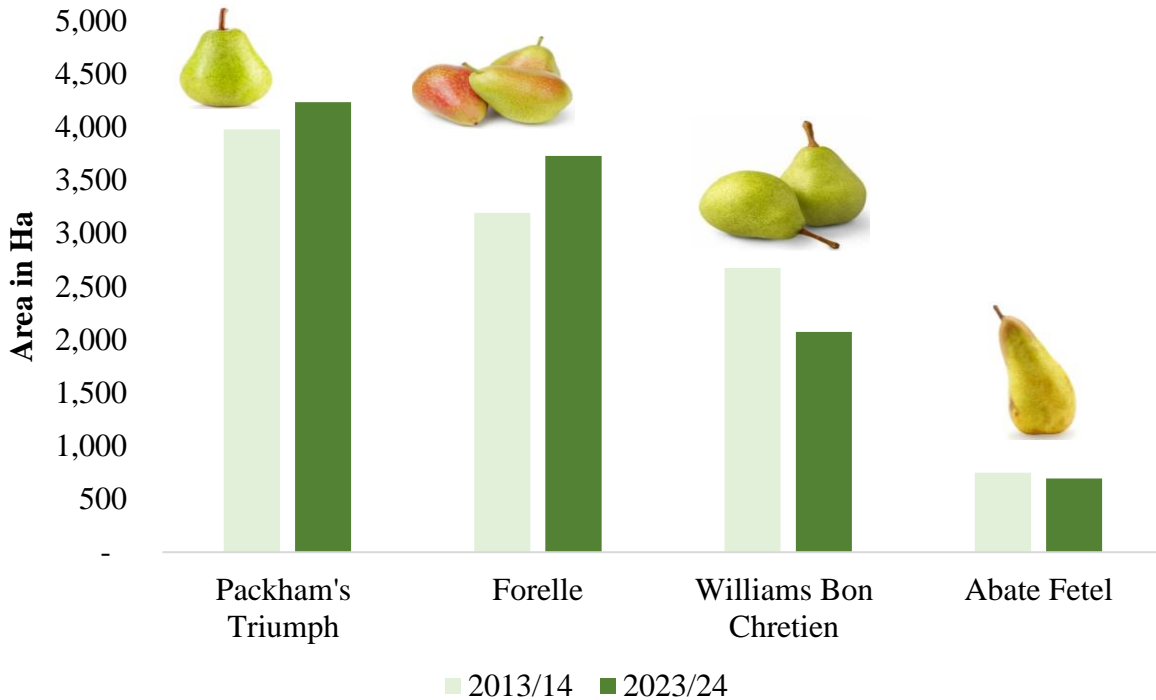
(HA) ,(1000 TREES) ,(MT)

OFFICIAL DATA CAN BE ACCESSED AT: [PSD Online Advanced Query](#)

## **Pears, Fresh**

Pears grow well in areas with moderate temperatures. Like apples, pears are predominately grown in the Western Cape province of South Africa, which receives most of its rainfall during the winter months (May to July). Collectively, the top four cultivars represent almost 83 percent of pear plantings in South Africa (see Figure 6).

**Figure 6: Planted Pear Varieties (Hectares)**



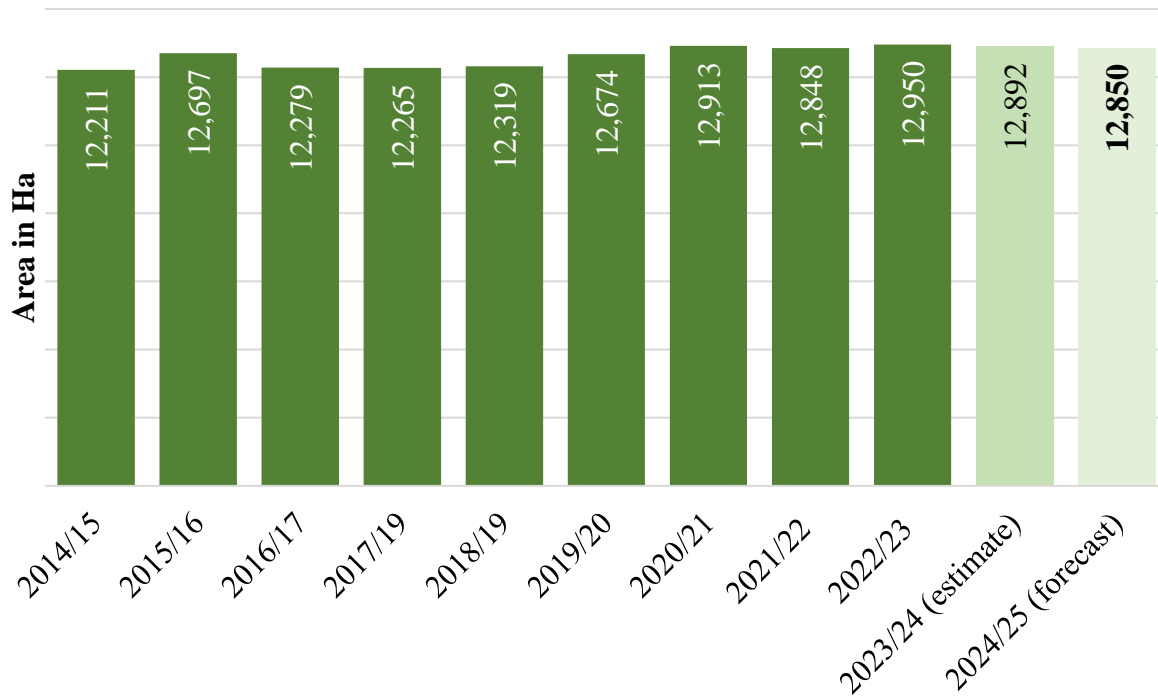
Source: *FAS Pretoria with 2023 Hortgro Tree Census*

### **Area Planted**

Post forecasts that area under pear production in MY 2024/25 will remain unchanged at 12,850 ha from MY 2023/24 (see Figure 7). Growth in area planted is limited by inefficiencies at the Port of Cape Town. Growers are reported to have re-routed produce to be exported from the Port of Port Elizabeth, which is almost 780 kilometers from Cape Town. Additionally, growers made use of conventional reefers to alleviate pressure from the Cape Town Port. Alternative solutions to exporting fruit come at an additional cost to farmers, diminishing the profitability of pear producers and limiting continued investments in expanding area planted. Additionally, growers are observed to be putting up hail nets to increase fruit quality.

