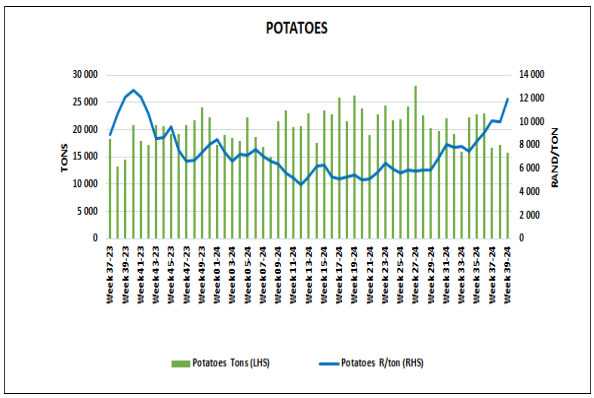
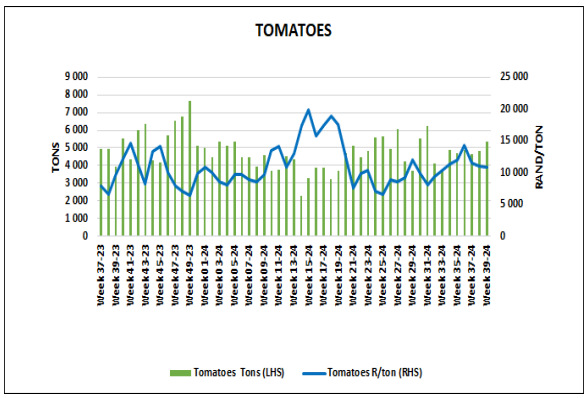
Summary

Earlier this week, the South African Table Grape Association (SATI) released its 2024/25 export crop estimate. Table grape volumes inspected for export are projected to increase by approximately 1% in comparison to the 2023/24 inspected volumes. This figure also represents a 6% increase on the five-year average volume. An export crop of 76.4 million cartons (4.5kg) is estimated, with the upper and lower limits expected at approximately 78.7 and 74.1 million cartons, respectively. With regards to the crop's quality, cold temperatures that were experienced in most production areas during the recent winter season should support the production of a good quality crop. The rainfall received during the winter months increased dam levels which provided sufficient water for normal berry development. As the citrus export season winds down, the trend of downward revisions to Valencia and Navel orange exports has been quite noticeable. This comes on the back of unseasonal rainfall and flooding in the Western Cape, less chill units and incidences of creasing in the Eastern Cape, as well as the severe cold in the Northern producing regions. Orange juice prices have been attractive of late due to lower supplies from the global industry leader Brazil. Juice prices are projected to remain high in the short- to medium-term. As a result, South African producers and exporters are taking advantage of the situation as it reduces their shipping and packaging costs by diverting more oranges to local processing.

