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South Africa, Republic of

Fresh Deciduous Fruit

Semi-Annual

2002

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Report Highlights:

South Africa's total production of apples, pears, and tablegrapes in CY2002 is expected to change marginally from last year, because of the fairly stable area planted. Farmers only replaced old orchards with new more competitive varieties. Deregulation and competitive exchange rate appear to be helping South Africa's fruit exports.

Includes PSD changes: Yes
Includes Trade Matrix: Yes
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Executive Summary

Total South African production of apples, pears, and tablegrapes in CY2002 is expected to change little from last year. Farmers are not increasing the area planted but are replacing old orchards with new more competitive varieties. Exports are expected to show an insignificant rise, although some improvement is possible based on the continued decline of the Rand. To boost exports, producers, exporters and government institutions have formed a joint venture (Marketing Forum) to better develop and coordinate export activities. Domestic consumption will also remain unchanged.

Production

South Africa's Cape Town Container Terminal (CTCT) is presently experiencing unprecedented growth in volumes, mainly because of lack of relatively accurate crop estimate as well as a slow and inaccurate flow of real intake information. In 2000, the Deciduous Fruit Producers' Trust (DFPT), through the Centre for International Agricultural Marketing and Development (CIAMD), developed a data base for crop estimates, crop intakes, crop distribution, and price benchmark. Information utilized is gathered from the primary producers, pack-houses and exporters.

South Africa's official produce quality inspection and certification service is delivered by the Perishable Products Export Control Board (PPECB). In the near future, PPECB's role will include handling certification for Good Agricultural Practices, especially EurepGAP(GAP), Hazard Analysis Critical Control Point (HACCP), Good Manufacturing Practices (GMP), Good Hygiene Practices (GHP), and other auditing functions to ensure food safety standards are met.

FRESH APPLES

PSD Table						
Country	South Africa, Republic of					
Commodity	Fresh Apples				(HA)(1000 TREES)(MT)	
	Revised	2000	Preliminary	2001	Forecast	2002
	Old	New	Old	New	Old	New
Market Year Begin		01/2001		01/2002		01/2003
Area Planted	23000	23000	23500	23500	0	24000
Area Harvested	17430	17430	17700	17700	0	18000
Bearing Trees	13080	16080	13160	16160	0	16300
Non-Bearing Trees	5360	6074	5400	6150	0	6500
Total Trees	18440	22154	18560	22310	0	22800
Commercial Production	567700	667730	570000	690000	0	710000
Non-Comm. Production	0	0	0	0	0	0
TOTAL Production	567700	667730	570000	690000	0	710000
TOTAL Imports	0	0	0	0	0	0
TOTAL SUPPLY	567700	667730	570000	690000	0	710000
Domestic Fresh Consump	148000	248466	140000	250000	0	255000
Exports, Fresh Only	228000	244819	220000	250000	0	260000
For Processing	191700	174445	210000	190000	0	195000
Withdrawal From Market	0	0	0	0	0	0
TOTAL UTILIZATION	567700	667730	570000	690000	0	710000

PSD Table						
Country	South Africa, Republic of					
Commodity	Concentrated Apple Juice				(MT)	
	Revised	2000	Preliminary	2001	Forecast	2002
	Old	New	Old	New	Old	New
Market Year Begin		01/2001		01/2002		01/2003
Deliv. To Processors	191700	191555	210000	210000	0	220000
Beginning Stocks	0	0	0	0	0	0
Production	23960	23960	26250	26250	0	26400
Imports	5900	5900	6000	6000	0	5900
TOTAL SUPPLY	29860	29860	32250	32250	0	32300
Exports	22000	22000	23000	23000	0	23000
Domestic Consumption	7860	7860	9250	9250	0	9300
Ending Stocks	0	0	0	0	0	0
TOTAL DISTRIBUTION	29860	29860	32250	32250	0	32300

Export Trade Matrix			
Country	South Africa, Republic of		
Commodity	Fresh Apples		
Time period	Jan-Dec	Units:	Tons
Exports for:	2000		2001
U.S.	7,264	U.S.	10,641
Others		Others	
United Kingdom	81,972	United Kingdom	82,205
Netherlands	24,290	Netherlands	39,210
Belgium	16,916	Belgium	12,250
Malaysia	8,141	Malaysia	11,550
Germany	5,980	Germany	10,991
Mauritius	4,621	Benin	6,200
Benin	4,116	France	5,139
Saudi Arabia	3,558	Canada	5,055
Hongkong	3,295	Hongkong	4,956
Singapore	3,053	Mauritius	4,947
Total for Others	155942		182503
Others not Listed	45303		51675
Grand Total	208509		244819

