Required Report: Required - Public Distribution **Date:** December 02, 2025

Report Number: SF2025-0039

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 in MY 2025/26 is forecast to increase from MY 2024/25, driven mostly by favorable weather conditions. Domestic apple consumption is expected to rise slightly, while pear and table grape consumption is forecast to remain stable. Improved port performance at Cape Town is expected to support export growth, while imports are forecast to decline due to increased local production. In MY 2024/25, South Africa exported record volumes of table grapes to the United States ahead of the new tariff implementation in August 2025. The United States does not have market access in South Africa for pears or table grapes and has access for apples only from areas free from Rhagoletis pomonella.

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Executive Summary

Area Planted: FAS Pretoria forecasts that MY 2025/26 area under apple, pear, and table grape production in South Africa will remain unchanged from MY 2024/25. Growers are prioritizing yield improvements and fruit quality over expanding area.

Production: Apple, pear, and table grape production for MY 2025/26 is forecast to increase slightly due to higher-yielding varieties, young trees entering production, and favorable weather conditions. Water supplies are sufficient to irrigate orchards during the warm, dry summer months.

Consumption: South Africa's deciduous fruit industry remains export-oriented, with surplus fruit supplied to the local market. MY 2025/26 domestic apple consumption is forecast to increase slightly from MY 2024/25, supported by improved local production. Pear and table grape consumption is forecast to remain stable, as production gains will primarily support export growth.

Exports: The majority of South African deciduous fruit is shipped through the port of Cape Town, where improved port performance is expected to support export growth. MY 2025/26 exports of deciduous fruit are forecast to increase, driven by higher production of export-quality fruit. In MY 2024/25 South Africa exported record volumes of table grapes to the United States ahead of the tariff implementation in August 2025.

Imports: Deciduous fruit imports are generally low due to domestic production gains and advancements in storage technologies, which have reduced import demand. MY 2025/26 imports are forecast to decline as local production improves.

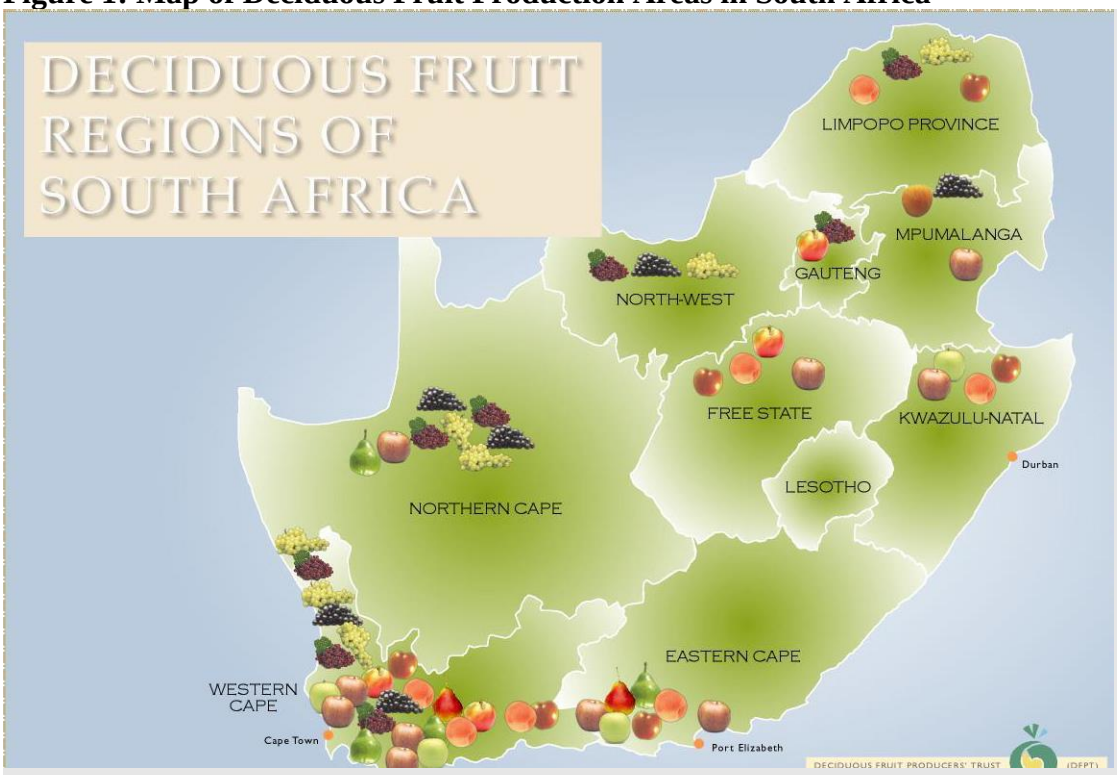
Report Notes

Apple and Pears Marketing Year (MY) January – December
Table Grapes MY – October to September
MT – Metric Tons
1 U.S. dollar = 17.1141 South African rands as of November 14, 2025

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 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 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 apples 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



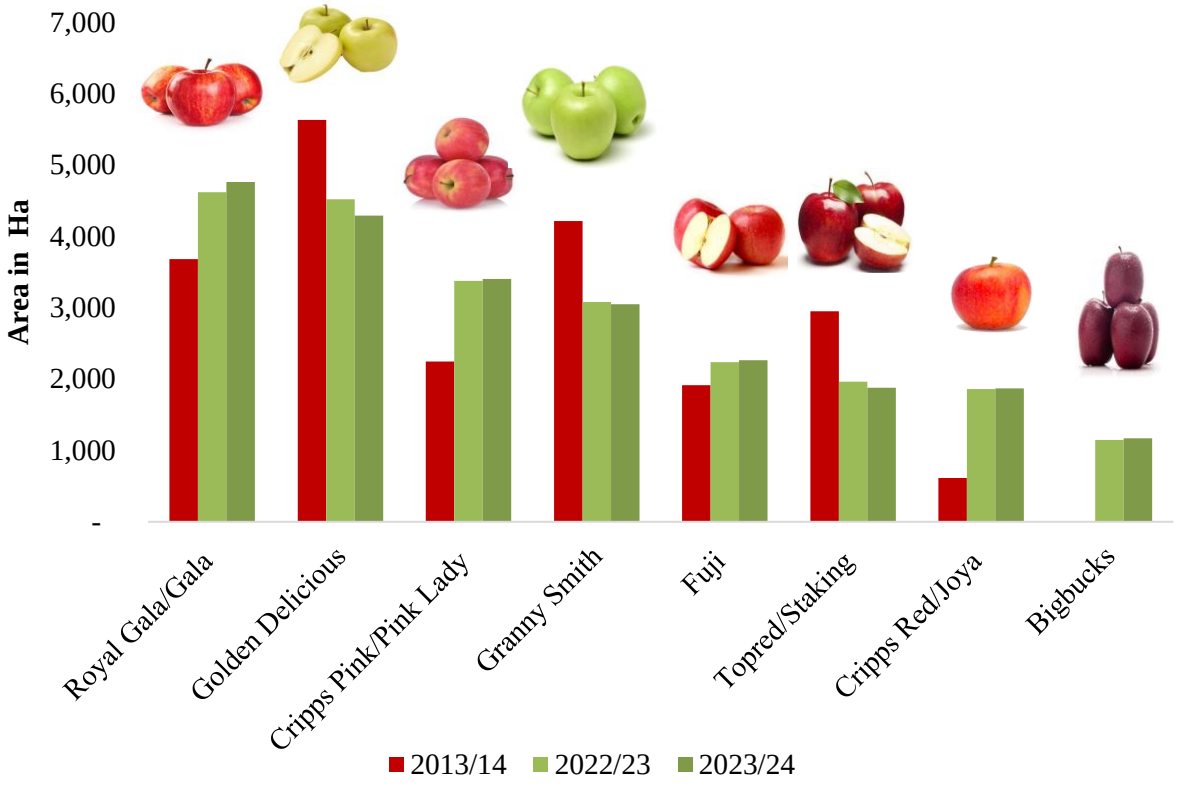
Source: *Hortgro*

Apple production in South Africa is dominated by eight cultivars, which account for approximately 90 percent of the total area planted. The choice of cultivars (see **Figure 2**) has historically primarily been influenced by consumer demand in South Africa's export markets. Over the past five years, however, planting decisions have also been driven by producers' efforts to improve yields.

The area dedicated to green apple varieties, such as Golden Delicious and Granny Smith, has been steadily declining. Instead, there has been a growing preference for cultivars like Royal Gala, Cripps Pink, Fuji, and Cripps Red. Additionally, the Bigbucks variety has recently gained

favor among producers due to its strong reception in key export markets, including China and India.

Figure 2: Planted Apple Varieties (Hectares)



Source: *FAS Pretoria based on Hortgro Tree Census*

Some apple varieties grown in South Africa were developed locally, while others were imported from key markets such as New Zealand, France, and Australia. Additionally, several apple varieties originating from the United States are available to South African growers, as shown in Figures 3, 4, and 5. See the Imports section of this report for more information on U.S. exports of plant material to South Africa.

Figure 3: *NY 1/ SnapDragon*

This solid red blush apple variety was developed at Cornell University. It typically flowers during weeks 41 and 42 and is harvested in weeks 11 and 12.

Figure 4: *WA 38/ Cosmic Crisp®*

This blushed and red apple variety was developed at Washington State University. It typically flowers during weeks 40 and 41 and is harvested in weeks 12, 13, and 14. The Hortgro tree census reports that this variety is grown on 25 hectares of apple orchards.

Figure 5: *WA 2/ Sunrise Magic®*

This blushed and red apple variety was developed at Washington State University. It typically flowers during weeks 41 and 42 and is harvested in weeks 11 and 12.

Source: FAS Pretoria using TopFruit information

Area Planted

FAS Pretoria forecasts that the area under apple production in South Africa for MY 2025/26 will remain unchanged from MY 2024/25, continuing the trend observed since MY 2021/22. The area planted appears to have stabilized as growers focus on replacing older trees with newer varieties to meet market demand. Additionally, growers are prioritizing investments in hail nets to improve the quality of exportable fruit.

In April 2025, the national power utility, Eskom, implemented a 13 percent electricity tariff increase, with an additional five percent hike planned for 2026. These rising electricity costs are expected to impact growers who still rely on the national grid to power irrigation, packing, and cooling operations.