In MY 2023/24, area planted decreased by one percent from MY 2022/23. Scheduled power outages in MY 2023/24 and preceding marketing years led to growers investing in alternative sources of electricity so that irrigation, cooling and packing are not interrupted, limiting investment in expanding area planted.

**Figure 7: Area Planted in Pears in South Africa**



Source: FAS Pretoria with Hortgro data

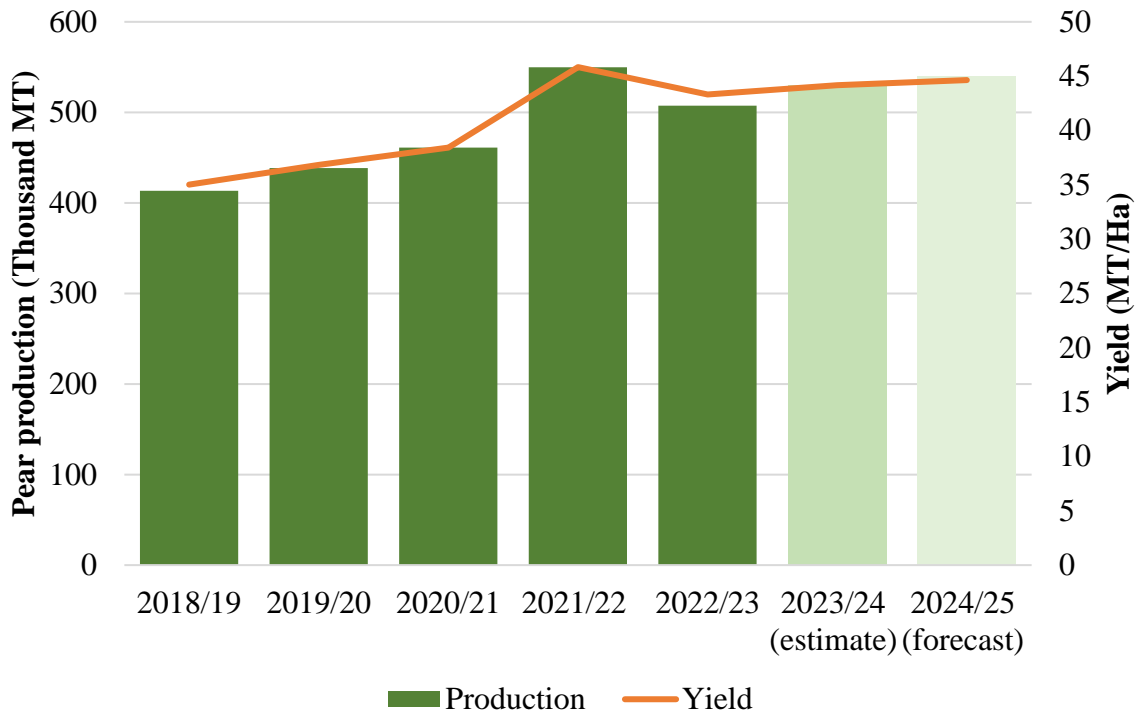
## Production

Post forecasts that pear production in MY 2024/25 will improve by two percent to 540,000 MT from MY 2023/24 on expected slight improvement in yields. Growth is based on the cold, wet winter of 2024, with good chilling hours which is expected to result in excellent fruit set and quality. Winter rainfall also ensures sufficient water for irrigation.

Post estimates MY 2023/24 production at 530,000 MT, a four percent increase from MY 2022/23. Pear orchards received good rain and sufficient chill hours in the winter of 2023, resulting in good quality produce. Summer pears in the Ceres region were slightly affected by the early frost damage; nevertheless, production from this region grew from MY 2022/23 production. Post contacts reported that pears produced in MY 2023/24 were generally smaller in size due to a shortened growing season, but overall yields were stronger than in MY 2022/23 because of extensive investment in netting. Blush pear varieties such as Cheeky, Celina and Rosemarie boosted overall production, while Abatel Fetel volumes dropped slightly due to the early harvest and some frost bite.

In MY 2022/23 pear production dropped by eight percent from record production of 550,000 MT in MY 2021/22, due to hail damage in a major pear producing region. (see Figure 8).

**Figure 8: Pear Production in South Africa**



Source: FAS Pretoria using Hortgro data

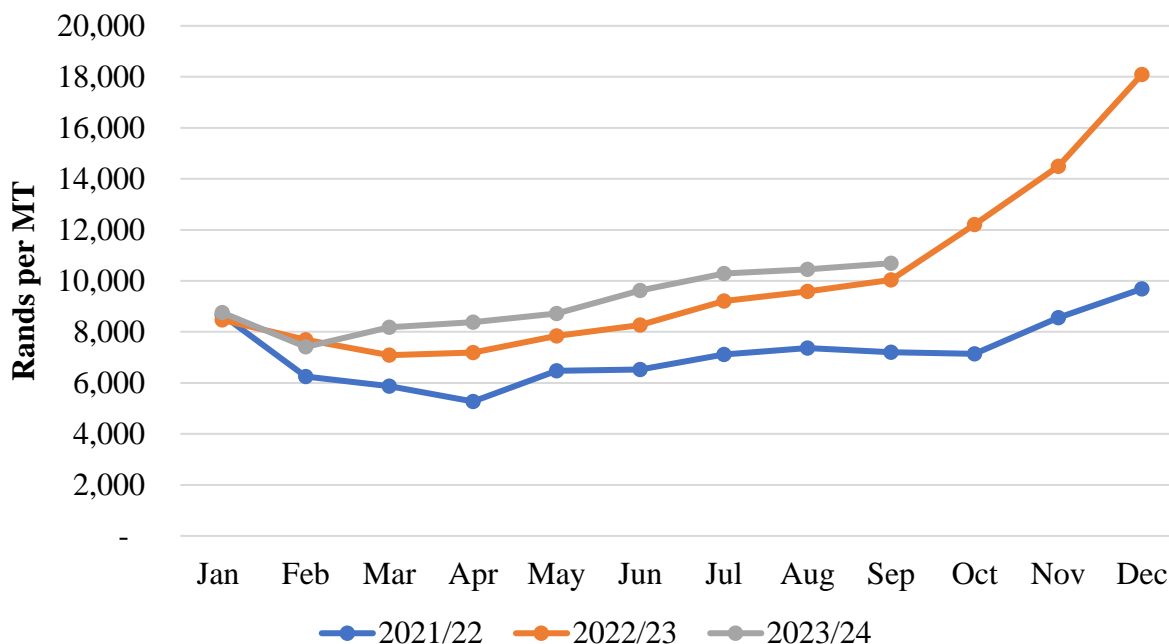
### Consumption

The industry is export orientated, with more than 50 percent of pear production destined for foreign markets. In South Africa, less than 25 percent of total pear demand is consumed fresh, while the majority is destined for the processing industry. Post forecasts that domestic consumption in MY 2024/25 will remain unchanged from MY 2023/24 because higher production is directed towards the export market. Furthermore, lower global demand for canned fruit is reducing demand from processors.

