Required Report: Required - Public Distribution **Date:** October 25, 2022

Report Number: SF2022-0036

Report Name: Fresh Deciduous Fruit Annual

Country: South Africa - Republic of

Post: Pretoria

Report Category: Fresh Deciduous Fruit

Prepared By: Dirk Esterhuizen

Approved By: Amy Caldwell

Report Highlights:

The area under apple, pears, and table grape cultivation in South Africa has grown steadily over the past decade, driven by ongoing investments into the deciduous fruit sector on relatively high earnings from export markets. However, the expansion in apple, pears, and table grape production is expected to alleviate in marketing year (MY) 2022/23, despite the production of record crops in MY 2021/22. Accelerating farming input costs, higher shipping rates, infrastructure inefficiencies, including electricity supply disruptions, ineffective ports operations, deteriorating road networks and increased competition from other southern hemisphere countries are challenging South Africa's exports of apple, pears, and table grapes. As a result, profitability of producers is diminishing, limiting continued investment in the industry.

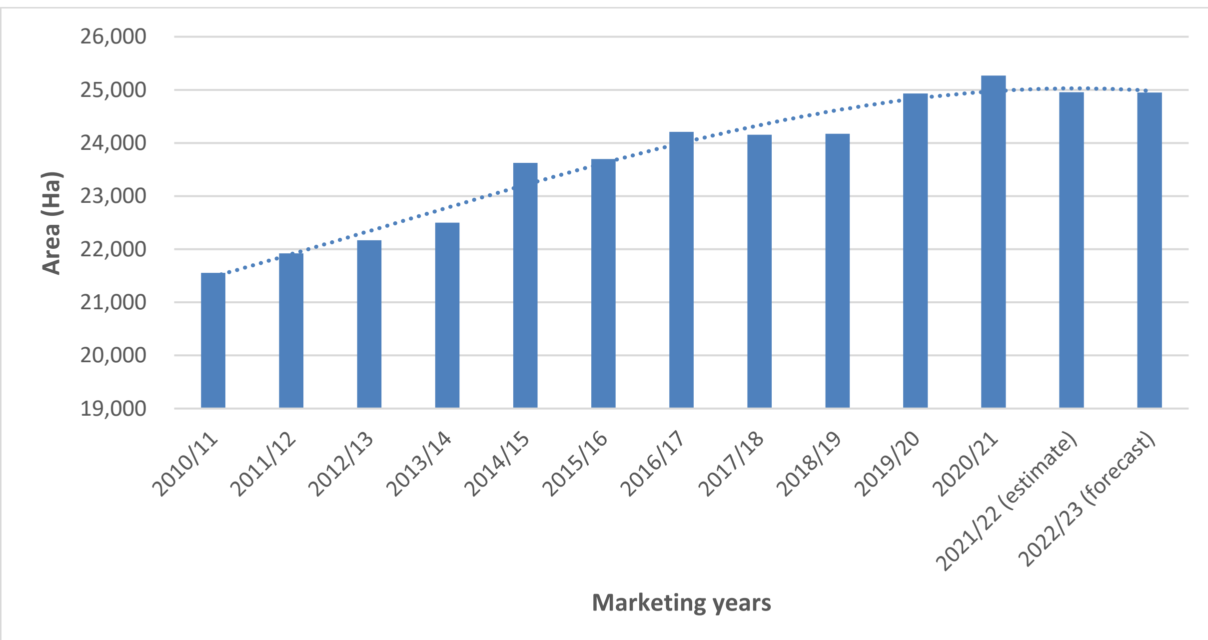
Apples, Fresh

Area

The area under apple production has enlarged steadily over the past decade with an average growth rate of more than one percent per annum (see Figure 1). This positive trend has been driven by ongoing investments into the deciduous fruit sector on relatively high earnings and improved profitability from export markets. In addition, enhanced cultivars, and better farming practices, that included investment in netting, resulted in higher yields. However, despite excellent production seasons in MY 2020/21 and MY 2021/22, the area under apple production in South Africa is expected to flatten in MY 2022/23 to 24,950 hectares (ha) or almost 37 million apple trees. Accelerating farming input costs, higher shipping rates and depressed markets are diminishing the profitability of apple producers and limiting continued investment in the industry. Ongoing shipping delays at the local ports (also see Labor Strikes Could Cripple South African Agricultural Trade) is negatively impacting the quality of fruit to the export markets and ultimately lowering returns to growers. The persistent problems at the ports, specifically the port of Cape Town, where most of the fruit is exported from, remain the single biggest risk and threat to the export orientated deciduous fruit industry of South Africa.

