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## **South Africa, Republic of**

### **Dried Fruit**

### **Annual**

### **2003**

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#### **Report Highlights:**

**South Africa's MY 2003 production of raisins is expected to total about 34,900 Mt. This is a decrease of about 14% from last year because more grapes were sent to the fresh markets and wine processing. Exports are also estimated at around 11% lower than the previous season.**

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

South Africa's MY 2003 official industry estimates for raisins indicate a decrease of about 14% from last year because more fruit was used for both wine-production and sold in the fresh markets. Thompson seedless output is estimated down by 65% from last year, whilst unbleached Sultana is expected to increase by more than double (250%). Storms and flooding around the grape growing districts (Montague, Robertson, Ashton) of the Western Cape towards the end of March this year are expected to have affected this year's raisin production volume, as they coincided with the end of harvest.

## Production

The South African Dried Fruit Industry (SAD) was formed in 1998 to replace the Dried Fruit Cooperative, which had been the official distribution and marketing entity for the government controlled dried fruit board. There are about 1,200 raisin producers in the Orange River Valley and about 350 tree fruit producers in the Boland and the Little Karoo. Dried fruit is delivered to SAD factories where it is processed and packaged on a large scale. The major dried fruit products are Thompson seedless raisins, golden sultanas, unbleached sultanas, hanepoot raisins, prunes, peaches, and apricots. Most raisins are produced in the area along the Lower Orange River while most currants come from the Vredendal district.

South Africa's raisin production has an alternating bearing cycle based on the climatic conditions that affect quality and fruit size. In a good year, larger grape size and increased quantity is possible. About 150,000 MT of the total fresh sultana crop is annually used for drying. The annual domestic consumption for raisins averages around 10,000 tons.

### FRESH GRAPES FOR DRYING PROCESSING:

VINES	2000	2001	2002
METRIC	TON	TON	TON
Total fresh grapes	152,568	139,372	169,420

Source: ZA.'s National Dept. of Agric.

The table below shows the dried fruit production over a period of five years.

### DRIED VINE FRUIT PRODUCTION TABLE

Type	1994/5	1995/6	1996/7	1997/8	1998/9	1999/0	2000/1	2001/2	2002/3*
Sultana	MT	MT	MT	MT	MT	MT	MT	MT	MT
Unbleached	5,891	3,593	9,300	3,700	5,097	4,709	9,158	2,591	6,500
Golden	6,731	5,154	6,945	6,912	8,539	4,028	7,490	5,536	7,470
Thompson seedless	25,591	9,586	23,950	10,451	26,722	27,622	16,552	31,844	20,850
Currants	1,117	1,473	1,7309	1,181	1,702	1,463	1,420	1,837	1,770
Raisins muscat	328	271	59	91	534	320	223	179	120
Total vines	39,658	30,077	41,984	22,335	42,594	38,142	34,843	41,987	36,710

Source: ZA's Dried Fruit Technological Services

\*Industry Estimates

The table below indicates stocks, production, imports&exports, and consumption for 1996-2001

	1996/07	1997/08	1998/09	1999/00	2000/01
Beginning Stock	15,588	11,563	8,334	8,963	12,269
Production	40,254	21,154	40,892	36,679	33,423
Imports	40	42	45	308	262
SUPPLY	55,882	32,759	49,271	45,950	46,364
Exports	30,331	13,000	28,258	21,001	26,108
D. Consumption	13,988	11,425	12,050	12,270	12,080
Ending Stock	11,563	8,334	8,963	12,269	8,176
DISTRIBUTION	55,882	32,759	49,271	45,950	46,364

Source: Dept. of Agric; D.F.T; and Dept. of Customs&Excise

South Africa's raisin industry averages about 34,000 MT of production and around 22,985 MT in exports annually. Production area is fairly stable, as producers prefers to uproot and re-plant on the same vineyards. Imports figures have been revised as appearing in data from the Dept. of Customs & Excise.

