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Report Name: Fresh Deciduous Fruit Annual

Country: South Africa - Republic of

Post: Pretoria

Report Category: Fresh Deciduous Fruit

Prepared By: Masego Moobi

Approved By: Oliver Flake

Report Highlights:

The winter of 2026 was not cold enough and therefore the Marketing Year 2026/27 season will likely start 10 to 14 days earlier than usual. The production of apples and pears in MY 2026/27 is forecast to increase from MY 2025/26 based on higher-yielding varieties and newer trees coming into production. MY 2026/27 table grape production is forecast to drop from the record production in MY 2025/26. FAS Pretoria forecasts that MY 2026/27 deciduous fruit exports will increase from MY 2025/26 based on increased production of export-quality fruit. Exports to the United States will likely remain low as deciduous fruit exports face a 12.5 percent U.S. import duty.

THIS REPORT CONTAINS ASSESSMENTS OF COMMODITY AND TRADE ISSUES MADE BY USDA STAFF AND NOT NECESSARILY STATEMENTS OF OFFICIAL U.S. GOVERNMENT POLICY

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Executive Summary

Area Planted: FAS Pretoria forecasts that the area planted to apples and pears in MY 2026/27 will decline slightly from MY 2025/26. The heavy rains in May 2026 washed away parts of some farms and uprooted some newly planted trees. FAS Pretoria also forecasts a slight decline in table grape area, which continues a long-term downward trend. Growers are focusing on yields and fruit quality rather than expanding area, and they are investing in replanting with newer, higher-yielding varieties.

Production: FAS Pretoria forecasts that apple and pear production in MY 2026/27 will increase from MY 2025/26 as higher-yielding varieties and young trees come into production. Growers have enough water to irrigate orchards through the warm, dry summer months. Table grape production in MY 2026/27 is forecast to drop by three percent from the record MY 2025/26 crop. The 2026 winter was warmer than usual with the result that the deciduous fruit season will likely start 10 to 14 days earlier than normal.

Consumption: MY 2026/27 domestic apple and pear consumption is forecast to rise from MY 2025/26, supported by improved local production. Table grape consumption is forecast to decrease as growers send more fruit to export markets.

Exports: MY 2026/27 exports of deciduous fruit are forecast to increase, driven by higher production of export-quality fruit. MY 2025/26 exports were affected by logistical challenges at the Port of Cape Town, including record weather disruptions.

Imports: South African imports of deciduous fruit are limited. Domestic production has grown, and better storage technology has reduced the need for imports. FAS Pretoria forecasts that MY 2026/27 imports of apples and pears will decline as local production improves. Table grape imports are forecast to increase to fill off-season demand between June and December.

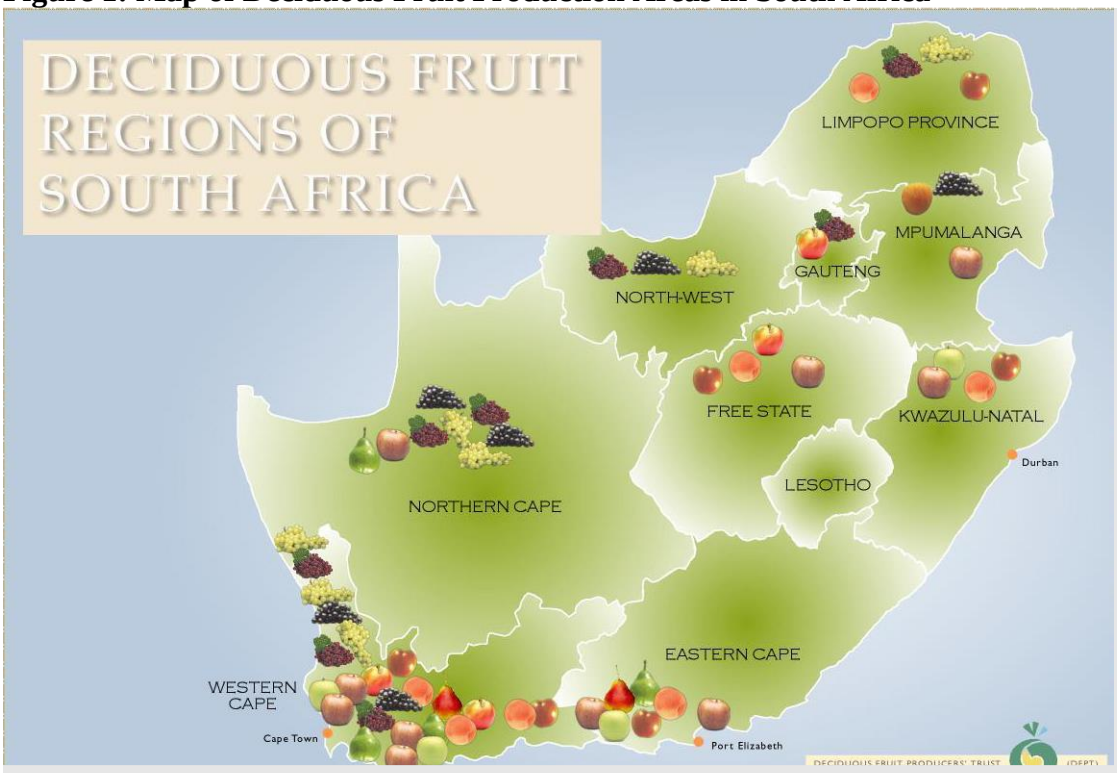
Report Notes

Deciduous Fruits covered in this report: Apple, Pears, and Table Grapes
Apples and Pears Marketing Year (MY): January – December
Table Grapes MY: October to September
MT – Metric Tons

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 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, such as China and India.

Figure 2: Area planted to Red-Bi apples

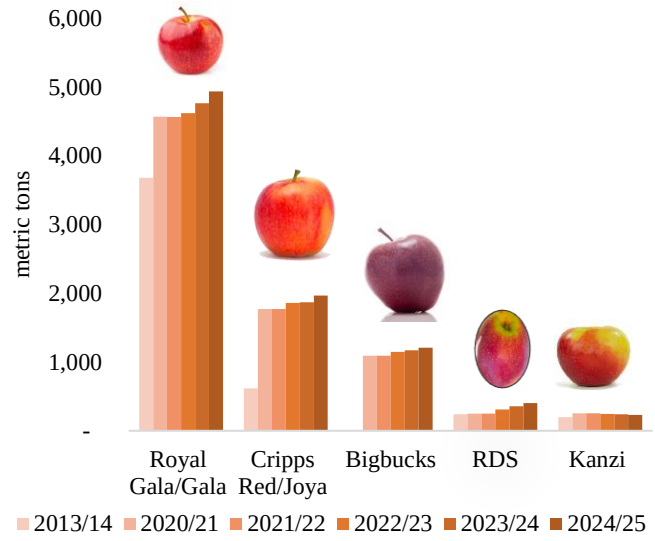


Figure 3: Area planted to Green Apples

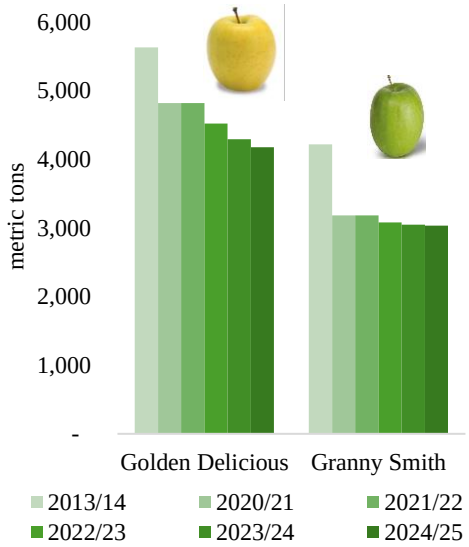


Figure 4: Area planted to Red apples

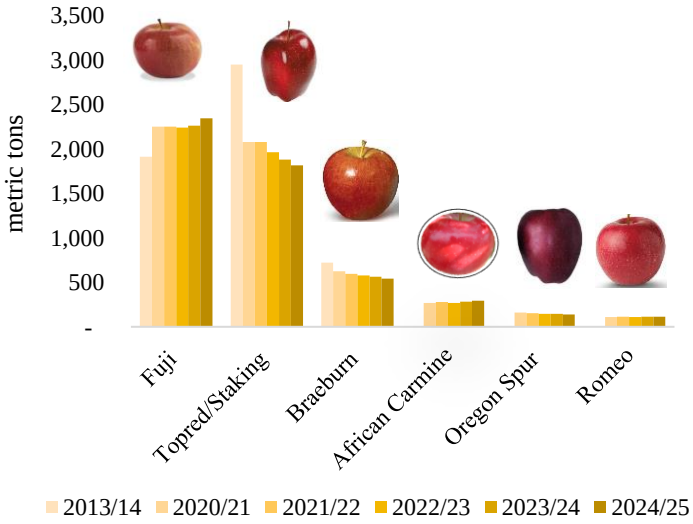
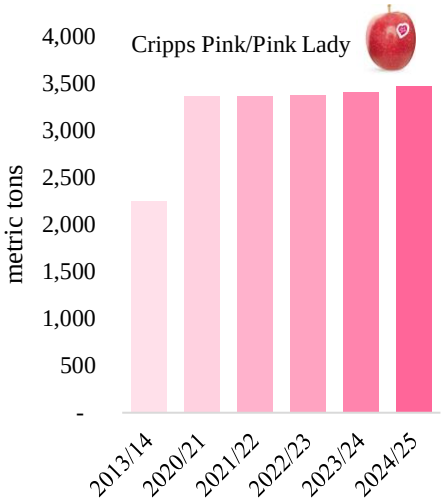


Figure 5: Area planted to Pink-Bi apples



Source: *FAS Pretoria using Hortgro data*

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 6, 7, and 8. In September 2026, Cosmic Crisp apples went on sale in South Africa for the first time, from local growers.