MY 2023/24 domestic consumption is estimated to drop by six percent, as production quality favors exports. In MY 2022/23, domestic consumption of pears is revised upwards to 267,062 MT, on increased availability of pears in the local market due to a hail-induced drop in export quality produce with increased supply sent to processing (consumption figures include fresh market sales, as well as pears destined for processing).

The pear prices indicated in Figure 9 are the average prices (Rand/MT) earned in the respective markets. Local prices are based on sales on the twenty-one wholesale fresh produce markets in South Africa. In MY 2022/23, the price for pears in the local market increased due to a drop in production and volumes sold in the local market.

**Figure 9: Local Price Trend of Pears**



Source: FAS Pretoria using DALLRD data

## Exports

Post forecasts that exports in MY 2024/25 will improve by four percent to 290,000 MT from MY 2023/24. Growth is based on an increase in the production of export quality fruit and easing of freight costs. Port inefficiencies remain a concern for the pome industry, and growers in MY 2024/25 are expected to continue using alternative ports and specialized reefer vessels to relieve pressure off the port of Cape Town and ensure that fruit reaches export markets.

Post estimates that pear exports will rebound by 16 percent in MY 2023/24 on increased production of exportable supply. The harvest season started about 7-10 days earlier than normal with the summer pear variety Celina entering relatively tight global markets due to lower than normal production in the northern hemisphere. Exports in MY 2022/23 had dropped from the previous year by 16 percent due to hailstorm damage.

India approved in-transit cold treatment for South African pears in August 2022. Exports to India are expected to grow due to improving demand of pears in that market. Post contacts report that the main varieties exported to India are Packham Truimp, Forelle and Vermont Beauty. MY 2023/24 marks the third marketing year that South Africa can export pears to China since market access was granted in 2021. China ranks 15<sup>th</sup> on the list of export destinations for South African pears, exporting 3,405 MT in MY 2022/23. Industry contacts expect growth in the Chinese market to be driven by Forelle, Cheeky, Packham's Triumph, Abate Fetel, and Celina. Exports to the United States are minimal at less than a 1,000 MT per annum. South Africa exports to the United States mainly between February and July.

**Table 4: South African Fresh Pear Exports (Values in MT)**

Rank	Partner Country	Jan - Dec				Year to date: Jan - Aug		
		2021/22 (MT)	2022/23 (MT)	2022/23 Market share	%Δ 2022/23	2022/23 (MT)	2023/24 (MT)	%Δ 2023/24
1	Netherlands	50,806	37,792	16%	-26%	37,640	49,224	31%
2	Russia	51,868	34,819	14%	-33%	28,242	33,297	18%
3	United Arab Emirates	28,224	25,481	11%	-10%	21,434	21,253	-1%
4	India	28,507	22,850	9%	-20%	15,656	16,624	6%
5	United Kingdom	13,754	15,708	7%	14%	15,547	11,738	-24%
6	Indonesia	9,957	9,865	4%	-1%	7,013	6,630	-5%
7	Portugal	4,309	7,580	3%	76%	7,580	9,968	32%
8	Saudi Arabia	7,402	7,275	3%	-2%	6,215	6,910	11%
9	Malaysia	8,618	7,251	3%	-16%	5,303	5,367	1%
10	Canada	6,920	6,648	3%	-4%	6,625	7,006	6%
...45	United States	301	391	0%	30%	391	535	37%
	Others	77,044	65,259	27%	-15%	53,910	60,664	13%
	<b>World</b>	<b>287,412</b>	<b>240,531</b>	<b>100%</b>	<b>-16%</b>	<b>205,164</b>	<b>228,681</b>	<b>11%</b>

Source: FAS Pretoria using Trade Data Monitor, LLC data

## Imports

As the second largest pear producer in the Southern Hemisphere after Argentina, South Africa imports minimal quantities of pears, mainly from China. Post forecasts pear imports in MY 2024/25 at 30 MT based on sustained supply of pears in the domestic market and the rate of import decline over the past few marketing years. In MY 2023/24, pear imports are estimated at 30 MT, dropping by 30 percent from MY 2022/23 on sufficient supply of pears in the domestic market.

The United States does not have market access for pear exports to South Africa. In July 2010, the United States requested market access for pears; however, progress on this request stalled and the process has not been finalized. If South Africa grants access, U.S. exports of pears would be subject to a four percent customs duty as indicated in Table 5.

**Table 5: Tariff Rates, Fresh Pears**

Heading Subheading	Article Description	Rate of Duty					
		General	EU/UK	EFTA	SADC	Mercosur	AfCFTA
0808.30	Pears, fresh	4%	Free	4%	Free	4%	2.4%

