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Fresh Deciduous Fruit Semi-annual

Update on the South African Deciduous Fruit Supply and Demand

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Report Highlights:
The deciduous fruit industry in South Africa showed some resilience by defying the drought conditions. In the 2016/17 MY, apple production increased by about one percent to 933,404 MT, pear production increased by less than one percent to 429,754 MT and the table grapes production increased by eighteen percent to 335,000 MT. These increases were mainly due to the increase in new area planted, young orchards coming into full production and high yielding varieties, partially offset by the drought conditions.

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

Executive Summary

South African apple production will increase by about one percent to 933,404 MT in the 2016/17 MY, based on the increase in new area planted and young orchards coming into full production. This increase was partially offset by the smaller fruit sizes and poor quality due to the drought conditions. This increase in production will result in less than one percent increase of the 2016/17 MY apple exports to 513,451 MT.

Pear production will increase marginally by less than one percent to 429,754 MT in the 2016/17 MY, due to the increase in area planted, and young orchards coming into full production. This increase was partially offset by the smaller fruit size because of the drought conditions. South African pear exports will increase marginally by less than one percent to 250,354 MT in the 2016/17 MY, based on the marginal increase in production.

Table grape production will increase by eighteen percent to 335,000 MT in the 2016/17 MY, based on the increase in area harvested as new plantings came into full production; expansion in area planted from the Orange River and Hex River Region; and new cultivars in the Hex River Region that produce higher yields and volumes. The impact of the dry conditions and little or no rains received during the crucial harvesting period also contributed to the increase in production. This will result in a nineteen percent increase in exports to 304,000 MT in the 2016/17 MY.

South Africa`s deciduous fruit industry is export oriented and prioritizes exporting as much volume as they can before supplying the surplus fruit to the local market. As a result, the domestic consumption of apples, pears and table grapes will increase marginally based on the increases in production in the 2016/17 MY. Domestic consumption will be partially offset by depressed demand from some consumers due to the challenging economic environment characterized by low economic growth and high inflation.

South Africa only imports small quantities of deciduous fruits to fulfill a niche market or to satisfy domestic demand when supply is limited.

Apples and Pears MY – Marketing Year (January to December)
Table Grapes MY – Marketing Year (October to September)
MT – Metric Tons

Sources

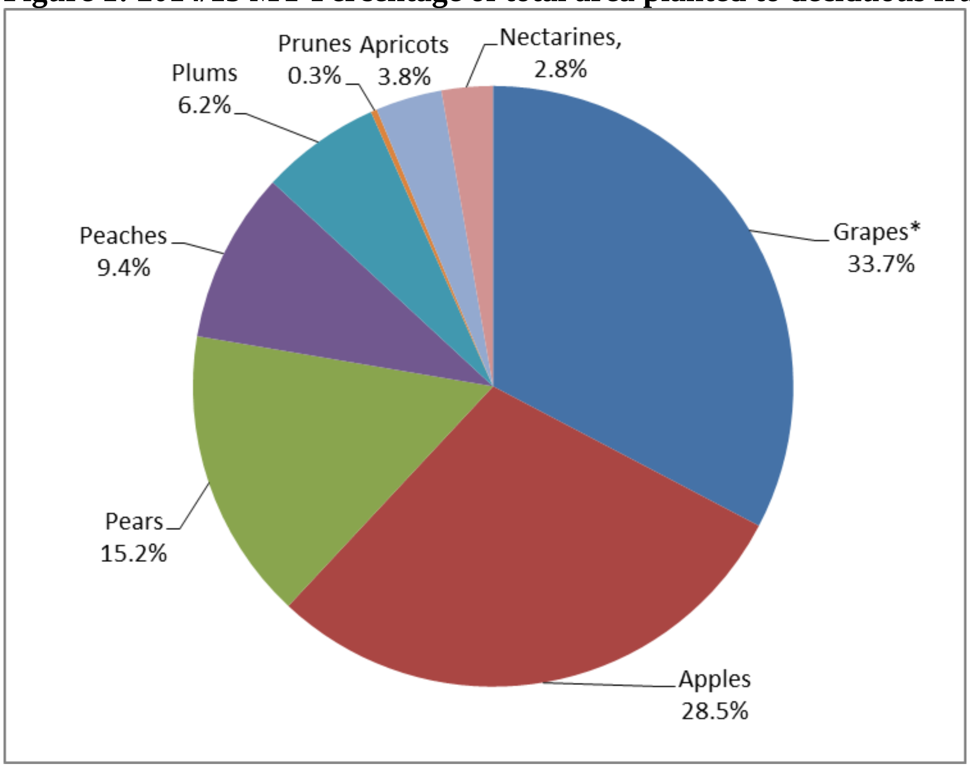
Name	**Website**
Hortgro	http://www.hortgro.co.za
South African Table Grapes Industry (SATGI)	http://www.satgi.co.za/
Global Trade Atlas (GTA)	http://www.gtis.com/gta/