Source: Dept. of Customs&Excise

FRESH PEARS

PSD Table						
Country	South Africa, Republic of					
Commodity	Fresh Pears				(HA)(1000 TREES)(MT)	
	Revised	2000	Preliminary	2001	Forecast	2002
	Old	New	Old	New	Old	New
Market Year Begin		01/2001		01/2002		01/2003
Area Planted	13000	13455	12500	13600	0	14000
Area Harvested	9110	9400	9150	9700	0	10000
Bearing Trees	7520	8110	7700	8300	0	8500
Non-Bearing Trees	4450	5600	0	5900	0	6100
Total Trees	11970	13710	7700	14200	0	14600
Commercial Production	246320	246320	240000	250000	0	260000
Non-Comm. Production	0	0	0	0	0	0
TOTAL Production	246320	246320	240000	250000	0	260000
TOTAL Imports	0	0	0	0	0	0
TOTAL SUPPLY	246320	246320	240000	250000	0	260000
Domestic Fresh Consump	55860	60860	48000	62000	0	62500
Exports, Fresh Only	101230	90406	105000	92000	0	101000
For Processing	88030	93054	85000	94800	0	95000
Withdrawal From Market	1200	2000	2000	1200	0	1500
TOTAL UTILIZATION	246320	246320	240000	250000	0	260000

Export Trade Matrix			
Country	South Africa, Republic of		
Commodity	Fresh Pears		
Time period	Jan-Dec	Units:	Tons
Exports for:	2000		2001
U.S.	4,323	U.S.	1,652
Others		Others	
Netherlands	26,728	Netherlands	28,845
United Kingdom	22,663	Unitedkingdom	20,322
Belgium	14,649	Belgium	8,797
France	7,404	Germany	6,524
Hongkong	2,336	France	5,105
Malaysia	2,151	Malaysia	3,139
Germany	2,120	Russia	2,597
Canada	1,984	Hongkong	2,215
Mauritius	1,341	Singapore	2,050
Singapore	1,254	Mauritius	1,524
Total for Others	82630		81118
Others not Listed	8587		7636
Grand Total	95540		90406

Source: Dept. of Customs&Excise

FRESH TABLEGRAPES

PSD Table						
Country	South Africa, Republic of					
Commodity	Fresh Table Grapes				(HA)(MT)	
	Revised	2000	Preliminary	2001	Forecast	2002
	Old	New	Old	New	Old	New
Market Year Begin		01/2001		01/2002		01/2003
Area Planted	18500	16000	19000	18500	0	19000
Area Harvested	11200	11205	11300	11300	0	11800
Commercial Production	346000	346060	350000	350000	0	370000
Non-Comm. Production	0	0	0	0	0	0
TOTAL Production	346000	346060	350000	350000	0	370000
TOTAL Imports	0	0	0	0	0	0
TOTAL SUPPLY	346000	346060	350000	350000	0	370000
Domestic Fresh Consump	24700	24555	25000	25000	0	28000
Exports, Fresh Only	175000	181834	180000	185000	0	190000
For Processing	146300	139671	145000	140000	0	152000
Withdrawal From Market	0	0	0	0	0	0
TOTAL UTILIZATION	346000	346060	350000	350000	0	370000

Export Trade Matrix			
Country	South Africa, Republic of		
Commodity	Fresh Table Grapes		
Time period	Jan-Dec	Units:	Tons
Exports for:	2000		2001
U.S.	11,365	U.S.	8919
Others		Others	
Netherlands	59,810	Netherlands	65,125
Belgium	39,779	Unitedkingdom	33,717
Unitedkingdom	36,241	Belgium	24,632
France	7,203	Germany	12,429
Canada	5,321	France	6,131
Germany	4,962	Hongkong	5,307
Hongkong	4,040	Spain	5,086
Saudi Arabia	2,548	Canada	3,659
Spain	2,103	United Arab Em	2,515
Italy	1,317	Saudi Arabia	2,022
Total for Others	163324		160623
Others not Listed	10553		12292
Grand Total	185242		181834

Source: Dept. of Customs&Excise

Trade

Exports

The peak export volumes for deciduous fruit handled by the port authorities, shipping lines, etc, during week 5-6 in MY 2001, was approximately 5.2 million cartons. Total deciduous fruit exports of approximately 75 million cartons is expected to grow to 92 million by 2005. Total fruit exports are expected to increase by more than 200,000 MT by 2005. CY2002 fresh produce exports is expected to reach R7,2 billion.

Policy

The Deciduous Fruit Producers' Trust (DFPT) has released the 2002/03 guidelines on the use of plant protection chemicals, to ensure compliance with maximum chemical residue tolerances in countries to which South Africa export. The guidelines include export MRL's contained in the National Department of Agriculture (NDA), Directorate Plant Health and Quality (DPHQ) Export Grading Regulations, under Act 119, Agricultural Product Standards Act.