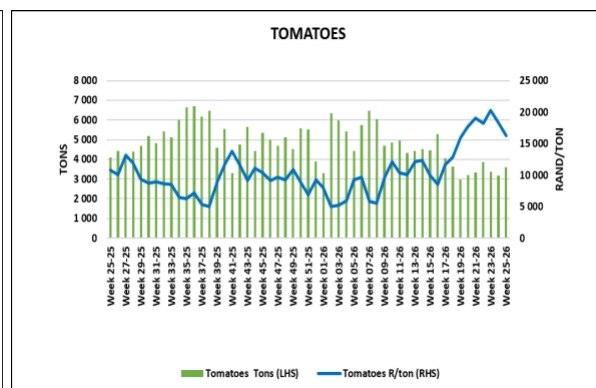
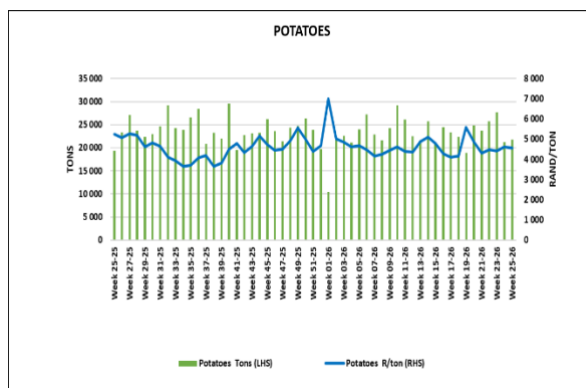




Summary

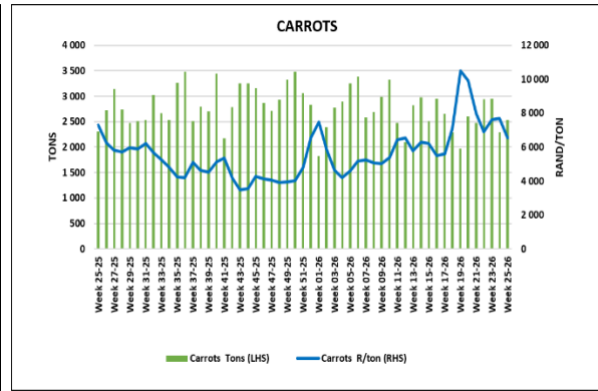
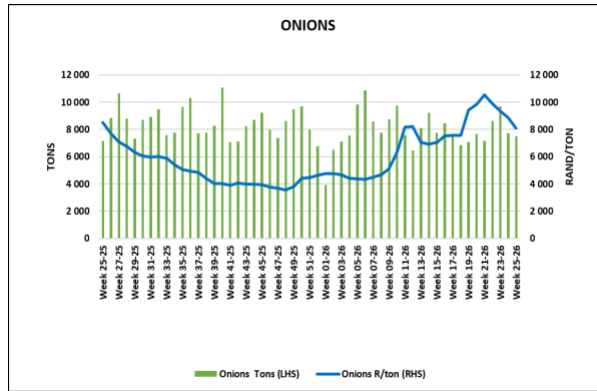
The Fresh Produce Exporters' Forum (FPEF), Hortgro, and the South African Table Grape Industry (SATI) have expressed concern over the 2025 Container Port Performance Index (CPPI), which ranked the Port of Cape Town as the lowest-performing container port globally. While other South African ports, including Durban, Ngqura, and Port Elizabeth, recorded notable improvements, the associations highlighted that Cape Town remains a critical gateway for agricultural exports, handling approximately 80% of South Africa's deciduous fruit shipments and a large volume of other agricultural commodities. Although Transnet's efforts to upgrade infrastructure and equipment were acknowledged, logistical inefficiencies continue to undermine export competitiveness. This comes as producers incurred table grape losses of approximately R3.2 billion and R1.05 billion worth of stone fruit during the 2025/26 season. The associations reiterated the need for sustained collaboration between Transnet, government, and the private sector to improve port performance, strengthen export competitiveness, and support long-term growth, investment, and employment in the agricultural sector.

Potatoes and Tomatoes



- In week 25-2026, **potato** prices declined by 1% week-on-week (w/w) to R4 549/ton from weaker demand and volumes that increased by 2% w/w to 21 745 tons. Prices are expected to remain under pressure over the coming weeks due to weaker demand, ample supplies, and ongoing disruptions around the Johannesburg Fresh Produce Market. However, frosty conditions in Limpopo from the end of July into early August could tighten supply and support prices during September and October 2026.
- **Tomato** prices dipped by 11% w/w to R16 240/ton from sluggish demand and availability that went up by 14% w/w to 3 600 tons. Prices are expected to ease further over the coming weeks as supplies continue to build up and demand remains subdued. Ongoing fresh produce market disruptions may also further weigh on trading activity, increasing the likelihood of a more pronounced decline in prices should larger volumes enter the market.

Onions and Carrots



- **Onion** prices went down by 8% w/w to R8 107/ton on account of weaker demand. Market volumes also declined by 2% w/w to 7 520 tons. Prices are expected to remain under pressure over the coming months as the early Limpopo harvest gains momentum and supplies from the North West are expected to enter the market from July. The anticipated increase in market volumes is likely to weigh on prices possibly up to October 2026.
- **Carrot** prices dipped by 15% w/w to R6 550/ton on the back of diminishing demand and market volumes that increased by 10% w/w to 2 531 tons. Prices are expected to trend lower over the next month or two as supplies increase and demand remains muted.