Brief background of the South African deciduous fruit industry

Deciduous fruit is the largest sub-sector of the South African fruit industry in terms of area planted in hectares. In the 2014/15 MY, about 80,738 hectares (ha) were planted to deciduous fruits in South Africa, up from 79,803 ha in the 2013/14 MY. **Figure 1** shows that grapes (fresh and dried), apples and pears have the largest area planted and accounted for approximately 78 percent of the total area planted with deciduous fruit in the 2014/15 MY.

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

Figure 1: 2014/15 MY Percentage of total area planted to deciduous fruits in South Africa



*Fresh and Dried. Source: HORTGRO

Apples, Fresh:

Production

South Africa`s apple production will increase by about one percent to 933,404 MT in the 2016/17 MY, from 924,162 MT in the 2015/16 MY, based on the increase in new areas planted and young orchards coming into full production. This increase was partially offset by the smaller fruit sizes due to the drought conditions. The quality of apples in the 2016/17 MY were severely impacted by the drought conditions, as the fruit was dry, had a shorter shelf life and in some regions the ideal color was not achieved. Adjustments were made to the 2015/16 MY apple production to 924,162 MT, based on final industry data and the impact of the dry conditions. The 2014/15 MY production remains unchanged at 920,406 MT based on final industry data.

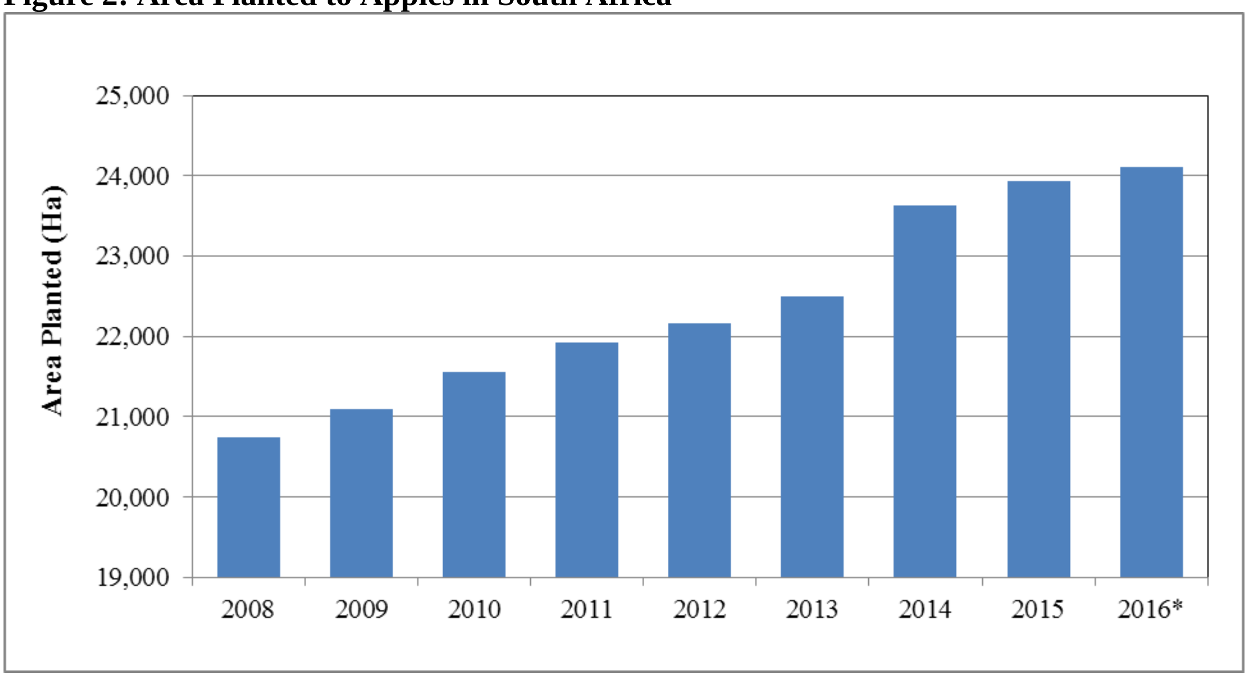
Apples are grown in several provinces throughout South Africa, but the Western Cape (WC) is the heartland of deciduous fruit production, accounting for approximately ninety percent of total apple production and exports. The WC is a winter rainfall area and has a climate similar to the Mediterranean, which is favorable for apple production. The most important apple growing regions are Ceres (contributes 29% to the area planted), Groenland (27%), Langkloof East (18%) and Villiersdorp (15%).

