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South Africa - Republic of

Fresh Deciduous Fruit Annual

Update on the South African Deciduous Fruit Supply and Demand

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Report Highlights:
Post estimates that the 2015/16 MY production of apples will increase by two percent to 865,000 MT and that the pears production will increase by three percent to 410,000 MT in the 2015/16 MY based on normal growing conditions and the minimal impact of the dry weather conditions to irrigation water availability. Another exceptional season is expected for table grapes production, as the 2015/16 MY table grapes production is forecasted at 294,000 MT.

Commodities:
Grapes, Table, Fresh
Apples, Fresh
Pears, Fresh

Executive Summary

Post forecasts that the South African apple production will increase by two percent to 865,000 MT in the 2015/16 MY, and that exports will increase by one percent to 455,000 MT in the 2015/16 MY, based on the available production and the weak rand exchange rate.

Post forecasts that the South African pear production will increase by three percent to 410,000 MT in the 2015/16 MY based on normal growing conditions and that exports will decrease by seven percent to 190,000 MT in the 2015/16 MY based on the difficult global pear market, and the growth in the local processing market demand and prices.

Post forecasts that the South African table grape production will increase marginally to 294,000 MT in the 2015/16 MY. Post forecasts that the 2015/16 MY exports will also increase marginally to 266,000 MT based on the available production and continued strong demand due to the weak exchange rate.

The domestic consumption of apples, pears and table grapes are forecasted to remain flat in the 2015/16 MY based on the available production and the slow economic growth prospects in South Africa.

South Africa is a net exporter of deciduous fruits, and only imports small quantities of apples, pears and grapes to fulfill a niche market or to satisfy domestic demand when supply is limited.

Exchange Rate
US $ 1 = R13.00

MY – Marketing Year (January to December)

Sources

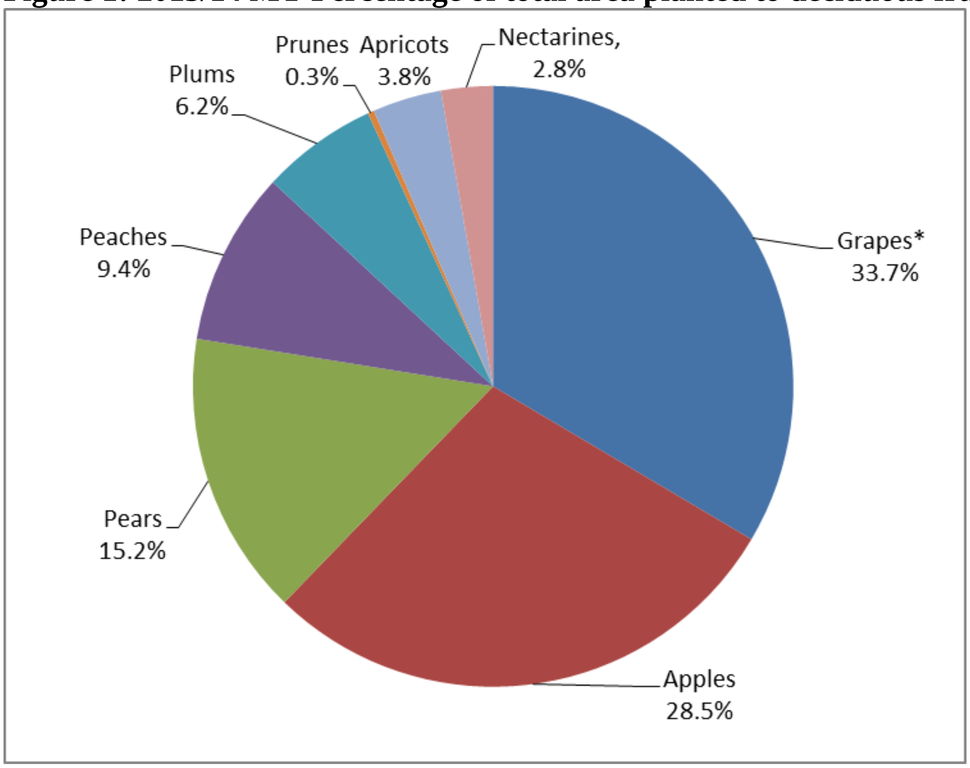
Name	Website
Hortgro	http://www.hortgro.co.za
South African Table Grapes Industry (SAGTI)	http://www.satgi.co.za/
Fresh Fruit Portal	http://www.freshfruitportal.com/

Brief background of the South African Deciduous fruit industry

Deciduous fruit is the largest sub-sector when measured in terms of hectares under fruit plantation in South Africa. Approximately 79,803 hectares (ha) was planted to deciduous fruits in South Africa in the 2013/14 MY. **Figure 1** shows that grapes (Fresh and dried), apples and pears have the largest area planted and accounted for approximately 78 percent of the total area planted with deciduous fruit in the 2013/14 MY.

The Western Cape is the largest and traditional producer of deciduous fruits in South Africa, however, in the past two decades; the Northern and Eastern Cape, and Limpopo provinces have become increasingly large producers of deciduous fruit. South Africa is ranked the fourth largest apple producer and second largest pear producer in the Southern Hemisphere.