**PSD RAISINS**

PSD Table						
Country	South Africa, Republic of					
Commodity	Raisins				(HA)(MT)	
	2001	Revised	2002	Estimate	2003	Forecast
	USDA Official [Old]	Post Estimate [New]	USDA Official [Old]	Post Estimate [New]	USDA Official [Old]	Post Estimate [New]
Market Year Begin		01/2002		01/2003		01/2004
Area Planted	12200	12200	12300	12300	12350	12350
Area Harvested	11300	11300	11400	11400	11450	11450
Beginning Stocks	8401	8176	6199	4598	4000	2051
Production	41987	40518	42000	34953	45000	40000
Imports	1	97	1	200	1	200
TOTAL SUPPLY	50389	48791	48200	39751	49001	42251
Exports	33690	33693	33700	28000	34000	26000
Domestic Consumption	10500	10500	10500	9700	11000	11000
Ending Stocks	6199	4598	4000	2051	4001	5251
TOTAL DISTRIBUTION	50389	48791	48200	39751	49001	42251

**Trade**

The table below indicate revenue for Raisins :

	2000	2001	2002
Prices(c/kg)	263.22	295.89	319.57
Gross Value(R1,000)	190.943	147.661	134.681
Export Value ( Rmillion)	151	180	263
% Share	12.04	13.44	16.38

Prices for raisins are based on world trends.

**Exports**

South Africa's total raisin exports for 2000 amounted to 21,001 MT and have been increased recently as shown in the table below.

Export Trade Matrix			
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Country	South Africa, Republic of		
Commodity	Raisins		
Time period	Jan-Dec	Units:	MT
Exports for:	2001		2002
U.S.	980	U.S.	2,576
Others		Others	
Canada	7,131	Canada	9,138
Germany	3,610	Germany	3,942
Netherlands	2,485	United Kingdom	3,896
United Kingdom	2,223	Netherlands	2,830
France	1,825	France	2,734
Japan	1,420	New Zealand	1,125
Australia	1,178	Japan	1,120
New Zealand	535	Phillipines	962
Phillipines	495	Hongkong	648
Hongkong	453	Algeria	628
Total for Others	21355		27023
Others not Listed	3773		4,094
Grand Total	26108		33693

## Imports

South Africa imported a total raisin volume that amounted to 308 MT in 2000 and have been decreasing recently as shown in the table below.

Import Trade Matrix			
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Country	South Africa, Republic of		
Commodity	Raisins		
Time period	Jan-Dec	Units:	MT
Imports for:	2001		2002
U.S.	0	U.S.	0
Others		Others	
Netherlands	192	Japan	39
Turkey	30	United Kingdom	30
United Kingdom	19	Turkey	23
Korea,South	15	France	5
France	5		
Total for Others	261		97
Others not Listed	1		0
Grand Total	262		97

## Policy

The industry is currently using the National Department of Agriculture's Regulation relating to raisin grading, packaging, and marking of dried fruit intended for domestic sale and exports as appears under the Agricultural Product Standards Act of 1990. The 2001 drafted regulation on imports is still pending.

Dried fruits are also regulated under the following Acts:

- The Foodstuffs, Cosmetics and Disinfectant Act, 1972 ( Act No. 54 of 1972) as applied by the National Department of Health;
- The Trade Metrology Act, 1973 (Act No. 77 of 1973) as applied by the SABS; and
- The phytosanitary requirements as prescribed by the Directorate: Plant and Quality Control within the National Department of Agriculture.

## Marketing

The local marketing of dried fruit operates under a free trade system. However, phytosanitary requirements should be adhered to for imports and exports.

Since 1997, the South African Dried Fruit (SAD) formed a joint-venture with a U.S. based food multinational, HJ Heinz. SAD is distributing Heinz sauces and condiments, imported from Zimbabwe, Indonesia, Britain and the U.S.

Export prices are based on world trends.