Figure 1

Area Planted to Apples in South Africa

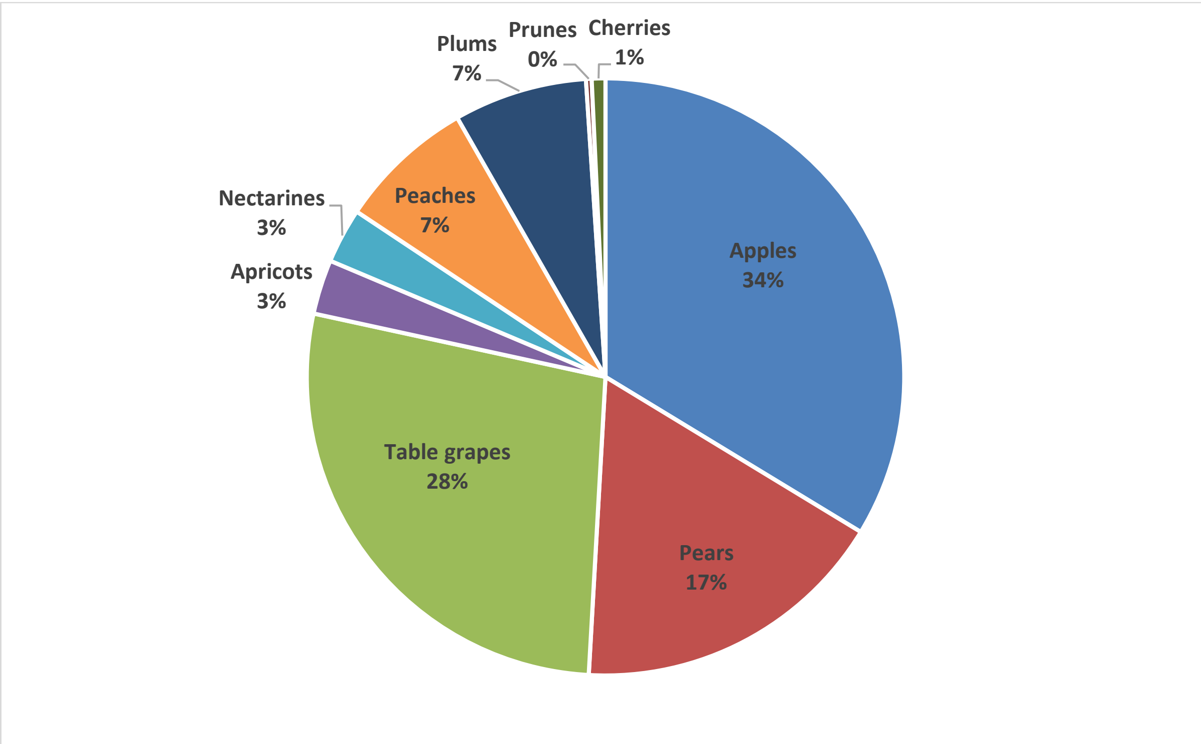


Source: Hortgro

Commercial apple production in South Africa began in the 1880s and exports started a few years later to the United Kingdom. Today, apples are the major deciduous fruit planted in South Africa and represent more than a third of the total deciduous fruit area of about 74,000 ha (see Figure 2).

Figure 2

Area Planted with Deciduous Fruit in South Africa



Source: Hortgro and South African Table Grape Industry (SATI)

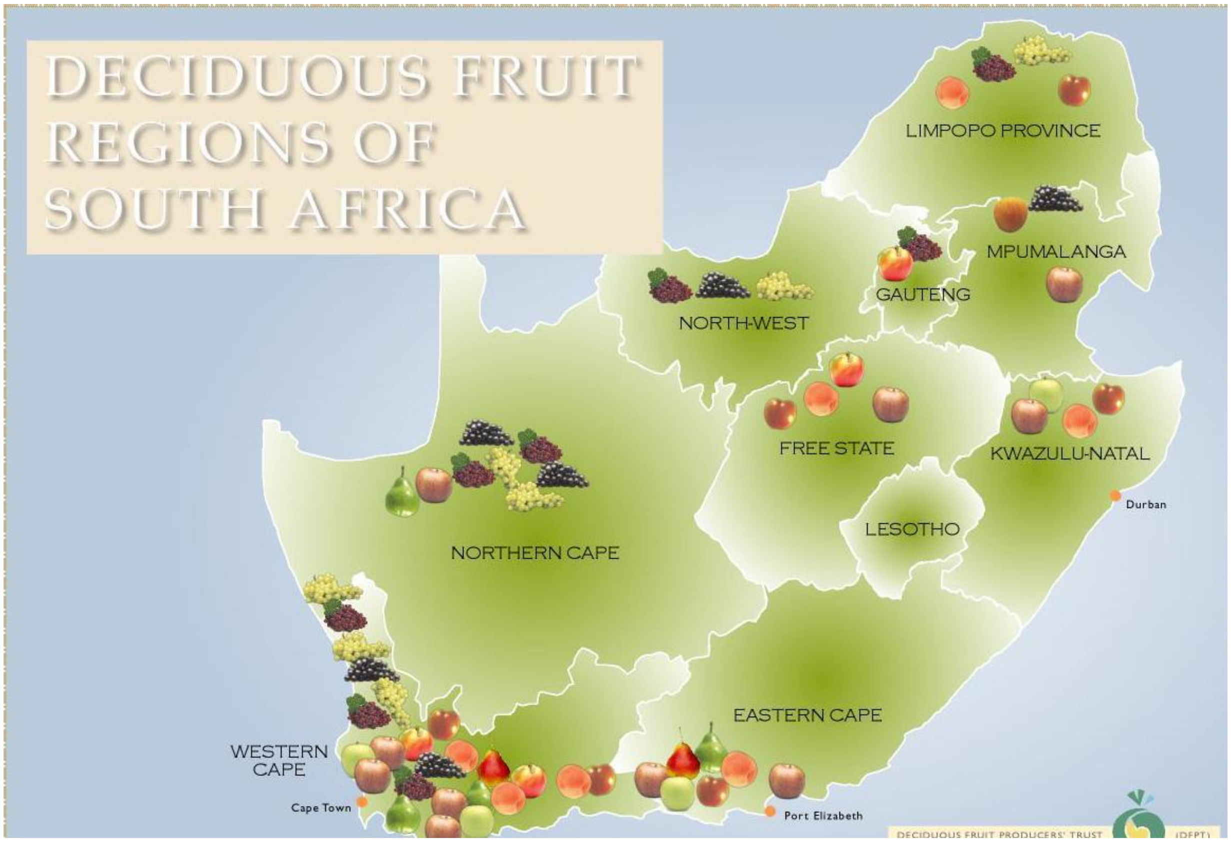
The Western Cape province is the largest apple producing area in South Africa, and together with the Eastern Cape province, accounts for more than 95 percent of the apple production (see Figure 3). Small, but growing production areas were established further north mainly in the Free State, Mpumalanga, and Limpopo Provinces.

Six cultivars dominate apple production in South Africa and account for more than 80 percent of area planted, namely, Golden Delicious (20 percent), Royal Gala (17 percent), Pink Lady (13 percent), Granny Smith (13 percent), Fuji (9 percent), and Top Red (9 percent). Other cultivars that have been growing steadily include Cripps Red and Bigbucks. The cultivars of choice are mainly determined by consumer preference and demand in South Africa's export markets.

Harvest for South African apples typically begins at the end of January and runs through to June, with peak harvest times falling between February and April. However, apples are available throughout the year in South Africa due to storage in temperature and air-controlled cold rooms.