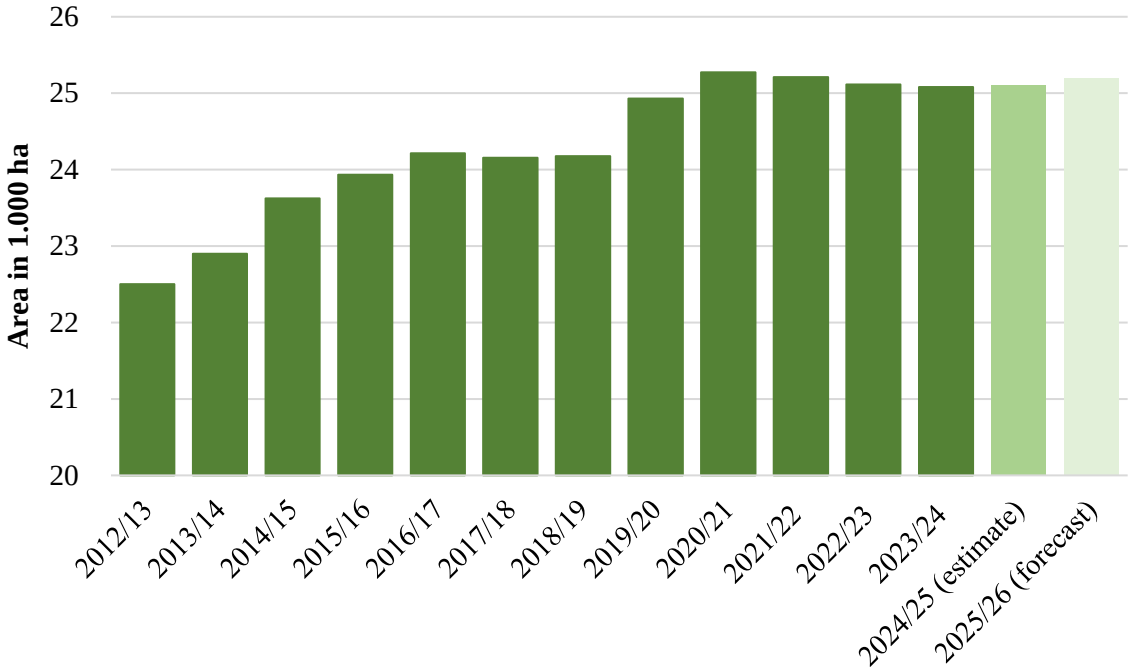
FAS Pretoria contacts report that performance has improved at the port of Cape Town due to the addition of new equipment, bringing some optimism. However, this improvement is unlikely to drive significant growth in the area planted for MY 2025/26.

The area planted in MY 2024/25 is estimated to remain unchanged from MY 2023/24, with limited new plantings and a focus on replanting newer varieties to replace old trees and improve yields (see Figure 6). According to the 2024 Hortgro census, the largest declines in planted area were recorded in the Klein Karoo (16 percent) and Boland (15 percent), both located in the Western Cape.

Overall, growers have held back on expanding planted area and have uprooted older orchards. The number of trees aged 0–3 years has dropped by 14 percent, while trees aged 25 years and

older have declined by one percent. The decrease in trees aged 0–3 years is attributed to some trees entering full production and the slow pace of replacement planting.

Figure 6: Area Planted to Apples in South Africa



Source: *FAS Pretoria using Hortgro data*

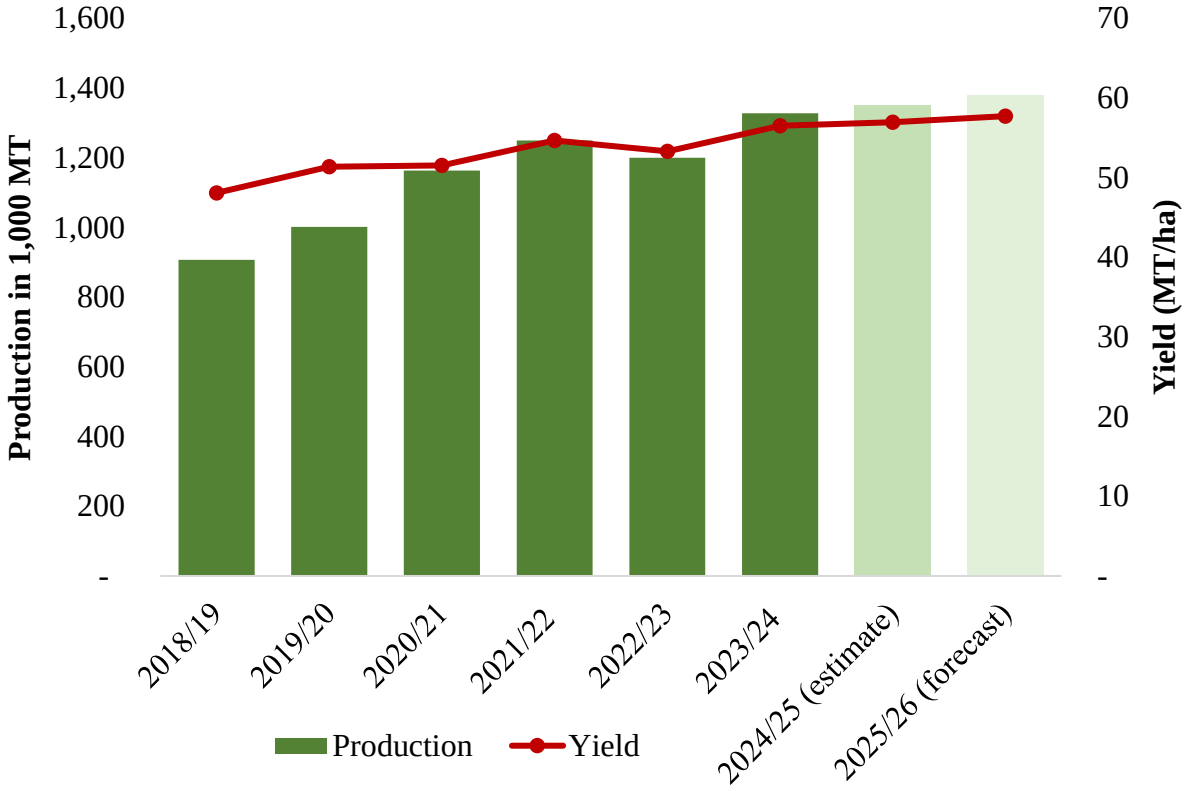
Production

FAS Pretoria forecasts that apple production in MY 2025/26 will increase by two percent compared to MY 2024/25, reaching record levels. This growth is attributed to higher-yielding varieties, young trees entering production, and favorable weather conditions. Apples are primarily grown in the Western Cape province, which benefits from winter rainfall. During the winter of 2025 (June–August), most growing regions in the Western Cape received adequate rainfall to support orchard irrigation. Additionally, chill units during the winter months were sufficient to promote optimal fruit development.

FAS Pretoria has revised its MY 2024/25 production estimates upward by 30,000 MT from the previous forecast, representing a two percent increase compared to MY 2023/24. This growth is attributed to the cold and wet winter months of 2024, which provided sufficient water for irrigation. Favorable weather conditions also supported optimal color development in the fruit. Additionally, high-yielding varieties such as Royal Gala and Pink Lady contributed to the production increase.

FAS Pretoria has slightly revised MY 2023/24 production upward by 28,334 MT based on final industry data which reflects favorable winter conditions and young trees entering production. This represents an 11 percent improvement compared to MY 2022/23, when production was negatively impacted by hail damage.

Figure 7: Apple Production in South Africa



Source: *FAS Pretoria using Hortgro data*

Consumption

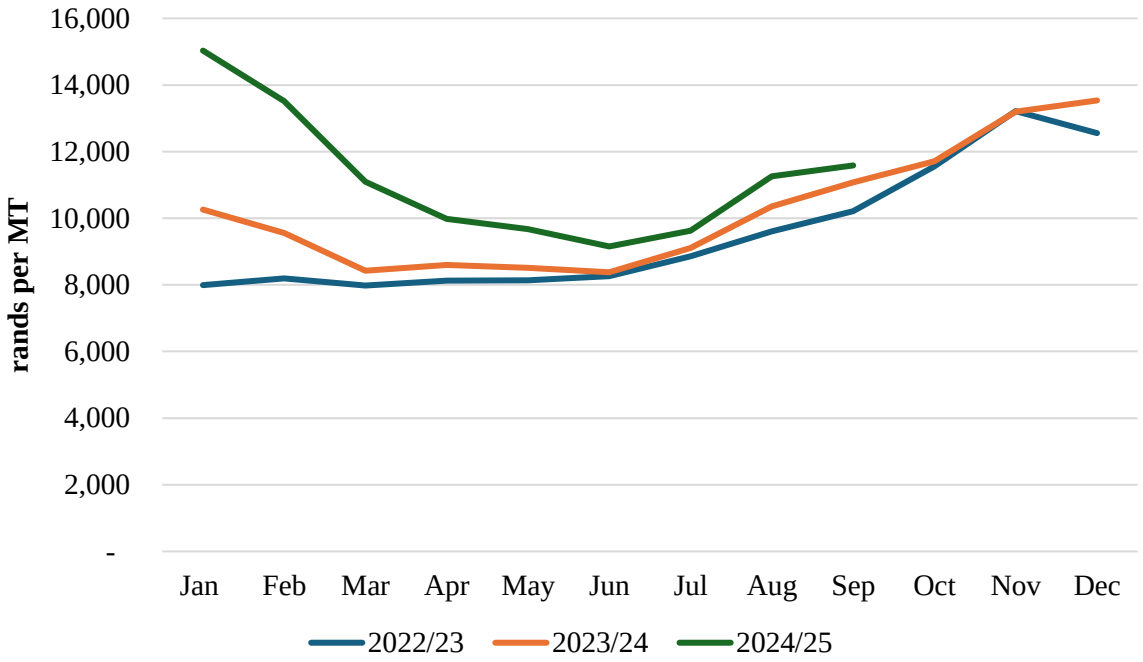
Apples are widely consumed in South Africa and remain popular throughout the year. The country's deciduous fruit industry is export-oriented, prioritizing exports while supplying surplus fruit to the local market. However, nearly half of South Africa's apple production is consumed domestically. FAS Pretoria forecasts that domestic consumption in MY 2025/26 will increase by two percent, driven by improved local production.

MY 2024/25 domestic consumption has been revised upward by 59,995 MT, driven by increased production and stable export volumes. Consumption is estimated to have increased by two percent between MY 2023/24 and MY 2024/25, supported by increased local supply that aligns with population growth.

Consumption figures include fresh market sales as well as apples used for processing. Approximately 29 percent of apple production is processed into products such as juice and purees, 20 percent is consumed as fresh fruit, and less than 1 percent is processed into dried fruit.

Apple prices indicated in Figure 8 are average prices (Rand/MT) based on sales in the 19 wholesale fresh produce markets in South Africa. Apple prices tend to be higher from November to January, just before the harvest season begins, due to limited supply in the local market.