Fruit Trends on all NFPMs in South Africa

Commodity	Rand per ton		% change (w/w)	Ton		% change (w/w)
	Week ending			Week ending		
	12 Jun	19 June		12 Jun	19 June	
Apples	9 240	9 360	↑ 1%	2 447	2 378	↓ -3%
Pears	9 630	9 590	↓ -0.4%	679	654	↓ -4%
Bananas	8 040	7 550	↓ -6%	5 025	5 081	↑ 1.1%
Oranges	2 620	2 320	↓ -11%	5 278	6 275	↑ 19%
Avocados	16 120	16 510	↑ 2%	553	579	↑ 5%

- **Apples** went up by 1% w/w to R9 360/ton on better demand and availability that dipped by 3% w/w. Prices could gain further momentum from August as local market volumes begin to decline.
- **Pear** prices dipped marginal by 0.4% w/w to R9 590/ton from slower demand. Supply also decreased by 4% w/w. Prices are likely to remain bearish this week as higher volumes enter the market and demand remains subdued.
- **Banana** prices dipped by 6% w/w to R7 550/ton driven by softer demand and a 1.1% w/w increase in supply. Ongoing protests and disruptions are expected to keep demand subdued and create uncertainty among buyers over the coming weeks.
- **Orange** prices declined by 11% w/w to R2 320/ton due to subdued demand and volumes that surged by 19% w/w. Prices are expected to remain low this week due to harvesting pressure. However, stronger export demand could help reduce domestic volumes and provide some support to prices over the coming months.
- **Avocado** prices increased by 2% w/w to R16 510/ton due to a recovery in demand. Market supply also increased by 5% w/w. Prices are expected to trade sideways over the next month, remaining close to current levels as market conditions remain relatively balanced.

Avocado Exports

Weekly Volumes 4kg Cartons	SA Exports to EU			EU Imports from the World		
	Week 26	27	w/w Change	Week 26	27	w/w Change
Hass	53 000	362 000	↑ 583%	5 046 000	5 933 000	↑ 18%
Green Skin	37 000	276 000	↑ 646%	500 000	521 000	↑ 4%
Total	90 000	638 000	↑ 609%	5 546 000	6 454 000	↑ 16%

Week 27-2026 exports:

- South Africa's avocado exports to the EU market are forecast to surge by 609% w/w to 638 000 cartons (4 kg) in week 27-2026. Hass and Green Skin exports are projected to soar by 583% and 646% to 362 000 and 276 000 cartons, respectively.
- The EU's avocado imports from the world are forecast to go up by 16% w/w to 6.5 million cartons, due to an increase in both Hass and Green Skin imports.
- In week 27-2026, Peruvian shipments are expected to maintain their spot as the top supplier to the EU market, with a total of 4.8 million cartons and a 75% market share. South Africa followed with a market share of 10%. According to Avobook, last week, avocado prices in both the EU and the US came under pressure due to ample supplies from Peru.

Citrus fruit Exports

Week 25 Million 15kg Cartons	Packed 2025	Packed 2026	Packed Difference y/y	Shipped 2025	Shipped 2026	Shipped Difference y/y	Original Annual Estimate 2026	Latest Annual Prediction 2026	Final Annual Packed 2025	Y/Y change
Grapefruit	10.9	11.3	↑ 4%	9.4	10.4	↑ 11%	17.8	16.8	15.3	9.8%
Soft Citrus	17.6	16.1	↓ -9%	12.7	14.3	↑ 13%	52.7	49.4	53.5	-7.7%
Lemons	22.8	32.1	↑ 41%	20.3	28.1	↑ 38%	45.9	49.4	41.6	18.8%
Navels	10.9	8.5	↓ -22%	6.0	6.2	↑ 3%	30.0	26.8	31.6	-15.2%
Valencia	3.5	1.5	↓ -57%	1.4	0.5	↓ -64%	63.0	62.6	62.0	1.0%
Total	65.7	69.5	↑ 6%	49.8	59.5	↑ 19%	209.4	205.0	204.0	0.5%

Week 25-2026 exports:

- **Grapefruit** exports increased by 11% y/y to 10.4 million cartons (15 kg). The latest grapefruit estimate is now 5.6% lower than the original estimate.
- **Soft citrus** shipments went up by 13% y/y to 14.3 million cartons. The latest soft citrus prediction is now 6.3% lower than the original estimate.
- **Lemon** exports shot up by 38% y/y to 28.1 million cartons. The latest lemon prediction is now 7.6% higher than the original estimate.
- **Navel** exports increased by 3% y/y to 6.2 million cartons. The latest Navel prediction is now 10.7% lower than the original estimate. **Valencia** exports dropped by 64% y/y to 500 000 cartons. The latest Valencia prediction is now 0.6% lower than the original estimate.
- The latest total annual citrus prediction is now 2.1% lower than the original estimates of 209.4 million cartons. The downward revisions are due to the recent severe flooding in major citrus producing regions, which caused significant damage to orchards, roads, bridges, and other critical infrastructure. This resulted in crop losses and disruptions to harvesting and transport operations.

Sources

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South African Table Grape Industry.

South African Wine.

Subtrop.

Vinpro

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