Figure 1: 2013/14 MY Percentage of total area planted to deciduous fruits in South Africa



***Fresh and Dried. Source: HORTGRO**

Apples, Fresh

Production

Post forecasts that the South African apple production will increase by two percent to 865,000 MT in the 2015/16 MY based on normal growing conditions with minimal impact of the dry weather conditions to irrigation water availability in the apple growing regions of the Western Cape. Post revised downwards the 2014/15 MY estimates to 860,000 MY, a nine percent increase from the 2013/14 MY production of 792,549 MT, due to additional hectares coming into production and the strong recovery from the 2013/14 MY hail damage.

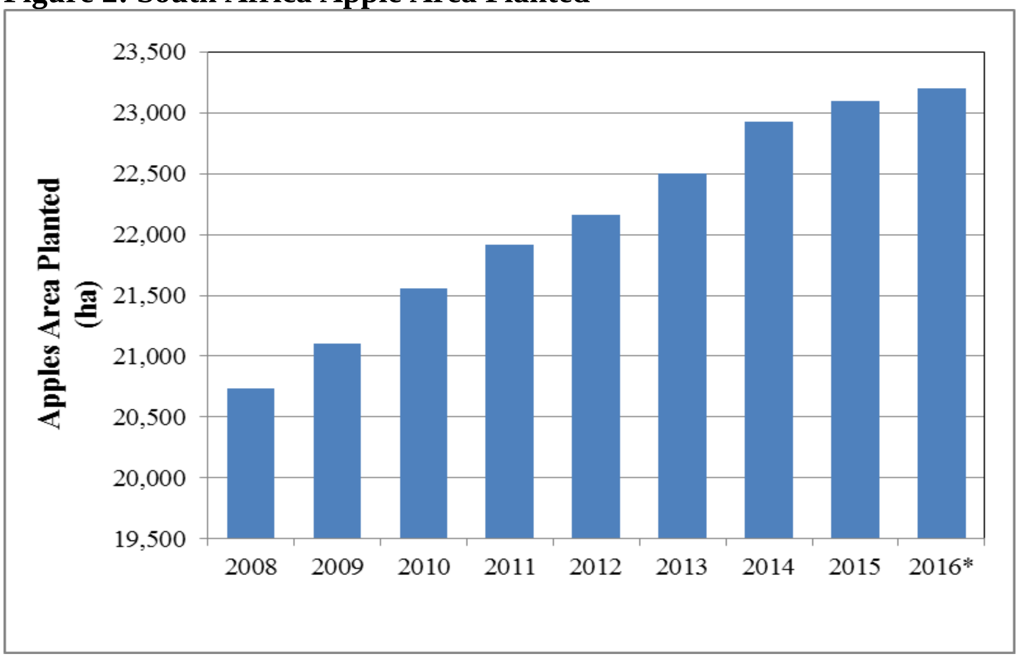
Apples are grown in several provinces around South Africa, but the Western Cape (WC) is the heartland of deciduous fruit production, accounting for approximately ninety percent of the total apple production and exports. The WC is a winter rainfall area and has a climate similar to the Mediterranean, which is favorable for apple production. The most important apple growing regions are Ceres, Groenland, Langkloof East, Villiersdorp, all located in the WC.

Harvest for South African apples typically begins at the end of January and runs through to June, with peak harvest times falling between February and April. Since 2008, Golden Delicious cultivar has been the leading favorite and most planted cultivar ahead of the Granny Smith cultivar which was previously favored by producers. Other cultivars which have been growing steadily are Gala, Pink Lady and Fuji.

Area Planted

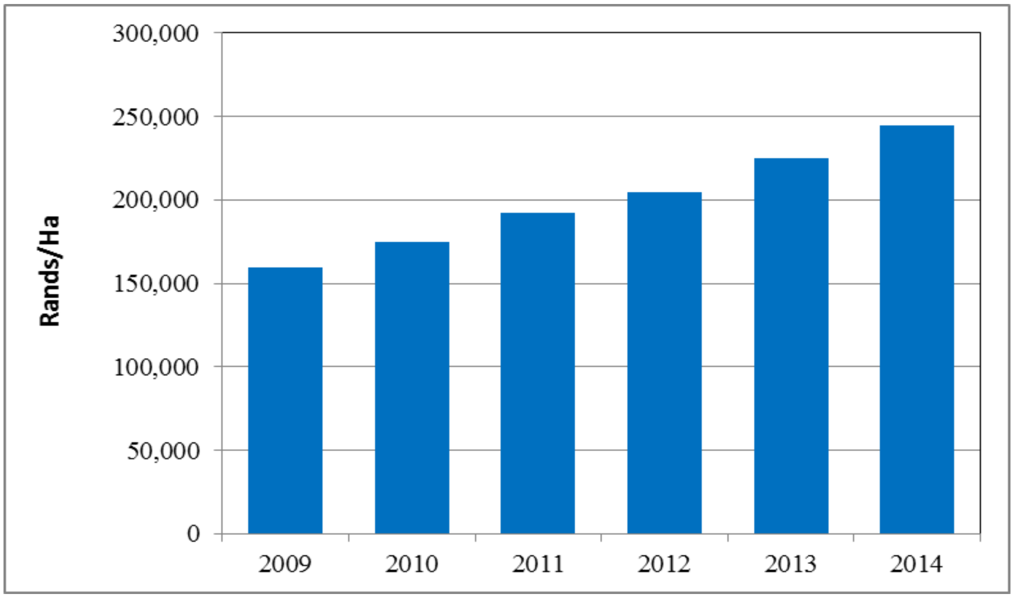
Post forecasts that the area planted to apples will increase marginally to 23,150 hectares (ha) in the 2015/16 MY, from the 2014/15 MY area planted of 23,100 ha. The 2013/14 MY area planted remains unchanged at 22,929 ha. **Figure 2** shows that the area planted has increased steadily since 2008.