Figure 3

Map of the Deciduous Fruit Production Areas in South Africa



Source: Hortgro

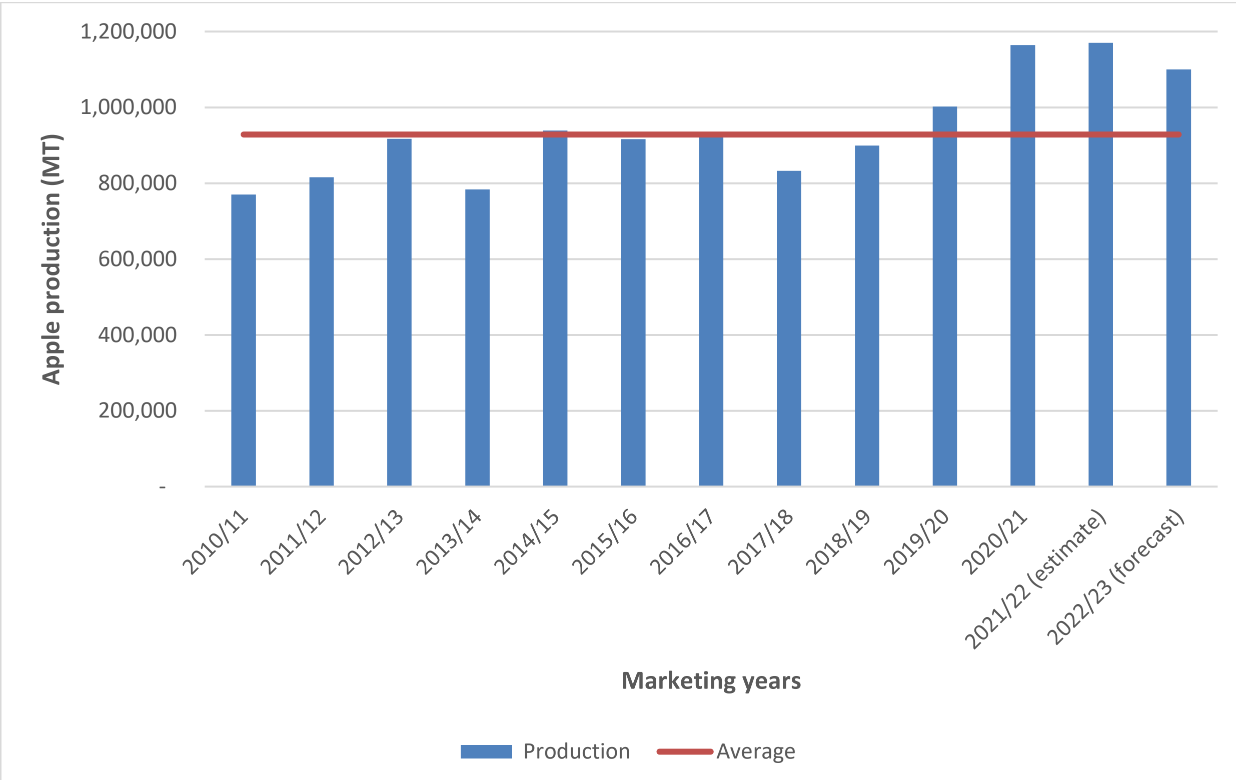
Production

Post forecasts that apple production in South Africa will drop by six percent to 1.10 million metric tons (MMT) in MY2022/23 (see Figure 4). This forecast is based on a stagnated production area and 3-year average yields.

In MY 2021/22, South Africa produced an estimated record apple crop of 1.17 MMT. Favorable rains and adequate chill units during the winter of 2021, guaranteed that producers had enough water for irrigation and favorable fruit development. Conducive weather conditions continued throughout the season ensuring an excellent crop and fruit quality. In addition, more young orchards came into production, contributing to higher volumes. According to the industry's representative organization, Hortgro, South Africa produced 1.16 MMT of apples in MY2020/21, a surge of 16 percent from the previous marketing year.

Figure 4

Apple Production in South Africa



Source: Hortgro and Post estimates

Consumption

Apples are popular in South Africa and are widely consumed throughout the year. However, slow economic growth, accelerating food price inflation (see South Africa: Food and Fuel Feed Rising Inflation) and competition from lower cost staple foods are putting downward pressure on local apple consumption. As a result, local consumption of apples is expected to drop by five percent in MY 2021/22 to 545,150 MT and decline marginally in MY2022/23 to 540,180. Consumption figures include fresh market sales, as well as apples destined for processing. In MY 2020/21, local apple consumption surged by 16 percent to 575,092 MT, mainly driven by higher production and heightened consumers preference for perceived "health foods" motivated by the Covid-19 pandemic.

Exports

Post forecasts that South Africa's apple exports will drop by 10 percent to 560,000 MT in MY 2022/23 on lower production. In MY2021/22 apple exports are expected to grow by six percent to reach 625,000 MT on a record crop. The expected growth rate could have been larger, but South Africa's exports of apples are under pressure due to raising shipping cost, local port challenges, the impact of the Russia-Ukraine conflict on established trading patterns and inflationary pressure in the United Kingdom (UK). As a result, year to date (January to August) exports to the UK and Russia are respectively 13 percent and 17 percent lower compared to MY2020/21 (see Table 1). However, the UK remains the largest market for South African apple exports accounting for 15 percent of the total exports. The UK is followed by Bangladesh (7 percent), Nigeria (7 percent), United Arab Emirates (7 percent), and Malaysia (5 percent). South Africa exports apples to more than 80 countries worldwide with African markets account for 30 percent of the total South African apple exports so far in 2022. Exports to Africa are largely driven by strong demand (especially for pink lady, gala, and golden delicious varieties), limited competition in these markets, and apples' ability to endure suboptimal handling conditions. Africa is followed by Europe at 24 percent. South Africa has free trade agreements with both the European Union (EU) and the UK, and benefits from duty free exports in these markets. South Africa's apple export to India grew by almost 70 percent in 2022, after the government of India approved in-transit cold treatment for South African apple and pear exports. The advantage of in-transit cold treatment is the arrival of better-quality fruit at destination countries.

South Africa's apple exports increased by almost 16 percent in MY 2020/21 to 589,186 MT. This was mainly due to higher local production, growing global demand for perceived health benefits, and industry's ability to manage shipping container shortages and shipping costs.