Figure 8: Apple Production in South Africa



Source: *FAS Pretoria using Department of Agriculture (DOA) data*

Exports

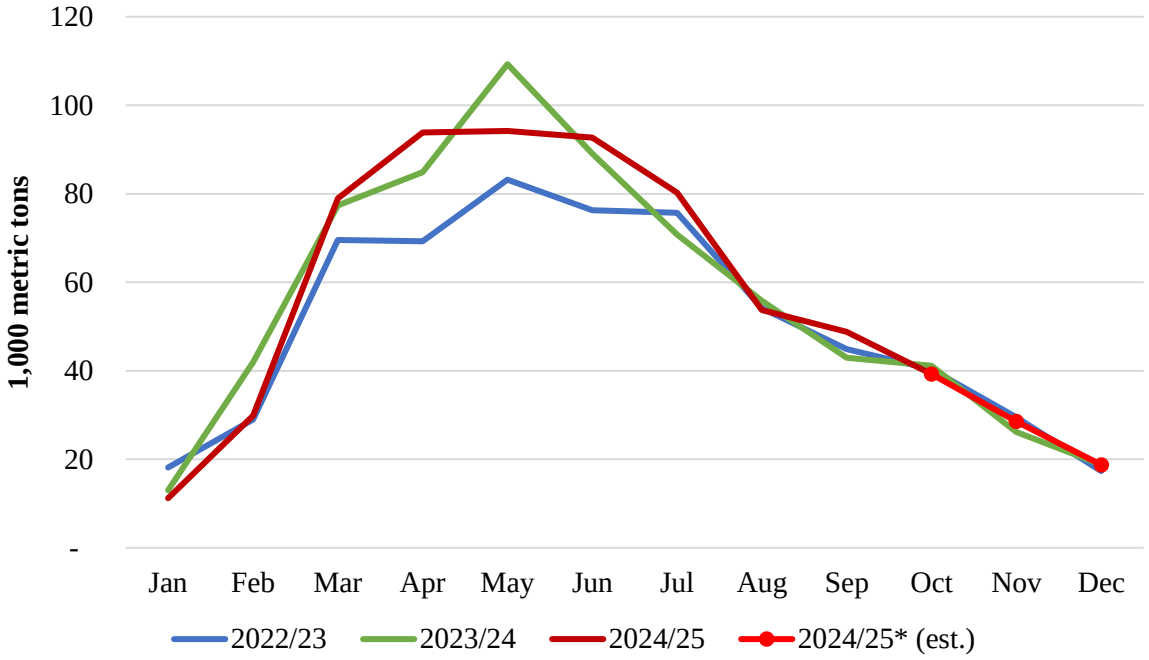
FAS Pretoria forecasts that apples exports in MY 2025/26 will increase by two percent due to improved production of export-quality apples and enhanced port operations. FAS Pretoria contacts report that exports are likely to be driven by growth in the Gala, Bigbucks, Pink Lady, and Cripps Red varieties, mirroring area planted. Traditionally, apples are shipped through the Port of Cape Town. According to FAS Pretoria contacts, additional equipment and more operators have been introduced at the port to enhance its performance.

FAS Pretoria revises MY 2024/25 apple exports downwards by 30,000 MT. However, exports are estimated to increase by one percent compared to MY 2023/24 driven by improved production and enhanced port performance following the replacement of equipment. FAS Pretoria contacts report that MY 2024/25 saw South Africa record its highest production of the Flash Gala variety. FAS Pretoria revises MY 2023/24 exports upwards by 48,060 MT on finalized trade data. MY 2023/24 exports improved on increased domestic production of exportable apples.

South Africa exports about 51 percent of its apple production to over 95 countries. Exports occur throughout the year due to the availability of cold storage. South Africa's top export markets for apples are the United Kingdom (12 percent), European Union (9 percent), United Arab Emirates (6 percent), Nigeria (6 percent), and India (6 percent). The bulk of the apple exports are recorded between April and July (on average 52 percent), and these are mainly exports to Europe. South Africa is the leading supplier of apples in the UK, followed by France and Italy, who have a different supply window than South Africa (typically between September and April). South Africa is the second largest supplier of apples in the European Union, preceded by Chile, with

both exporters having the same export window. South Africa has free trade agreements with both the European Union and the UK, and benefits from duty free exports in these markets.

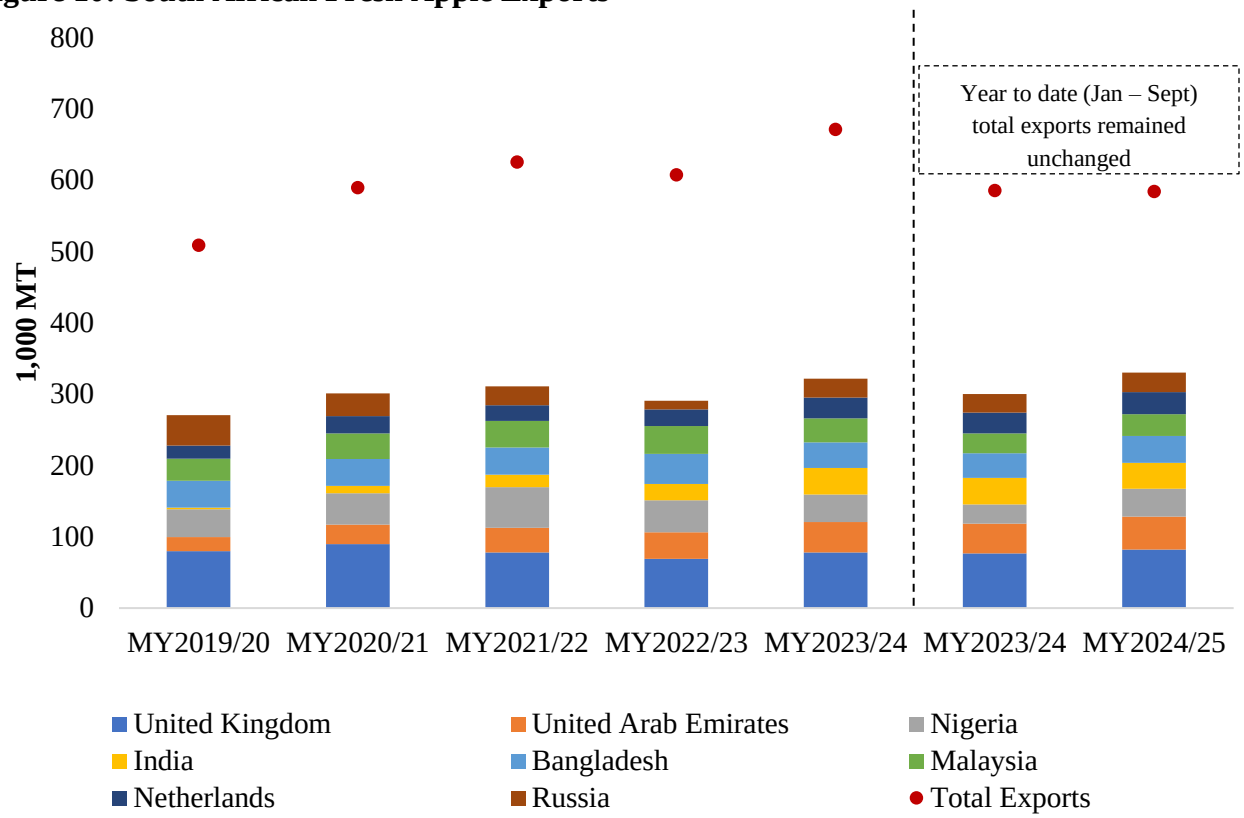
Figure 9: South African Monthly Exports of Apples



*FAS Pretoria estimates for MY 2024/25 October – December
Source: *FAS Pretoria using Trade Data Monitor, LLC data*

Almost 39 percent of South Africa's apple exports are destined to African countries. South Africa exports mainly Golden Delicious to West African countries such as Nigeria and Senegal, while to East African countries, such as Kenya and Tanzania, exports are comprised of varieties such as Royal Gala, Cripps Red, Cripps Pink, and Pink Lady. These varieties have a longer shelf life as cooling facilities are limited in some African countries. In 2024, South Africa regained market access for apples in Thailand after the market had been closed since 2008. As a result, South Africa exported its first shipment of apples to Thailand in 2025.FAS Pretoria contacts report that exports to Thailand will be mostly Gala type varieties with some Pink Lady apples.

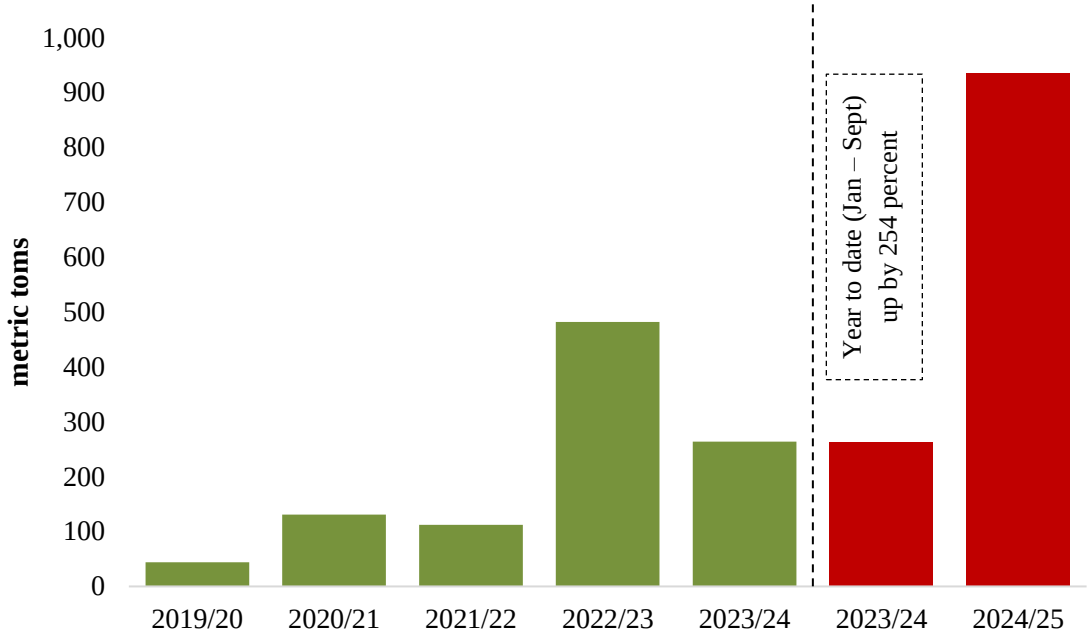
Figure 10: South African Fresh Apple Exports



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

South Africa exported its first apple consignment to China in 2015 and has become the second largest supplier after New Zealand. FAS Pretoria contacts report that South Africa fills the supply gap in China for local Chinese production. South Africa's most exported varieties are Fuji, Royal Gala, and Flash Gala. South Africa exported record volumes in MY 2024/25 to India after the government of India approved in-transit cold treatment for South African apple and pear exports in August 2022. Some of the apple varieties exported to India are Gala varieties, Pink Lady, Granny Smith and Top Red. Despite this growth, South Africa faces a 50 percent tariff in India on apples.