Harvest for South African apples typically begins at the end of January and runs through to June, with peak harvest times falling between February and April. Since 2008, the Golden Delicious cultivar has been the leading favorite and most planted cultivar at about 24% of the area planted, followed by the Granny Smith cultivar at 18%. Other cultivars which have been growing steadily are Gala (16%), Pink Lady (10%) and Fuji (9%).

Area Planted

The area planted to apples has steadily increased over the past decade as shown in **Figure 2**, mainly driven by increased earnings from the export market due to the weakening rand, which is attracting investment into the sector. Post estimates that the area planted to apples will increase by one percent to 24,100 hectares (ha) in the 2016/17 MY, from 23,932 ha in the 2015/16 MY. The 2014/15 MY area planted remains unchanged at 23,625 ha based on final industry data.

Figure 2: Area Planted to Apples in South Africa



*Estimate. Source: HORTGRO

Consumption

Domestic consumption of apples will increase by two percent to 226,012 MT in the 2016/17 MY, from 221,580 MT in the 2015/16 MY, based on the increase in production and supply to the domestic market of the fruit that didn't meet the export quality standards such as the ideal color and the shorter shelf life. The increase in domestic consumption was partially offset by depressed demand from some consumers due to a challenging economic environment characterized by low economic growth and high inflation. Domestic consumption remains unchanged at 213,058 MT in the 2014/15 MY, based on final industry data.

Over the past years, growth and stability in the domestic market has largely been driven by the increasing preference for fresh fruit over processed fruit from a growing middle class. Apples are popular in South Africa and are widely consumed throughout the year. In addition, apples form part of the national food basket of goods monitored by the National Agricultural Marketing Council (NAMC) to track food price inflation. However, the per capita consumption of apples in South Africa is still relatively low at about 4kg, compared to other countries such as the United States (at least 7kg) and Europe (about 15kg).

Exports

South African apple exports will increase by less than one percent to 513,451 MT in the 2016/17 MY, from 510,897 MT in the 2015/16 MY, based on the available production and largely due to the increased demand for the Fuji, Royal Gala and Golden Delicious apple varieties. This increase was partially offset by the smaller fruit sizes and fruit that didn't meet export quality standards due to the drought conditions. Post revised downwards the 2015/16 MY exports to 510,897 MT, based on final Global Trade Atlas (GTA) data and lower than expected exports for the months of October to December 2016. The 2014/15 MY exports remain unchanged at 465,695 MT based on final Global Trade Atlas (GTA) data.

While the United Kingdom remains the single largest country destination, Africa is now the leading export region for South African apples. In the 2015/16 MY, exports to other African countries amounted to 39% of the total South African apple exports, followed by the European Union (28%), Asia (21%) and the Middle East (7%). **Table 1** shows the breakdown of the major export countries for South African apples.

Table 1: South African Fresh Apple exports

South Africa Export Statistics				
Commodity: 080810, Apples, Fresh				
Year Ending: December				
Partner Country	**Unit**	**Quantity**		
		2014	**2015**	**2016**
World	T	381,909	465,695	510,897
United Kingdom	T	65,218	87,828	107,614
Malaysia	T	43,797	53,651	51,311
Nigeria	T	43,624	55,395	41,121
Bangladesh	T	10,276	17,778	25,082
United Arab Emirates	T	16,227	19,360	23,207
Kenya	T	11,169	15,482	18,166
Netherlands	T	12,170	15,259	16,773
Russia	T	4,512	7,832	14,739
Zambia	T	12,392	14,555	14,113
Zimbabwe	T	12,124	13,713	13,946
Taiwan	T	5,390	7,128	13,495
Senegal	T	8,074	11,038	13,342
Botswana	T	8,524	11,381	13,003
Singapore	T	12,084	12,745	11,356
Namibia	T	10,011	9,813	9,623
Ghana	T	6,256	7,358	9,256
Angola	T	16,853	12,743	8,725
Swaziland	T	7,399	6,839	6,548
Cameroon	T	4,306	4,886	6,403
Mozambique	T	5,754	5,457	6,362
Mauritius	T	5,203	6,011	6,333
Bosnia & Herzegovina	T	1,115	4,224	5,946
Cote d Ivoire	T	4,014	4,730	5,364
Lesotho	T	3,213	4,365	5,170
Germany	T	3,130	3,507	4,884
France	T	4,951	4,413	4,698
Saudi Arabia	T	4,170	2,537	4,661

Source: Global Trade Atlas (GTA)

Imports

South Africa is a net exporter of apples, and only imports apples to fulfill niche markets or satisfy domestic demand when supply is limited as shown in **Table 2**. Post estimates that imports will increase to 100 MT in the 2016/17 MY, based on year to date imports. USDA - APHIS has been working with the South African Department of Agriculture, Fisheries and Forests (DAFF) on the United States and South Africa protocol agreement, to allow for the importation of apples from Apple Maggot regulated areas in the United States to South Africa. The draft protocol may be obtained from the Northwest Fruit Exporters (509/576-8004) or from the South African Department of Agriculture, Fisheries and Forests, on the following link: Click here to download the protocol.