Figure 2: South Africa Apple Area Planted



**Forecast*
Source: HORTGRO

Figure 3: South Africa Apple Orchard Cost of Establishment



Source: HORTGRO

Figure 3 above shows that the cost of establishing an apple orchard has increased annually since 2009. In the 2013/14 MY, the cost of establishing an apple orchard was R244,994/ha (US$18,846/ha), an increase of nine percent from the 2012/13 MY cost of R225,043/ha (US$17,311/ha), against a general price inflation of six percent in 2014. The rising orchard establishment costs has been cited as one of the reason for low orchard replanting and expansion. Most apple trees are ageing; about 34 percent are over 25 years old, mostly being the Golden Delicious, Granny Smith and Topred cultivar. Industry reported that the number of apple trees aged between zero and three years in the 2013/14 MY was nine percent, this is slightly below the recommended replacement stock of ten percent as per best practice. Apple production costs have also increased. In the 2013/14 MY, the cost of apple production was R279,805/ha (US$21,523/ha), an increase of six percent from the 2012/13 MY cost of R264,655/ha (US$20,358/ha). Key drivers of the increased costs were labor and fuel.

Consumption

Post forecasts that the 2015/16 MY domestic consumption of apples will remain flat at 210,000 MT based on the available production supply and the slow economic growth prospects in South Africa. The 2014/15 MY and 2013/14 MY consumption remains unchanged at 210,000 MT and 210,303 MT, respectively, based on industry data.

Over the past years, growth and stability in the domestic market has largely been driven by the increasing preference for fresh fruit over processed fruit from a growing middle class. Apples are popular in South Africa and are widely consumed throughout the year. In addition, apples form part of the national food basket of goods which are monitored by the South African National Agricultural Marketing Council (NAMC) to track food price inflation. The Johannesburg Fresh Produce Market, a fresh produce market with an annual turnover of over R4 billion (US$308 million), reports that apples rank among the top five highly consumed fruits in South Africa.

Exports

Post forecasts that the South African apple exports will increase by one percent to 455,000 MT in the 2015/16 MY, based on the available production and the weak rand exchange rate. Post revised upwards the 2014/15 MY to 450,000 MT, an eighteen percent increase from the 2013/14 MY exports of 381,931 MT, based on the increase in production, the weak rand exchange rate, and the higher year to date exports in 2015.

Africa is now the leading export market for South Africa apples. In the 2013/14 MY, exports to other African countries constituted 48% of the total exports, followed by the European Union (26%), Asia (20%) and the Middle East (7%). The top five export country markets for South African apples in the 2013/14 MY was the United Kingdom (17%), Malaysia (11%), Nigeria (11%), Angola (4%) and the United Arab Emirates (4%).

Table 1: South African Fresh Apple exports

South Africa Export Statistics				
Commodity: 080810, Apples, Fresh				
Year Ending: December				
Partner Country	Unit	Quantity		
		2012	2013	2014
World	T	388,728	459,327	381,930
United Kingdom	T	98,050	107,541	65,218
Malaysia	T	41,043	46,515	43,797
Nigeria	T	7,857	32,317	43,624
Angola	T	21,929	19,789	16,853
United Arab Emirates	T	19,263	23,947	16,227
Zambia	T	8,195	10,072	12,392
Netherlands	T	16,438	33,371	12,170
Zimbabwe	T	13,449	12,154	12,124
Singapore	T	11,575	12,549	12,084
Kenya	T	7,881	10,384	11,169
Bangladesh	T	10,789	8,369	10,297
Namibia	T	275	1,986	10,011
Botswana	T	78	1,395	8,524
Senegal	T	8,779	9,692	8,074
Swaziland	T	0	852	7,399
Ghana	T	13,551	11,250	6,256
Mozambique	T	2,850	5,089	5,754
Benin	T	29,771	14,599	5,602
Taiwan	T	3,374	6,212	5,390
Mauritius	T	5,314	5,841	5,203
France	T	4,981	8,587	4,951
Russia	T	7,432	7,195	4,512

Cameroon	T	6,579	6,835	4,306
Saudi Arabia	T	5,065	6,324	4,170
Cote d Ivoire	T	3,228	3,678	4,014
Oman	T	3,375	3,555	3,619
Gabon	T	2,075	2,995	3,320
Lesotho	T	0	600	3,213
Germany	T	2,253	5,228	3,130

Source: GTA

Imports

South Africa is a net exporter of apples, and only imports apples to fulfill niche markets or satisfy domestic demand when supply is limited. Post forecasts that South African apple imports will remain flat at 21 MT in the 2015/16 MY.

