



# HORTICULTURE BIWEEKLY 2023

## Report No. 17 2023

29 September 2023

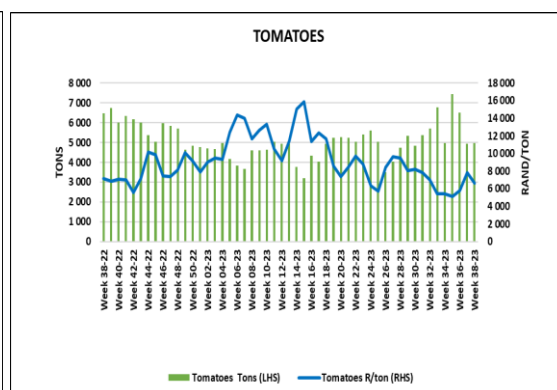
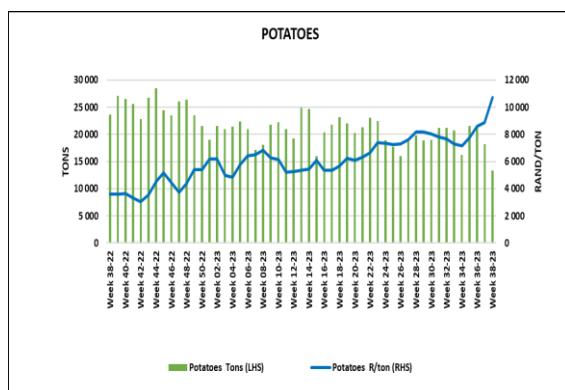
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## Summary

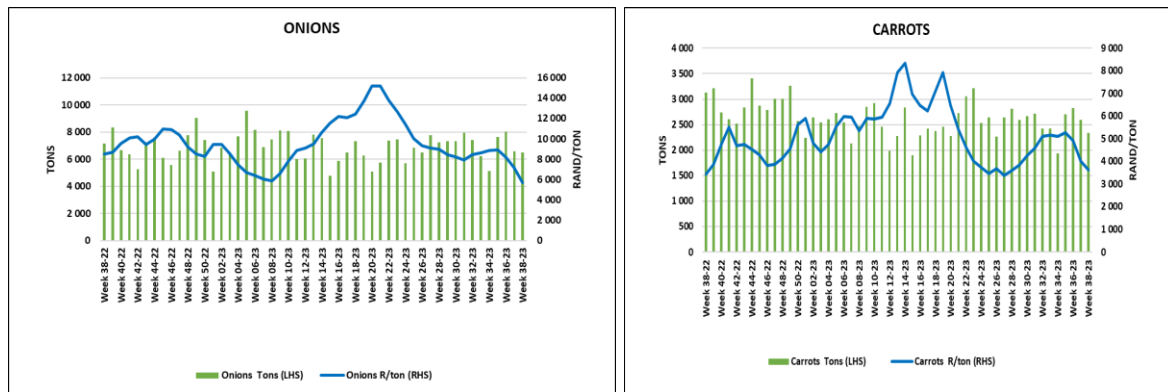
The South African Table Grape Industry Association (SATI) is expected to release its 2023/24 table grape crop estimate next week. Due to the extensive rainfall and flooding that took place recently, the table grape crop estimate could most likely be revised downwards from the initial prediction. The South African stone fruit exporting season is also set to begin in the fourth quarter of 2023. After an excellent winter with good cold units and full ponds, the stone fruit industry is optimistic about the 2023/24 season and it is expecting a good harvest. The stone fruit outlook is still largely positive. This is despite some frost, sleet, and hail damage that took place in limited areas two to three weeks ago, and the floods that recently affected most production areas. The recent flooding will also result in the Western Cape's citrus season concluding earlier than usual. Currently, late season soft citrus and Valencia oranges are yet to be picked.

## Potatoes and Tomatoes



- In week 38-2023, **potato** prices averaged R10 704/ton, increasing by 21% w/w as volumes declined by 27% w/w to 13 291 tons. The record high prices are due to lower production from the northern production regions. Prices are expected to maintain their upward trend in the coming week.
- **Tomato** prices decreased by 16% w/w to R6 610/ton as volumes rose slightly by 0.5% w/w. Prices are expected to trend upwards in the coming weeks and then moderate around mid-October 2023.

# Onions and Carrots



- **Onion** prices decreased by 20% w/w to R5 683/ton. This was from ample availability over the recent weeks, even though volumes dipped by 1% w/w to 6 511 tons last week. However, prices are expected to trend upwards over the coming weeks due to tighter supply and higher demand.
- **Carrot** prices declined by 10% w/w to R3 620/ton due to lower market demand. Market volumes also declined by 10% w/w. Prices are expected to increase in the coming week as demand is expected to increase as per seasonal trend.

## Fruit Trends on all NFPMs in South Africa

Commodity	Rand per ton		% change (w/w)	Ton		% change (w/w)
	Week ending			Week ending		
	15 Sep	22 Sep		15 Sep	22 Sep	
<b>Apples</b>	10 140	10 410	↑ 3%	3 300	2 541	↓ -23%
<b>Pears</b>	10 180	10 460	↑ 3%	750	667	↓ -11%
<b>Bananas</b>	11 480	11 000	↓ -4%	3 802	3 498	↓ -8%
<b>Oranges</b>	4 960	5 220	↑ 5%	1 835	1 266	↓ -31%
<b>Avocados</b>	18 740	18 260	↓ -3%	508	483	↓ -5%

- **Apple** prices increased by 3% w/w to R10 410/ton as market supply decreased by 23% w/w. Prices are expected to trend downwards in the coming week as per seasonal trend.
- **Pear** prices rose by 3% w/w to R10 460/ton as volumes declined by 11% w/w. Prices are expected to remain elevated for the rest of the year as local supply is expected to dwindle.
- **Banana** prices decreased by 4% w/w to R11 000/ton due to lower demand, even though market supply declined by 8% w/w. Prices are expected to trend higher for the rest of the year due to lower volumes.
- **Orange** prices increased by 5% w/w to R5 220/ton as volumes dropped by 31% w/w. Prices are expected to maintain their upward trend as seasonal volumes decline.
- **Avocado** prices decreased by 3% w/w to R18 260/ton due to higher demand and supply that declined by 5% w/w. Prices are expected to remain at higher levels as the avocado season tapers off.