Figure 6: *NY 1/ SnapDragon*



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

Figure 7: *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 8: *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*

Table 1: Production, Supply and Distribution of Fresh Apples

Apples, Fresh	2024/2025		2025/2026		2026/2027	
Market Year Begins	Jan 2025		Jan 2026		Jan 2027	
South Africa	USDA Official	New Post	USDA Official	New Post	USDA Official	New Post
Area Planted (HA)	25100	25385	25200	25400	0	25200
Area Harvested (HA)	23400	23785	23500	23800	0	23600
Bearing Trees (1000 TREES)	33600	40010	33800	42680	0	42344
Non-Bearing Trees (1000 TREES)	1800	2645	1750	2689	0	2655
Total Trees (1000 TREES)	35400	42655	35550	45369	0	44999
Commercial Production (MT)	1350000	1330543	1380000	1260000	0	1350000
Non-Comm. Production (MT)	0	0	0	0	0	0
Production (MT)	1350000	1330543	1380000	1260000	0	1350000
Imports (MT)	50	0	50	10	0	5
Total Supply (MT)	1350050	1330543	1380050	1260010	0	1350005
Domestic Consumption (MT)	680050	650000	685050	510010	0	570005
Exports (MT)	670000	680543	695000	750000	0	780000
Withdrawal From Market (MT)	0	0	0	0	0	0
Total Distribution (MT)	1350050	1330543	1380050	1260010	0	1350005
(HA) ,(1000 TREES) ,(MT)						
OFFICIAL DATA CAN BE ACCESSED AT: PSD Online Advanced Query						

Area Planted

FAS Pretoria forecasts that the area planted to apples in MY 2026/27 will decline by one percent from MY 2025/26 to 25,200 hectares (ha). In May 2026, heavy rain and flooding hit the Ceres area, one of South Africa's leading apple planted regions (31 percent) and the Eastern Cape (11 percent) and washed away parts of some farms (see **Figure 9**). As a result, growers there will likely focus on repairing their orchards and replacing damaged infrastructure, which will draw investment away from expanding planted area.

The floods also damaged the electricity network and left the Ceres area without power for about seven weeks. For almost a month, packhouses and cold rooms ran on diesel generators, which raised operating costs. During a visit to Ceres and other parts of the Western Cape in August 2026, FAS Pretoria observed that road repairs were still underway after the floods.

Figure 9: Heavy Rain Damage to Farms and Farm Infrastructure





Source: *FAS Pretoria Contacts*

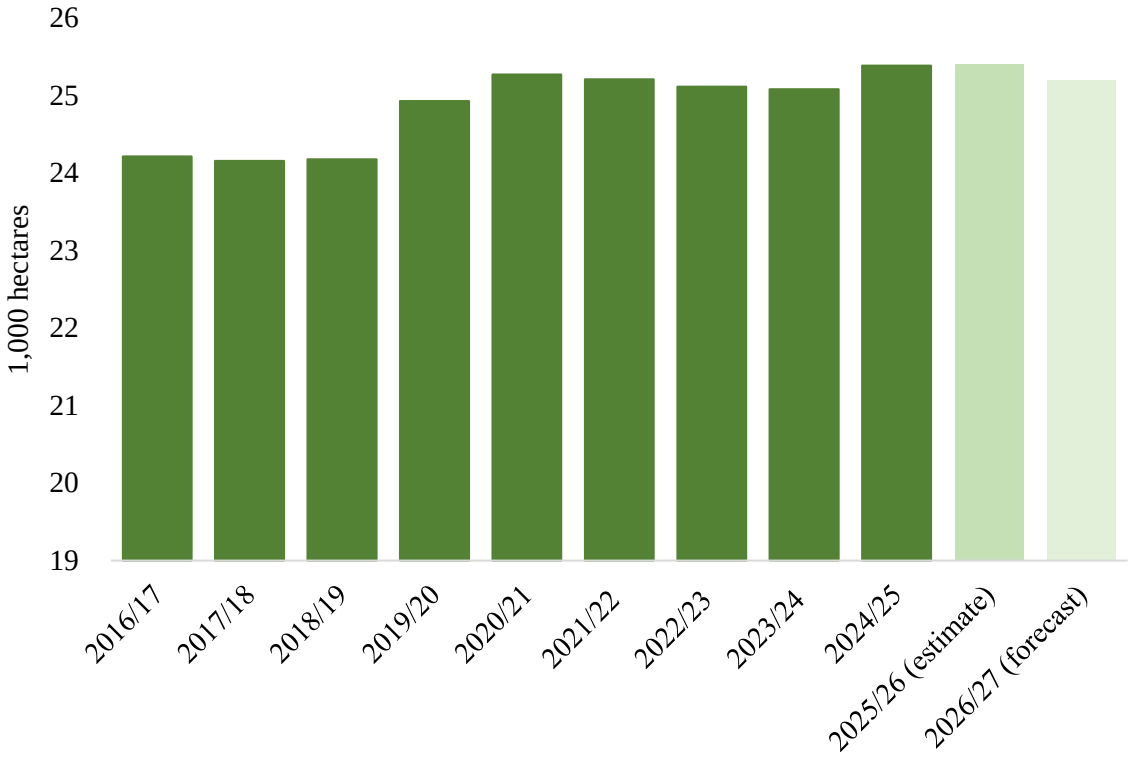
The apple industry is expanding cold storage capacity by adding controlled-atmosphere facilities. This added capacity will help handle larger volumes from trees coming into production and will extend the storage period. During a visit to one packhouse, contacts described to FAS Pretoria recent storage upgrades and plans for more upgrades and expansion. However, limited electricity capacity is holding back this expansion.

FAS Pretoria estimates that area planted in MY 2025/26 will remain unchanged from MY 2024/25. Even though area under apple production remains unchanged, yields continue to improve as growers replace older varieties with newer, higher yielding varieties. Additionally, growers are prioritizing investments in hail nets to improve the quality of exportable fruit.

FAS Pretoria revises area planted in MY 2024/25 upwards by 285 ha based on updated census data. According to the 2025 Hortgro census, planted area grew most in the Free State (5 percent), Groenland (3 percent) and Klein Karoo (3 percent). Overall, growers have held back on expanding planted area, hence the number of trees aged 0–3 years has dropped by nine percent. In addition, older orchards have been uprooted as trees aged 26 years and older have declined by

two percent. The decrease in trees aged 0–3 years is attributed to some trees entering full production and the slow pace of replacement planting. Trees aged 4–10 years make up 28 percent of planted area and therefore production volumes should rise as these trees mature. Trees aged 11–25 years, which are in full production, make up 39 percent, and trees older than 25 years make up 27 percent. FAS Pretoria updated the number of trees planted in MY 2024/25, in accordance with the Hortgro tree census.

Figure 10: Area Planted to Apples in South Africa



Source: *FAS Pretoria using Hortgro data*

Production

FAS Pretoria forecasts that apple production in MY 2026/27 will rebound by seven percent compared to MY 2025/26. Higher-yielding varieties, young trees coming into production, and available water for irrigation will drive the increase. FAS Pretoria contacts report that the 2026 winter was warmer than usual, so harvest will likely start 10 to 14 days earlier. During a visit to apple producing regions in the Western Cape in August 2026, FAS Pretoria observed that trees were flowering slightly earlier than in past seasons. The Western Cape province usually receives rain during winter, but FAS Pretoria contacts report that the winter of 2026 was dry. However, the heavy rains in May 2026 raised dam levels and improved water availability, though they also caused flooding.

FAS Pretoria revises estimated MY 2025/26 apple production downwards to 1.26 MMT, falling by five percent from MY 2024/25 due to severe weather. Around week 6 (early February 2026), heavy rain, hail, and windstorms hit the Langkloof and Ceres regions. FAS Pretoria contacts

report that the storms affected up to 15 percent of production in each region, and that the wind damaged netting and farm infrastructure as well as fruit.

Figure 11: Hailstorm Damage to Apple Orchards

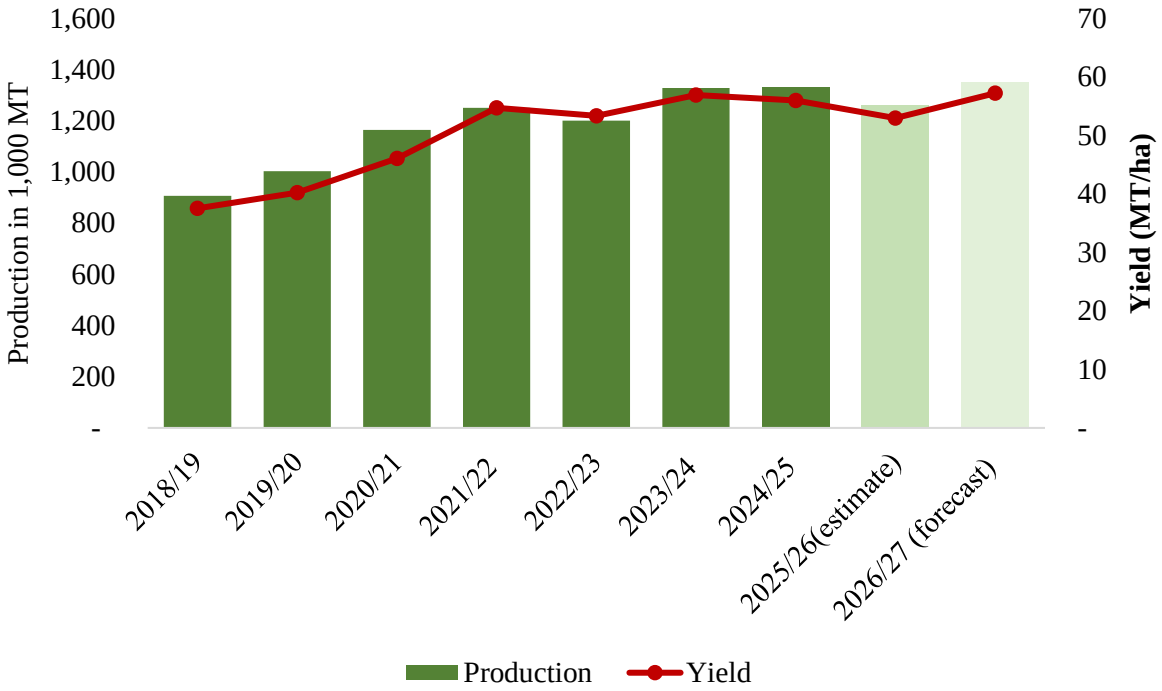


Source: *Hortgro*

In May 2026, Ceres received about 507 millimeters (mm) of rain, well above the long-term May average of 80 mm. The rain raised dam levels, but it also caused flooding, damaged farm infrastructure, and destroyed fruit. Some growers could not reach their orchards, preventing harvest of late varieties such as Pink Lady and Cripps Red. Growers finished harvesting in June, later than usual. In contrast, areas such as Elgin, Grabouw, Vyeboom, and Villiersdorp experienced a bumper crop, due to good weather and young trees coming into production, which offsets the losses in the other regions.