Imports from the United States are believed to be driven by local demand for the larger sized United States apples and as a result of the United States and South Africa protocol agreement on apple imports. Under the agreement, apples from the Pacific Northwest may be exported to South Africa under the terms of the "Protocol of Phytosanitary Requirements for the Export of Apple Fruit from the United States of America, Pacific Northwest States of Washington, Idaho and Oregon (PNW) to South Africa". This protocol may be obtained from the Northwest Fruit Exporters (509/576-8004) or from the South African Department of Agriculture, Fisheries and Forests, on the following link: http://www.daff.gov.za/daffweb3/Branches/Agricultural-Production-Health-Food-Safety/Plant-Health/Import-into-SA/Import-protocols.

Table 2: South African Fresh Apple imports

South Africa Import Statistics				
Commodity: 080810, Apples, Fresh				
Year Ending: December				
Partner Country	Unit	Quantity		
		2012	2013	2014
World	T	0	124	21
United States	T	0	123	21
Swaziland	T	0	0	0
Botswana	T	0	1	0

Source: GTA

Table 3: Tariff Rates, Fresh Apples

Heading / Subheading	CD	Article Description	Statistical Unit	Rate of Duty			
				General	EU	EFTA	SADC
0808.10	9	Apples, fresh	kg	4 %	Free	4 %	Free

Source: SARS – Schedule 1 - Customs and Excise Tariffs

Table 4: PSD - Apples, Fresh

Apples, Fresh	2013/2014		2014/2015		2015/2016	
Market Begin Year	Jan 2014		Jan 2015		Jan 2016	
South Africa	USDA Official	New Post	USDA Official	New Post	USDA Official	New Post
Area Planted	22,900	22,929	23,000	23,100	0	23,150
Area Harvested	20,600	20,633	20,650	21,000	0	21,000
Bearing Trees	25,600	25,637	25,650	25,650	0	25,700
Non-Bearing Trees	2,500	2,536	3,000	3,000	0	3,000
Total Trees	28,100	28,173	28,650	28,650	0	28,700
Commercial Production	792,500	792,549	900,000	860,000	0	865,000
Non-Comm. Production	0	0	0	0	0	0
Production	792,500	792,549	900,000	860,000	0	865,000
Imports	0	21	0	21	0	21
Total Supply	792,500	792,570	900,000	860,021	0	865,021
Fresh Dom. Consumption	210,200	210,303	209,900	210,000	0	210,000
Exports	382,000	381,931	420,000	450,000	0	455,000
For Processing	200,300	200,336	270,100	200,021	0	200,021
Withdrawal From Market	0	0	0	0	0	0
Total Distribution	792,500	792,570	900,000	860,021	0	865,021
(HA) ,(1000 TREES) ,(MT)						

<u>Pears, Fresh</u>

Production

Post forecasts that the South African pear production will increase by three percent to 410,000 MT in the 2015/16 MY based on normal growing conditions with minimal impact of the drought conditions to irrigation water availability. Post revised the 2014/15 MY estimates to 400,000 MY, a three percent decrease from the 2013/14 MY production of 413,614 MT, as the 2014/15 MY had normal growing conditions compared to the 2013/14 MY excellent growing conditions.

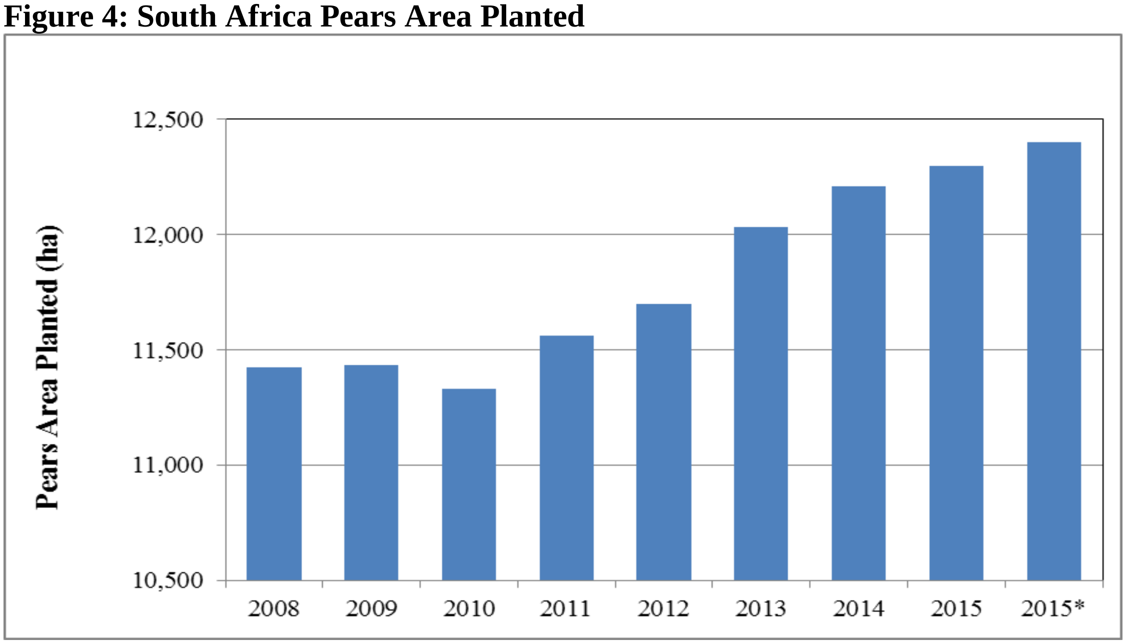
The major growing areas for pears in South Africa are Ceres, Groenland, Wolseley/Tulbagh (all in the Western Cape) and Langkloof East in the Eastern Cape. Like apples, pears grow well in areas that do not have very high temperatures; hence the Western Cape is the heartland of pear production, accounting for at least 79 percent of the total production in South Africa.