Figure 11: South African Fresh Apple Exports to the United States



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

South Africa's apple exports to the United States are relatively small, with occasional increases in certain marketing years. The United States imposed a 30 percent tariff on South African products, including apples. The record spike in exports during MY 2024/25, though still comparatively low, occurred as exporters increased shipments ahead of the tariff implementation in August 2025. FAS Pretoria contacts report that they expect apple exports to the United States to decline going forward due to the 30 percent tariff.

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. FAS Pretoria forecasts that in MY 2025/26 imports will decrease to 40 MT from MY 2024/25 based on an increase in production for local supply. Imports in MY 2024/25 are revised downwards to 30 MT as there were no imports recorded between January and July 2025,

The customs duties payable on imports are indicated in Table 1. 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, (Phytosanitary import requirements for importation of Apples from USA,PNW to South Africa).

Table 1: 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%

Source: South African Revenue Services (SARS) Updated October 25, 2025

FAS Pretoria contacts responsible for managing fruit varieties in South Africa actively participate in international events to engage with licensing sources and plant breeders. FAS Pretoria contacts plan to attend a conference in the state of Washington in May 2026 to strengthen these partnerships.

While South Africa produces enough apples to meet domestic demand, there is an opportunity to import plant material to enhance local production. The importation of plant material is regulated by the Ministry of Agriculture under the Plant Improvement Act 53 of 1976 and the Plant Breeders' Rights Act of 2018.

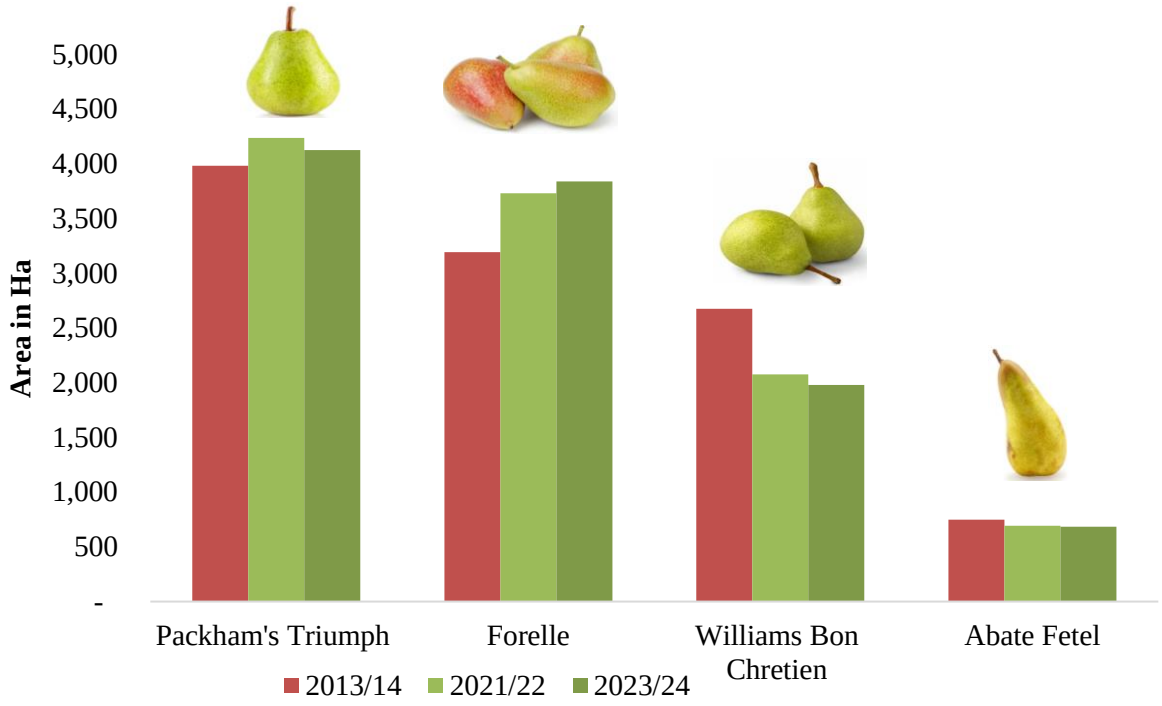
Table 2: Production, Supply and Distribution of Fresh Apples

Apples, Fresh	2023/2024		2024/2025		2025/2026	
Market Year Begins	Jan 2024		Jan 2025		Jan 2026	
South Africa	USDA Official	New Post	USDA Official	New Post	USDA Official	New Post
Area Planted (HA)	25114	25080	25100	25100	0	25200
Area Harvested (HA)	22950	23350	23090	23400	0	23500
Bearing Trees (1000 TREES)	33500	33200	33400	33600	0	33800
Non-Bearing Trees (1000 TREES)	2000	1900	1990	1800	0	1750
Total Trees (1000 TREES)	35500	35100	35390	35400	0	35550
Commercial Production (MT)	1300000	1328334	1320000	1350000	0	1380000
Non-Comm. Production (MT)	0	0	0	0	0	0
Production (MT)	1300000	1328334	1320000	1350000	0	1380000
Imports (MT)	100	49	50	45	0	40
Total Supply (MT)	1300100	1328383	1320050	1350045	0	1380040
Domestic Consumption (MT)	620100	657201	610050	670045	0	685040
Exports (MT)	680000	671182	710000	680000	0	695000
Withdrawal From Market (MT)	0	0	0	0	0	0
Total Distribution (MT)	1300100	1328383	1320050	1350045	0	1380040
(HA) ,(1000 TREES) ,(MT)						
OFFICIAL DATA CAN BE ACCESSED AT: PSD Online Advanced Query						

Pears, Fresh

Pears grow well in areas with moderate temperatures. Similar to apples, pears are primarily cultivated in South Africa's Western Cape province, which experiences most of its rainfall during the winter months, from May to July. The Ceres and Langkloof East areas within the Western Cape are the country's top pear-producing regions, accounting for half of the total land dedicated to pear farming. Four leading pear varieties have dominated production for over ten years and make up nearly 83 percent of all pear plantings in South Africa (see Figure 12).

Figure 12: Planted Pear Varieties (Hectares)



Source: *FAS Pretoria with 2023 Hortgro Tree Census*

Area Planted

FAS Pretoria forecasts that area under pear production in MY 2025/26 will remain steady at 12,900 hectares, unchanged from MY 2024/25 (see Figure 13). Growers are prioritizing precision farming techniques to enhance yields and fruit quality, redirecting resources away from expanding area. The most widely planted variety, Packham's Triumph, continues to be sold in several export markets, but its plantings have stabilized, with no recent additions. Instead, growers are replacing older trees and the Williams Bon Chretien variety with blush summer pears like Forelle and the newer Rosemarie variety. With this shift producers aim to enter the market earlier in the season to secure better prices, particularly in the European market. Grower profitability remains under pressure due to logistical costs, although some input costs have stabilized.

In MY 2023/24, trees aged 0-3 years accounted for only 5 percent of the planted area, down from 6 percent in MY 2022/23, indicating a slight decline in new plantings. Consequently, FAS Pretoria estimates that the planted area remained unchanged in both MY 2023/24 and MY 2024/25.

Figure 13: Area Planted in Pears in South Africa

Source: *FAS Pretoria with Hortgro data*

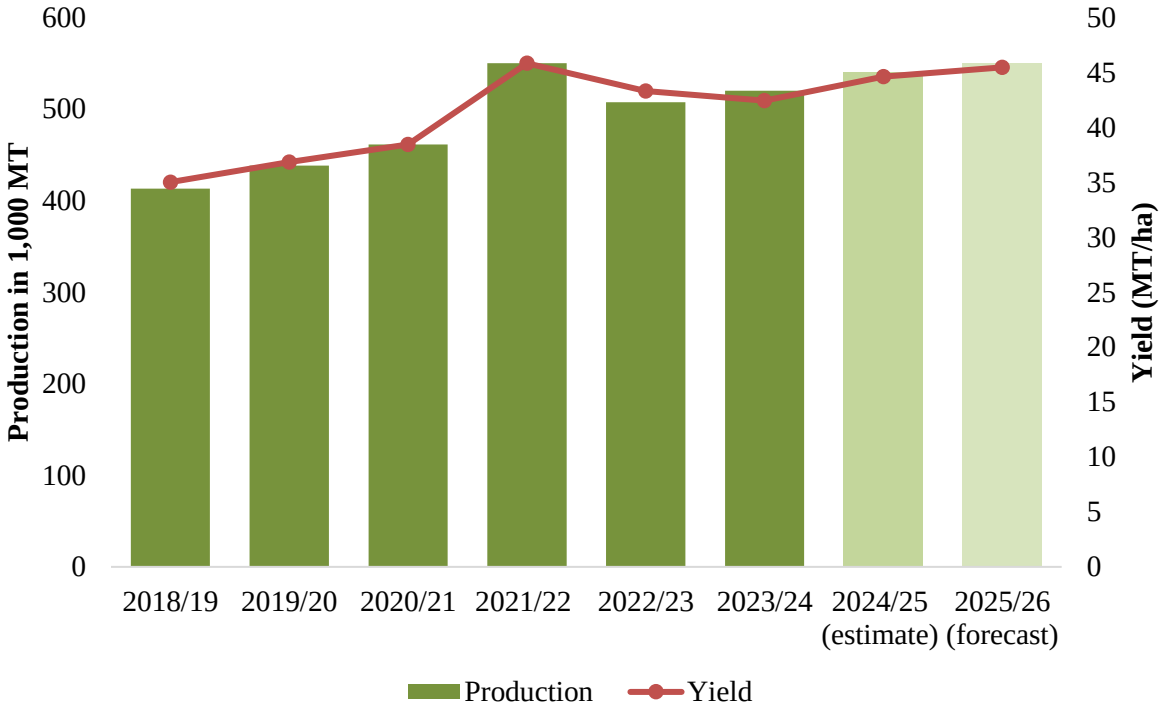
Production

FAS Pretoria forecasts that MY 2025/26 pear production will increase by two percent compared to MY 2024/25. The cold, wet winter of 2025 is expected to support fruit growth, color development and overall production volumes. Additionally, water supplies are sufficient to irrigate orchards during the warm and dry summer months.

The Western Cape province experienced a cold winter season, which supported MY 2024/25 pear production. Major production regions received sufficient rainfall, ensuring adequate water for irrigation. Therefore, FAS Pretoria estimates that MY 2024/25 production improved by four percent compared to MY 2023/24. FAS Pretoria reported that the pear season started 7-10 days later compared to MY 2023/24 but ultimately aligned with a normal harvest schedule. Early varieties such as Williams Bon Chrestien saw a slight decline compared to MY 2023/24. Similarly, Packham's Triumph production was lower year-on-year due to wet spring conditions that affected yield and quality. However, varieties like Forelle and Abate Fetel showed year-on-year increases.