Source: SARS

Updated October 16, 2024

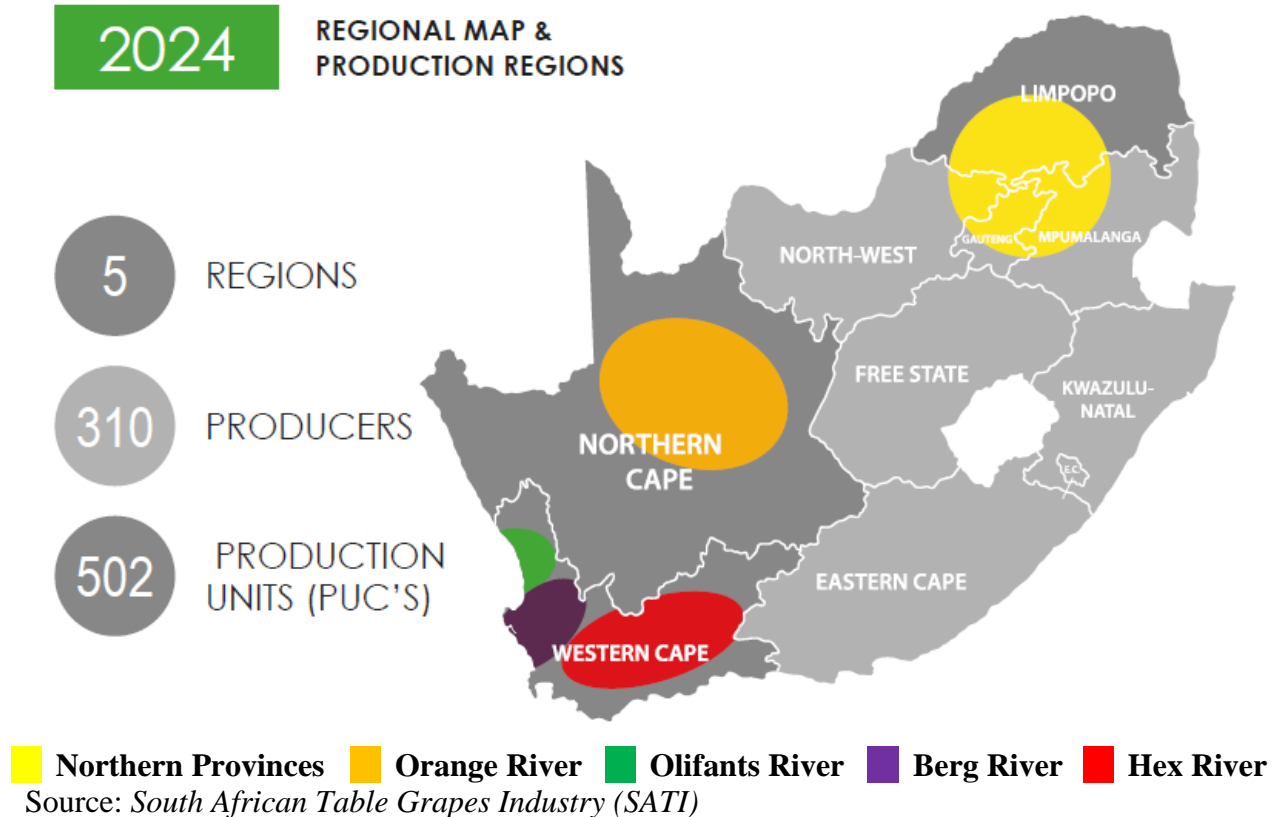
**Table 6: Production, Supply and Distribution of Fresh Pears**

Pears, Fresh Market Year Begins	2022/2023		2023/2024		2024/2025	
	Jan 2023		Jan 2024		Jan 2025	
South Africa	USDA Official	New Post	USDA Official	New Post	USDA Official	New Post
Area Planted (HA)	13000	12892	13000	12900	0	12950
Area Harvested (HA)	11400	11720	12100	12000	0	12100
Bearing Trees (1000 TREES)	17230	17264	17350	17300	0	17350
Non-Bearing Trees (1000 TREES)	900	920	800	910	0	900
Total Trees (1000 TREES)	18130	18184	18150	18210	0	18250
Commercial Production (MT)	500000	507550	530000	530000	0	540000
Non-Comm. Production (MT)	0	0	0	0	0	0
Production (MT)	500000	507550	530000	530000	0	540000
Imports (MT)	50	43	30	30	0	30
Total Supply (MT)	500050	507593	530030	530030	0	540030
Domestic Consumption (MT)	259550	267062	250030	250030	0	250030
Exports (MT)	240500	240531	280000	280000	0	290000
Withdrawal From Market (MT)	0	0	0	0	0	0
Total Distribution (MT)	500050	507593	530030	530030	0	540030
(HA) ,(1000 TREES) ,(MT)						
OFFICIAL DATA CAN BE ACCESSED AT: <a href="#">PSD Online Advanced Query</a>						

## Table Grapes, Fresh

South Africa's major growing areas for table grapes, include the Hex River (32 percent), the Berg River Valley (23 percent), Olifants River (6 percent) in the Western Cape province, the Orange River in the Northern Cape province (29 percent), and Northern Provinces (10 percent) (see Figure 10). The South African Table Grapes Producers Association (SATGI) represents and supports the interests of table grapes producers.

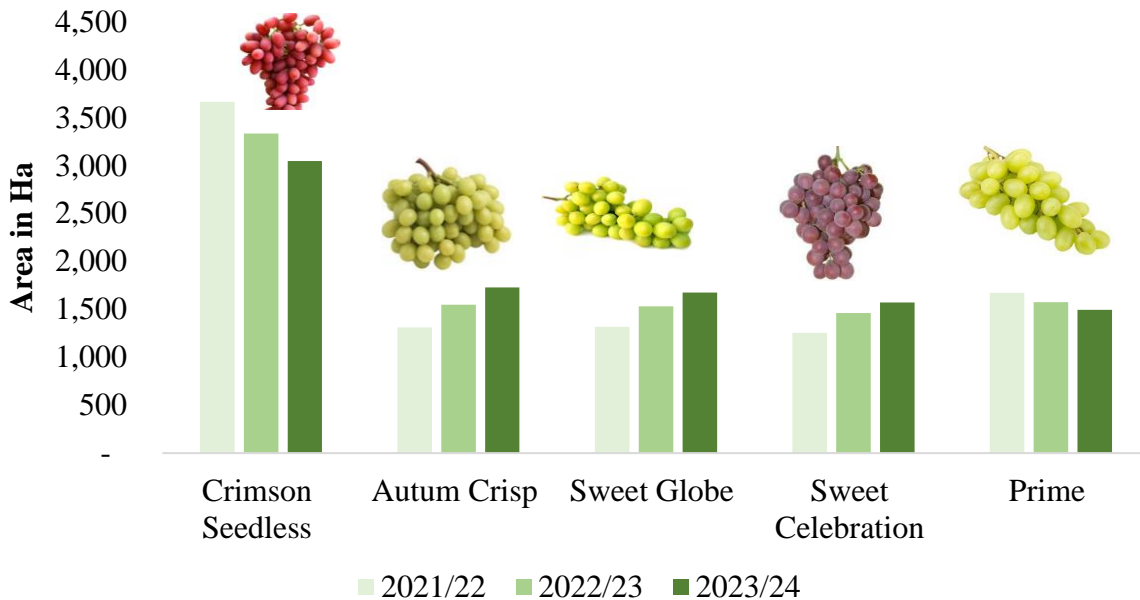
**Figure 10: Map of Table Grape Production Areas in South Africa**



According to the SATI Tree Census (2024), the area planted to table grapes was mostly covered with vines aged between 3-9 years (57 percent), followed by vines aged 10-15 years (20 percent). Area covered in new vines younger than 2 years dropped by 27 percent to 2,120 hectares in MY 2023/24, reflecting a decrease in overall area planted. The cultivar profile of table grapes in South Africa has changed significantly over the past decade. Consumers prefer seedless grapes, therefore seeded cultivars are declining while seedless table grapes varieties are growing. Less than 6 percent of current production are seeded table grapes. The top five cultivars planted include Crimson Seedless (16 percent), Autumn Crisp (9 percent), Sweet Globe (9 percent), Sweet Celebration (8 percent) and Prime (8 percent). These cultivars make up 50 percent of total area planted and are highlighted in Figure 11.