Table 1

South African Fresh Apple Exports

Export destinations	MY2020/21 (MT)	MY2020/21 (MT)	MY2021/22 (MT)	% Change
	Calendar year	**January - August**		
United Kingdom	89,598	84,052	73,176	-12.9%
Bangladesh	37,496	34,234	35,803	4.6%
Nigeria	43,790	29,929	34,697	15.9%
United Arab Emirates	27,486	24,521	32,236	31.5%
Malaysia	36,210	22,554	26,458	17.3%
Russia	31,711	31,687	26,218	-17.3%
Netherlands	24,086	23,020	20,817	-9.6%
India	10,446	10,326	17,194	66.5%
Senegal	22,049	15,411	14,328	-7.0%
Vietnam	16,878	8,659	14,279	64.9%
Germany	9,396	8,897	11,835	33.0%
China	9,028	8,660	11,835	36.7%
Kenya	18,999	11,612	11,753	1.2%
Zambia	12,485	7,279	10,013	37.6%
Zimbabwe	12,969	7,125	9,868	38.5%
Botswana	14,070	9,099	9,314	2.4%
Ghana	14,856	9,666	8,710	9.9%
Saudi Arabia	7,967	7,183	7,934	10.5%
Cameroon	11,146	6,942	6,937	0.1%
Namibia	8,995	5,953	6,188	4.0%
Others	129,527	91,745	95,765	4.4%
Total	**589,188**	**458,554**	**485,358**	**5.9%**

Source: Trade Data Monitor

Imports

South Africa's imports of apples have declined steadily since 2017 to less than 200 MT, due to the rise in local production and improved storage technologies. Post believes that this tendency will continue in MY 2022/23 with South Africa importing an estimate 180 MT of apples. In MY 2021/22, imports of apples are estimated at 150 MT, after 173 MT were imported in MY2020/21.

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

Table 2

Tariff Rates, Fresh Apples

Heading / Subheading	Article Description	Rate of Duty					
		General	EU/UK	EFTA	SADC	Mercosur	AfCFTA
0808.10	Apples, fresh	4%	Free	4%	Free	4%	3.2%

Source: South African Revenue Services (SARS)

Table 3

Fresh Apples Production, Supply and Distribution

Apples, Fresh	2020/2021		2021/2022		2022/2023	
Market Year Begins	Jan 2021		Jan 2022		Jan 2023	
South Africa	USDA Official	New Post	USDA Official	New Post	USDA Official	New Post
Area Planted (HA)	25272	25272	25500	24956	0	24950
Area Harvested (HA)	19770	22580	20000	22850	0	22800
Bearing Trees (1000 TREES)	32470	32540	32900	33637	0	33560
Non-Bearing Trees (1000 TREES)	4000	3934	4100	3100	0	3170
Total Trees (1000 TREES)	36470	36474	37000	36737	0	36730
Commercial Production (MT)	1100000	1164105	1160000	1170000	0	1100000
Non-Comm. Production (MT)	0	0	0	0	0	0
Production (MT)	1100000	1164105	1160000	1170000	0	1100000
Imports (MT)	200	173	150	150	0	180
Total Supply (MT)	1100200	1164278	1160150	1170150	0	1100180
Domestic Consumption (MT)	511000	575092	535150	545150	0	540180
Exports (MT)	589200	589186	625000	625000	0	560000
Withdrawal From Market (MT)	0	0	0	0	0	0
Total Distribution (MT)	1100200	1164278	1160150	1170150	0	1100180
(HA) ,(1000 TREES) ,(MT)						

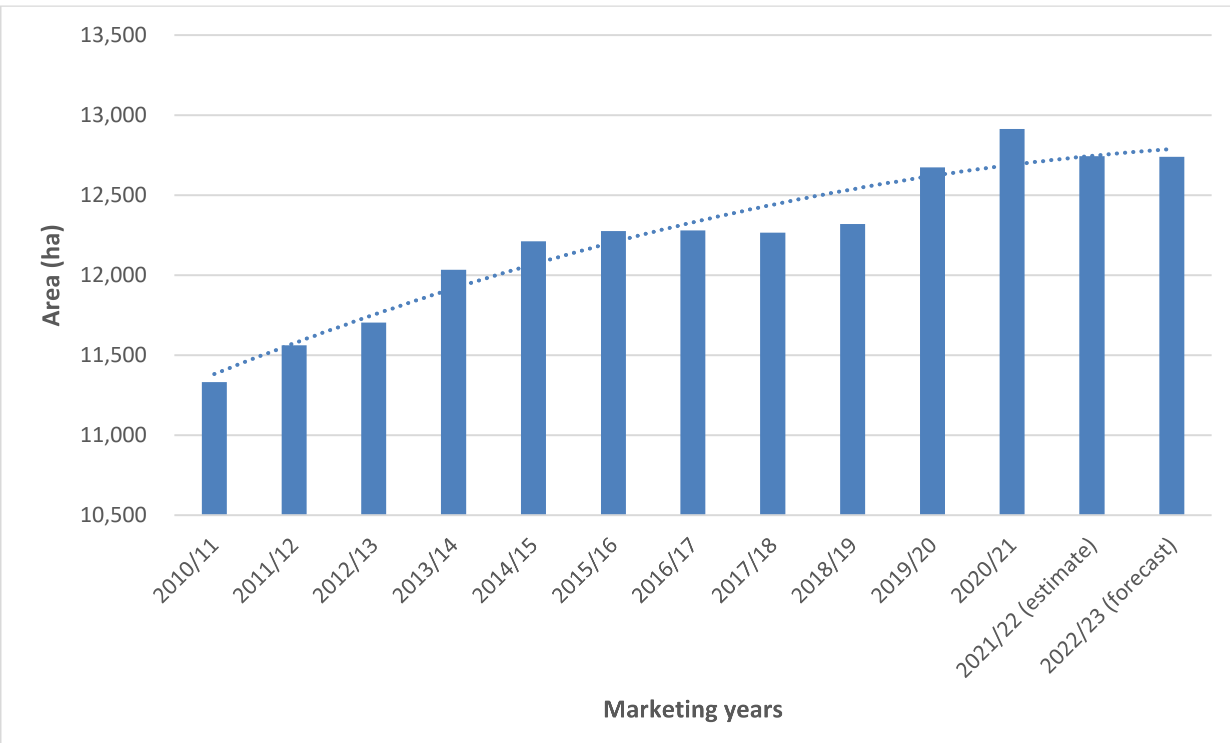
Pears, Fresh

Area Planted

Pears are the third largest deciduous fruit produced in South Africa, representing 17 percent of the total area under deciduous fruit production. The area under pear production has increased steadily over the past decade with an average growth rate of around one percent per annum to an estimated 12,913 ha or 18 million trees in MY 2020/21 (see Figure 5). As with apple production, was the expansion in pear production driven by relatively high earnings from export markets and sound financial returns on investments. However, the area under pears declined in MY 2021/22 to an estimated 12,743 ha and is expected to flatten in the coming years. Accelerating farming input costs and higher shipping rates are diminishing the profitability of pear producers which limit continuing investments in the industry. As a result, Post forecasts South Africa's production area of pears at 12,740 ha in MY 2022/23.