Table 2: South African Fresh Apple imports

South Africa Import Statistics				
Commodity: 080810, Apples, Fresh				
Year Ending: December				
Partner Country	**Unit**	**Quantity**		
		2014	**2015**	**2016**
World	T	21	4	62
United Arab Emirates	T	0	0	23
Bahrain	T	0	0	20
Sri Lanka	T	0	0	19
Lesotho	T	0	4	0
United States	T	21	0	0

Source: GTA

Table 3: Tariff Rates, Fresh Apples

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

Source: South African Revenue Services (SARS)

Table 4: PSD - Apples, Fresh

Apples, Fresh	2014/2015		2015/2016		2016/2017	
Market Begin Year	Jan 2015		Jan 2016		Jan 2017	
South Africa	USDA Official	New Post	USDA Official	New Post	USDA Official	New Post
Area Planted	23600	23625	23932	23932	24100	24100
Area Harvested	21600	21638	21919	21919	22000	22000
Bearing Trees	26300	26337	26679	26679	27100	27200
Non-Bearing Trees	3300	3287	3330	3330	3200	3100
Total Trees	29600	29624	30009	30009	30300	30300
Commercial Production	920400	920406	961000	924162	980000	933404
Non-Comm. Production	0	0	0	0	0	0
Production	920400	920406	961000	924162	980000	933404
Imports	0	4	100	62	100	100
Total Supply	920400	920410	961100	924224	980100	933504
Fresh Dom. Consumption	184600	213058	232100	221580	214000	226012
Exports	465700	465695	529000	510897	550000	513451
For Processing	270100	241657	200000	191747	216100	194041
Withdrawal From Market	0	0	0	0	0	0
Total Distribution	920400	920410	961100	924224	980100	933504
(HA) ,(1000 TREES) ,(MT)						

Pears, Fresh:

Production

South Africa`s pear production will increase marginally by less than one percent to 429,754 MT in the 2016/17 MY, from 429,582 MT in the 2015/16 MY, due to the increase in area planted and young orchards coming into full production. This increase was partially offset by the smaller fruit size because of the drought conditions. Post revised downwards the 2015/16 MY pear production to 429,582 MT based on final industry data and lower than expected production. The 2014/15 MY pear production remains unchanged at 410,840 MT based on final industry data.

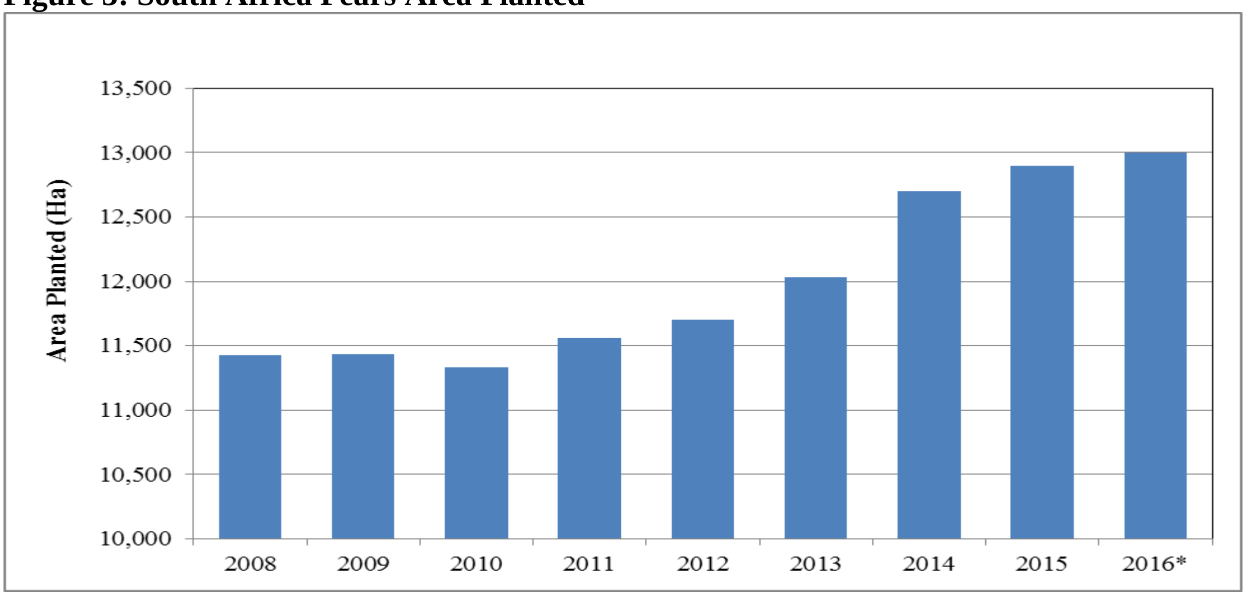
Similar to apples, pears grow well in areas that do not experience very high temperatures. Hence, the Western Cape is the heartland of pear production, accounting for at least 79 percent of the total production in South Africa. The major growing areas for pears in South Africa are Ceres which contributes about 37% to the area planted, Langkloof East (14%), Groenland (12%), Wolseley/Tulbagh (11%), Klein Karoo (9%) and Villiersdorp (8%).