FAS Pretoria lowers MY 2023/24 production by 10,000 MT on finalized data; however, year on year production has increased by two percent due to good rain and sufficient chill hours, in the winter of 2023, increasing quality (see **Figure 14**).

Figure 14: Pear Production in South Africa



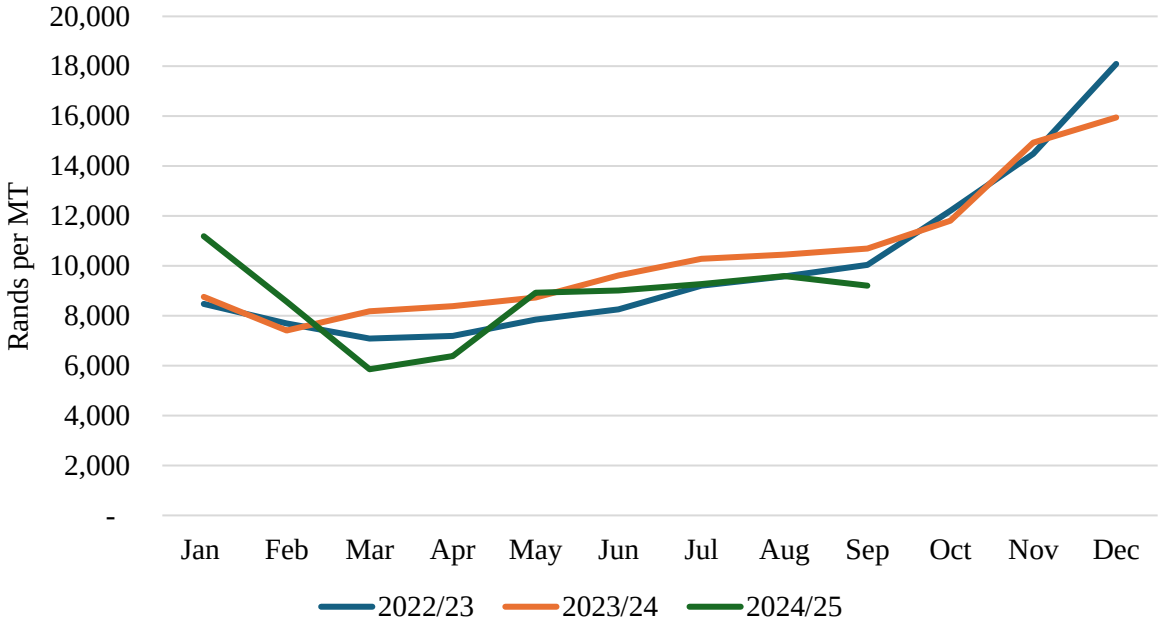
Source: *FAS Pretoria using Hortgro data*

Consumption

The industry is export-oriented, with half of pear production destined for foreign markets. In South Africa, 15 percent of total pear production is consumed fresh, while 33 percent is processed into juice and purees, and two percent is dried. FAS Pretoria forecasts that domestic consumption in MY 2025/26 will remain unchanged from MY 2024/25, as the anticipated increase in production is expected to be directed primarily toward exports. MY 2024/25 domestic consumption is revised downwards as more pears were sold in the export market. Therefore, MY 2024/25 domestic consumption is estimated to decrease by three percent year-on-year.

The pear prices indicated in **Figure 15** are the average prices (Rand/MT) earned in the respective markets. Local prices are based on sales on the 19 wholesale fresh produce markets in South Africa. In MY 2024/25, the price for pears in the local market decreased due to improved production and volumes sold in the local market.

Figure 15: Local Price Trend of Pears



Source: *FAS Pretoria using DOA data*

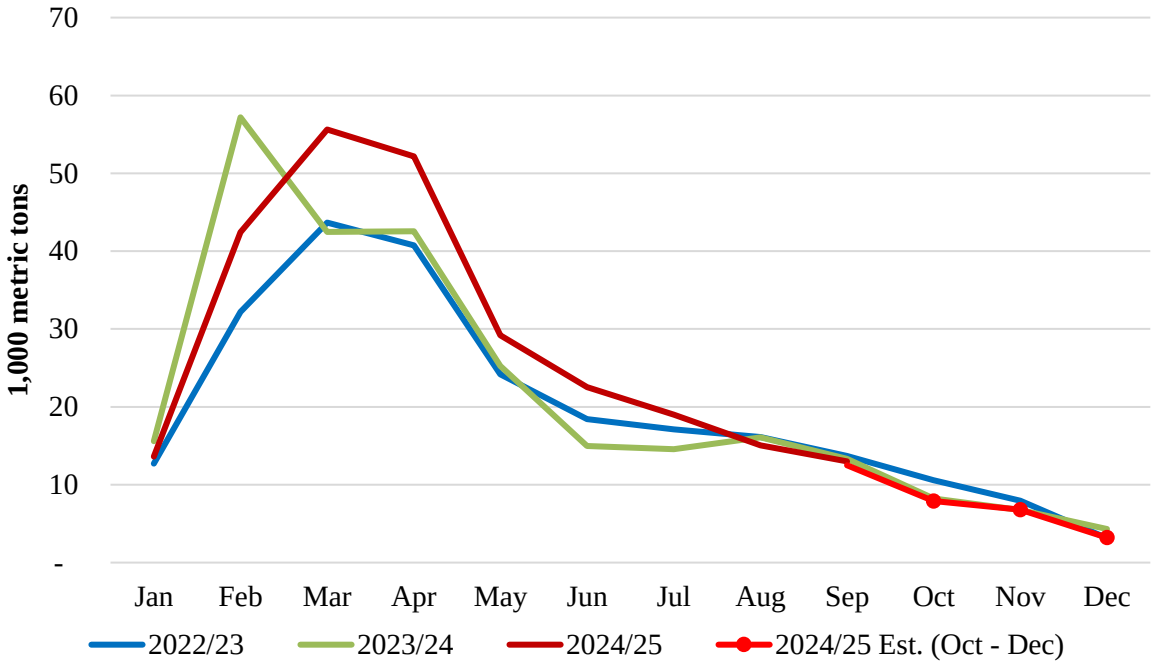
Exports

FAS Pretoria forecasts that MY 2025/26 exports will improve by three percent compared to MY 2024/25 due to improved production of export quality fruit and improved productivity at the port of Cape Town. Exports are expected to be driven by Packham's Triumph, Forelle and Abate Fetel varieties.

FAS Pretoria estimates that MY 2024/25 exports will increase by eleven percent from MY 2023/24 based on the increased production of exportable fruit. Furthermore, export data shows that the MY 2024/25 pace of exports between January and September has increased by eleven percent, compared to the same period in MY 2023/24. Supported by improved port performance at the Port of Cape Town, with fewer wind delays, export growth is driven by increased volumes of the Forelle, Abate Fedel varieties and summer pear such as Rosemarie, Cheeky, Celina and Comice.

FAS Pretoria lowers MY 2023/24 exports to 261,348 MT based on finalized data. MY 2023/24 exports improved by nine percent from MY 2022/23 on improved production. On average, almost 61 percent of South Africa's pear exports are recorded between February and May, which coincides with the harvest season as shown in Figure 16.

Figure 16: South African Monthly Exports of Pears

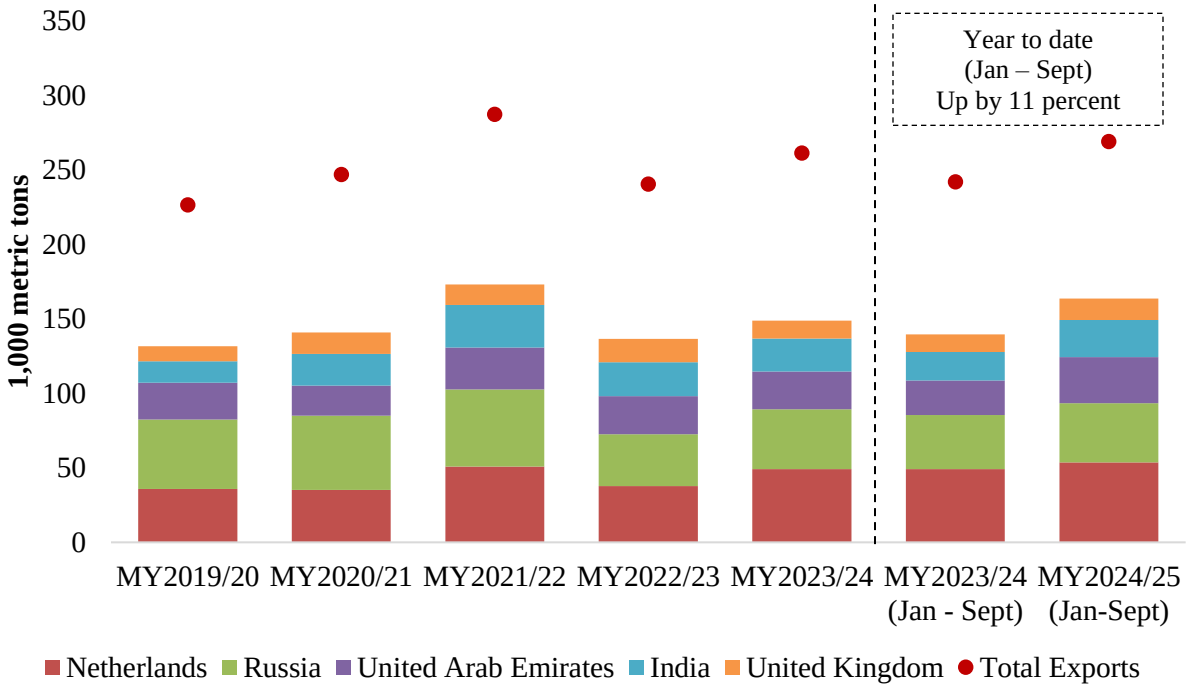


*FAS Pretoria estimates for MY 2024/25 October – December
Source: *FAS Pretoria using Trade Data Monitor, LLC data*

South Africa's main pear export markets are the EU (31 percent), Russia (15 percent), United Arab Emirates (10 percent), India (8 percent), and the United Kingdom (5 percent). South Africa is the leading supplier of pears to the European Union, accounting for a 43 percent share in MY 2023/24, followed by Chile (24 percent) and Argentina (19 percent). South Africa's pear exports benefit from duty-free access into the EU.

India approved in-transit cold treatment for South African pears in August 2022. Exports to India are expected to grow due to improving demand for pears in that market. However, India imposes a 33 percent tariff on pears from South Africa. Post contacts report that the main varieties exported to India are Packham's Truimph, Forelle and Vermount Beauty. Exports to the United States are minimal at less than a 2,000 MT per annum. South Africa exports to the United States mainly between February and July.