FAS Pretoria revises MY 2024/25 production estimates downwards by 19,457 MT from the previous estimate, virtually unchanged from MY 2023/24.

Figure 12: Apple Production in South Africa



Source: *FAS Pretoria with Hortgro historical data*

Consumption

Apples are widely consumed in South Africa and remain popular throughout the year. Just over 40 percent of South Africa's apple production is consumed domestically. FAS Pretoria forecasts that domestic consumption in MY 2026/27 will increase by 12 percent, driven by improved local production. However, more of other fruit types on the local market will limit further growth. In July 2026, a major Western Cape peach and apricot canning factory announced it would close, citing a shrinking canned fruit market. As a result, more fruit will likely go to the local fresh market and compete with apples.

FAS Pretoria revises MY 2025/26 consumption downwards to 510,010 MT due to a drop in domestic production while more fruit is sold in the export market. Lower citrus juicing prices also sent more citrus to the local fresh market, which cut into apple sales. FAS Pretoria revises MY 2024/25 domestic consumption downward by 20,045 MT, driven by an increase in export volumes.

Consumption figures include fresh market sales as well as apples used for processing into products such as juice, concentrates, purees, and dried fruit.

Figure 13: Apples Sorted for Juicing



Source: *FAS Pretoria while on Crop Assessment Travel in August 2026*

Growers typically send fruit that is either too small or damaged by the wind or sun for juicing as shown in Figure 13.

Exports

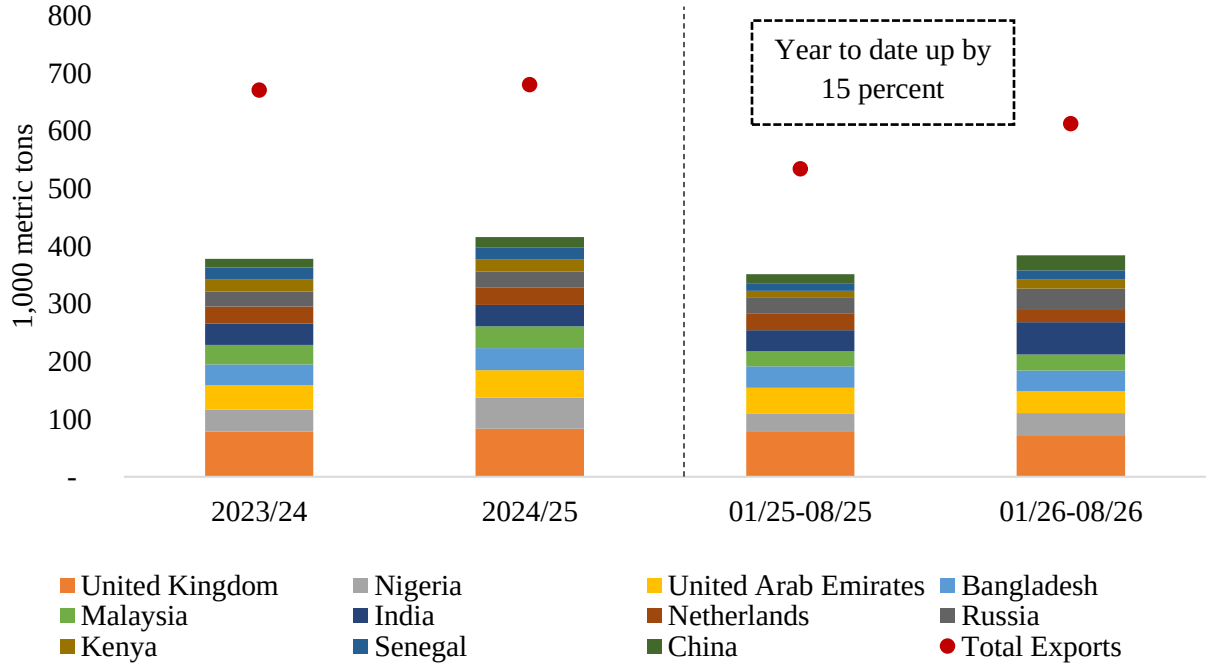
FAS Pretoria forecasts that South Africa's apple exports will rise by four percent in MY 2026/27 from MY 2025/26. Growth is expected to be driven by improved production of export-quality fruit and stronger demand for premium varieties. Exports are expected to be driven by improved demand for Royal Gala, Pink Lady, Golden Delicious, Cripps Red, and Bigbucks. FAS Pretoria expects South Africa to send more apples to China. On May 1, 2026, China began a zero-tariff policy that removed the 10 percent duty on South African apples.

FAS Pretoria revises MY 2025/26 apple exports estimate upwards to 750,000 MT, a 10 percent increase from MY 2024/25. Demand in key markets drives this growth, including the Far East and Asia, Africa, the EU and UK. MY 2025/26 year-to-date data (January to August) show that exports to China rose by 52 percent from the same period in MY 2024/25, which reflects the benefit of the zero-tariff policy. FAS Pretoria contacts report that South Africa fills the supply gap in China for local Chinese production. South Africa exports mostly Fuji, Royal Gala, and Flash Gala to China.

India is a growing market for South African apples with year-to-date shipments up by 52 percent. Even though South Africa is one of the leading suppliers of apples to India, it faces a 50 percent tariff, eroding some competitiveness. Some of the apple varieties exported to India include Gala, Pink Lady, Granny Smith and Top Red. Despite growth in exports, MY 2025/26 exports were affected by logistical delays due to heavy rains in the apple producing region of the Western Cape province and delays at the Port of Cape Town.

FAS Pretoria revises MY 2024/25 exports slightly upwards by 543 MT based on finalized data. MY 2024/25 exports improved by one percent from MY 2023/24 on increased domestic production of exportable apples.

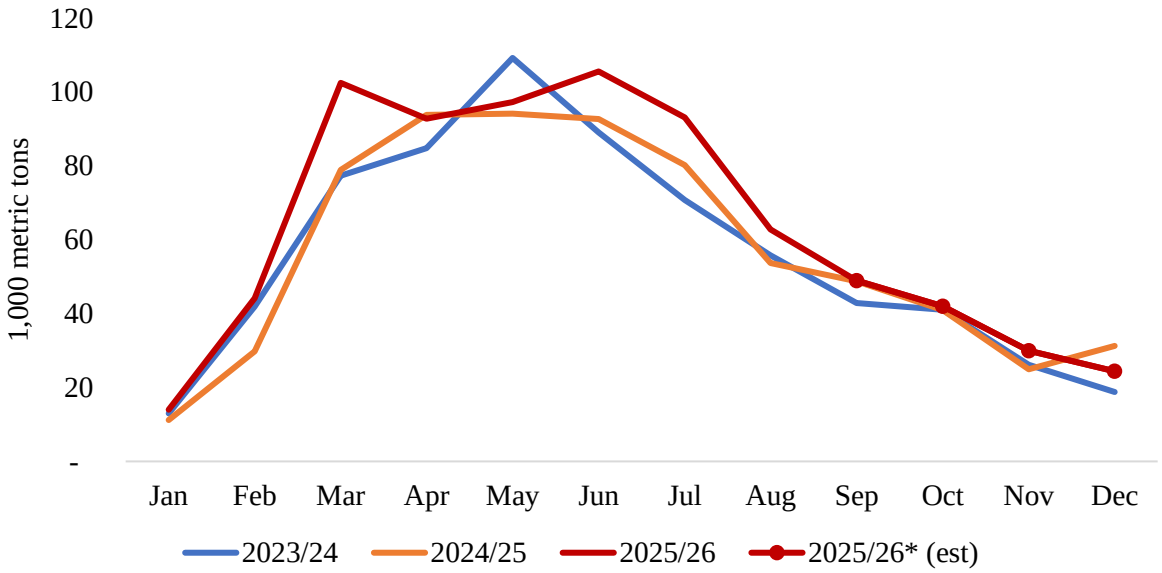
Figure 14: South African Fresh Apple Exports



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

South Africa exported about 51 percent of its apple production to over 90 countries. Exports occur throughout the year due to the availability of cold storage. In MY 2024/25, South Africa's top export markets for apples were the United Kingdom (12 percent), European Union (9 percent), Nigeria (8 percent), United Arab Emirates (7 percent), Bangladesh (6 percent), and Malaysia (6 percent). The bulk of the apple exports are recorded between April and July (on average 52 percent), with these exports primarily destined for Europe. South Africa is the leading supplier of apples to the UK, followed by France and Italy, which have a different supply window than South Africa (typically between September and April). South Africa is the second largest supplier of apples to 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 15: South African Monthly Exports of Apples