Pears are normally harvested from late December to early January. Packham's Triumph which contributes about 34% to the area planted is the most popular pear variety, followed by Forelle (26%), William Bon Chretien (20%) and Abate Fetel (6%).

Area Planted

The area planted with pears will increase by less than one percent to 13,000 hectares (ha) in the 2016/17 MY, from 12,894 ha in the 2015/16 MY based on increased investment in the sector. The 2014/15 MY area planted remains unchanged at 12,697 ha based on final industry data. **Figure 3** shows that the area planted for pears has increased steadily since 2010.

Figure 3: South Africa Pears Area Planted



*Estimate. Source: HORTGRO

Consumption

Domestic consumption of pears will increase marginally by less than one percent to 47,728 MT in the 2016/17 MY, from 47,255 MT in the 2015/16 MY, based on the increase in production and supply to the domestic market. The increase in domestic consumption was partially offset by depressed demand from some consumers due to a challenging economic environment characterized by low economic growth and high inflation. The 2014/15 MY domestic consumption of pears remains unchanged at 45,879 MT based on final industry data. Pears and apples are close substitutes in the domestic market. The per capita consumption of pears in South Africa is still relatively lower at less than 1kg, compared to other countries such as Europe (about 4kg).

Exports

South African pear exports will increase marginally by less than one percent to 250,354 MT in the 2016/17 MY, from 250,254 MT in the 2015/16 MY, based on the marginal increase in production. Minor upward adjustments were made to the 2015/16 MY exports to 250,254 MT based on final GTA data and higher than expected exports for the months of September to December 2016. The 2014/15 MY pear exports remain unchanged at 205,199 MT based on final GTA data. The EU is South Africa`s traditional market accounting for about 49% of total pear exports, followed by Asia (16%), Africa (8%) and the Middle East (5%).

Table 5: South African Fresh Pears exports

South Africa Export Statistics				
Commodity: 080830, Pears, Fresh				
Year Ending: December				
Partner Country	**Unit**	**Quantity**		
		2014	**2015**	**2016**
World	T	207,309	205,199	250,254
Netherlands	T	55,055	47,283	63,561
United Arab Emirates	T	21,295	22,022	25,170
Russia	T	15,540	14,920	19,550
United Kingdom	T	17,541	14,552	13,283
Germany	T	10,457	13,501	12,887
France	T	7,634	7,200	9,492
Malaysia	T	8,576	8,565	9,127
Saudi Arabia	T	4,448	5,577	8,585
Hong Kong	T	7,614	7,125	8,404
Canada	T	3,822	3,921	8,194
Indonesia	T	4,304	3,570	7,869
Italy	T	8,293	8,708	7,842
India	T	4,555	6,029	7,681
Portugal	T	4,409	3,792	5,774
Singapore	T	4,388	4,308	4,384

Belgium	T	82	3,254	3,581
Nigeria	T	2,379	3,819	3,221
Mauritius	T	1,666	1,918	2,157
Botswana	T	1,340	1,793	2,074
Oman	T	1,909	1,588	2,058
Spain	T	1,747	1,439	1,932
Mozambique	T	877	858	1,638
Angola	T	1,977	1,954	1,526
Greece	T	1,312	849	1,412
Bahrain	T	863	1,094	1,298
Ireland	T	1,077	899	1,286
United States	T	848	1,062	1,195
Senegal	T	620	595	1,148
Namibia	T	1,417	1,374	1,131
Swaziland	T	1,051	1,095	1,131
Vietnam	T	1,017	1,168	1,119
Kuwait	T	515	411	1,058

Source: GTA

Imports

As the second largest pear producer behind Argentina in the Southern Hemisphere, South Africa only imports small quantities of pears, with China as the leading source of Ya pears (white colored pears). Imports from China began after a 2007 agreement that allowed imports of Chinese pears into the South Africa market. The South Africa and China agreement is available on the South African Department of Agriculture, Fisheries and Forestry on the following website link: http://www.nda.agric.za/doaDev/sideMenu/plantHealth/docs/protocol_pear_China.pdf .