Figure 17: South African Fresh Pear Exports (Values in MT)



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. FAS Pretoria forecasts pear imports in MY 2025/26 at 20 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 2024/25, pear imports are estimated at 30 MT, remaining unchanged from MY 2022/23 on sufficient supply of pears in the domestic market.

The United States does not have market access for pears into South Africa as the 2010 access request was never finalized. However, if access were granted, exports would be subject to a 4 percent customs duty, as shown in Table 3.

Table 3: 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%

Source: *SARS* Updated October 24, 2025

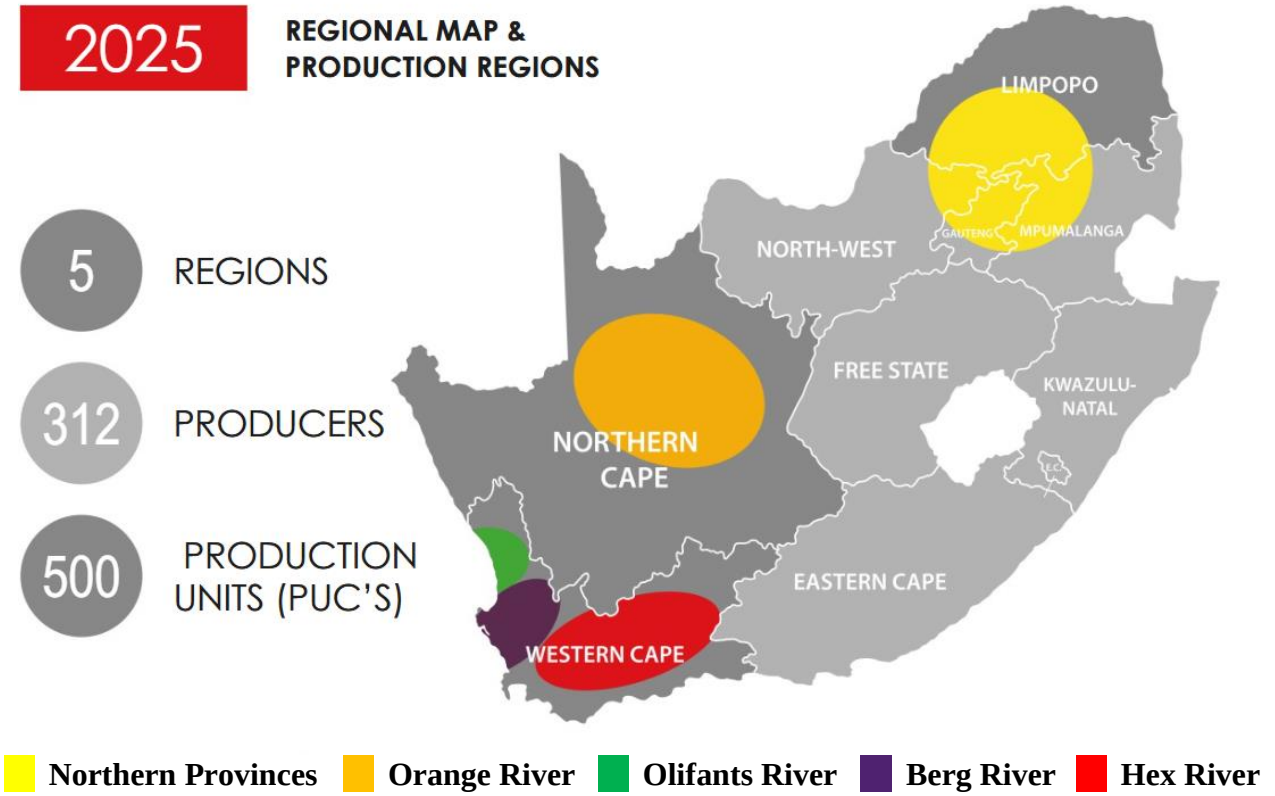
Table 4: Production, Supply and Distribution of Fresh Pears

Pears, Fresh	2023/2024		2024/2025		2025/2026	
Market Year Begins	Jan 2024		Jan 2025		Jan 2026	
South Africa	USDA Official	New Post	USDA Official	New Post	USDA Official	New Post
Area Planted (HA)	12900	12850	12950	12900	0	12900
Area Harvested (HA)	12000	12250	12100	12100	0	12100
Bearing Trees (1000 TREES)	17300	17200	17350	17300	0	17200
Non-Bearing Trees (1000 TREES)	910	910	900	890	0	880
Total Trees (1000 TREES)	18210	18110	18250	18190	0	18080
Commercial Production (MT)	530000	520000	540000	540000	0	550000
Non-Comm. Production (MT)	0	0	0	0	0	0
Production (MT)	530000	520000	540000	540000	0	550000
Imports (MT)	50	29	30	30	0	20
Total Supply (MT)	530050	520029	540030	540030	0	550020
Domestic Consumption (MT)	260050	258681	260030	250030	0	250020
Exports (MT)	270000	261348	280000	290000	0	300000
Withdrawal From Market (MT)	0	0	0	0	0	0
Total Distribution (MT)	530050	520029	540030	540030	0	550020
(HA) ,(1000 TREES) ,(MT)						
OFFICIAL DATA CAN BE ACCESSED AT: PSD Online Advanced Query						

Table Grapes, Fresh

South Africa's major table grape growing regions include the Hex River Valley (32 percent), the Berg River Valley (24 percent), the Olifants River region (6 percent) in the Western Cape province, the Orange River region in the Northern Cape province (29 percent), and the Northern Provinces (9 percent) (see Figure 18). The grape season typically begins in the Northern Provinces, followed by the Western Cape regions, which enter the season between weeks 48 (October) and week 18 (April) (see Table 5).

Figure 18: Map of Table Grape Production Areas in South Africa



Source: *South African Table Grapes Industry (SATI)*

Table 5: Typical Regional Calendar

Production Region	Week																										
	44	45	46	47	48	49	50	51	52	1	2	3	4	5	6	7	8	9	10	11	12	13	14	15	16	17	18
Northern Province																											
Orange River																											
Olifants River																											
Berg River																											
Hex River																											

Source: *FAS Pretoria using SATI data*

Table 6: Table Grape Varieties, Tree Age Distributing According to Production Regions

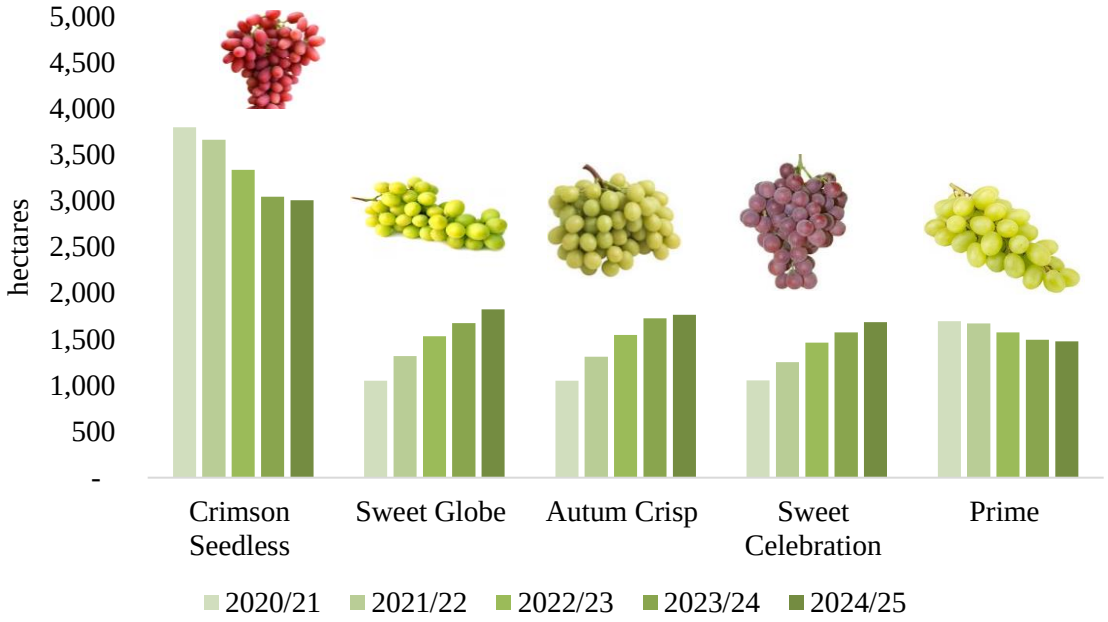
Production Region	Topmost planted varieties	Area Planted (ha)		Tree Age			
		2024/25	YoY change %	0-2	3-9	10-15	+16
Northern Province	Crimson Seedless (19%), Starlight (17%)	1,837	-3%	6%	62%	21%	11%
Orange River	Prime (20%), Sweet Globe (13%)	5,662	-1%	9%	53%	26%	12%
Olifants River	Crimson Seedless (12%), Autumncrisp (12%)	1,090	-6%	6%	55%	25%	14%
Berg River	Autumncrisp (14%), Sweet Globe (10%)	4,621	2%	11%	54%	23%	12%
Hex River	Crimson Seedless (33%), Autumncrisp (12%)	6,194	1%	14%	55%	21%	11%

Source: *FAS Pretoria using SATI data*

The South African Table Grapes Industry (SATI) represents and supports the interests of table grape producers. According to the SATI Tree Census (2025), the majority of table grapes in South Africa consist of vines aged between 3 and 9 years (55 percent), followed by vines aged 10 to 15 years (23 percent). The area covered by new vines younger than 2 years decreased by 2 percent to 2,082 hectares in MY 2024/25, indicating a slight slowdown in overall area expansion. Over the past decade, the cultivar profile of table grapes in South Africa has shifted significantly. Due to consumer preference for seedless grapes, seeded cultivars are declining, while seedless varieties continue to grow in popularity. Currently, less than six percent of production consists of seeded table grapes.

The most widely planted variety is Crimson Seedless, a late-season red seedless grape that accounts for 15 percent of the total area under table grapes. Despite a declining trend, Crimson Seedless remains an important variety in South Africa. Other popular varieties include Sweet Globe (9 percent), Autumn Crisp (9 percent), Sweet Celebration (9 percent), and Prime (8 percent). Together, these cultivars represent 50 percent of the total area planted, as illustrated in Figure 19. The industry is planting newer varieties that align with global market demand and not replacing older and more traditional varieties.