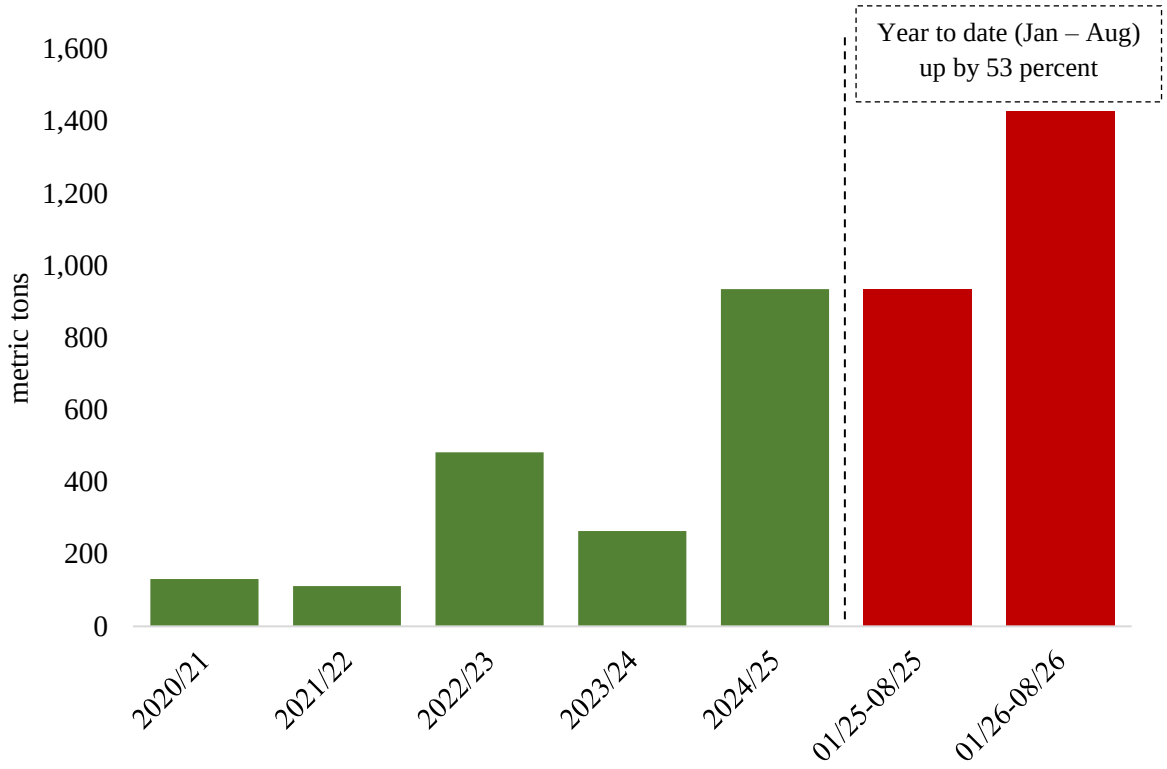


*FAS Pretoria estimates for MY 2025/26 September to December
Source: *FAS Pretoria using Trade Data Monitor, LLC. data*

In MY 2024/25, South Africa exported apples to over 40 countries in Africa, accounting for an export share of 39 percent. 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 to Thailand after the market had been closed since 2008. As a result, South Africa exported its first shipment of apples to Thailand in 2025. MY 2024/25 export volumes were 861 MT, making South Africa the 5th leading supplier. FAS Pretoria contacts report that exports to Thailand are mostly Gala type varieties with some Pink Lady apples.

Figure 16: 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 imposes a 12.5 percent tariff on South African apples.

Imports

Imports of apples in South Africa are generally negligible as production gains and improvements in storage technologies have substantially dampened import demand, and 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 2026/27 imports will decrease to 5 MT from MY 2025/26 based on an increase in production of apples and availability of other fruits in the domestic market. Imports in MY 2024/25 are revised downwards to zero on finalized trade data and local production.

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, (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%	1.6%

Source: *South African Revenue Services (SARS)* Updated October 6, 2026

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

Pears, Fresh

Pears grow well in areas with moderate temperatures. Like 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: Packham's Triumph (31 percent), Forelle (31 percent), Williams Bon Chretien (15 percent), and Abate Fetel (5 percent). Area planted to brown and green pears is declining, while blush pear plantings are increasing reflecting market demand trends.

Figure 17: Area planted to Brown Pears

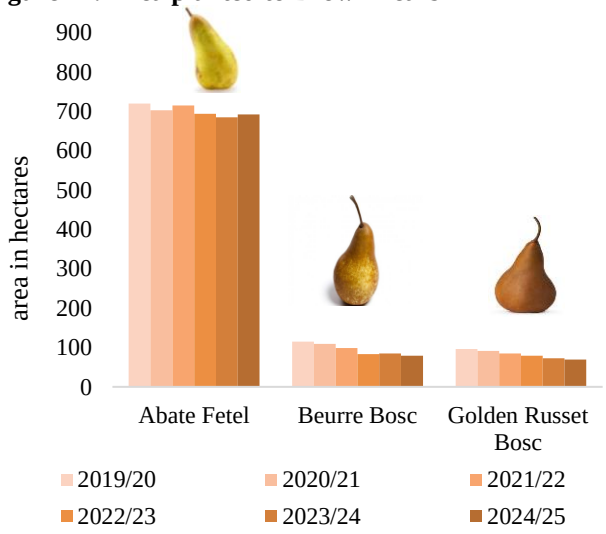


Figure 18: Area Planted to Green Pears

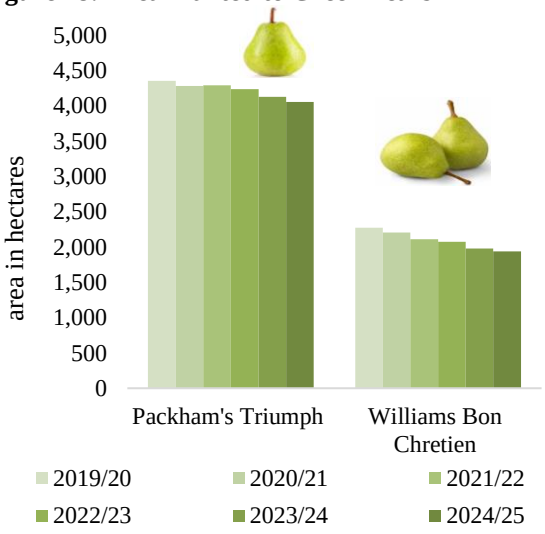
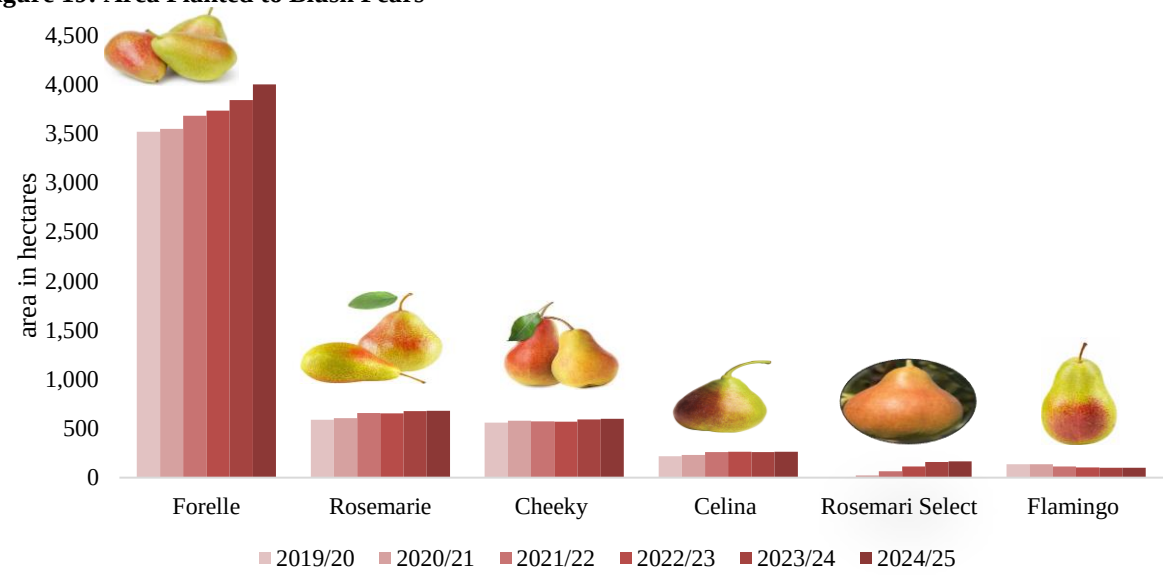


Figure 19: Area Planted to Blush Pears



Source: *FAS Pretoria using Hortgro data*

Table 3: Production, Supply and Distribution of Fresh Pears

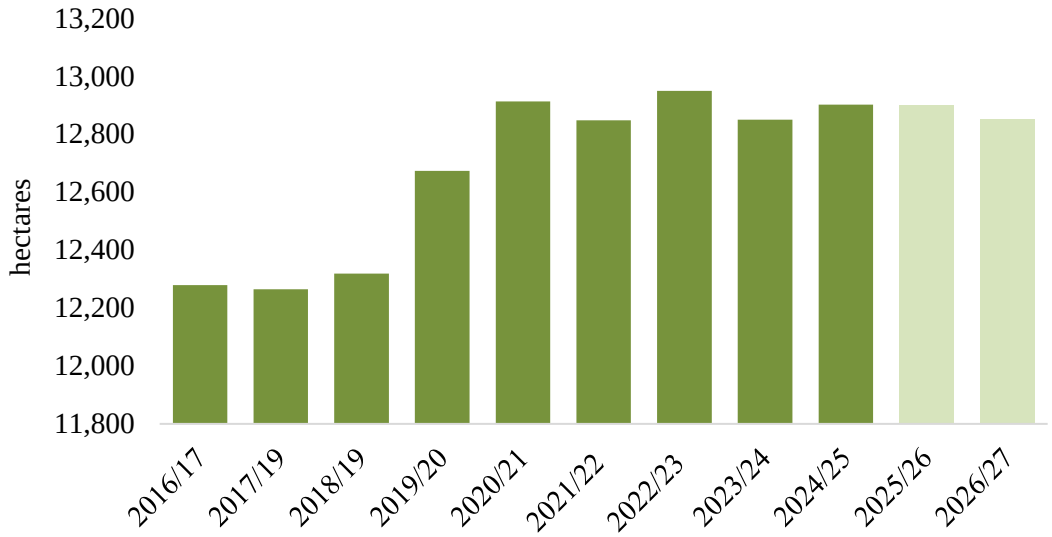
Pears, Fresh	2024/2025		2025/2026		2026/2027	
Market Year Begins	Jan 2025		Jan 2026		Jan 2027	
South Africa	USDA Official	New Post	USDA Official	New Post	USDA Official	New Post
Area Planted (HA)	12900	12900	12900	12900	0	12850
Area Harvested (HA)	12100	12100	12100	12529	0	12100
Bearing Trees (1000 TREES)	17300	18000	17200	18200	0	18300
Non-Bearing Trees (1000 TREES)	890	879	880	740	0	720
Total Trees (1000 TREES)	18190	18879	18080	18940	0	19020
Commercial Production (MT)	540000	540000	550000	530000	0	540000
Non-Comm. Production (MT)	0	0	0	0	0	0
Production (MT)	540000	540000	550000	530000	0	540000
Imports (MT)	30	30	20	10	0	10
Total Supply (MT)	540030	540030	550020	530010	0	540010
Domestic Consumption (MT)	240030	240030	250020	268010	0	270010
Exports (MT)	300000	300000	300000	262000	0	270000
Withdrawal From Market (MT)	0	0	0	0	0	0
Total Distribution (MT)	540030	540030	550020	530010	0	540010
(HA) ,(1000 TREES) ,(MT)						
OFFICIAL DATA CAN BE ACCESSED AT: PSD Online Advanced Query						

Area Planted

FAS Pretoria forecasts that MY 2026/27 area planted to pears will drop slightly by 0.4 percent from MY 2025/26 as growers uproot some orchards. Overall, planted area has stabilized, but growers are replacing some green pear orchards with blush varieties such as Forelle and the newer Rosemarie. With this shift, producers aim to enter the market earlier in the season to secure better prices in European and other markets. Growers are also focusing on precision farming techniques to enhance yields and fruit quality, redirecting resources away from expanding area. Further, the heavy rains in May 2026 destroyed some orchards.