Table 6: South African Fresh Pears imports

South Africa Import Statistics				
Commodity: 080830, Pears, Fresh				
Year Ending: December				
Partner Country	**Unit**	**Quantity**		
		2014	**2015**	**2016**
World	T	44	144	89
China	T	44	119	65
Russia	T	0	0	24

Source: GTA

Table 7: Tariff Rates, Fresh Pears

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

Source: SARS

Table 8: PSD - Pears, Fresh

Pears, Fresh	2014/2015		2015/2016		2016/2017	
Market Begin Year	Jan 2015		Jan 2016		Jan 2017	
South Africa	USDA Official	New Post	USDA Official	New Post	USDA Official	New Post
Area Planted	12700	12697	12894	12894	13000	13000
Area Harvested	11700	11682	11863	11863	12000	12000
Bearing Trees	14800	14838	15068	15068	15300	15300
Non-Bearing Trees	1100	1107	1124	1124	1000	1000
Total Trees	15900	15945	16192	16192	16300	16300
Commercial Production	400000	410840	430000	429582	440000	429754
Non-Comm. Production	0	0	0	0	0	0
Production	400000	410840	430000	429582	440000	429754
Imports	300	144	300	89	100	100
Total Supply	400300	410984	430300	429671	440100	429854
Fresh Dom. Consumption	48500	45879	46182	47255	46000	47728
Exports	205200	205199	249436	250254	260000	250354
For Processing	146600	159906	134682	132162	134100	131772
Withdrawal From Market	0	0	0	0	0	0
Total Distribution	400300	410984	430300	429671	440100	429854
(HA) ,(1000 TREES) ,(MT)						

Table grapes, Fresh:

Production

South Africa`s table grapes production will increase by eighteen percent to 335,000 MT in the 2016/17 MY, from 284,739 MT in the 2015/16 MY, based on the increase in area harvested as new plantings came into full production; expansion in area planted from the Orange River and Hex River Region; some wine grapes being diverted to the table grapes market; and new cultivars in the Hex River Region that produce higher yields and volumes. The impact of the dry conditions and the little or no rains received during the crucial harvesting period also contributed to the increase in production. Post made minor adjustments to the 2015/16 MY table grapes production to 284,739 MT based on final industry data. The 2014/15 MY table grapes production remains unchanged at 291,442 MT based on final industry data.

The major growing areas for grapes are the Hex River and Berg River regions in the Western Cape Province, and the Orange River and Olifants River regions in the Northern Cape Province as shown in **Table 9**. Grapes are normally harvested from October to May. Harvest starts in week 43 (Beginning of October) in the Northern Cape Region followed by the Orange River region. The Hex River valley is the last region for table grapes harvesting.

Table 9: Table Grapes Area Planted per region

Regions	2015/16	Percentage to Total Area Planted
Hex River	6,154	33%
Orange River	5,367	29%
Berg River	4,237	23%
Northern Provinces	1,577	8%
Olifants River	1,240	7%
Total Area Planted	**18,575**	**100%**