**Figure 11: Planted Table Grape Varieties (Hectares)**



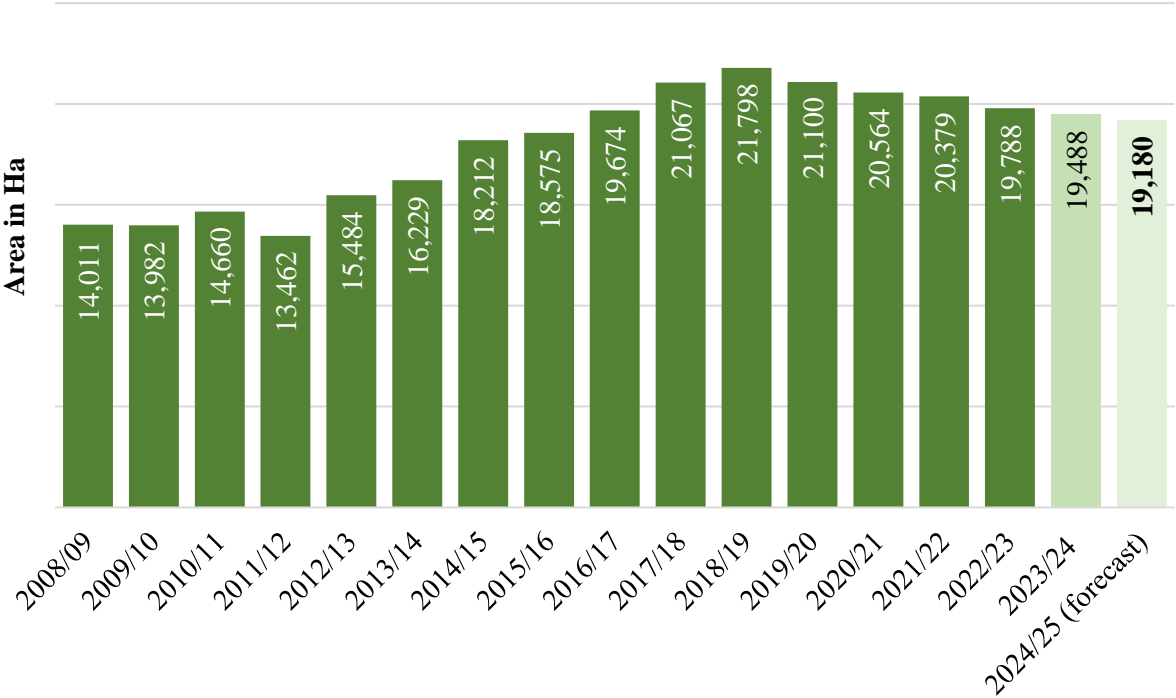
Source: FAS Pretoria using SATI data

### Area Planted

Post forecasts that area under table grape production will drop by two percent to 19,180 ha in MY 2024/25 compared to MY 2023/24. Growers are replacing older varieties with newer, higher yielding varieties. Area planted has shown a downward trend since MY 2018/19, falling by an annual average of two percent. The downwards trend in area planted follows a sharp increase in table grape area from MY 2012/13 to MY 2018/19 (see Figure 12), mainly driven by growing export earnings. South African table grapes are mostly exported; therefore, inefficient port operations and deteriorating road networks diminish the profitability of table grape producers in South Africa and limit new investments in the industry. Furthermore, growers carry the added costs of rerouting produce to be exported through the Port of Port Elizabeth rather than the efficient Port of Cape Town.

The estimated area under production decreased by two percent to 19,488 ha in MY 2023/24 from MY 2022/23. All production regions showed slight decreases (Northern Province -eight percent, Hex River -two percent, Berg River -one percent and Orange River -one percent) in area planted except for Oliphants River (+one percent). The cost of fertilizer and chemicals has stabilized but remains above the price levels prior to the Russia-Ukraine conflict. According to the industry association SATGI, the biggest direct cost component for producers is labor, which makes up almost 55 percent of total direct cost. The South African Department of Employment and Labor published a new national minimum wage of R27.58 (\$1.48) per hour as of March 1, 2024, an eight percent increase from R25.42 (\$1.36) in 2023.

**Figure 12: Area Planted in Table Grapes in South Africa**



Source: FAS Pretoria using SATI data

In MY 2022/23, the area under production declined by three percent to 19,788 ha. The Northern Provinces region recorded the largest decline in area planted due to changing weather conditions and increasing production costs.