In MY 2024/25, trees aged 0–3 years made up only 5 percent of planted area, the same as in MY 2023/24. This shows that growers planted only enough new trees to replace the few productive trees they removed. FAS Pretoria therefore estimates that planted area was unchanged in MY 2024/25 and remains unchanged in MY 2025/26.

Figure 20: Area Planted in Pears in South Africa

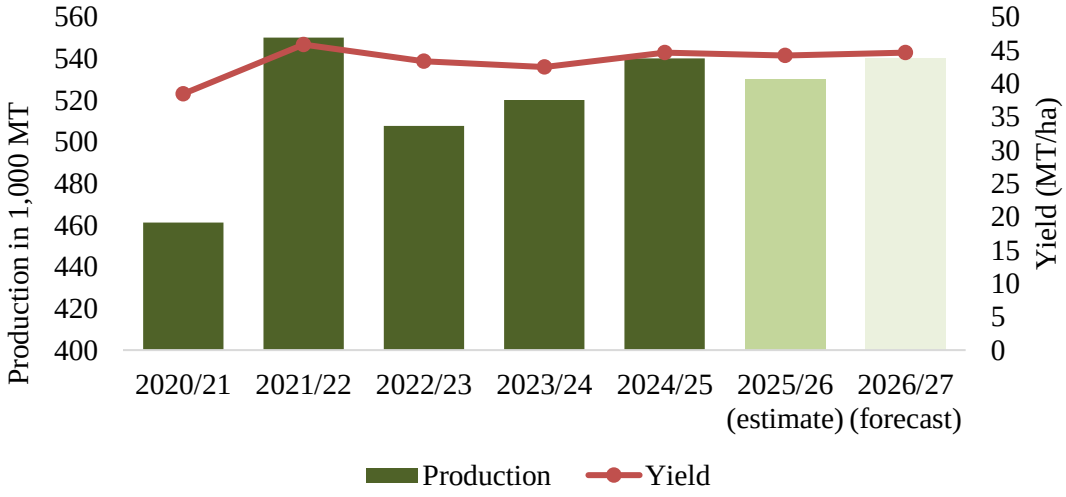


Source: *FAS Pretoria with Hortgro data*

Production

FAS Pretoria forecasts that in MY 2026/27 production will increase by two percent from MY 2025/26 based on availability of water for irrigation, higher yielding varieties, and better farming practices. The MY 2026/27 season is expected to start 10-14 days earlier due to a warmer winter. FAS Pretoria estimates MY 2025/26 pear production will drop by two percent compared to MY 2024/25 based on the production of smaller sized fruit and adverse weather, such as hail and flooding, in some production regions. Other regions had a bumper crop, which partly offsets these losses. FAS Pretoria maintains MY 2024/25 production estimate with no change.

Figure 21: Pear Production in South Africa



Source: *FAS Pretoria using Hortgro data*

Consumption

In South Africa, 15 percent of total pear production is consumed fresh, while 48 percent is exported, 35 percent is processed into juice, concentrates, and purees, and two percent is dried. FAS Pretoria forecasts that domestic consumption in MY 2026/27 will improve by one percent on improved domestic production. MY 2025/26 domestic consumption is revised upwards as export quality fruit decline on adverse weather. Therefore, MY 2025/26 domestic consumption is estimated to increase by 12 percent year-on-year. Consumption figures include fresh market sales as well as pears used for processing.

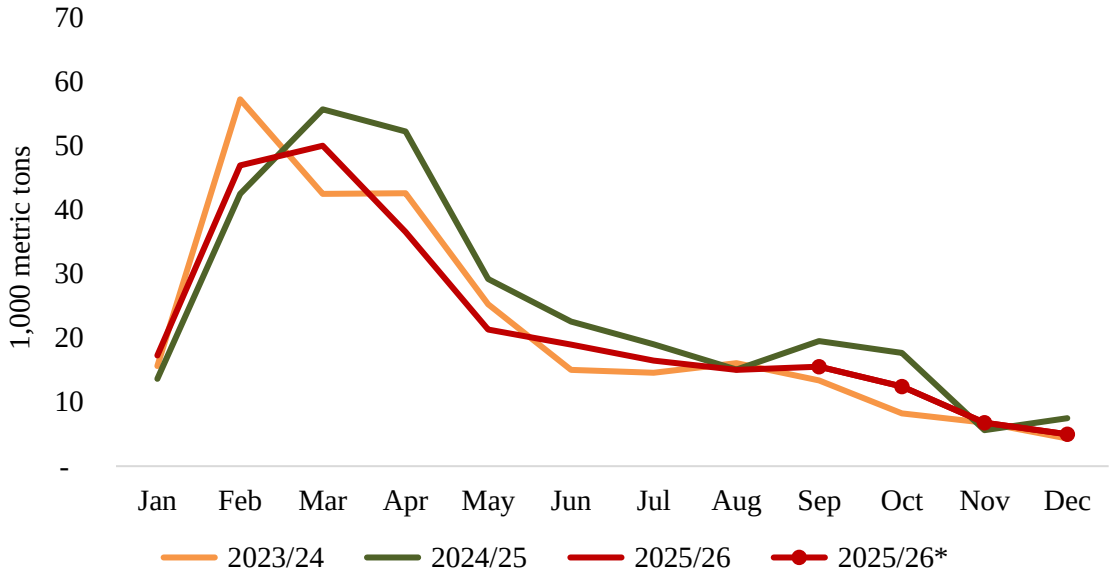
Exports

FAS Pretoria forecasts that MY 2026/27 exports will improve by three percent compared to MY 2025/26 due to improved production of export quality fruit. Exports are expected to be driven by Packham's Triumph, Forelle and Abate Fetel varieties.

FAS Pretoria estimates that MY 2025/26 exports will drop by 13 percent compared to MY 2024/25 due to a production of fewer smaller sized fruit. Furthermore, the Middle East conflict caused shipment delays and increases in logistics costs. FAS Pretoria maintains MY 2024/25 exports at 300,000 MT on finalized data.

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 22.

Figure 22: South African Monthly Exports of Pears

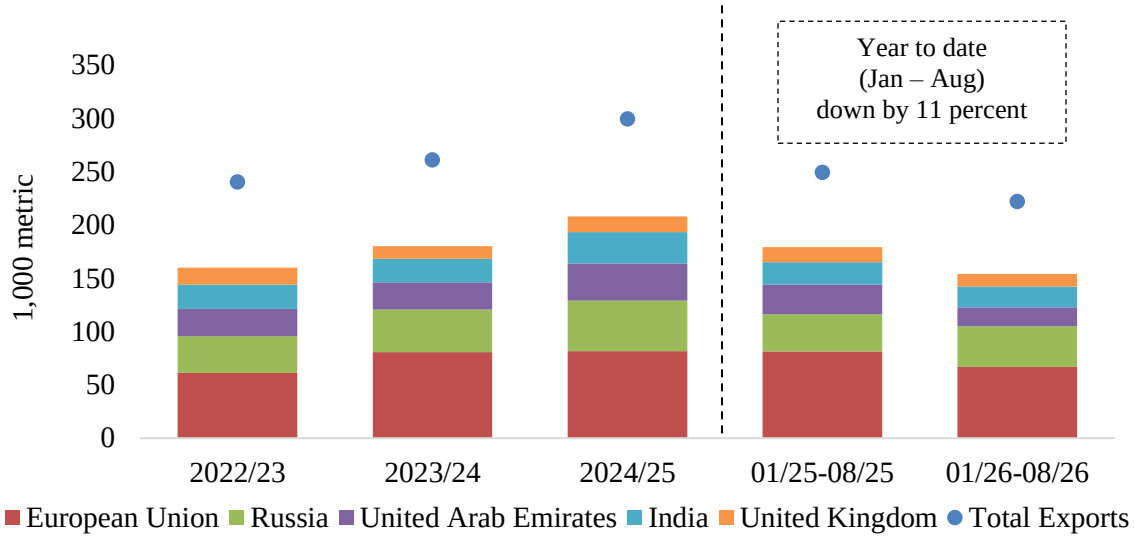


*FAS Pretoria estimates for MY 2025/26 September to December
Source: *FAS Pretoria using Trade Data Monitor, LLC. data*

South Africa's main pear export markets are the EU (27 percent), Russia (17 percent), United Arab Emirates (12 percent), India (10 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 2024/25, followed by Chile (24 percent) and Argentina (19 percent). South Africa's pear exports benefit from duty-free access into the EU. Exports to the United States are minimal at less than 2,000 MT per annum. South Africa exports to the United States mainly between February and July.

Figure 23: 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 2026/27 at 10 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 2025/26, pear imports are estimated at 10 MT, based on the pace of imports between January and August 2026. FAS Pretoria maintains MY 2024/25 imports at 30 MT based on finalized data.

The United States does not have market access for pears into South Africa because 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 4.