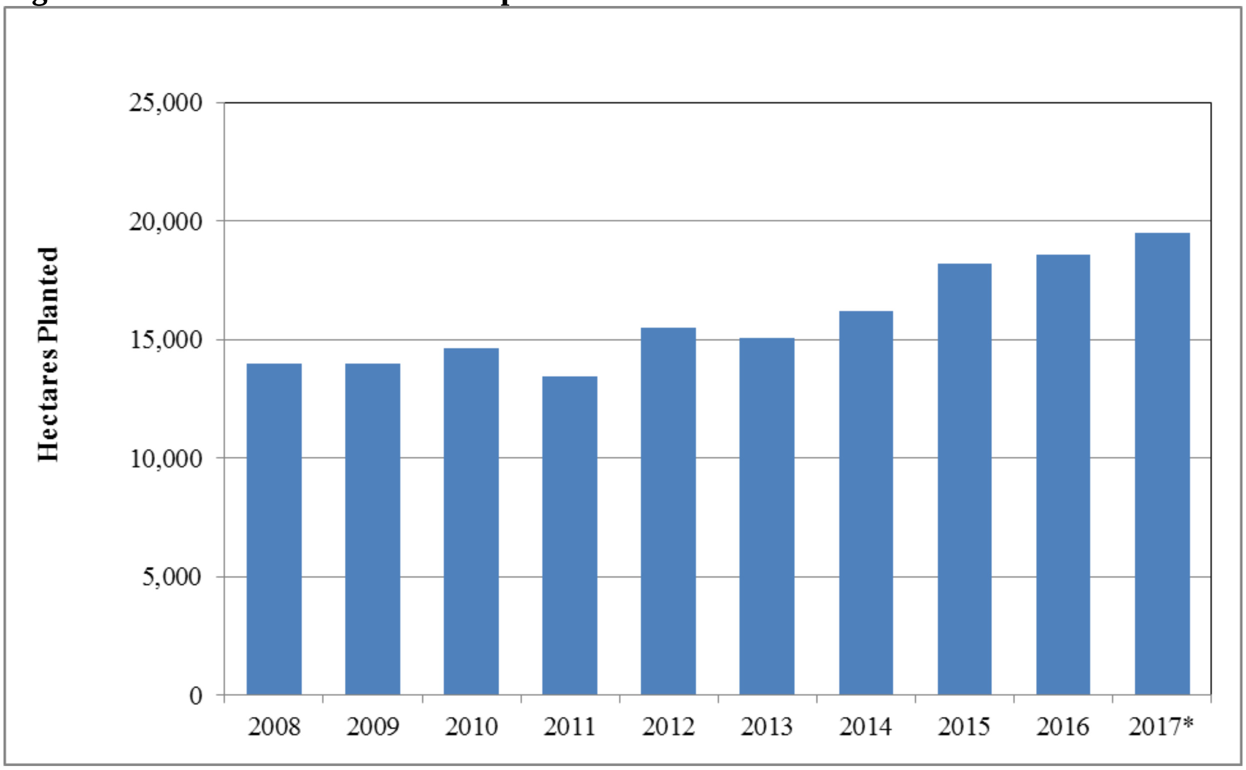
Source: South African Table Grapes Industry (SATGI)

The leading varieties of South African Table Grapes based on area planted are Crimson Seedless at 24%, Prime (9%), Thomson Seedless (8%), Flame Seedless (7%), Sugraone (6%), Redglobe (6%) and the Sugrathirteen (5%). The cultivar profile in South Africa has changed in recent years. Seeded cultivars are declining as consumers prefer seedless grapes, while the production of black and red seedless table grapes varieties has increased. The popularity of seedless cultivars stems from their characteristics such as large berry size (with elongated or oval berry shapes), favorable texture (crunchiness) and good eating qualities.

Area Planted

Post estimates that the area planted to table grapes will increase by five percent to 19,500 hectares (ha) in the 2016/17 MY, from 18,575 ha in the 2015/16 MY based on orchard expansions and new area under cultivations mainly in the Hex and Orange River regions at the back of increased investment in the sector. **Table 9** above shows the area planted to table grapes per growing region and their percentage contribution to the total area planted. The area planted in the 2014/15 MY will remain unchanged at 18,212 ha based on final industry data. **Figure 4** shows that the area planted to table grapes has been increasing since 2008. This increase is correlated to the weakening of the rand and increased revenues received as the industry is export oriented.

Figure 4: Area Planted to Table Grapes in South Africa



Estimate, **Forecast.* Source:** SATGI

Consumption

Domestic consumption of table grapes will increase by four percent to 37,000 MT in the 2016/17 MY, from 35,739 MT in the 2015/16 MY based on the increase in production and supply to the domestic market. The 2014/15 MY domestic consumption remains unchanged at 33,592 MT based on final industry data.

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

Exports

Table grape exports will increase by nineteen percent to 304,000 MT in the 2016/17 MY, from 254,969 MT in the 2015/16 MY based on the significant increase in production. South Africa`s table grape industry is export oriented, and exports as much as possible before supplying the surplus to the local market. Minor adjustments were made to the 2015/16 MY exports to 254,969 MT based on final industry data. The 2014/15 MY table grape exports remain unchanged at 263,452 MT based on final industry data.

The EU is the leading historical export market for South African table grapes, accounting for at least 75 percent of table grape exports. South Africa benefits from a shorter shipping distance than other Southern Hemisphere competitors, strong demand for seedless varieties, and a free trade agreement with the EU. Exports have also benefitted from a weaker Rand against its major trading currencies such as the Euro. Exports to Asia (14%), the Middle East (6%) and Africa (4%) also have strong growth potential and are increasingly becoming a core focus for the South African industry. Export volumes to the United States and Canada have significantly grown over the past years but are still low at about 12,000 MT and accounted for less than four percent of the total South African exports in the 2016/17 MY.