# Pome Fruit Exports

Week 36 Weekly Volumes 12.50 kg Cartons	2022 Exports (a)	2023 Exports (b)	y/y Change (a/b)	Cumulative Volumes YTD 2022 (c)	Cumulative Volumes YTD 2023 (d)	y/y Change (c/d)
Apples	492 798	618 345	↑ 25%	32 022 625	32 648 757	↑ 2%
Pears	162 097	175 177	↑ 8%	17 044 248	15 810 564	↓ -7%

**Week 38-2023 exports:** Kindly **note** that there was no Hortgro update on **pome fruit** exports for week 38-2023 due to a downward revision to the crop estimates and low quantities of fruit being exported.

### Week 36-2023 exports:

- South Africa exported 618 345 cartons (12.5kg) of **apples**, an increase of 25% y/y. **Pear** exports rose by 8% y/y to 175177 cartons. The cumulative export volume of apples increased by 2% y/y, while pears declined by 7% y/y. Overall, 2023 apple and pear exports are forecast to decline by 7% and 17% y/y, respectively.
- The bulk of the consignment of apples was shipped to the Far East and Asia (68%) and Africa (18%). South African pears were mainly shipped to the Far East and Asia (67%) and the Russian Federation (29%).
- In week 36-2023, apple and pear volumes inspected and passed for export are down by 4% and 13% y/y, respectively.

# Citrus Exports

Week 37 Million 15kg Cartons	Packed 2022	Packed 2023	Packed Difference y/y	Shipped 2022	Shipped 2023	Shipped Difference y/y	Original Annual Estimate 2023	Latest Annual Prediction 2023	Final Annual Packed 2022
Grapefruit	16.6	14.7	↓ -11%	14.6	13.6	↓ -7%	14.4	14.9	16.7
Soft Citrus	31.1	36.9	↑ 19%	29.7	36.5	↑ 23%	34.1	37.5	31.8
Lemons	34.2	35.4	↑ 4%	33.0	35.3	↑ 7%	37.3	35.9	34.7
Navels	27.1	24.7	↓ -9%	25.7	24.5	↓ -5%	25.3	24.9	27.8
Valencia	49.0	48.6	↓ -1%	38.3	40.8	↑ 7%	54.5	51.0	53.8
Total	158.0	160.3	↑ 1%	141.3	150.7	↑ 7%	165.6	164.2	164.8

### Week 37-2023 exports:

- **Grapefruit** exports declined by 7% y/y to 13.6 million cartons (15kg) in week 37-2023 as the season concludes. The latest annual prediction exceeds the original estimate by 500 000 cartons.
- **Soft citrus** shipments increased by 23% y/y to 36.5 million cartons, exceeding the original estimate of 34.1 million tons. Total exports are expected to increase by almost 18% y/y.
- **Lemon** exports rose by 7% y/y to 35.3 million cartons. While the latest prediction is lower than the original estimate, on a y/y basis, lemon exports are up by 3.5%.
- **Navel** exports declined by 5% y/y to 24.5 million cartons as the bulk of packing has taken place.
- **Valencia** exports rose by 7% y/y to 40.8 million cartons. The latest Valencia prediction dropped by 6.4% from the original estimate of 54.5 million cartons.
- The recent Western Cape floods might result in the export season concluding earlier than expected.

Weekly Volumes 4kg Cartons	SA Exports to EU			EU Imports from the World		
	Week 38	Week 39	w/w Change	Week 38	Week 39	w/w Change
Hass	356 000	294 000	↓ -17%	3 376 000	2 613 000	↓ -23%
Green Skin	101 000	31 000	↓ -69%	364 000	337 000	↓ -7%
<b>Total</b>	<b>457 000</b>	<b>325 000</b>	<b>↓ -29%</b>	<b>3 740 000</b>	<b>2 950 000</b>	<b>↓ -21%</b>

## Week 39-2023 exports:

- In week 39-2023, South Africa's **avocado** exports to the EU market are expected to decrease by 29% w/w to 325 000 cartons (4kg). Hass exports are expected to decrease by 17% w/w to 294 000 cartons, while Green Skin exports are expected to decrease by 69% w/w to 31 000 cartons.
- A total of 2.95 million cartons of avocados should be received by the EU market in week 39-2023. This is a decrease of 21% w/w despite Israeli and Chilean avocados entering the market.
- Peru will remain the dominant exporter to the EU market in week 39-2023, holding a market share of 67% of total exports as their season begins to conclude. South Africa comes in second with a market share of 11%.

## Sources

*Agri-Market Trends.*

*Bureau of Food and Agricultural Policy*

*Citrus Growers Association.*

*Department of Agriculture Land Reform and Rural Development.*

*Fresh Plaza.*

*Hortgro.*

*South African Avocado Growers Association.*

*South African Table Grape Industry.*

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