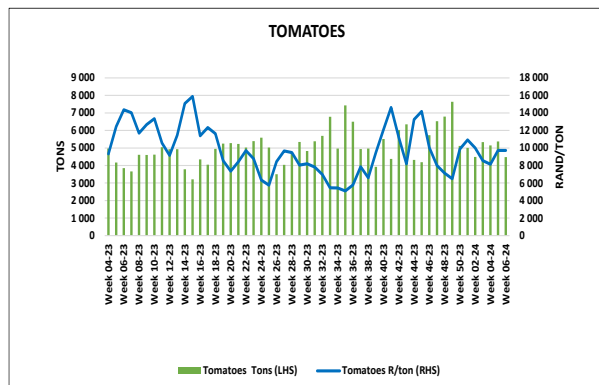
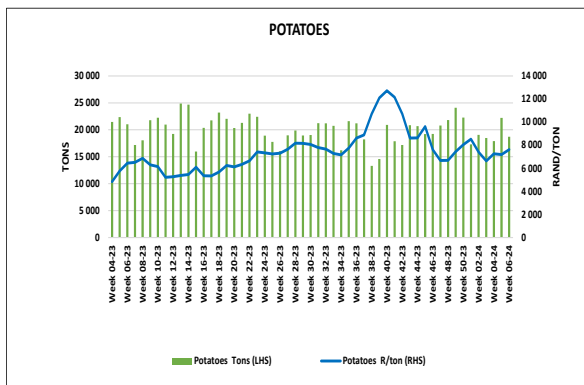




# Summary

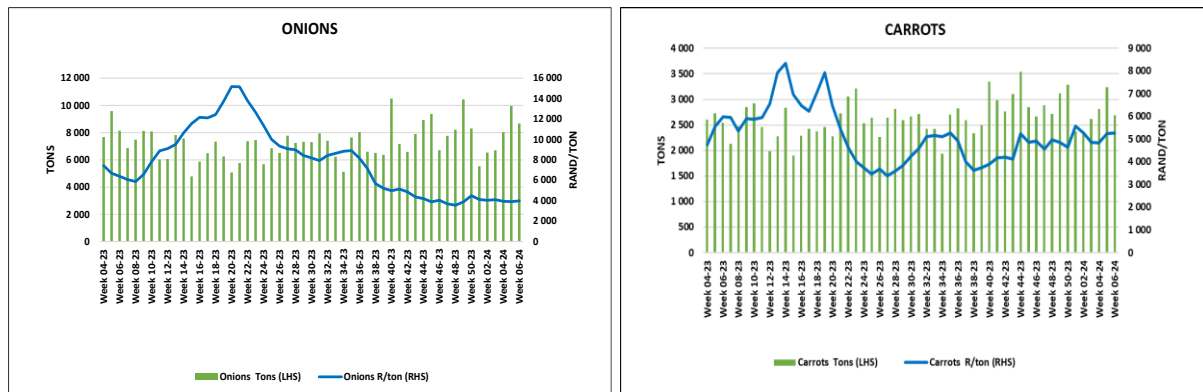
The Western Cape province has been grappling with extreme heat, dry winds, and wildfires since the beginning of December 2023. The area that was most adversely impacted by these fires was Wolseley in the upper Breede River Valley region. The Western Cape Department of Agriculture (WCDoA) has reported that it has been dealing with the challenges of containing flare ups and estimating the total damage to farmers. The WCDoA has also requested these fires to be declared a national state of disaster to assist in getting aid to those that have been impacted timeously. South Africa's 2023/24 blueberry exporting season has started to wind down. In week 05-2024 (week five of 2024), cumulative year-to-date (YTD) exports amounted to 21 212 tons, a decrease of almost 13% year-on-year (y/y). The lower exportable volume is due to heavy rainfall, logistical delays, and loadshedding. Approximately 44% of blueberries are exported by airfreight while the balance is shipped. Major export markets include the European Union (47%), the United Kingdom (35%), and the Middle East (10%). Blueberry producers and exporters had a chance to partially recover this season due to weather-related setbacks that beset Peru's exporting season.

# Potatoes and Tomatoes



- In week 06-2024, **potato** prices increased by 6% week-on-week (w/w) to R7 614/ton. This was due to high demand and supply that declined by 16% w/w to 18 722 tons. Prices are expected to remain bullish this month and probably decline next month when volumes are expected to rise.
- **Tomato** prices remained flat w/w at R9 720/ton due to slow demand. Prices receded even though market volumes tightened by 17% w/w to 4 476 tons. Prices are expected to remain subdued for the duration of this month.

