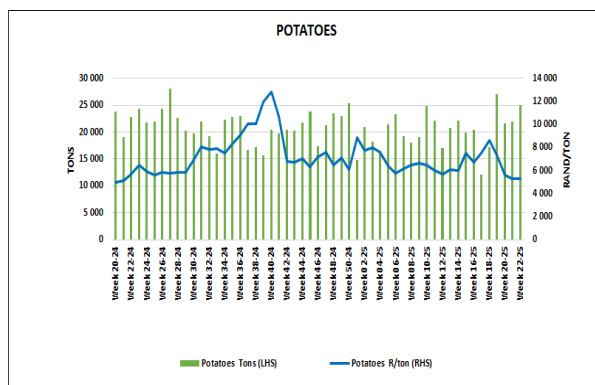




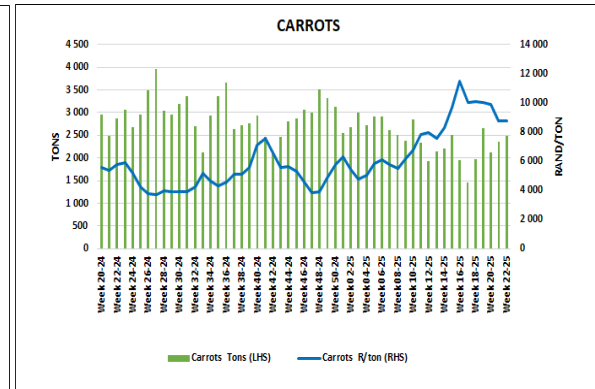
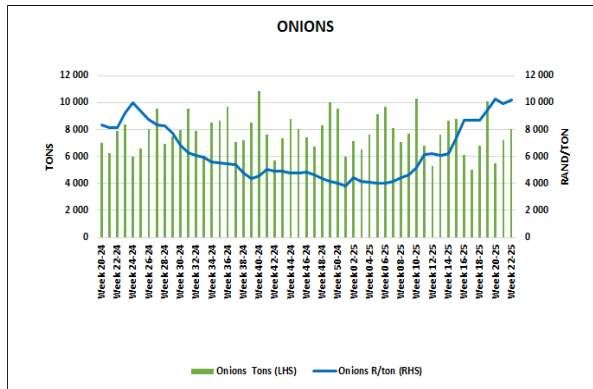
## Summary

Growing popularity of functional foods and active lifestyles among middle-income consumers has been increasing the demand for dried cranberries and cranberry juice in South Africa. However, South Africa does not produce cranberries at a commercial scale and practically relies entirely on imports, mainly from North American countries. Exports of cranberry juice from the US to South Africa have been growing robustly. They increased by over 40% year-on-year (y/y) in 2024, and the five-year average growth rate has been 6.8% per annum. Over the next five years, the United States Department of Agriculture (USDA) forecasts steady growth in US exports to South Africa of dried cranberries and cranberry juice at 3% and 7% per annum, respectively. Despite the overall challenging economic environment, health and wellness concerns remain a priority and continue to influence consumer behaviour. This trend is projected to continue to drive the focus towards healthier eating options. South Africa does not currently have special import requirements for processed cranberries from the US, but it imposes a 5% tariff on prepared/dried cranberries and a 20% tariff on cranberry juice (concentrated, not containing added sugar or other sweetening matter, of a Brix value exceeding 45). South Africa does not currently allow imports of fresh cranberries from the US.

## Potatoes and Tomatoes



# Onions and Carrots



- **Onion** prices rose by 3% w/w to R10 176/ton on the back of higher consumer demand, even as market supply rose by 11% w/w to 8 003 tons. Prices are expected to remain firm for the rest of the month due to lower supplies.
- **Carrot** prices remained flat w/w at R8 760/ton. This came as higher consumer demand was offset by a 5% w/w increase in market volumes to 2 476 tons. Prices are expected to decline further in June and July 2025 due to higher expected market volumes.