Figure 19: Planted Table Grape Varieties (Hectares)



Source: *FAS Pretoria using SATI data*

Area Planted

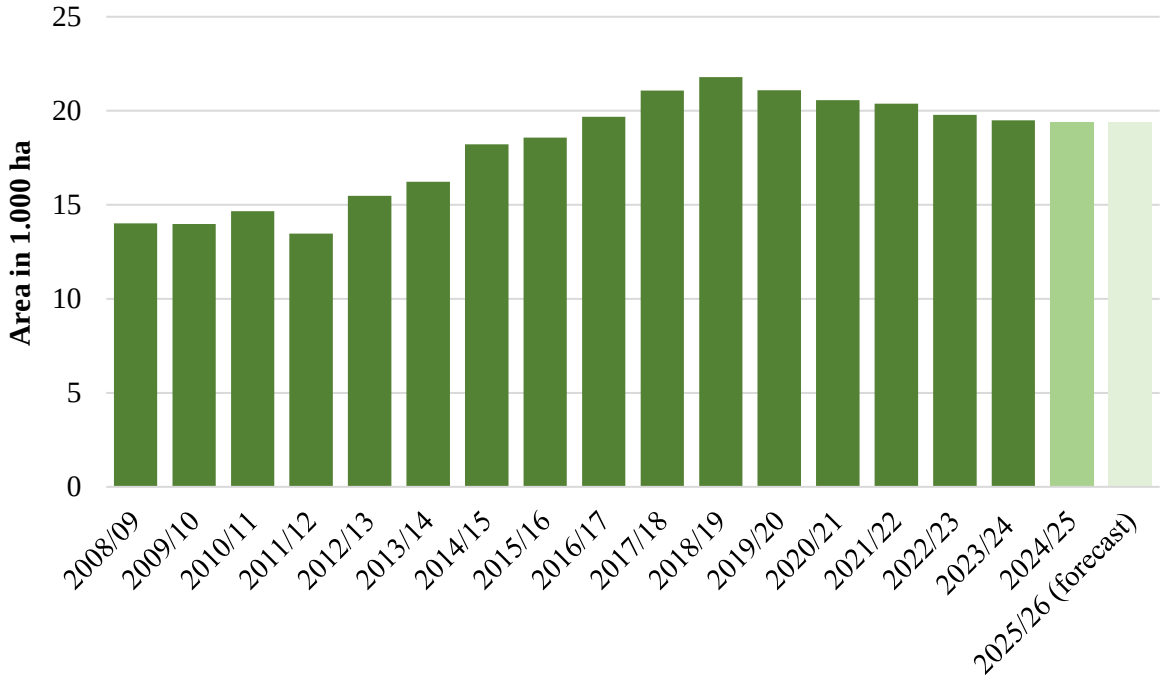
FAS Pretoria forecasts that the area planted to table grapes in MY 2025/26 will remain unchanged from MY 2024/25 at 19,390 hectares. The industry appears to be consolidating as growers are prioritizing the replacement of older varieties with newer, higher-yielding varieties and managing production costs. Although electricity supply has stabilized since MY 2024/25, the cost of electricity increased by 13 percent in April 2025 and is set to rise by an additional five percent in April 2026. These increases are expected to impact production costs, and may limit area expansion, as table grapes are under irrigation. South African table grapes are predominantly exported, and FAS Pretoria contacts report improved performance at the Port of Cape Town during MY 2024/25, which supported exports. While there is optimism about continued port efficiency in MY 2025/26, it is too early for this improvement to drive significant investments in expanding production area.

FAS Pretoria revises MY 2024/25 area planted slightly upwards to 19,404 ha based on updated industry figures, reflecting no significant change from MY 2023/24. The area under production in the Northern provinces declined for the fourth consecutive year in MY 2024/25, decreasing by three percent year-on-year due to changing weather conditions and rising production costs. The Olifants River region shrank by six percent, driven by the replacement of older varieties. Meanwhile, the Berg and Hex River regions saw only marginal increases year-on-year. FAS Pretoria maintains the MY 2023/24 area under table grape production at 19,488 hectares.

The stabilization of production area follows a sharp increase between MY 2012/13 and MY 2018/19 (see Figure 20), driven largely by growing export earnings. In the past few seasons, growers faced challenges such as increasing input costs, erratic electricity supply, and inefficient

port operations which diminished the profitability of table grape producers in South Africa and limited new investments in the industry.

Figure 20: Area Planted in Table Grapes in South Africa



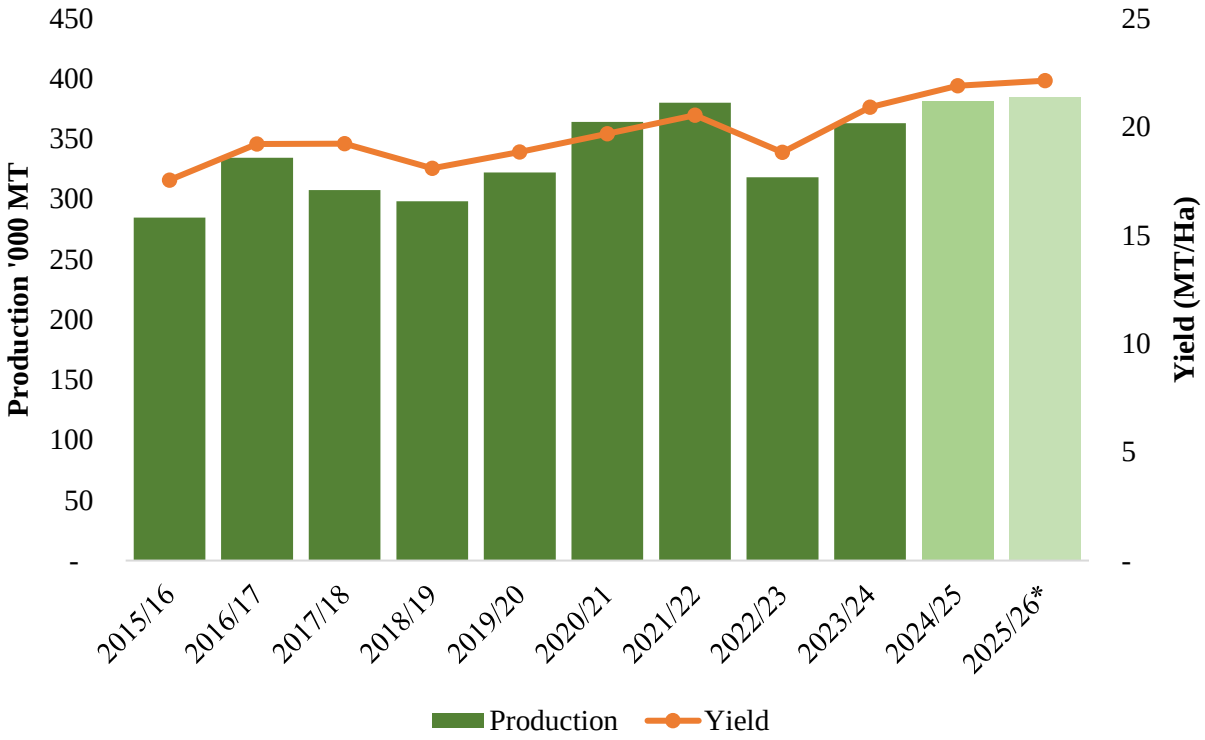
Source: *FAS Pretoria using SATI data*

Production

FAS Pretoria forecasts a slight increase in production of one percent in MY 2025/26 based on higher-yielding cultivars coming into full production. FAS Pretoria contacts report that winter rainfall in the Western Cape was sufficient to ensure water availability for irrigation, while cold temperatures during the winter months of 2025 were sufficient and is expected to support berry size and coloring.

MY 2024/25 production is revised upwards to 381,000 MT, marking record production and a five percent increase from MY 2023/24. This growth is driven by favorable weather conditions across production regions. FAS Pretoria contacts note that the Northern region experienced early rains and late cold weather, which reduced yields for early-season varieties. However, production of mid- to late-season varieties increased, offsetting these losses. FAS Pretoria maintains MY 2023/24 production at 363,000 MT.

Figure 21: Table Grape Production in South Africa



Source: *FAS Pretoria using SATI data* **FAS Pretoria Forecast*

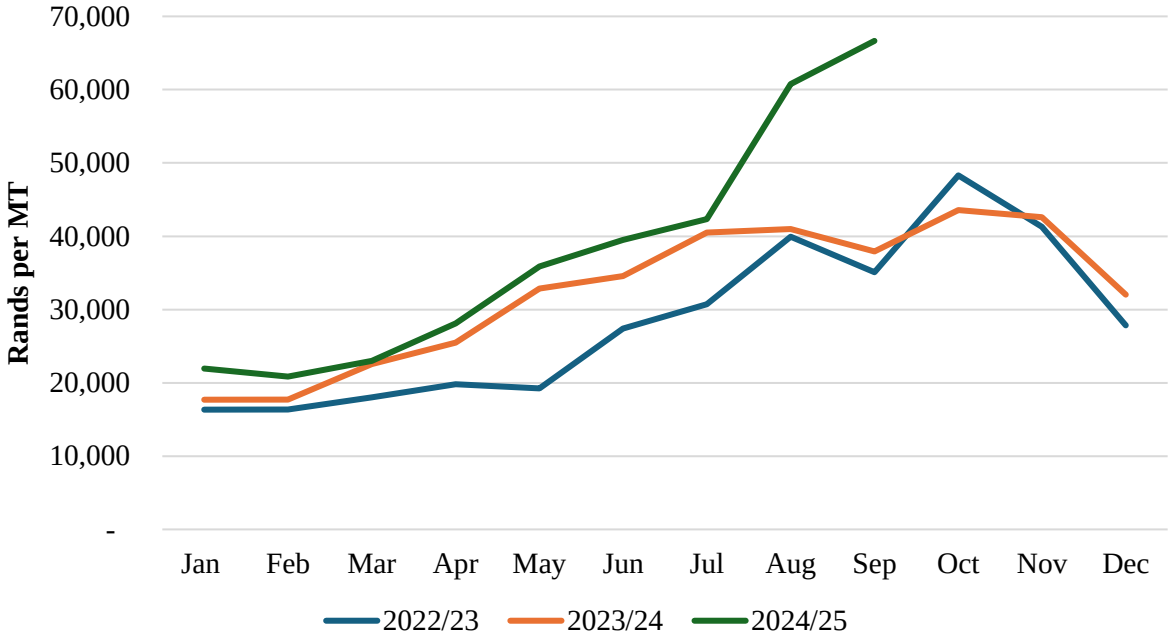
Consumption

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.

FAS Pretoria forecasts that MY 2025/26 consumption with remain unchanged from MY 2024/25 as the modest increase in production is expected to be allocated primarily to exports. In MY 2024/25, the Northern provinces—traditionally focused on local supply—experienced late cold weather that affected the quality of grapes. This led to an increased supply in the domestic market. As a result, FAS Pretoria has slightly revised domestic consumption estimates for MY 2024/25 upward.

Table grapes are mainly consumed by middle-income and affluent consumers. Figure 22 shows the average price of table grapes in 19 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 22: Table Grape Average Price Trend



Source: FAS/Pretoria *using DOA data*

Exports

FAS Pretoria forecasts a one percent increase in exports for MY 2025/26 compared to MY 2024/25, driven by higher production of export-quality table grapes. The majority of South African table grapes are shipped through the port of Cape Town, where improved port performance, as reported by FAS Pretoria contacts, is expected to support export growth. Additionally, South Africa has secured new market access for table grapes in the Philippines, with the industry likely to export its first consignment in MY 2025/26.