Table 4: Tariff Rates, Fresh Pears

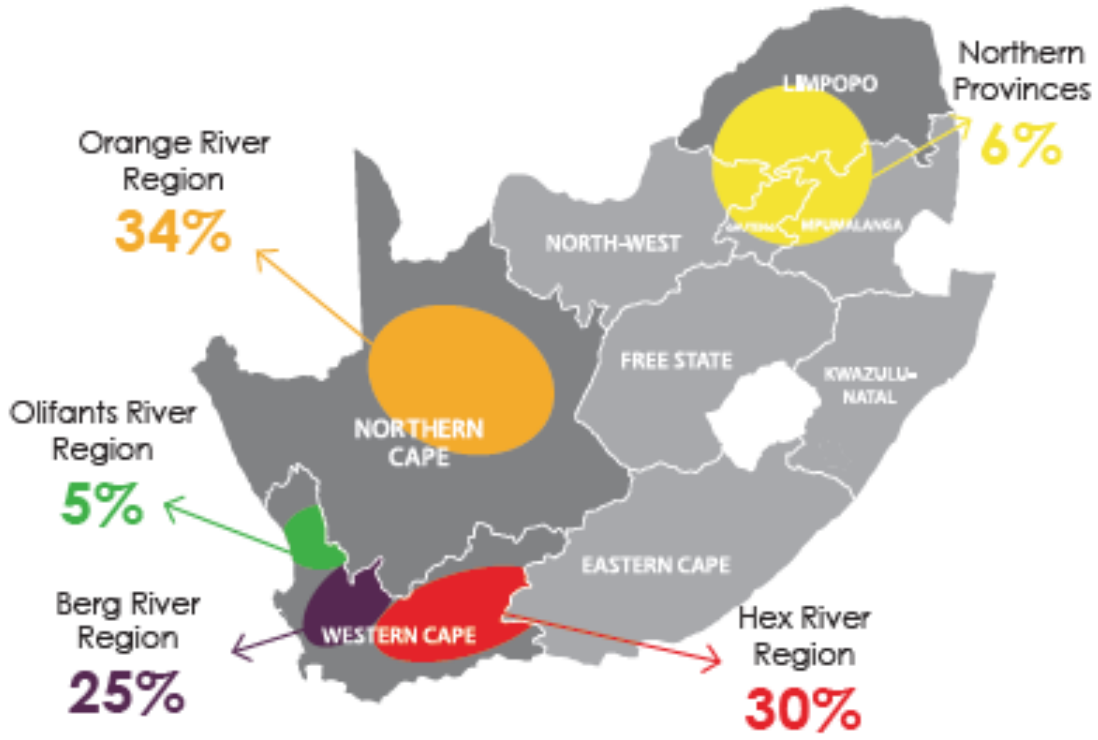
Heading Subheading	Article Description	Rate of Duty					
		General	EU/UK	EFTA	SADC	Mercosur	AfCFTA
0808.30	Pears, fresh	4%	Free	4%	Free	4%	1.6%

Source: *SARS* Updated October 6, 2026

Table Grapes, Fresh

South Africa's major table grape growing regions include the Hex River Valley (30 percent), the Berg River Valley (25 percent), and the Olifants River region (5 percent) in the Western Cape province, the Orange River region in the Northern Cape province (34 percent), and the Northern Provinces (6 percent) (see Figure 24). The grape season typically begins in the Northern Provinces, followed by the Western Cape regions, which enter the season between weeks 48 and 51 (November/December) (see Table 5). Because of the regional variance, grapes are harvested for approximately 27 weeks of the year.

Figure 24: 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																											

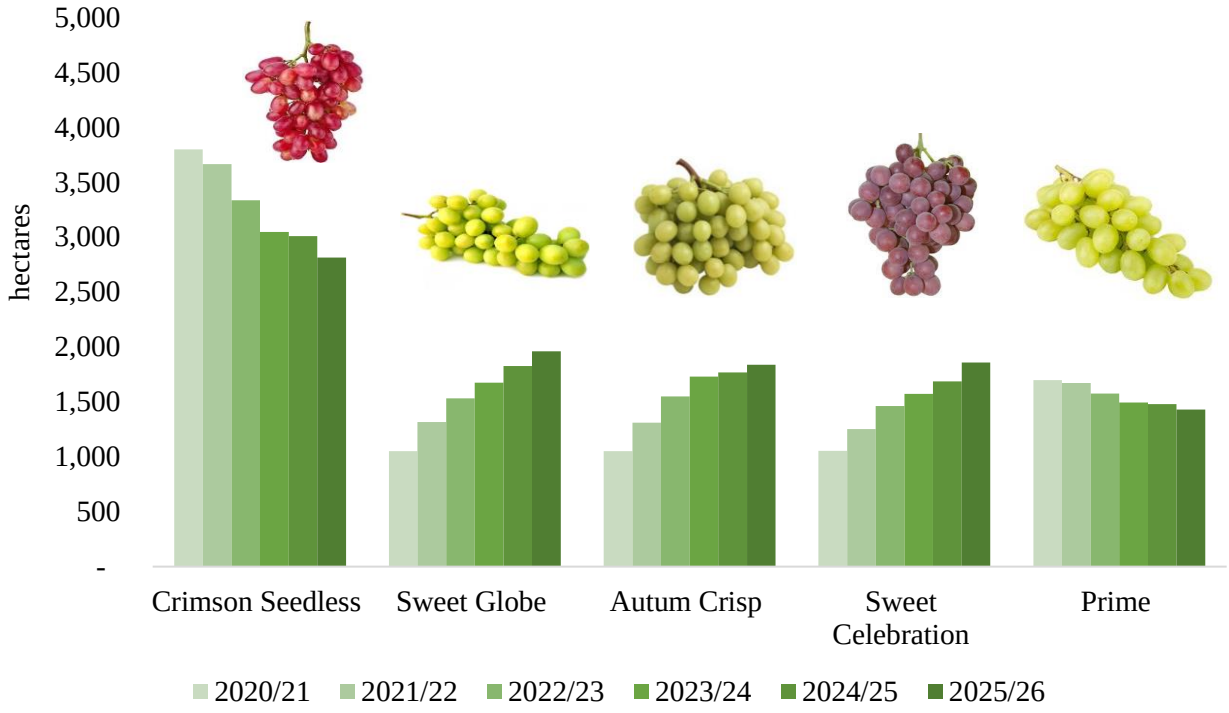
Source: *FAS Pretoria using SATI data*

The South African Table Grape Industry (SATI) represents and supports the interests of table grape producers. According to the SATI vineyard census (2026), half of South Africa's table grape vines are between 3 and 9 years old (50 percent), and another 27 percent are between 10 and 15 years old. Total planted area was unchanged in MY 2025/26. However, the area under new vines (2 years old and younger) rose 15 percent to 2,384 hectares, as growers replaced old vines with newer varieties.

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.

Crimson Seedless, a late-season red seedless grape, is the most widely planted variety, at 15 percent of total table grape area. Despite a declining trend, Crimson Seedless remains an important variety in South Africa. Other popular varieties include Sweet Globe (10 percent), Sweet Celebration (10 percent), Autumn Crisp (9 percent), and Prime (7 percent). Together, these cultivars represent 51 percent of the total area planted, as illustrated in Figure 25. The industry is planting newer varieties that align with global market demand and not replacing older and more traditional varieties.

Figure 25: Planted Table Grape Varieties (Hectares)



Source: *FAS Pretoria using SATI data*

Table 6: Production, Supply and Distribution of Table Grapes

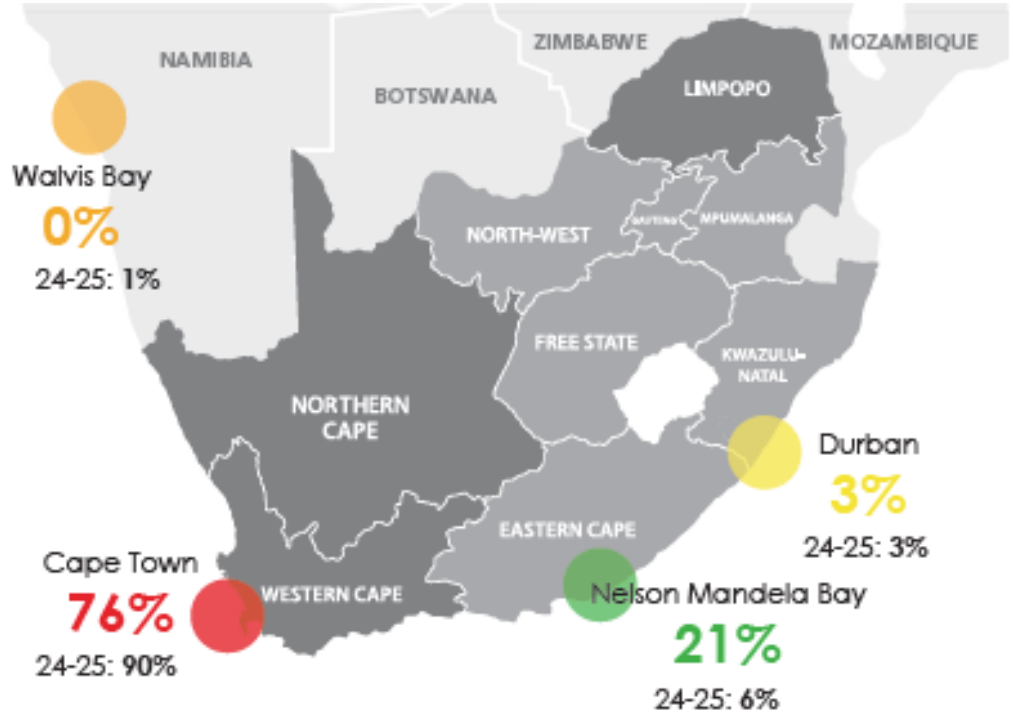
Grapes, Fresh Table	2024/2025		2025/2026		2026/2027	
Market Year Begins	Oct 2024		Oct 2025		Oct 2026	
South Africa	USDA Official	New Post	USDA Official	New Post	USDA Official	New Post
Area Planted (HA)	19404	19404	19390	19343	0	19200
Area Harvested (HA)	17400	17400	17400	17500	0	17400
Commercial Production (MT)	381000	381000	385000	393000	0	380000
Non-Comm. Production (MT)	0	0	0	0	0	0
Production (MT)	381000	381000	385000	393000	0	380000
Imports (MT)	11900	11900	10000	13000	0	19000
Total Supply (MT)	392900	392900	395000	406000	0	399000
Fresh Dom. Consumption (MT)	41100	41100	40000	51375	0	41000
Exports (MT)	351800	351800	355000	354625	0	358000
Withdrawal From Market (MT)	0	0	0	0	0	0
Total Distribution (MT)	392900	392900	395000	406000	0	399000
(HA) ,(MT)						
OFFICIAL DATA CAN BE ACCESSED AT: PSD Online Advanced Query						

Area Planted

FAS Pretoria forecasts that the area planted to table grapes in MY 2026/27 will decline by one percent from MY 2025/26, continuing a steady downward trend. Since MY 2019/20, planted area has been declining by an annual average of two percent, which suggests the industry is consolidating. Growers are replacing older varieties with newer, higher yielding ones. Additionally, the industry is investing in research and better farming practices to improve quality and yields. In May 2026, heavy rain caused flooding in the Western Cape's table grape regions. FAS Pretoria contacts report that the floods also damaged newly planted vines. Growers will likely focus on repairing flood damage on their farms, which will draw investment away from expansion.