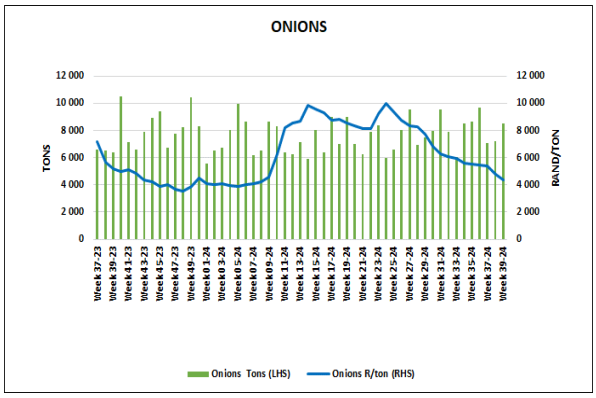
Potatoes and Tomatoes

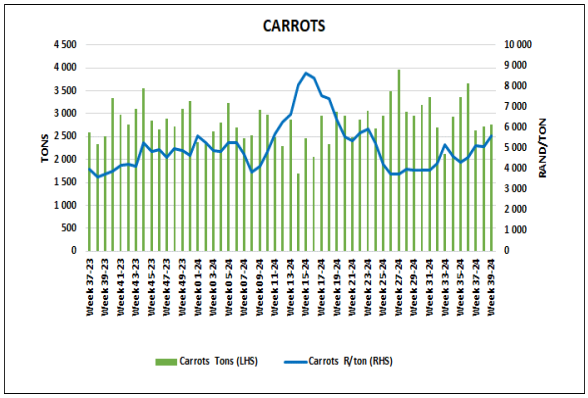




- In week 39-2024, **potato** prices increased by 19% week-on-week (w/w) to R11 919/ton due to a 9% w/w decline in market volumes to 15 702 tons. Prices are expected to trend higher in the coming week as the effect of the Limpopo black frost on potato volumes becomes apparent.
- **Tomato** prices decreased by 2% w/w to R10 800/ton on the back of increased volumes. Volumes rose by 11% w/w to 5 376 tons. Prices are expected to trend lower in the coming week due to higher expected market supply, but October month end demand may result in an uptick in prices.

Onions and Carrots





- **Onion** prices declined by 9% w/w to R4 380/ton due to higher availability. Market supply rose by 17% w/w to 8 493 tons. Prices should remain flat over the coming weeks but could descend towards the end of the year.
- **Carrot** prices increased by 10% w/w to R5 580/ton on the back of higher consumer demand. Market volume increased by 2% w/w to 2 768 tons. Prices are expected to trend upwards in the coming week as higher demand is expected to persist.

Fruit Trends on all NFPMs in South Africa

Commodity	Rand per ton		% change (w/w)	Ton		% change (w/w)
	Week ending			Week ending		
	20 Sep	27 Sept		20 Sep	27 Sept	
Apples	11 310	11 300	↓ -0.1%	2 872	2 435	↓ -15%
Pears	10 970	10 830	↓ -1%	784	666	↓ -15%
Bananas	9 880	9 690	↓ -2%	4 745	4 614	↓ -3%
Oranges	7 320	7 470	↑ 2%	952	821	↓ -14%
Avocados	22 830	22 570	↓ -1%	393	446	↑ 13%

- **Apple** prices decreased marginally by 0.1% w/w to R11 300/ton due to lower demand. Volumes supplied to the market also declined by 15% w/w to 2 435 tons. However, bullish prices are generally expected over the coming months.
- **Pear** prices decreased by 1% w/w at R10 830/ton due to lower demand. Market volumes also declined by 15% w/w to 666 tons. Similar to applies, bullish pear prices can be expected over the following months.
- **Banana** prices decreased by 2% w/w to R9 690/ton due to lower demand. Market volumes also declined by 3% w/w to 4 614 tons. Prices are expected to trend upwards for the remainder of the year.
- **Orange** prices increased by 2% w/w to R7 470/ton as market supply declined by 14% w/w. Prices are expected to trend upwards until February 2025 as the 2024 season comes to an end.
- **Avocado** prices decreased by 1% w/w to R22 570/ton due to a 13% w/w increase in market volumes to 446 tons. Prices are expected to remain elevated until January 2025 as the 2024 season winds down.

Pome Fruit Exports

Week 36 Weekly Volumes 12.50 kg Cartons	2023 Exports (a)	2024 Exports (b)	y/y Change (a/b)	Cumulative Volumes YTD 2023 (c)	Cumulative Volumes YTD 2024 (d)	y/y Change (c/d)
Apples	676 982	844 602	25%	33 157 328	35 483 136	7%
Pears	174 791	246 679	41%	15 887 438	17 063 383	7%

Week 36-2024 exports: (No Update)

- South Africa exported 844 602 cartons (12.5kg) of **apples** in week 36-2024, up by 25% y/y. **Pear** exports followed suit, increasing by 41% y/y to 246 679 cartons. The cumulative export volumes of apples and pears are both up by 7% y/y, respectively.
- The bulk of the consignment of apples was shipped to the Far East and Asia (57%) and Africa (27%). South African pears were mainly shipped to the Far East and Asia (61%) and the Russian Federation (20%).
- 2024 apple exports are forecast to increase by 8% y/y and pears by 5% y/y.