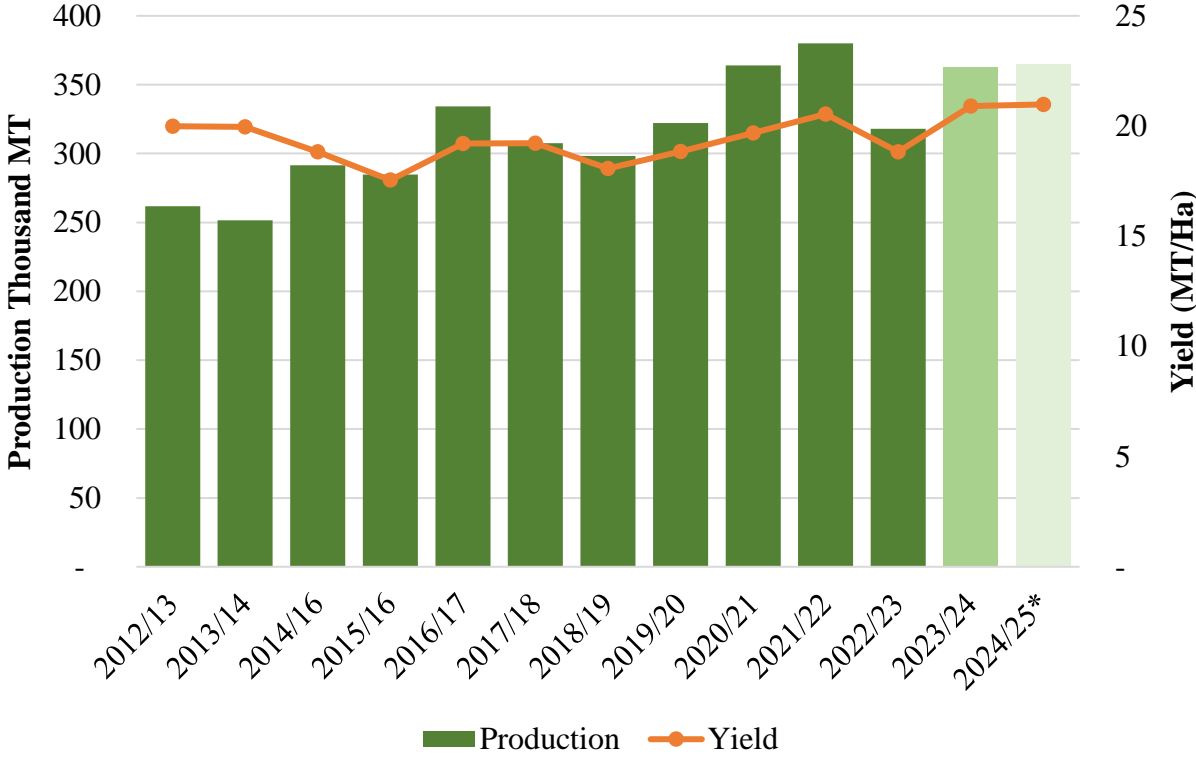
**Production**

Based on normal weather conditions and newer cultivars coming into full production, Post forecasts that table grape production in South Africa will increase minimally, by one percent to 365,000 MT in MY 2024/25 compared to MY 2023/24. Cold temperatures during the winter months of 2024 were sufficient to support berry size, coloring, and quality. Furthermore, rainfall received in winter increased dam levels ensuring water availability for irrigation. Post contacts report that table grape production in the majority of regions is expected to increase slightly or maintain averages due to improved yields while production in the Northern Provinces regions will likely drop, mirroring the downward trend in area planted.

Post estimates table grape production at 363,000 MT in MY 2023/24, a 14 percent improvement from MY 2022/23. In addition to new higher yields cultivars coming into full production, all production regions except for the Hex River experienced favorable weather conditions during the season, which aided improvement in production volumes and quality. Although localized hail was reported in the Hex River production region, it did not significantly affect national table grape production. The production season in MY 2023/24 ended about 2 weeks earlier than usual, due to changing weather patterns and rains received in the Hex River production region during mid-late season. This led to lighter than usual production on late cultivars.

In MY 2022/23, table grape production dropped by 16 percent to 318,000 MT after a record crop of 380,000 MT produced in MY 2021/22 (see Figure 13). This is based on a marginal reduction in production area and adverse weather conditions, particularly in the Orange River area.

**Figure 13: Table Grape Production in South Africa**



Source: FAS Pretoria using SATI data

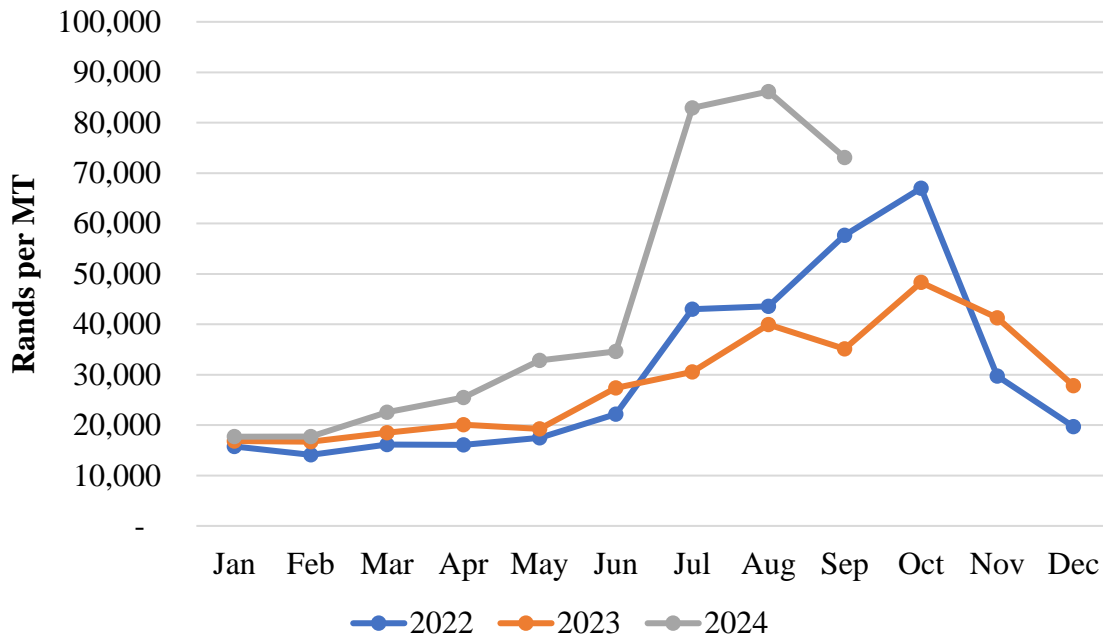
\*Post Forecast

**Consumption**

South Africa’s table grape industry is mainly export-orientated, with more than 85 percent of production destined for foreign markets. The supply of table grapes to the domestic market is dependent on exports, with table grapes that do not meet export quality standards being sold to the domestic fresh produce market or supplied to processors. As a result, for MY 2024/25, Post forecasts that domestic consumption will decrease by two percent due to modest domestic production and a slight increase in exportable supply.

Table grapes are mainly consumed by middle-income and affluent consumers. Figure 14 shows the average price of table grapes in 16 wholesale fresh produce markets across South Africa. Price trends mirror seasonality, as prices increase during the off-season due to lower supply in the market.

**Figure 14: Table Grape Average Price trend**



Source: FAS/Pretoria using DALRRD data

In MY 2023/24 domestic consumption is estimated to have dropped by 12 percent based on increased export supply.