Growers are also faced with the rising cost of fuel, fertilizer, electricity, water, and labor among other pressures cutting into their profits. In November 2025, the Cape Town Container Terminal (CTCT) recorded 414 hours of weather-related delays due to wind and fog disruptions, compared to 265 hours in November 2024. In December 2025, the terminal recorded 349 hours of wind-related delays, compared to 127 hours in December 2024. This represents a record of weather-related delays, further exacerbated by 22 hours of network downtime. Additionally, the CTCT reported significant equipment downtime and operational inefficiencies causing export delays. This led to growers diverting exports from the port of Cape Town to other ports at an added cost (see Figure 26).

Figure 26: Export Share of Table Grapes Through the Port of Cape Town Declined in MY 2025/26

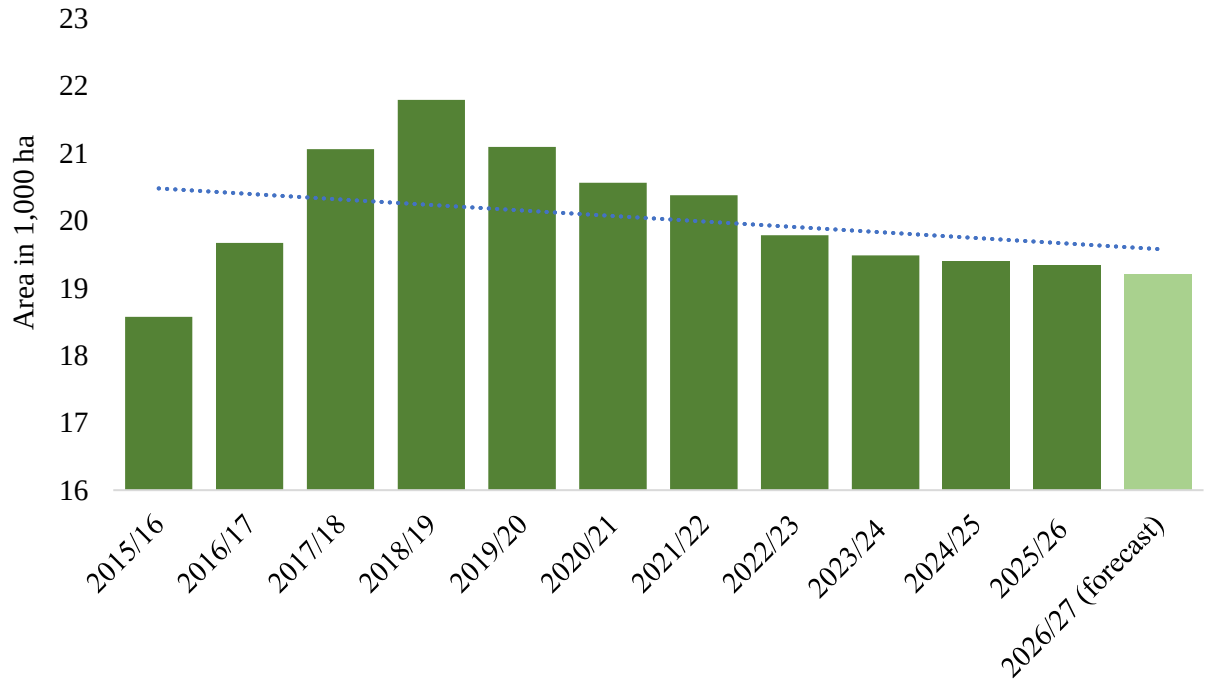


Source: *SATI*

FAS Pretoria revises MY 2025/26 area planted slightly upwards to 19,343 ha based on updated industry figures, reflecting no significant change from MY 2024/25. The area under production in the Northern provinces declined for the fifth consecutive year in MY 2025/26, decreasing by six percent year-on-year due to changing weather conditions and rising production costs.

The stabilization of production area follows a sharp increase between MY 2015/16 and MY 2018/19 (see Figure 27), 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 27: Area Planted in Table Grapes in South Africa



Source: *FAS Pretoria using SATI data*

Production

FAS Pretoria forecasts that table grape production in MY 2026/27 will decline by three percent from the record-setting MY 2025/26 crop, based on trend yield. FAS Pretoria contacts report that the 2026 winter was warmer than normal, which caused early bud break. As a result, yields will likely fall slightly, and harvest will likely start 10 to 14 days earlier than in MY 2025/26. During a farm visit in August 2026, FAS Pretoria observed that vines had already started budding (see Figure 28). In May 2026, heavy rains in the Western Cape Province caused flooding across the Berg River, Hex River, and Olifants River table grape producing regions (See FAS Pretoria report; Peak-Season Flooding Threatens South Africa's Citrus Exports). FAS Pretoria contacts report that the floods damaged vineyards, netting, trellising systems, and irrigation infrastructure.

Figure 28: Early Bud Break Due to Warm Winter

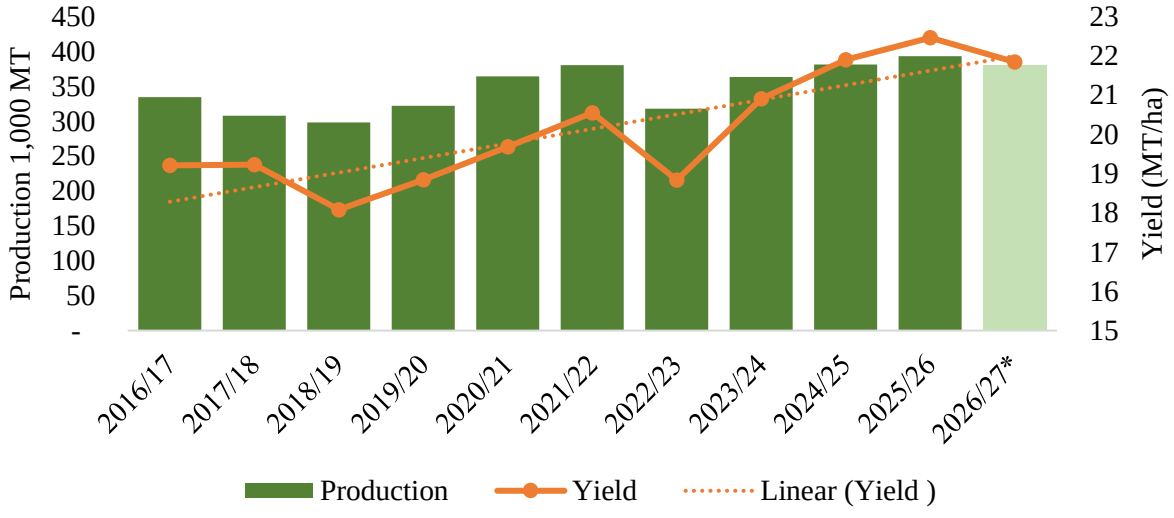


Source: *FAS Pretoria while on Crop Assessment Travel in August 2026*

FAS Pretoria revises MY 2025/26 production upwards to a record 393,000 MT, a three percent improvement from MY 2024/25 supported by higher-yielding cultivars coming into full production and sufficient water for irrigation. Production regions experienced favorable weather overall; however, FAS Pretoria reports that one region was affected by rains toward the end of the season.

FAS Pretoria maintains MY 2024/25 production volumes at 381,000 MT.

Figure 29: Table Grape Production in South Africa



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

Consumption

South Africa's table grape industry is strongly export-oriented, with more than 85 percent of production destined for foreign markets. The supply of table grapes to the domestic market is dependent on exports, as only table grapes that do not meet export quality standards are sold to the domestic fresh produce market or supplied to processors. Table grapes are mainly consumed by middle-income and affluent consumers.

FAS Pretoria forecasts that consumption in MY 2026/27 will drop to 41,000 MT from MY 2025/26 due to a decline in production and more fruit being sold to the export market. FAS Pretoria revises MY 2025/26 domestic consumption upwards based on record production.

Exports

FAS Pretoria forecasts that table grape exports in MY 2026/27 will rise by one percent, supported by more production of export quality grapes and the opening of new export markets. In MY 2025/26, South Africa exported its first table grapes to the Philippines after securing market access in 2025. Trade Data Monitor data shows that in MY 2025/26, South Africa exported 19 MT to this market, and FAS Pretoria expects that exports to the Philippines will increase in MY 2026/27. In the Philippines, South Africa is expected to compete with China and Australia, which are the top suppliers to this market. South Africa also secured market access to South Korea in 2026, and exporters expect to ship the first consignment in MY 2026/27. In South Korea, South African grapes will compete with grapes from Australia, Chile, and Peru, which ship during the same period.

The port of Cape Town remains a concern for MY 2026/27 exports, as delays affect fruit quality. FAS Pretoria contacts plan to continue engaging with Port of Cape Town authorities to support improvements of port performance. However, FAS Pretoria expects that exporters will continue to ship produce from other ports in MY 2026/27, reducing pressure off the Port of Cape Town.

FAS Pretoria revises MY 2025/26 exports slightly upwards to 354,625 MT based on finalized data. This is one percent higher than in MY 2024/25. Growth was modest due to logistical challenges at the Port of Cape Town, including record weather disruptions and constrained throughput in MY 2025/26, exports through the Cape Town Port decreased to 76 percent from 90 percent in MY 2024/25.