## Fruit Trends on all NFPMs in South Africa

Commodity	Rand per ton		% change (w/w)	Ton		% change (w/w)
	Week ending			Week ending		
	23 May	30 May		23 May	30 May	
Apples	9 910	9 530	🔴 -4%	2 846	3 027	🟢 6%
Pears	9 040	9 060	🟢 0.2%	914	926	🟢 1%
Bananas	8 690	7 650	🔴 -12%	4 926	5 297	🟢 8%
Oranges	4 670	4 130	🔴 -12%	3 808	4 367	🟢 15%
Avocados	16 480	15 490	🔴 -6%	582	704	🟢 21%

- **Apple** prices declined by 4% w/w to R9 530/ton from lower demand, while market volumes expanded by 6% w/w. Prices are expected to trend lower for the rest of this month.
- **Pear** prices rose marginally by 0.2% w/w to R9 060/ton supported by higher consumer demand. Market volumes went up by 1% w/w. Bearish prices are expected for the rest of this month.
- **Banana** prices decreased by 12% w/w to R7 650/ton due to subdued demand. Market volumes also increased by 8% w/w. Prices may remain under pressure for the next three months due to higher expected market volumes.
- **Orange** prices decreased by 12% w/w to R4 130/ton on the back of weaker demand and a surge in market supply by 15% w/w. Bearish prices are anticipated over the following weeks as Valencia oranges come into harvest.
- **Avocado** prices decreased by 6% w/w to R15 490/ton due to lower consumer demand and market volumes that rose by 21% w/w. Prices are forecast to recover for the rest of June and July 2025 based on seasonal trends.

# Citrus Exports

Week 21 Million 15kg Cartons	Packed 2024	Packed 2025	Packed Difference y/y	Shipped 2024	Shipped 2025	Shipped Difference y/y	Original Annual Estimate 2025	Latest Annual Prediction 2025	Final Annual Packed 2024
Grapefruit	8.8	8.6	↓ -2%	6.2	7.3	↑ 18%	15.3	15.1	14.4
Soft Citrus	9.9	10.0	↑ 1%	6.3	7.0	↑ 11%	44.9	44.9	41.6
Lemons	15.9	16.9	↑ 6%	12.3	14.8	↑ 20%	32.9	33.2	34.7
Navels	4.0	3.2	↓ -20%	1.3	1.7	↑ 31%	26.1	26.0	25.1
Valencia	-	0.2	-	-	-	-	52.0	52.0	48.8
Total	38.6	38.9	↑ 1%	26.1	30.8	↑ 18%	171.2	171.2	164.6

## Week 21-2024 exports:

- **Grapefruit** exports rose by 18% y/y to 7.3 million cartons (15 kg). The latest grapefruit prediction has declined by 1.3% from the original estimate.
- **Soft citrus** shipments increased by 11% y/y to 7 million cartons. The latest soft citrus prediction is on par with the original estimate.
- **Lemon** exports increased by 20% y/y to 14.8 million cartons. The latest lemon prediction remains 1% higher than the original estimate.
- **Navel** exports rose by 31% y/y to 1.7 million cartons. **Valencia** export data will be released once exports begin. Overall, the latest Navel orange prediction is 0.4% lower than the original estimate.
- **Total citrus** exports for week 21-2025 rose by 18% y/y, while the 2025 export estimates is projected to increase by 4% y/y. Production in the Northern regions is now at the peak of the season, with Valencia orange production expected to peak around week 28-36. In the Central

# Avocado Exports

Weekly Volumes 4kg Cartons	SA Exports to EU			EU Imports from the World		
	Week 22	Week 23	w/w Change	Week 22	Week 23	w/w Change
Hass	387 000	532 000	↑ 37%	4 968 000	4 539 000	↓ -9%
Green Skin	263 000	273 000	↑ 4%	750 000	848 000	↑ 13%
Total	650 000	805 000	↑ 24%	5 718 000	5 387 000	↓ -6%

## Week 23-2025 exports:

- South Africa's **avocado** exports to the EU market are forecast to increase by 24% w/w to 805 000 cartons (4 kg) in week 23-2025. Hass exports are estimated to rise by 37% w/w to 532 000 cartons. Green Skin exports are projected to rise by 4% w/w to 273 000 cartons.
- The EU's avocado imports from the world are forecast to decrease by 6% w/w to 5.38 million cartons on the back of an 8% w/w decrease in Peruvian Hass exports.
- In week 22-2025, Peru had the dominant market share in the EU market of 75% of total avocado exports. South Africa followed with a share of 8%. According to Avobook, the average EU avocado price in week 22-2025 was US\$2.57/kg, this marks a decline of 13.5% w/w.

## **Sources**

*Agri-Market Trends.*

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