Figure 5

Area Planted to Pears in South Africa



Source: Hortgro

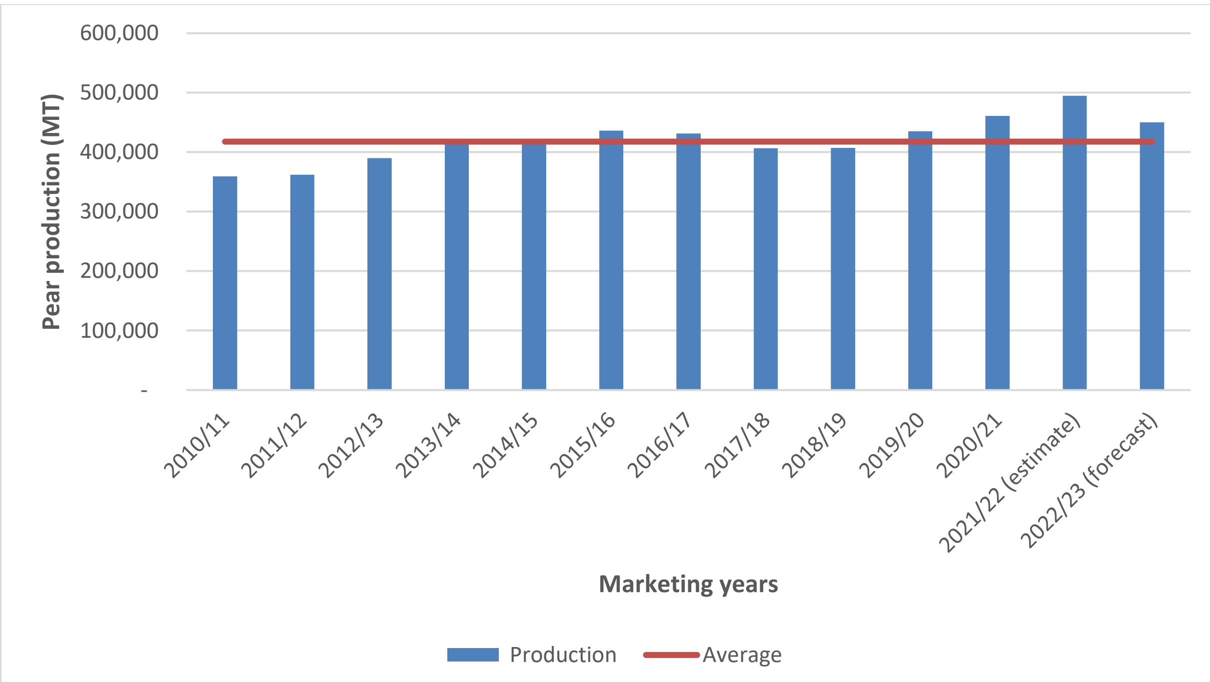
Pears grow well in areas that do not experience very high temperatures. Like apples, pears are predominately grown in the Western Cape province of South Africa, which receive most of its rainfall during the winter months (May to July). Packham's Triumph is the most popular cultivar, accounting for 33 percent of total area planted, followed by Forelle (28 percent) and William Bon Chretien (17 percent). Collectively, these three cultivars represent almost 80 percent of pear plantings in South Africa. Other cultivars planted in South Africa include, Abate Fetel, Rosmarie, Cheeky, Celina, Flamingo, Beurre Bosc, and Doyenne du Comice.

Production

Post forecasts that pear production in South Africa will drop by nine percent to 450,000 MT in MY 2022/23, based on 3-year average yields and zero growth in the production area. Pear production MY 2021/22 is estimated at a record 495,000 MT. Pear orchards received good rain and sufficient chill units in 2021, resulting in excellent fruit set and quality. According to Hortgro, South Africa produced 461,200 MT of pears in MY 2020/21 (see Figure 6).

Figure 6

Pear Production in South Africa



Source: Hortgro and Post estimates

Consumption

The industry is mainly export orientated with more than 50 percent of pear production destined for foreign markets. Locally, less than 25 percent of total pear demand is consumed fresh, while the majority is destined for the processing industry. Local consumption of pears is expected to stay flat in MY 2021/22 at around 214,000 MT, but to drop by 7 percent to 200,200 MT in MY 2022/23. Slow economic growth, accelerating food price inflation and an estimated decline in local production will be putting downward pressure on local pear consumption. Post estimates South Africa's consumption of pears in MY 2020/21 at 214,266 MT, a growth of three precent from MY 2019/20. Consumption figures include fresh market sales, as well as pears destined for processing.

Exports

Post forecasts that South Africa's pear exports will decline by 11 percent to 250,000 MT in MY 2022/23 on lower production. However, in MY2021/22 pear exports are expected to grow by 14 percent to reach 281,000 MT on record production. The Netherlands, the destination for 21 percent of total pear exports, has surpassed Russia as South Africa's largest market for pears in 2022. In MY 2020/21, South Africa exported 49,870 MT of pears to Russia, representing more than 20 percent of total pear exports (see Table 4). However, year to date (January to August) pear exports to Russia dropped by two precent as the Russia-Ukraine conflict forced the local industry to find alternative markets. The United Arab Emirates (9 Percent), India (8 percent) and UK (6 percent) are the other major markets for South African pears in 2022. Pear exports to India grew by 24 percent after the government of India approved in-transit cold treatment for South African apple and pear exports. South Africa's pear exports to the United States are minimal at less than a 1,000 MT per annum.

With the signing of the food safety protocols late last year, South Africa received final approval to export pears to China. As a result, South Africa's inaugural pear shipment arrived in China in September 2022. The one-container trial shipment was 18 years in the making. A second container of South African pears arrived in China shortly after the first one and the success with these initial shipments could pave the way for larger shipments in the future and a consistent presence of South African pears in the China market.

South Africa's pear exports improved by nine percent in MY 2020/21 to 247,116 MT. This was mainly driven by higher local production, growing global demand for perceived health benefits, and industry's ability in managing shipping container shortages and shipping costs.