In November 2016, China relaxed its cold treatment protocols to address False Coddling Moth (FCM) for South African table grapes. The new protocol was changed from -0.6°C for 22 days to +0.8°C for a minimum of 20 days. Post contacts indicated that there are high possibilities that in the future, South Africa could submit a similar request for the United States to relax its cold treatment protocols for South African table grapes.

Table 10: South African Fresh Table Grapes exports

Season (Oct. - Sept.)	**Exports (MT)**
2004/2005	210,823
2005/2006	230,896
2006/2007	227,265
2007/2008	224,123
2008/2009	217,875
2009/2010	234,579
2010/2011	202,500
2011/2012	245,797
2012/2013	234,463
2013/2014	226,401
2014/2015	263,452
2015/2016	254,969
2016/2017*	304,000

***Estimate. Source: South African Table Grapes Industry

Imports

South Africa is a net exporter of table grapes, and imports are mainly to fulfill the gap when South Africa is out of the season or has low volumes from around July to November. Spain, Namibia and Egypt are the major suppliers as shown in **Table 11**.

Table 11: South African Fresh Table Grapes imports

South Africa Import Statistics
Commodity: 080610, Grapes, Fresh

Year Ending: September				
Partner Country	**Unit**	**Quantity**		
		2014	**2015**	**2016**
World	T	4,687	5,584	5,969
Spain	T	2,833	2,873	2,801
Egypt	T	1,461	1,220	1,757
Namibia	T	332	1,324	1,102
Zambia	T	17	96	196
Norway	T	0	0	27
United Arab Emirates	T	0	0	20
Turkey	T	0	0	20
Saudi Arabia	T	0	0	20
Germany	T	0	0	19
France	T	0	0	6
Israel	T	41	22	0
Other Countries NES	T	0	50	0
United Kingdom	T	3	0	0

Source: GTA

Table 12: Tariff Rates, Fresh Table Grapes

Heading / Subheading	**CD**	**Article Description**	**Statistical Unit**	**Rate of Duty**				
				General	**EU**	**EFTA**	**SADC**	**Mercosur**
0806.10	1	Grapes, fresh	kg	4%	Free	4%	Free	4%

Source: SARS

Table 13: PSD; Table Grapes, Fresh

Grapes, Fresh	2014/2015		2015/2016		2016/2017	
Market Begin Year	Oct 2014		Oct 2015		Oct 2016	
South Africa	USDA Official	New Post	USDA Official	New Post	USDA Official	New Post
Area Planted	18212	18212	18500	18575	18600	19500
Area Harvested	15000	15484	15200	16229	15300	17200
Commercial Production	291442	291442	284575	284739	280000	335000
Non-Comm. Production	0	0	0	0	0	0
Production	291442	291442	284575	284739	280000	335000
Imports	5600	5602	6700	5969	5300	6000
Total Supply	297042	297044	291275	290708	285300	341000
Fresh Dom. Consumption	33542	33592	33075	35739	30300	37000
Exports	263500	263452	258200	254969	255000	304000
Withdrawal From Market	0	0	0	0	0	0
Total Distribution	297042	297044	291275	290708	285300	341000
(HA) ,(MT)						

Policy:

Table 14 provides a list of the regulations applicable to apples, pears and table grapes in South Africa. Exporters should also be aware that there is no law in South Africa restricting an importer from requesting additional certifications over and above the minimum legislation and regulations indicated in this section.

Table 14: List of key legislations and regulations

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

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

Prices

The apple and pear prices shown in **Table 15** are the average prices (Rand/Ton) earned in the respective markets. The key driving force of the increases in apple and pear export prices is the depreciation of the rand. The export market for pears and apples remains lucrative from a price perspective in comparison to the local and processed markets.

Table 15: Price of Apples and Pears

	APLES			PEARS		
	Local Market	Export Market	Processed Market	Local Market	Export Market	Processed Market
Season	(R/Ton)	(R/Ton)	(R/Ton)	(R/Ton)	(R/Ton)	(R/Ton)
2003/2004	2,109	3,794	336	1,977	4,059	495
2004/2005	2,310	3,638	341	2,128	3,861	491
2005/2006	2,580	3,791	373	2,304	3,786	573
2006/2007	2,799	4,363	447	2,664	4,680	715
2007/2008	3,618	5,419	1,071	3,222	5,704	973
2008/2009	3,568	5,834	786	3,452	6,336	1,035
2009/2010	3,656	5,881	534	3,454	6,144	810
2010/2011	4,326	6,210	737	3,856	6,612	896
2011/2012	4,470	6,531	1,146	4,191	6,803	1,115
2012/2013	4,845	8,658	1,137	4,650	8,835	1,316
2013/2014	4,944	10,136	1,141	4,815	9,900	1,376
2014/2015	5,024	10,689	1,142	5,164	9,977	1,561

Source: HORTGRO