Pears are normally harvested from late December to early January. Packham's Triumph is the most popular variety planted, followed by Forelle, William Bon Chretien, and Abate Fetel.

Area Planted

Post forecasts that the 2015/16 MY area planted with pears will increase to 12,400 hectares (ha), from the 2014/15 MY area planted of 12,300 ha. The 2013/14 MY area planted remains unchanged at 12,211 ha. **Figure 4** shows that the area planted with pears has increased steadily since 2010.

Figure 4: South Africa Pears Area Planted

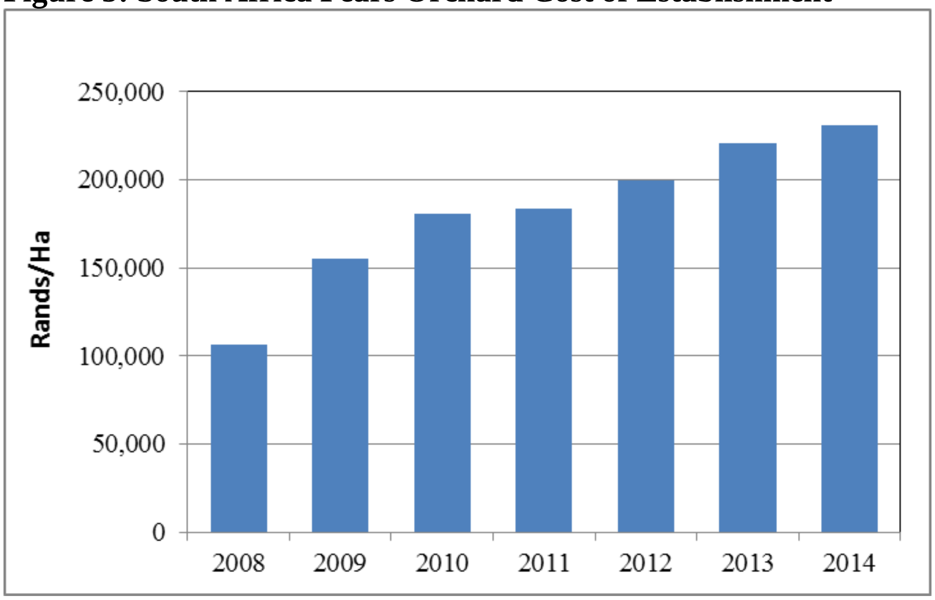


**Estimate*
Source: HORTGRO

Figure 5 shows that the cost of establishing an orchard has been rising since 2008. In the 2013/14 MY, the cost of establishing a pears orchard was R231,099/ha (US$17,777/ha), an increase of five percent from the 2012/13 MY cost of R220,419/ha (US$16,955/ha), against a general price inflation of 6 percent in 2014. The rising establishment costs have also been cited as one of the reasons for low orchard replanting and expansion. Most pear trees are ageing; about 29 percent are over 25 years old, and 33 percent are between 16 – 25 years old. Non-bearing trees between the ages of 0 – 3 years were eight percent in the 2013/14 MY, which is below the benchmarked best practice of maintaining the replacement stock (0 – 3 years) at above ten percent for sustainable and consistent supply.

Pears production cost have also increased. In the 2013/14 MY, the cost of pear production was R241,508/ha (US$18,578/ha), an increase of seven percent from the 2012/13 MY cost of R226,612/ha (US$17,432/ha). Key drivers of the increased costs were labor and fuel.

Figure 5: South Africa Pears Orchard Cost of Establishment



Source: HORTGRO

Consumption

Post forecasts that the domestic consumption of pears will remain flat at 48,500 MT in the 2015/16 MY based on available production supply, and the slow economic growth prospects in South Africa. The 2013/14 MY consumption remains unchanged at 48,535 MT based on final industry statistics.