## Exports

Post forecasts that table grapes in MY 2024/25 will increase slightly by one percent from MY 2023/24 due to expected modest growth in production. Further, port logistics continue to pose a risk to the exports due to equipment shortages and breakdowns particularly at Cape Town’s Container Terminal (CTCT) and the Cape Town Multipurpose Terminal (CTMPT) during the export season.

In MY 2023/24 table grape exports increased by 17 percent on a rebound in production. The most exported cultivars in MY 2023/24 were Crimson Seedless, Sweet Globe, Sweet Celebration, Prime and Autumn Crisp, mirroring overall production. The Port of Cape Town, which is traditionally used to export a bulk of South African table grapes, experienced fewer weather-related export disruptions in MY 2023/24 compared to MY 2022/23. Post contacts report that only 105 hours of weather delays were recorded in February 2024 compared to 254 hours in February 2023. However, the export season was threatened by other challenges at the Port of Cape Town. The port experienced crane breakdowns at the start of the season and equipment shortages during the export peak season causing some delays. While these delays did not have a significant impact on volumes exported in MY 2023/24, they impacted profit margins through reduced quality, inability to capture early season premiums, and contractual failure on timely deliveries.

To alleviate pressure off the Port of Cape Town, growers in MY 2023/24 had to divert approximately 10.6 percent of table grape exports through the Port of Port Elizabeth. Additionally, Namibian exporters who traditionally export through the Port of Cape Town, shipped about 21 percent of their table grape exports through the Walvis Bay port in Namibia. Cape Town port management, government and the fruit industry engaged on a regular basis to review port productivity and readiness throughout the export season, and to implement any remedial action when necessary.

Post visited Walvis Bay in September and observed plans to increase cold storage and potentially increase export of South Africa table grapes. Post expects that in MY 2024/25 more Namibian grapes along with South African grapes from the Northern Provinces will be shipped through Walvis Bay. A portion of exported grapes produced in the Western Cape will be shipped through the Port of Port Elizabeth. This is expected to ease some pressure off the Port of Cape Town especially during the peak season. Even though the Port of Cape Town has a plan to replace some of the old equipment in 2025, improved productivity will likely not be realized until the MY 2025/26 export season.

In MY 2022/23, table grape exports dropped by 16 percent drop compared MY 2021/22 due to a decline in production and challenges at the port.

Europe is the leading export market for South African table grapes, accounting for about 78 percent of total table grape exports in MY 2023/24. The Netherlands, as the entry point to the European market, is the largest export market for South Africa's table grapes, accounting for more than 40 percent of total exports. South Africa benefits from a shorter shipping distance to Europe than other Southern Hemisphere competitors, and from preferential trade agreements with the EU and United Kingdom. Exports to Asia, the Middle East, and Africa also have strong growth potential and are core focus areas for the South African table grape industry.

Exports to the United States increased by 73 percent in MY 2023/24 compared to MY 2022/23. Some Southern Hemisphere countries experienced adverse weather conditions which affected exportable production. This gave South Africa an opportunity to increase export volumes to the United States. Table grapes exported to the United States are seedless and the main varieties include Sweet Globe, AutumnCrisp, Sweet Celebration and Sable Seedless.

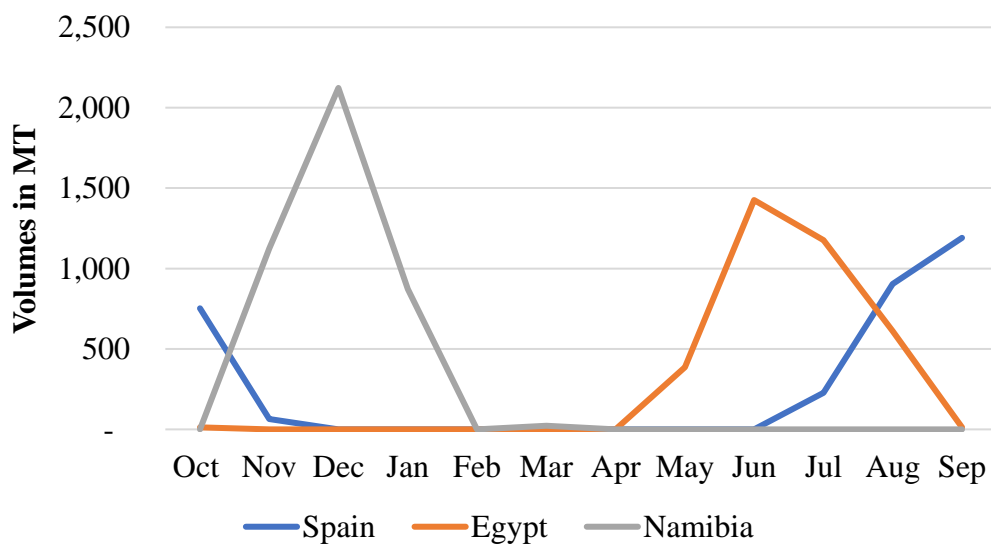
**Table 8: South Africa's Table Grape Exports**

Export destinations	MY 2022/23 (MT)	MY 2023/24 (MT)	% Share in MY 2023/24	% Change
European Union	154,406	191,484	58%	24%
United Kingdom	57,557	65,709	20%	14%
Middle East	20,320	20,431	6%	1%
Canada	14,441	11,672	4%	-19%
Southeast Asia	14,169	11,196	3%	-21%
China & Hong Kong	8,153	6,683	2%	-18%
Africa	4,171	6,427	2%	54%
Russia	3,728	6,163	2%	65%
United States	3,460	5,987	2%	73%
Indian Ocean Island	1,407	4,889	1%	247%
<i>All others</i>	<i>1,443</i>	<i>2,141</i>	<i>1%</i>	<i>48%</i>
<b>Total</b>	<b>283,255</b>	<b>332,782</b>	<b>100%</b>	<b>17%</b>