Table 4

South African Fresh Pear Exports

Export destinations	MY2020/21 (MT)	MY2020/21 (MT)	MY2021/22 (MT)	% Change
	Calendar year	January - August		
Netherlands	35,193	35,193	50,781	44.3%
Russia	49,870	39,855	38,966	-2.2%
United Arab Emirates	20,247	16,547	21,883	32.3%
India	21,167	15,694	19,416	23.7%
United Kingdom	14,523	14,366	13,679	-4.8%
Italy	5,545	5,545	7,718	39.2%
Canada	6,792	6,766	6,920	2.3%
Saudi Arabia	6,553	6,189	6,459	4.4%
Indonesia	9,079	5,973	6,251	4.7%
Malaysia	7,619	4,820	6,054	25.6%
Germany	4,611	4,611	5,445	18.1%
France	5,743	5,503	4,507	-18.1%
Portugal	5,567	5,567	4,309	-22.6%
Vietnam	3,255	2,701	3,940	45.9%
Singapore	3,886	2,836	3,327	17.3%
Nigeria	3,992	2,722	2,989	9.8%
Oman	3,276	2,861	2,777	-2.9%
Qatar	2,503	2,109	2,594	23.0%
Hong Kong	3,429	2,720	2,222	-18.3%
Senegal	1,951	1,604	2,033	26.8%
Others	32,315	24,965	25,285	1.3%
Total	**247,116**	**209,147**	**237,555**	**13.6%**

Source: Trade Data Monitor

Imports

As the second largest pear producer in the Southern Hemisphere after Argentina, South Africa imports minimal quantities of pears (around 200 MT) mainly from China and India. The United States does not have market access for pear exports to South Africa. In July 2010, the United States requested market access for pears, however progress on this request stalled and the process has not been finalized. If South Africa grants access, United States exports of pears would be subject to a four percent customs duty as indicated in Table 5.

Table 5

Tariff Rates, Fresh Pears

Heading / Subheading	Article Description	Rate of Duty					
		General	EU/UK	EFTA	SADC	Mercosur	AfCFTA
0808.30	Pears, fresh	4%	Free	4%	Free	4%	3.2%

Source: SARS

Table 6

Fresh Pears Production, Supply and Distribution

Pears, Fresh	2020/2021		2021/2022		2022/2023	
Market Year Begins	Jan 2021		Jan 2022		Jan 2023	
South Africa	USDA Official	New Post	USDA Official	New Post	USDA Official	New Post
Area Planted (HA)	12913	12913	13000	12743	0	12740
Area Harvested (HA)	12000	12000	12400	12000	0	12000
Bearing Trees (1000 TREES)	16550	16550	17000	16970	0	17000
Non-Bearing Trees (1000 TREES)	1440	1440	1300	1045	0	1020
Total Trees (1000 TREES)	17990	17990	18300	18015	0	18020
Commercial Production (MT)	475000	461200	510000	495000	0	450000
Non-Comm. Production (MT)	0	0	0	0	0	0
Production (MT)	475000	461200	510000	495000	0	450000
Imports (MT)	200	182	100	200	0	200
Total Supply (MT)	475200	461382	510100	495200	0	450200
Domestic Consumption (MT)	228100	214266	250100	214200	0	200200
Exports (MT)	247100	247116	260000	281000	0	250000
Withdrawal From Market (MT)	0	0	0	0	0	0
Total Distribution (MT)	475200	461382	510100	495200	0	450200
(HA) ,(1000 TREES) ,(MT)						

Prices

The apple and pear prices indicated in Table 7 are the average prices (Rand/MT) earned in the respective markets. The increase in apple and pear export prices from MY 2010/11 to MY 2015/16 was mainly due to the depreciation of the rand. In MY 2016/17, the rand strengthened against the United States dollar which lowered average export prices. Export prices for both apples and pears decline in MY 2020/21 but remains lucrative in comparison to the local and processed markets. Information on table grape prices is unavailable.

Table 7

Local and Export Price of Apples and Pears

Marketing years	APPLES			PEARS		
	Local Market (R/MT)	Export Market (R/MT)	Processed Market (R/MT)	Local Market (R/MT)	Export Market (R/MT)	Processed Market (R/MT)
2010/11	4,326	6,210	737	3,856	6,612	896
2011/12	4,470	6,531	1,146	4,191	6,803	1,115
2012/13	4,845	8,658	1,137	4,650	8,835	1,316
2013/14	4,944	10,136	1,141	4,815	9,900	1,376
2014/15	5,024	10,689	1,142	5,164	9,977	1,561
2015/16	5,556	10,815	1,431	5,605	11,157	1,861
2016/17	5,554	9,651	1,336	5,677	10,029	1,593
2017/18	5,868	11,419	1,522	5,673	11,373	1,553
2018/19	6,455	11,504	2,017	6,335	11,600	1,938
2019/20	6,288	13,159	1,975	6,198	13,745	1,884
2020/21	6,379	12,145	1,597	6,301	12,211	1,930