Local consumption of pears has been fluctuating on a yearly basis between 45,333MT to 67,379 MT between the 2002/03 MY and 2014/15 MY. The main drivers of the fluctuations in domestic consumption are the available crop and that pears and apples are close substitutes in the domestic market.

Exports

Post forecasts that the South African pear exports will decrease by seven percent to 190,000 MT in the 2015/16 MY, from the 2014/15 MY exports of 205,000 MT based on the difficult global pear market, and growth in the South African domestic processing market demand and prices. The 2013/14 MY exports remain unchanged at 207,310 MT based on GTA data. The EU, is SA`s traditional market accounting for about 57% of the total exports followed by Asia (22%), Middle East (14%), and Africa (7%). The Netherlands is the biggest individual market, accounting for 27% of the export market followed by the United Arab Emirates at 10%.

Table 5: South African Fresh Pears exports

South Africa Export Statistics				
Commodity: 080830, Pears, Fresh				
Year Ending: December				
Partner Country	**Unit**	**Quantity**		
		2012	**2013**	**2014**
World	T	181,928	202,431	207,309
Netherlands	T	50,520	64,685	55,055
United Arab Emirates	T	15,457	17,665	21,295
United Kingdom	T	17,785	20,258	17,541
Russia	T	16,180	15,486	15,540
Germany	T	7,770	10,794	10,457
Malaysia	T	8,020	5,714	8,576
Italy	T	5,241	7,032	8,293
France	T	6,575	8,705	7,634
Hong Kong	T	5,137	5,311	7,614
India	T	3,822	2,807	4,555
Saudi Arabia	T	3,159	2,812	4,448
Portugal	T	3,816	5,395	4,409
Singapore	T	4,196	3,600	4,388
Indonesia	T	4,183	3,741	4,304
Canada	T	5,532	4,361	3,822
Nigeria	T	306	906	2,379
Angola	T	2,532	2,027	1,977
Oman	T	2,445	1,628	1,909
Spain	T	676	1,954	1,747
Mauritius	T	1,740	1,382	1,666
Namibia	T	12	78	1,417
Botswana	T	5	93	1,340

Source: GTA

Imports

As the second largest pear producer behind Argentina in the Southern Hemisphere, South Africa only imports small quantities of pears, with China as the leading source of Ya pears (white colored pears). Imports from China began after a 2007 agreement that allowed imports of Chinese pears into the South

Africa market. The South Africa and Chinese agreement is available on the South African Department of Agriculture, Fisheries and Forestry on the following website link: http://www.nda.agric.za/doaDev/sideMenu/plantHealth/docs/protocol_pear_China.pdf .

Table 6: South African Fresh Pears imports

South Africa Import Statistics				
Commodity: 080830, Pears, Fresh				
Year Ending: December				
		Quantity		
Partner Country	Unit	Total 2012	Total 2013	Total 2014
World	T	245	64	44
China	T	245	64	44

Source: GTA

Table 7: Tariff Rates, Fresh Pears

Heading / Subheading	CD	Article Description	Statistical Unit	Rate of Duty			
				General	EU	EFTA	SADC
0808.30	8	Pears, fresh	kg	4 percent	Free	4 percent	Free

Source: SARS – Schedule 1 - Customs and Excise Tariffs

Table 8: PSD - Pears, Fresh

Pears, Fresh	2013/2014		2014/2015		2015/2016	
Market Begin Year	Jan 2014		Jan 2015		Jan 2016	
South Africa	USDA Official	New Post	USDA Official	New Post	USDA Official	New Post
Area Planted	12,200	12,211	12,300	12,300	0	12,400
Area Harvested	11,200	11,234	11,200	11,200	0	11,300
Bearing Trees	13,700	13,665	13,600	13,600	0	13,700
Non-Bearing Trees	1,900	1,863	2,000	1,800	0	2,000
Total Trees	15,600	15,528	15,600	15,400	0	15,700
Commercial Production	413,600	413,614	390,000	400,000	0	410,000
Non-Comm. Production	0	0	0	0	0	0
Production	413,600	413,614	390,000	400,000	0	410,000
Imports	0	44	100	100	0	100
Total Supply	413,600	413,658	390,100	400,100	0	410,100
Fresh Dom. Consumption	47,900	48,535	50,000	48,500	0	48,500
Exports	207,900	207,310	200,000	20,5000	0	190,000
For Processing	157,800	157,813	140,100	146,600	0	171,600
Withdrawal From Market	0	0	0	0	0	0
Total Distribution	413,600	413,658	390,100	400,100	0	410,100
(HA) ,(1000 TREES) ,(MT)						

Table grapes, Fresh

Production

Post forecasts that the South African table grape production will increase marginally by one percent to 294,000 MT in the 2015/16 MY based on the continuation of the current excellent growing conditions and the minimal impact of the dry weather to the irrigation water availability. Post revised the 2014/15 MY production to 291,442 MT based on final industry data. The 2014/15 MY remains the highest production in the past fifteen years due to excellent growing conditions. The 2013/14 MY grape production has been revised downwards to 251,447 MT based on industry data.