# Onions and Carrots



- **Onion** prices rose by 2% w/w to R3 988/ton on tighter market volumes and increased demand. Supply contracted by 13% w/w to 8 668 tons. Prices are expected to trend downwards for the remainder of this month, then pick up in the next month.
- **Carrot** prices remained relatively flat w/w at R5 280/ton mostly due to muted demand. Supply decreased by 17% w/w to 2 691 tons. Going forward, prices are expected to begin to firm until April 2023.

## Fruit Trends on all NFPMs in South Africa

Commodity	Rand per ton		% change (w/w)	Ton		% change (w/w)
	Week ending			Week ending		
	02 Feb	09 Feb		02 Feb	09 Feb	
<b>Apples</b>	9 460	10 240	↑ 8%	3 410	2 789	↓ -18%
<b>Pears</b>	7 490	7 690	↑ 3%	1 168	1 119	↓ -4%
<b>Bananas</b>	5 840	6 630	↑ 14%	8 469	7 240	↓ -15%
<b>Oranges</b>	13 760	12 500	↓ -9%	149	115	↓ -23%
<b>Avocados</b>	24 060	23 410	↓ -3%	317	300	↓ -5%

- **Apple** prices increased by 8% w/w to R10 240/ton on higher demand and lower volumes. Prices may trend downwards in the coming weeks as local production is expected to increase.
- **Pear** prices increased by 3% w/w to R7 690/ton due to higher demand and availability that dropped by 4% w/w. Prices are expected to stabilise at lower levels over the short-term as production steadily increases.
- **Banana** prices increased by 14% w/w to R6 630/ton from volumes that declined by 15% w/w. Prices are expected to then move sideways this month as volumes are stabilising.
- **Orange** prices decreased by 9% w/w to R12 500/ton. This was due to lower demand despite the market experiencing lower supply. Prices may spike in the next two weeks due to increased demand, however, prices should return to lower levels thereafter as per seasonal trend.
- **Avocado** prices decreased by 3% w/w to R23 410/ton. This came as a decline in consumer demand outpaces that of supply. Market volumes decreased by 5% w/w. Prices are expected to trend downwards as the new season is expected to begin around March 2023.

# Pome Fruit Exports

Week 05 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	278 628	205 994	↓ -26%	1 156 250	637 682	↓ -45%
Pears	652 561	1 394 268	↑ 114%	1 544 222	2 132 675	↑ 38%

## Week 05-2024 exports:

- South Africa exported 205 994 cartons (12.5kg) of **apples** in week 05-2024, a decrease of 26% y/y. **Pear** exports surged by 114% y/y to 1.39 million cartons. The cumulative export volume of apples declined by 45% y/y while that of pears rose by 38% y/y.
- The bulk of the consignment of apples was shipped to Africa (48%) and the Far East and Asia (36%). South African pears were mainly shipped to the Middle East (36%), the European Union (EU) (24%), and the Russian Federation (29%).
- 2024 pome fruit exports are expected to increase by 5% y/y to 65.1 million cartons, supported by much-improved weather conditions and younger trees coming into production.

# Stone Fruit Exports

Weekly Volumes Week 06	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)
Apricots (4.75 kg carton)	8 089	1 863	↓ -77%	565 578	448 149	↓ -21%
Nectarines (2.5 kg carton)	421 490	784 924	↑ 86%	5 466 860	6 281 632	↑ 15%
Peaches (2.5 kg carton)	37 020	47 875	↑ 29%	1 662 225	1 370 966	↓ -18%
Plums/Prunes (5.25 kg carton)	679 692	748 855	↑ 10%	6 326 577	5 797 619	↓ -8%
Cherries (2.5 kg carton)	0	0	-	312 622	285 892	↓ -9%

## Week 06-2024 exports:

- **Apricot** exports declined by 77% y/y to 1 863 cartons (4.75kg) as the season winds down. About 91% of the consignment was shipped to the EU.
- **Nectarine** exports rose by 86% y/y to 784 924 cartons (2.5kg) as the late season varieties come into production. Cumulative exports increased by 15% y/y to 6.28 million cartons YTD. Major export markets included the EU (61%) and the United Kingdom (UK) (21%).
- **Peach** exports increased by 29% y/y to 47 875 cartons (2.5kg). Total cumulative volumes are estimated to decline by 18% y/y to 1.371 million cartons YTD. Main export markets included the UK (37%) and the Middle East (35%).
- **Plum** exports rose by 10% y/y to 748 855 million cartons (5.25kg). Most of the volume was shipped to the EU (67%), the UK (9%), and the Middle East (13%). Based on seasonal trends, in week 11-2024 exports are expected to spike as the late season varieties come into production.
- **Cherry** exports ended in week 03-2024 with cumulative exports decreasing by 9% y/y to 285 892 cartons (2.5kg).

## **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.*

*Subtrop.*

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