Avocado Exports

Weekly Volumes 4kg Cartons	SA Exports to EU			EU Imports from the World		
	Week 39	Week 40	w/w Change	Week 39	Week 40	w/w Change
Hass	321 000	447 000	39%	4 011 000	3 770 000	-6%
Green Skin	59 000	90 000	53%	508 000	531 000	5%
Total	**380 000**	**537 000**	**41%**	**4 519 000**	**4 301 000**	**-5%**

Week 40-2024 exports:

- South Africa's **avocado** exports to the EU market are forecast to increase by 41% w/w to 537 000 cartons (4kg) in week 40-2024. Hass exports may increase by 39% w/w to 447 000 cartons, while Green Skins are expected to rise by 53% w/w to 90 000 cartons. Henceforth, volumes will start to decline as the season comes to an end.
- EU avocado imports from the world are forecast at 4.3 million cartons in week 40-2024. This is a 5% decrease w/w as the Peruvian export season also starts to taper down. Thus far, Chilean exports into the EU have slowed down, but they are expected to pick up and dominate the EU market as Peru and South Africa make their seasonal exits.

Citrus Exports

Week 38 Million 15kg Cartons	Packed 2023	Packed 2024	Packed Difference y/y	Shipped 2023	Shipped 2024	Shipped Difference y/y	Original Annual Estimate 2024	Latest Annual Prediction 2024	Final Annual Packed 2023
Grapefruit	14.6	**14.4**	↓ **-1%**	13.7	**14.0**	↑ **2%**	**16.8**	**14.5**	14.7
Soft Citrus	38.0	**41.5**	↑ **9%**	37.0	**40.4**	↑ **9%**	**43.0**	**41.7**	38.0
Lemons	35.6	**34.7**	↓ **-3%**	35.4	**33.7**	↓ **-5%**	**37.9**	**34.8**	35.6
Navels	24.8	**25.1**	↑ **1%**	24.6	**23.9**	↓ **-3%**	**25.7**	**25.1**	24.8
Valencia	51.2	**47.1**	↓ **-8%**	45.2	**43.8**	↓ **-3%**	**58.3**	**48.7**	52.0
Total	**164.2**	**162.8**	↓ **-1%**	**155.9**	**155.8**	↓ **-0.1%**	**181.7**	**164.8**	**165.1**

Week 38-2024 exports:

- **Grapefruit** exports rose by 2% y/y to 14 million cartons (15kg). The latest grapefruit prediction is now 14% lower than the original estimate and the industry has reached the end of its season.
- **Soft citrus** shipments increased by 9% y/y to 40.4 million cartons. The latest soft citrus prediction is 3% lower than the original estimate.
- **Lemon** exports decreased by 5% y/y to 33.7 million cartons. The latest lemon prediction was revised downwards by 8.2% from the original estimate and the lemon season has ended.
- **Navel** exports declined by 3% y/y to 23.9 million cartons and the latest prediction is now 2.3% lower than the original estimate of 25.7 million cartons.
- **Valencia** exports were also down by 3% y/y to 43.8 million cartons. The latest Valencia prediction is now 16.5% lower than the original estimate of 58.3 million cartons.
- Overall, total citrus exports for week 38-2024 declined by 0.1% y/y as the season comes to an end. The latest annual prediction for total citrus exports is for a decline by 9% y/y to 164.8 million cartons, primarily due to a 10.2 million carton reduction in orange exports.

Sources

Agri-Market Trends.

AVOBOOK

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South African Table Grape Industry.

Subtrop.

South African Wine.

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