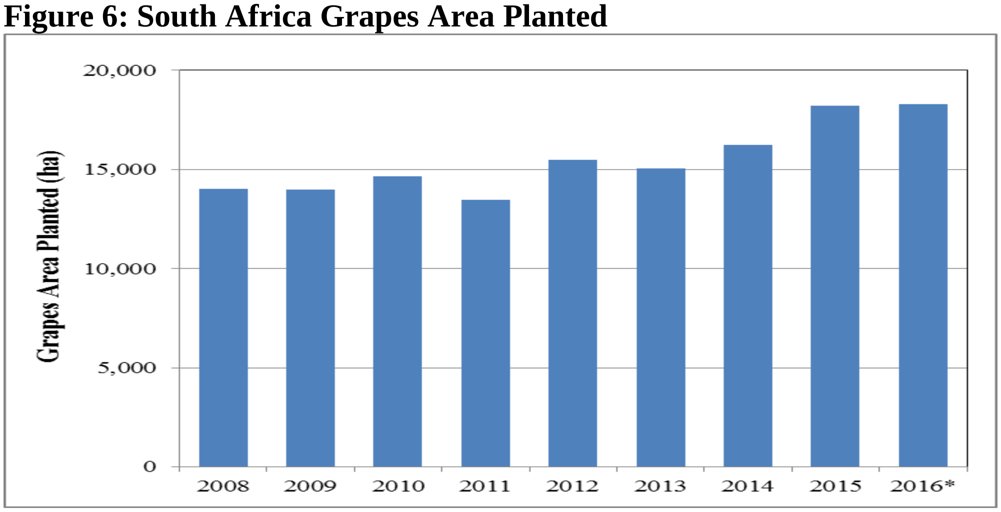
The major growing areas for grapes are the Berg River and Hex River in the Western Cape Province; and the Olifants River and Orange River in the Northern Cape Province. Grapes are normally harvested from October to May. Harvest starts in week 43 (October) in the Northern Cape Region followed by Orange River region. Hex River valley is the last region for table grapes harvesting.

The leading varieties of South African Table Grapes are Crimson Seedless, Thomson Seedless, Prime and Flame. The cultivar profile in South Africa has changed in recent years, seeded cultivars are declining on a yearly basis as consumers prefer seedless grapes and production of black and red seedless varieties has increased. The popularity of seedless cultivars stems from characteristics such as large berry size (with elongated or oval berry shapes), favorable texture (crunchiness), and good eating qualities.

Area Planted

Post forecasts that the 2015/16 MY area planted to table grapes will remain flat at 18,200 hectares (ha). The 2014/15 MY area planted to table grapes was revised upwards to the peak 18,212 ha based on industry data. The area planted in the 2013/14 MY will remain unchanged at 16,229 ha. **Figure 6** shows that the area planted to grapes has been increasing since 2008.

Figure 6: South Africa Grapes Area Planted



*__Forecast__, *Source*: **SAGTI**

Consumption

Post forecasts that the 2015/16 MY domestic consumption of table grapes will remain flat at 33,500 MT based on the available production and the low economic growth prospects. The 2014/15 MY domestic consumption has been revised upwards to 33,490 MT based on industry data at the back of the increased production. The 2013/14 MY consumption has been revised upwards to 29,763 MT based on industry data.

The domestic consumption of grapes in South Africa is dependent on the export market. Grapes that cannot be sold on the export market, including grapes that do not meet the export standards and quality are diverted to the domestic market.

Exports

Post forecasts that the 2015/16 MY exports will increase marginally by one percent to 266,000 MT based on the expected available production and continued strong demand due to the weak exchange rate. Post revised the 2014/15 MY and 2013/14 MY exports to 263,452 MT and 226,401 MT, respectively, based on industry data and the revision of the MY from Jan – Dec to Oct – Sept.

The EU is the leading historical export market for South African grapes, accounting for at least 75 percent of the table grapes exports. South Africa benefits from a shorter shipping distance than other Southern Hemisphere competitors, strong demand for seedless varieties, and a free trade agreement with the EU. Exports have also benefitted from a weaker Rand against the Euro. Exports to Asia (14%), Middle East (6%) and Africa (4%) also have strong growth potential.

Table 9: South African Fresh Table Grapes exports

Season (Oct. - Sept.)	Exports (MT)
2002/2003	198,235
2003/2004	238,298
2004/2005	210,823
2005/2006	230,896
2006/2007	227,265
2007/2008	224,123
2008/2009	217,875
2009/2010	234,579
2010/2011	202,500
2011/2012	245,797
2012/2013	234,463
2013/2014	226,401
2014/2015*	263,452
2015/2016**	266,000

***Estimate, **Forecast, Source: South African Table Grapes Industry**

Imports

South Africa is a net exporter of table grapes, and imports are mainly to make up for out of season demand, with Egypt, Spain and Namibia being the major suppliers, and a small quantities being imported from Israel.