Source: Hortgro

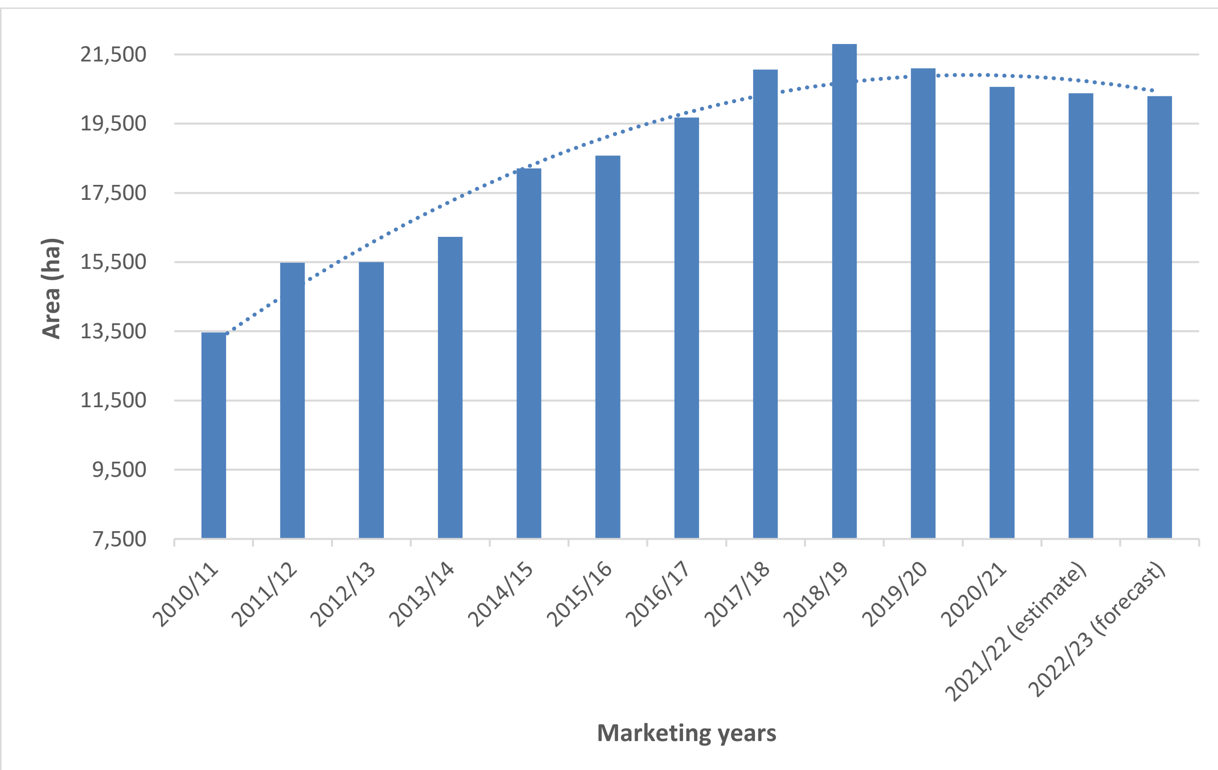
Table Grapes, Fresh

Area Planted

Table grapes are the second largest deciduous fruit produced in South Africa, representing almost 30 percent of the total area under deciduous fruit production. The area planted with table grapes in South Africa is estimated to flatten at 20,300 ha in MY 2022/23. In MY 2021/22 the area planted with table grapes was estimated 20,379 ha. After a sharp increase in area under table grapes from 2010 (see Figure 7), mainly driven by growing export earnings, the table grape area in South Africa consolidated at around 20,000 ha. The availability of irrigation water is a major constraint to the area planted to table grapes in South Africa. In addition to water constraints, the current upsurge in farming input costs and infrastructure inefficiencies, including electricity supply disruptions (see Load shedding the Achilles heel to the South African agricultural sector), ineffective ports operations, deteriorating road networks and increased competition from other southern hemisphere countries are diminishing the profitability of table grape producers in South Africa and limiting new investments in the industry.

Figure 7

Area Planted to Table Grapes in South Africa

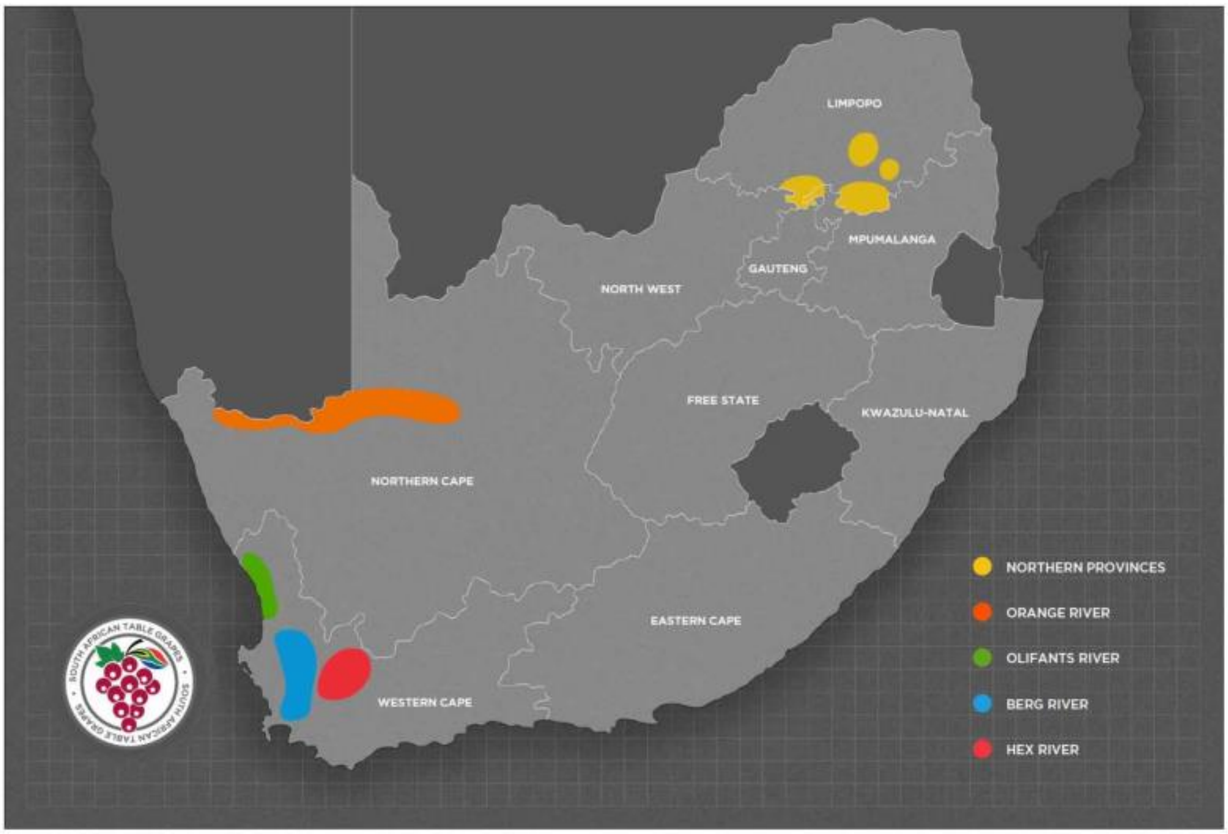


Source: South African Table Grape Industry **(**SATI)

The Hex River Valley in the Western Cape province is the major growing area for table grapes, accounting for 33 percent of the total area planted in South Africa (see Figure 8). The Hex River Valley is followed by plantings along the Orange River in the Northern Cape province (29 percent), the Berg River Valley in the Western Cape (25 percent) and plantings in the Limpopo provinces (10 percent).