FAS Pretoria has revised MY 2024/25 exports upward to 355,778 MT, reflecting increased production and a five percent growth compared to MY 2023/24, marking record export levels. According to FAS Pretoria contacts, the number of cartons inspected for export between weeks 02 and 04 (January 2025) reached the highest weekly inspections ever recorded. The most exported cultivars in MY 2024/25—Crimson Seedless, Sweet Celebration, Sweet Globe, Autumn Crisp, and Prime—aligned with overall production trends.

FAS Pretoria contacts report that collaboration between the fruit industry, government, and port authorities has significantly improved efficiency at the Port of Cape Town. Key upgrades included the installation of two generators with 60 container plug points to boost capacity during peak season, replacement of outdated equipment, and adjustments to holiday shifts and recovery days following wind-bound periods, all of which enhanced productivity in MY 2024/25. Regular engagement among port management, government, and the fruit industry ensured ongoing reviews of port productivity and readiness throughout the export season, with remedial actions implemented as needed.

In MY 2023/24, table grape exports were diverted to alternative ports. However, due to improvements at Cape Town's Container Terminal and the Cape Town Multipurpose Terminal, exports through these facilities increased from 82 percent in MY 2023/24 to 90 percent in MY 2024/25. Exports through the Port of Port Elizabeth decreased by from 11 percent to 6 percent, Durban from 7 percent to 3 percent. This shift reduced costs for some growers, as they no longer needed to reroute fruit to other ports, as was necessary in MY 2023/24. In September 2024, FAS Pretoria visited Walvis Bay and observed plans to expand cold storage capacity and increase South African table grape exports. FAS Pretoria contacts reported that exports through Walvis Bay rose from 0 percent in MY 2023/24 to 1 percent in MY 2024/25. FAS Pretoria maintains MY 2023/24 export volumes at 332,800 metric tons (MT).

Europe is the leading export market for South African table grapes, accounting for about 76 percent of total table grape exports in MY 2024/25. 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.

South Africa achieved record table grape exports to the United States in MY 2024/25, driven by increased production. The United States accounted for three percent of South Africa's total exports, with MY 2024/25 shipments to the United States rising by 65 percent compared to MY 2023/24. A 30 percent import duty on South African table grapes in the United States took effect on August 7, 2025. FAS Pretoria contacts reported a surge in export activity to the United States ahead of the new tariff implementation.

At the 30 percent tariff rate, South Africa loses competitiveness to other southern hemisphere exporters, such as Peru and Chile. Despite this, FAS Pretoria contacts anticipate that South Africa will continue exporting to the United States, although at reduced competitiveness. South Africa primarily exports white seedless grapes (57 percent), such as Sweet Globe and Autumn Crisp; red seedless grapes (34 percent), such as Sweet Celebration; and black seedless grapes (10 percent), such as Sable Seedless, to the United States.

Table 7: South Africa's Table Grape Exports

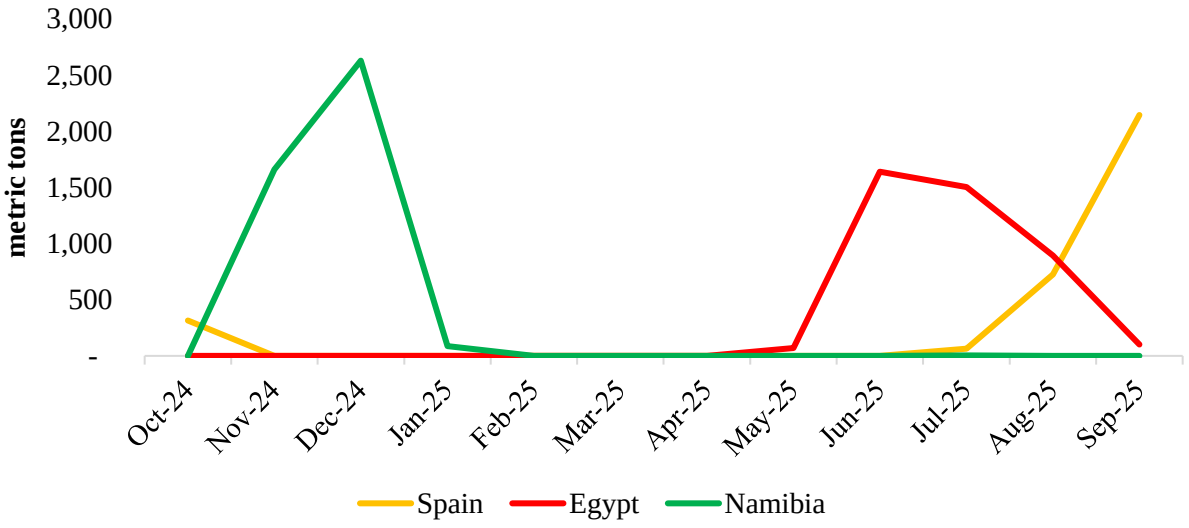
Export destinations	MY 2023/24 (MT)	MY 2024/25 (MT)	% Share in MY 2024/25	% Change
European Union	191,484	202,897	58%	6%
United Kingdom	65,709	64,929	18%	-1%
Middle East	20,431	23,839	7%	17%
Canada	11,672	14,731	4%	26%
Southeast Asia	11,196	7,613	2%	-32%
China & Hong Kong	6,683	6,554	2%	-2%
Africa	6,427	8,635	2%	34%
Russia	6,163	3,009	1%	-51%
United States	***5,987***	***9,886***	***3%***	***65%***
Indian Ocean Island	4,889	6,766	2%	38%
All others	2,141	2,332	1%	9%
Total	**333,673**	**351,778**	**100%**	**5%**

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 23), 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 December.

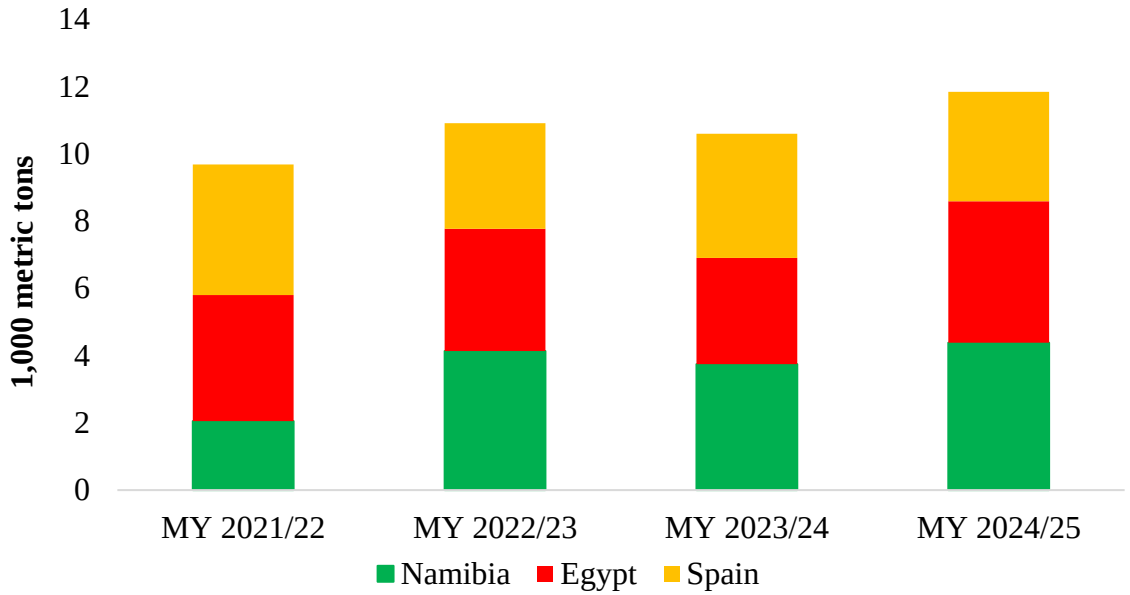
Figure 23: Off-Season Suppliers of Table Grapes in South Africa: MY 2024/25



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

FAS Pretoria forecasts that imports will drop by eight percent to 11,000 MT in MY 2025/26 from MY 2024/25 due to slight improvement in domestic supply and stagnated demand from the domestic market. FAS Pretoria revises MY 2024/25 table grape import slightly upwards to 11,940 MT based on an increase of out of season supply from Namibia and Egypt. This represents an 11 percent increase from MY 2023/24. MY 2023/24 imports are revised slightly upwards to 10,713 MT based on updated trade data.

Figure 24: 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 8.

Table 8: 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%

Source: SARS (Updated August 27, 2025)

Table 9: Production, Supply and Distribution of Table Grapes

Grapes, Fresh Table	2023/2024		2024/2025		2025/2026	
Market Year Begins	Oct 2023		Oct 2024		Oct 2025	
South Africa	USDA Official	New Post	USDA Official	New Post	USDA Official	New Post
Area Planted (HA)	19488	19488	19180	19404	0	19390
Area Harvested (HA)	17368	17368	17400	17400	0	17400
Commercial Production (MT)	363000	363000	365000	381000	0	385000
Non-Comm. Production (MT)	0	0	0	0	0	0
Production (MT)	363000	363000	365000	381000	0	385000
Imports (MT)	10000	10713	9000	11940	0	11000
Total Supply (MT)	373000	373713	374000	392940	0	396000
Fresh Dom. Consumption (MT)	40200	40913	39000	41162	0	41000
Exports (MT)	332800	332800	335000	351778	0	355000
Withdrawal From Market (MT)	0	0	0	0	0	0
Total Distribution (MT)	373000	373713	374000	392940	0	396000
(HA) ,(MT)						
OFFICIAL DATA CAN BE ACCESSED AT: PSD Online Advanced Query						

Policies and Regulations

Table 10 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 10: List of Key Legislations and Regulations

Policy or Regulation	Website Links
Agriculture Product Standards Act No 119 of 1990	Agricultural Product Standard Act
Agricultural Pests, Act, 36 of 1983	Agricultural Pests Act
Foodstuffs, cosmetics, and disinfectants Act 54 of 1972	Foodstuffs, cosmetics and disinfectants act
Procedures for exporting to South Africa	Plant Health (Import into SA)
Maximum Residue Limits	Maximum Residue Limits Apples Pears Table grapes
Import Protocols	Phytosanitary import requirements for importation of Apples from USA, PNW to South Africa

Source: DOA

Sources:
Hortgro - http://www.hortgro.co.za
South African Table Grapes Industry (SATI) - http://www.SATI.co.za/
South African Revenue Services (SARS) - https://www.sars.gov.za/

Attachments:

No Attachments

Attachments:

No Attachments