Exports declined in most markets in MY 2025/26, cementing the importance of Europe to South African exporters. The European Union (EU) is the largest market for South African table grape exports, accounting for a 66 percent share. In MY 2025/26, South Africa's table grape exports to the EU rose by 16 percent from MY 2024/25. However, there were some quality issues due to the delays at the port of Cape Town. FAS Pretoria contacts report that some grapes arrived in the EU in such poor condition that buyers could not rework (repack) them. The UK is the second largest market for South African table grapes, followed by the Middle East Region and Canada (see Table 7).

The top exported table grape varieties in MY 2025/26 were Crimson Seedless (12 percent), Sweet Globe (11 percent), Sweet Celebration (11 percent), AUTUMNCRISP (9 percent), and Prime (8 percent), in line with the most planted varieties.

FAS Pretoria maintains MY 2024/25 exports at 351,800 MT, reflecting six percent growth compared to MY 2023/24, based on increased production of export-quality grapes.

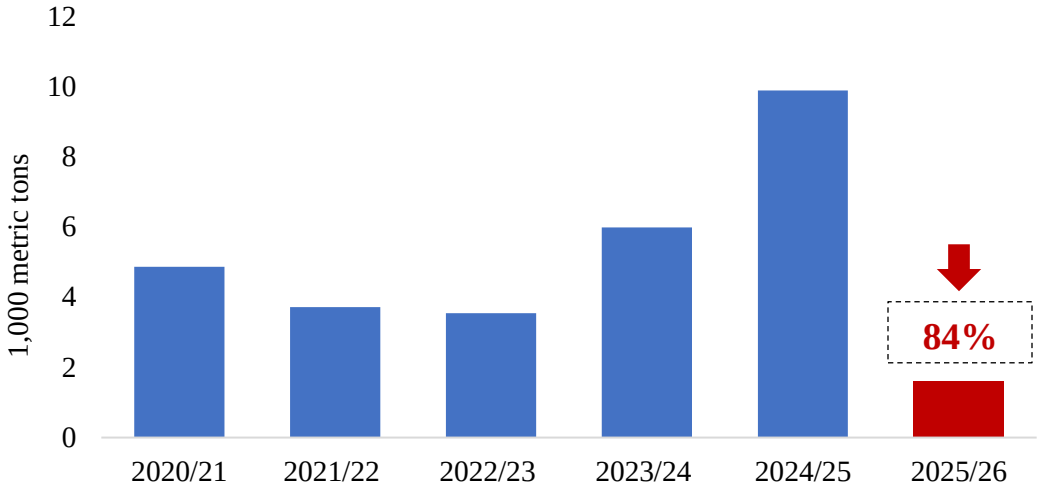
Table 7: South Africa's Table Grape Exports

Export destinations	MY 2024/25 (MT)	MY 2025/26 (MT)	% Share in MY 2025/26	% Change
European Union	202,897	234,675	66%	16%
United Kingdom	64,929	60,810	17%	-6%
Middle East	23,839	14,373	4%	-40%
Canada	14,731	13,214	4%	-10%
Southeast Asia	7,613	5,136	1%	-33%
China & Hong Kong	6,554	6,306	2%	-4%
Africa	8,635	6,525	2%	-24%
Russia	3,009	751	0%	-75%
United States	9,886	1,609	0%	-84%
Indian Ocean Island	6,766	8,439	2%	25%
All others	2,941	2,787	1%	-5%
Total	**351,800**	**354,625**	**100%**	**1%**

Source: *FAS Pretoria using SATI data*

South Africa considers the United States a premium market for table grapes. However, South Africa's table grape exports to the United States fell by 84 percent in MY 2025/26 from MY 2024/25 due to an import duty on South African table grapes in the United States which took effect in April 2025. South African table grapes now face a 12.5 percent duty in the U.S. market. FAS Pretoria contacts report that South Africa also faces increased competition from Peru and Chile, which have a similar export window. South Africa shipped to the United States from about the first week of December 2025 to the first week of March 2026. Exporters sent much of the fruit that would have gone to the United States to the EU instead.

Figure 30: South African Exports of Table Grapes to the United States



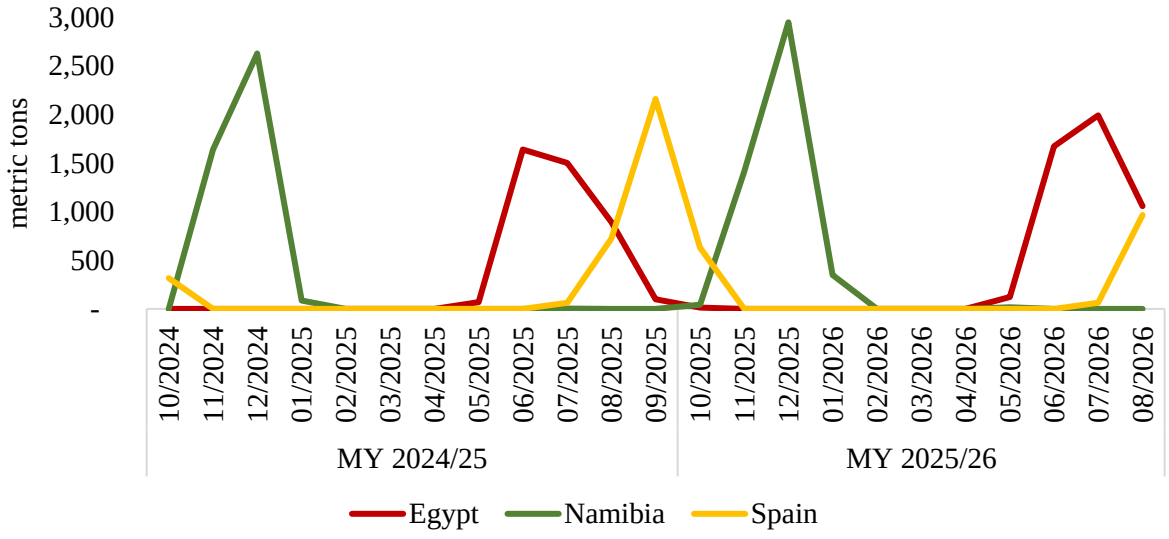
Source: *FAS Pretoria using SATI* data

South Africa primarily exports to the United States white seedless grapes such as Sweet Globe and Autumn Crisp, red seedless grapes such as Sweet Celebration, and black seedless grapes such as Sable Seedless.

Imports

South Africa imports small volume of table grapes to fill off-season demand from approximately June through December. Namibia, Egypt, and Spain are the primary suppliers (see Figure 31), 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.

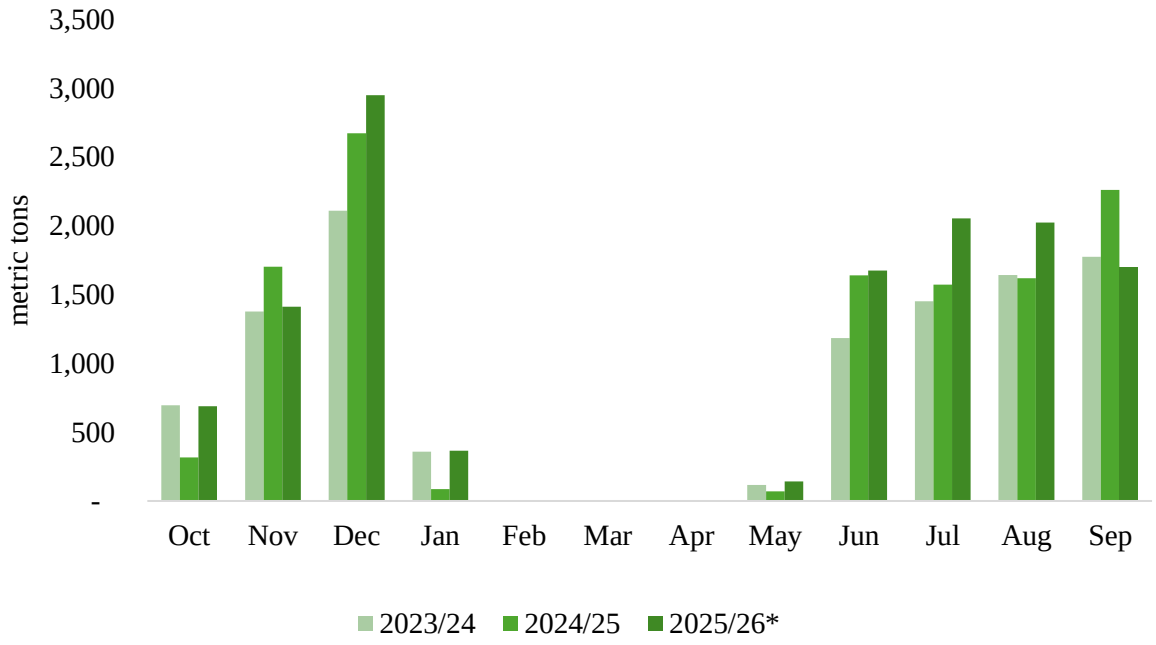
Figure 31: Off-Season Suppliers of Table Grapes in South Africa



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

FAS Pretoria forecasts that MY 2026/27 imports will increase to 19,000 MT based on increased domestic supply to the export market and sustained demand during the off-season between June and December. FAS Pretoria revises MY 2025/26 imports slightly upwards by 1,000 MT to 13,000 MT based on the pace of year-to-date data. FAS Pretoria maintains MY 2024/25 table grape import numbers based on finalized trade data.

Figure 32: South Africa's Table Grape Imports



Source: *FAS Pretoria using Trade Data Monitor, LLC. data*
*FAS Pretoria estimate for September MY 2025/26

The United States does not have market access for table grapes into South Africa. If access were granted, exports would be subject to a four percent customs duty, as shown in Table 8. U.S. exports to South Africa would likely concentrate between July and November, competing with imports from Spain at a time when South Africa is out of season.

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%	1.6%

Source: *SARS* (Updated October 6, 2026)

Policies and Regulations

Table 9 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 9: List of Key Legislations and Regulations

Policy or Regulation	Website Links
Agricultural 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*

Attachments:

No Attachments