Table 10: South African Fresh Table Grapes imports

South Africa Import Statistics				
Commodity: 080610, Grapes, Fresh				
Year Ending: September				
Partner Country	Unit	Quantity		
		2012	2013	2014
World	T	3,554	4,558	4,687
Spain	T	2,111	2,818	2,833
Egypt	T	1,199	1,630	1,461
Namibia	T	0	0	332
Israel	T	244	111	41
Zambia	T	0	0	17
United Kingdom	T	0	0	3

Source: GTA

Table 11: Tariff Rates, Fresh Table Grapes

Heading / Subheading	CD	Article Description	Statistical Unit	Rate of Duty			
				General	EU	EFTA	SADC
0808.30	8	Grapes, fresh	kg	4 %	Free	4 %	Free

Source: SARS – Schedule 1 - Customs and Excise Tariffs

Table 12: PSD; Table Grapes, Fresh

Grapes, Fresh	2013/2014		2014/2015		2015/2016	
Market Begin Year	Oct 2013		Oct 2014		Oct 2015	
South Africa	USDA Official	New Post	USDA Official	New Post	USDA Official	New Post
Area Planted	16,200	16,229	16,400	18,212	0	18,200
Area Harvested	12,600	12,600	13,200	15,000	0	15,000
Commercial Production	318,143	251,477	340,000	291,442	0	294,000
Non-Comm. Production	0	0	0	0	0	0
Production	318,143	251,477	340,000	291,442	0	294,000
Imports	5,400	4,687	5,000	5,500	0	5,500
Total Supply	323,543	256,164	345,000	296,942	0	299,500
Fresh Dom. Consumption	25,143	29,763	25,000	33,490	0	33,500
Exports	298,400	226,401	320,000	263,452	0	266,000
Withdrawal From Market	0	0	0	0	0	0
Total Distribution	323,543	256,164	345,000	296,942	0	299,500
(HA) ,(MT)						

Policy

Table 13 provides the list of the regulations applicable to apples, pears and table grapes in South Africa. Exporters should also be aware that there is no law in South Africa governing an importer from requesting additional certifications over and above the legislation and regulations indicated in this section.

Table 13: List of key legislations and regulations

Policy	Link
Agriculture Product Standards Act No 119 of 1990	http://www.nda.agric.za/doaDev/sideMenu/Food percent20Import percent20& percent20Export percent20Standard/docs/Agric percent20Product percent20Standards percent20Act percent20No percent20119 percent20 percent20of percent201990.pdf
Agricultural Pests, Act, 36 of 1983	**Agricultural Pests Amendment Act, 9 of 1992** http://www.nda.agric.za/doaDev/sideMenu/APIS/doc/Agricultural percent20Pests percent20Act.pdf
Foodstuffs, cosmetics and disinfectants Act 54 of 1972	http://www.nda.agric.za/vetweb/Legislation/Other percent20acts/Act percent20- percent20Foodstuffs, percent20Cosmetics percent20and percent20Disinfectants percent20Act-54 percent20of percent201972.pdf
Procedures for exporting to South Africa	http://www.nda.agric.za/doaDev/sideMenu/plantHealth/docs/importProcedure.pdf.
Maximum Residue Limits	http://www.daff.gov.za/daffweb3/Branches/Agricultural-Production-Health-Food-Safety/Food-Safety-Quality-Assurance/Maximum-Residue-Limits
Regulations relating to standards, grading, packing and marking	**Apples** http://www.nda.agric.za/doaDev/sideMenu/foodSafety/doc/localImportRegulations/Apples_regulations.pdf **Pears** http://www.nda.agric.za/doaDev/sideMenu/foodSafety/doc/localImportRegulations/Pears_regulations.pdf **Grapes** http://www.nda.agric.za/doaDev/sideMenu/foodSafety/doc/localImportRegulations/gg35395 percent20nn422 percent20APS percent20table percent20grapes.pdf

Source: South African Department of Agriculture Fisheries and Forestry (DAFF)

Prices

Table 14 below shows that the price of apples has always been higher than the price of pears in the local market, while in the export market, pears are normally priced higher than apples. The apple and pear prices in **Table 14** are the average prices (Rand/Ton) earned in the respective markets. The key driving forces of the increases in apple and pear export prices is the depreciation in the value of the rand and increasing world demand.

Table 14: Price of Apples and Pears

Season	APLES			PEARS		
	Local Market	Export Market	Processed Market	Local Market	Export Market	Processed Market
	(R/Ton)	(R/Ton)	(R/Ton)	(R/Ton)	(R/Ton)	(R/Ton)
2003/2004	2,109	3,794	336	1,977	4,059	495
2004/2005	2,310	3,638	341	2,128	3,861	491
2005/2006	2,580	3,791	373	2,304	3,786	573
2006/2007	2,799	4,363	447	2,664	4,680	715
2007/2008	3,618	5,419	1,071	3,222	5,704	973
2008/2009	3,568	5,834	786	3,452	6,336	1,035
2009/2010	3,656	5,881	534	3,454	6,144	810
2010/2011	4,326	6,210	737	3,856	6,612	896
2011/2012	4,470	6,531	1,146	4,191	6,803	1,115
2012/2013	4,845	8,658	1,137	4,650	8,835	1,316
2013/2014	4,944	10,136	1,141	4,815	9,900	1,376

Source: HORTGRO