Figure 8

Map of Table Grape Production Areas in South Africa



Source: SATI

The five leading table grape cultivars planted in South Africa are Crimson Seedless (18 percent of total area), Prime (8 percent), Sweet Globe (6 percent) Sugrathirtyfive (6 percent) and Sweet Celebration (6 percent). These five cultivars represent 45 percent of the total area planted with table grapes in South Africa. Other cultivars planted include, Sugranineteen (Scarlotta Seedless), Tawny Seedless, Thomson Seedless, Sugrathirteen (Midnight Beauty), Grapaes and Starlight. The cultivar profile of table grapes in South Africa has changed significantly over the past decade. Consumers prefer seedless grapes and as a result seeded cultivars are declining while the production of seedless table grapes varieties are growing. Less than eight percent of current vineyards are still seeded table grapes.

Production

Post forecasts that table grape production in South Africa will drop by eight percent to 350,000 (MT) in MY2022/23, after an estimated record crop of 380,000 MT was produced in MY 2021/22 (see Figure 7). This forecast is based on assuming normal weather, a marginal reduction in production area, and 3-year average yields.

Although table grape production areas have consolidated in MY2021/22, the record crop has been achieved by new higher-yielding cultivars coming into full production and mostly favorable weather conditions during the season. In MY 2020/21, South Africa produced 364,063 MT of table grapes.

Figure 7

Table Grape Production in South Africa

Source: USDA, SATI, and Post estimates

Consumption

The 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 and consequently consumption in South Africa is dependent on the supply to export markets. Table grapes that cannot be sold on the export market, including those that do not meet export quality standards, are sold to the domestic fresh produce market, or supplied to juice processors. Table grapes are mainly consumed by the upper middle-income and affluent consumers. Slow economic growth, accelerating food price inflation and increased exports are putting downward pressure on local table grape consumption. As a result, local consumption of table grapes is expected to stay flat in MY 2022/23 and MY2021/22 at around 50,000 MT. In MY 2020/21, the domestic consumption of table grapes surged by six percent to an estimated 51,347 MT on higher production and improved consumer demand for nutritional and healthy foods to enhance overall wellbeing due to the Covid-19 pandemic.

Exports

Post forecasts that South Africa's table grape exports will drop by eight percent to 310,000 MT in MY 2022/23 on expected lower production. In MY2021/22 table grape exports grew by four percent to reach a record level of 335,750 MT on historically high production (see Table 8). However, raising shipping costs, shipping delays, Covid-19 related restriction in China and inefficiencies at the Cape Town port, placed significant pressure on the industry. Approximately 95 percent of table grapes are exported through the Cape Town port.

According to the industry's representative organization, the South African Table Grape Industry (SATI), South Africa exported 321,770 MT of table grapes in MY 2020/21, up 13 percent from the 284,280 MT exported in MY 2019/20 on improved local production,

Europe is the leading export market for South African table grapes, accounting for about 75 percent of total table grape exports. The Netherlands is the largest single country export market for South Africa's table grapes, accounting for more than 40 percent of the total exports. The Netherland is followed by the United Kingdom (22 percent) and Canada (6 percent). South Africa benefits from a shorter shipping distance than other Southern Hemisphere competitors to Europe, strong demand for seedless varieties, and a free trade agreement with the EU and United Kingdom. Exports to Asia, the Middle East and Africa also have strong growth potential and are a core focus for the South African table grape industry. Export volumes to the United States have grown significantly over the past five years, but are still at below 5,000 MT, accounting for less than two percent of total table grape exports. The main varieties exported to the United States includes Autumn Crisp, Red Seedless and Adora Seedless. South Africa's table grape exports to Russia decline by 29 percent in MY2021/22 to 3,452 MT, due to the current Russia-Ukraine conflict.

Table 8

South Africa's Table Grape Exports

Export destinations	MY 2020/21 (MT)	MY 2021/22 (MT)
European Union	173,538	179,555
United Kingdom	70,992	75,027
Canada	17,885	20,152
Middle East	14,463	17,945
Southeast Asia	15,517	15,840
Far East	12,332	11,290
Africa	4,748	5,957
United States	4,866	3,718
Russia	4,835	3,452
All others	2,594	2,814
Total	**321,770**	**335,750**

Source: SATI

Imports

South Africa is a net exporter of table grapes, and imports are mainly to fill the gap during the off-season or when volumes are low from around July to November. Spain, Namibia, and Egypt are the primary suppliers. Post forecasts table grape imports will grow to 10,000 MT in MY 2022/23 due to expected lower local production. In MY 2021/22, table grape imports are estimated to drop by 23 percent to 7,000 MT on record local production. In MY 2020/21 South Africa imported 9,053 MT of table grapes. The United States does not have market access for table grapes into South Africa. However, if access were granted to the United States, exports would be subject to a four percent customs duty as shown in Table 9.

Table 9

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%	3.2%

Source: SARS

Table 10

Table Grapes Production, Supply and Distribution

Grapes, Fresh Table	2020/2021		2021/2022		2022/2023	
Market Year Begins	Oct 2020		Oct 2021		Oct 2022	
South Africa	USDA Official	New Post	USDA Official	New Post	USDA Official	New Post
Area Planted (HA)	20564	20564	20500	20379	0	20300
Area Harvested (HA)	18000	18000	18500	18500	0	18500
Commercial Production (MT)	364063	364063	380000	380000	0	350000
Non-Comm. Production (MT)	0	0	0	0	0	0
Production (MT)	364063	364063	380000	380000	0	350000
Imports (MT)	9100	9053	10000	7000	0	10000
Total Supply (MT)	373163	373116	390000	387000	0	360000
Fresh Dom. Consumption (MT)	51393	51346	70000	51250	0	50000
Exports (MT)	321770	321770	320000	335750	0	310000
Withdrawal From Market (MT)	0	0	0	0	0	0
Total Distribution (MT)	373163	373116	390000	387000	0	360000
(HA) ,(MT)						

Policies and Regulations

Table 11 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 11

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
Regulations relating to standards, grading, packing, and marking	Apples Local Import Regulations - Apples Pears Local Import Regulations - Pears Table Grapes Local Import Regulations - Table grapes
Import Protocols	Phytosanitary import requirements for importation of Apples from China to South Africa Phytosanitary import requirements for importation of Apples from Netherlands to South Africa Phytosanitary import requirements for importation of Pears from China to South Africa Phytosanitary import requirements for importation of Apples from USA, PNW to South Africa

Source: DALRRD

Attachments:

No Attachments