Source: FAS Pretoria using SATI data

## Imports

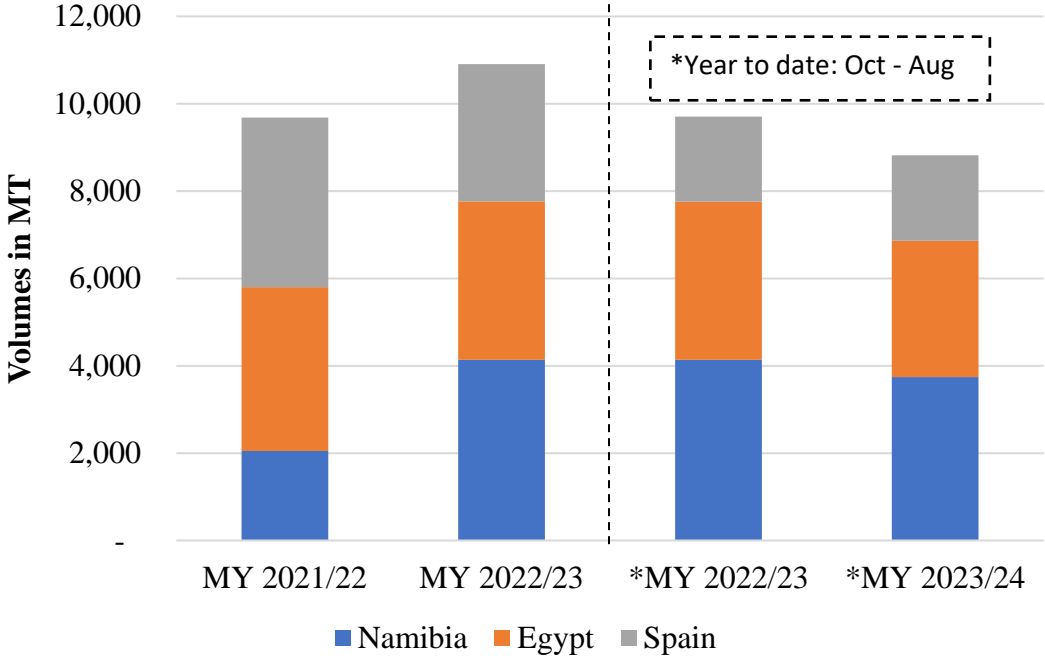
South Africa is a net exporter of table grapes. Imports primarily fill the off-season demand from around June to October. Namibia, Egypt, and Spain are the primary suppliers (see Figure 15), with both Namibian and Spanish grapes entering the market duty-free. The Namibian table grape season starts a few weeks earlier than South Africa's, and exports are mainly between October and January.

**Figure 15: Off-Season Suppliers of Table Grapes in South Africa: MY 2022/23**

Source: FAS Pretoria using Trade Data Monitor, LLC. data

Post forecasts that imports will drop by 11 percent to 9,000 MT in MY 2024/25 from MY 2023/24 due to slight improvement in domestic supply and stagnated demand from the domestic market. MY 2023/24 imports are also estimated to have dropped by seven percent compared to MY 2022/23 also from improved production and lower demand by South African consumers. Further, available data shows that imports for the period October – August in MY 2023/24 are eight percent lower compared to the same period in MY 2022/23 (see Figure 16).

**Figure 16: South Africa’s Table Grape Imports**



Source: FAS Pretoria using Trade Data Monitor, LLC. data

The United States does not have market access for table grapes into South Africa. However, if access were granted, exports would be subject to a 4 percent customs duty, as shown in Table 10.

**Table 10: Tariff Rates, Grapes Fresh**

Heading Subheading	Article Description	Rate of Duty					
		General	EU/UK	EFTA	SADC	Mercosur	AfCFTA
0806.10	Grapes, fresh	4%	Free	4%	Free	4%	2.4%

Source: SARS (Updated October 10, 2024)

**Table 11: Production, Supply and Distribution of Table Grapes**

Grapes, Fresh Table Market Year Begins South Africa	2022/2023		2023/2024		2024/2025	
	Oct 2022		Oct 2023		Oct 2024	
	USDA Official	New Post	USDA Official	New Post	USDA Official	New Post
Area Planted (HA)	19788	19788	19500	19488	0	19180
Area Harvested (HA)	18000	18000	18200	17368	0	17400
Commercial Production (MT)	318000	318000	370000	363000	0	365000
Non-Comm. Production (MT)	0	0	0	0	0	0
Production (MT)	318000	318000	370000	363000	0	365000
Imports (MT)	10900	10907	9000	10100	0	9000
Total Supply (MT)	328900	328907	379000	373100	0	374000
Fresh Dom. Consumption (MT)	43900	45652	39000	40318	0	39400
Exports (MT)	285000	283255	340000	332782	0	334600
Withdrawal From Market (MT)	0	0	0	0	0	0
Total Distribution (MT)	328900	328907	379000	373100	0	374000
(HA) ,(MT)						
OFFICIAL DATA CAN BE ACCESSED AT: <a href="#">PSD Online Advanced Query</a>						



## Policies and Regulations

Table 12 provides a list of the regulations applicable to apples, pears, and table grapes in South Africa. Exporters should also be aware that an importer may request additional certifications over and above the minimum legislation and regulations indicated in this section.

**Table 12: List of Key Legislations and Regulations**

<b>Policy or Regulation</b>	<b>Website Links</b>
<b>Agriculture Product Standards Act No 119 of 1990</b>	<a href="#">Agricultural Product Standard Act</a>
<b>Agricultural Pests, Act, 36 of 1983</b>	<a href="#">Agricultural Pests Act</a>
<b>Foodstuffs, cosmetics, and disinfectants Act 54 of 1972</b>	<a href="#">Foodstuffs, cosmetics and disinfectants act</a>
<b>Procedures for exporting to South Africa</b>	<a href="#">Plant Health (Import into SA)</a>
<b>Maximum Residue Limits</b>	<a href="#">Maximum Residue Limits</a>  <a href="#">Apples</a> <a href="#">Pears</a> <a href="#">Table grapes</a>
<b>Regulations relating to standards, grading, packing, and marking</b>	<a href="#">Apples</a> <a href="#">Local Import Regulations - Apples</a> <a href="#">Pears</a> <a href="#">Local Import Regulations - Pears</a> <a href="#">Table Grapes</a> <a href="#">Local Import Regulations - Table grapes</a>
<b>Import Protocols</b>	<a href="#">Phytosanitary import requirements for importation of Apples from China to South Africa</a>  <a href="#">Phytosanitary import requirements for importation of Apples from Netherlands to South Africa</a>  <a href="#">Phytosanitary import requirements for importation of Pears from China to South Africa</a>  <a href="#">Phytosanitary import requirements for importation of Apples from USA, PNW to South Africa</a>

Source: DALRRD

### Sources:

Hortgro - <http://www.hortgro.co.za>

South African Table Grapes Industry (SATGI) - <http://www.satgi.co.za/>

South African Revenue Services (SARS) - <https://www.sars.gov.za/>

**Attachments:**

No Attachments