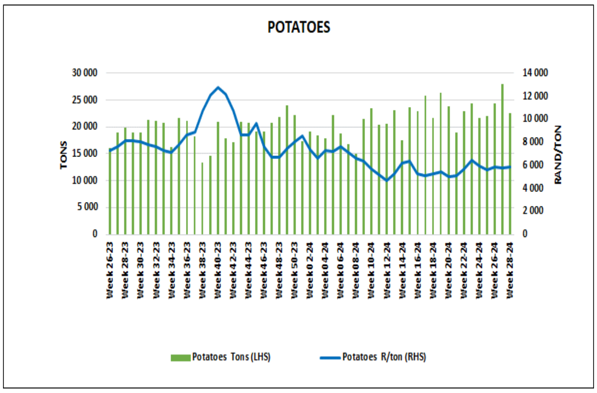
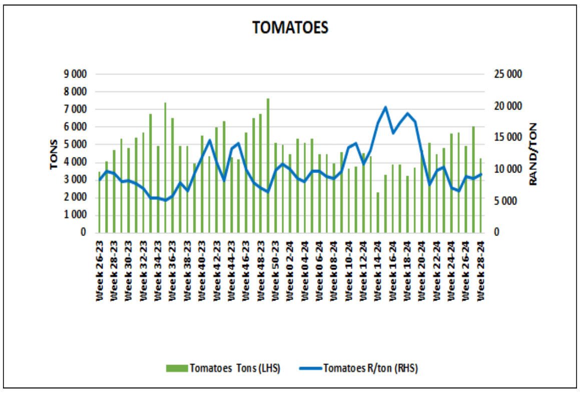
Summary

The cold front that made landfall early last week brought heavy rainfall that caused flooding in various parts of the Western Cape province. The Citrusdal area was severely impacted and most access routes to the town remain closed, according to the latest update provided by the Western Cape Department of Infrastructure. With roads either under water or washed away, residents and fruit flow are cut off from the rest of the province. Citrusdal is one of the major citrus growing regions of the Western Cape. While no official damage report has been issued, there are reports of residents being displaced and waterlogged citrus orchards. In Limpopo, frost damage has been reported in some vegetables and citrus fruit in the low-lying orchards and fields of the Limpopo River Valley. As a result, vegetable prices on some fresh produce markets are expected to increase in the short-term due to tighter supply. Macadamia South Africa (SAMAC) has revised its crop estimate for the 2024 season. The March 2024 crop estimate was pinned at 90 135 tons of dry nut-in-shell (DNIS) at 1.5% moisture content (MC). According to SAMAC, the March figure was optimistic and a 15% downward adjustment to 76 753 tons DNIS at 1.5% MC was in order.

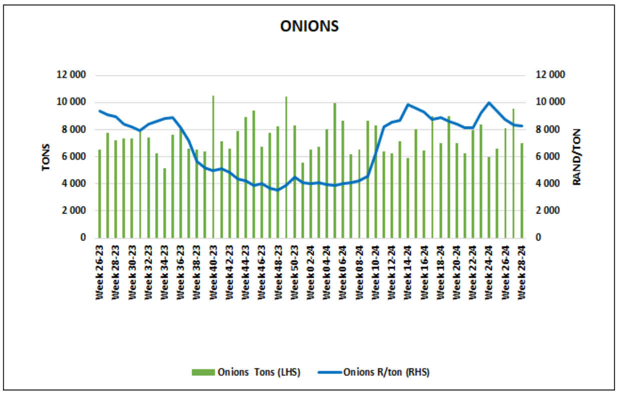
Potatoes and Tomatoes

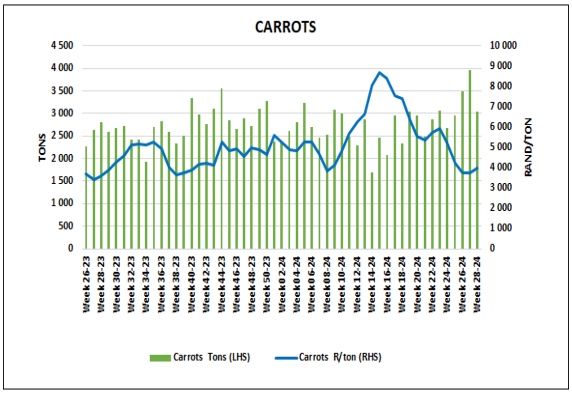




- In week 28-2024, **potato** prices increased marginally by 0.9% week-on-week (w/w) to R5 851/ton due to higher mid-winter demand. Volumes declined by 20% w/w to 22 562 tons. The severe frost that affected parts of Limpopo is expected to impact potato yields. This may keep prices high in the short-term and possibly see them reaching record highs of above R12 000/ton.
- **Tomato** prices increased by 8% w/w to R9 240/ton on the back of higher consumer demand and tighter market volumes. Supply decreased by 31% w/w to 4 228 tons. While not as severe as damage to potatoes, tomatoes grown in Limpopo were also impacted by frost. This is expected to keep prices high in the short-term due to reduced availability.

Onions and Carrots





- **Onion** prices declined by 1% w/w to R8 251/ton due to lower demand. Market supply also declined by 27% w/w to 6 969 tons. Prices are expected to maintain this bearish trend for the next three months.
- **Carrot** prices increased by 6% w/w to R3 970/ton on the back of increased demand. Market volumes decreased by 23% w/w to 3 033 tons. Prices are expected to come under pressure until October 2024 due to higher market deliveries. However, prices might temporarily recover towards the end of this month from higher consumer demand.

Fruit Trends on all NFPMs in South Africa

Commodity	Rand per ton		% change (w/w)	Ton		% change (w/w)
	Week ending			Week ending		
	05 Jul	12 Jul		05 Jul	12 Jul	
Apples	8 520	8 680	2%	3 140	2 840	-10%
Pears	9 570	9 760	2%	752	669	-11%
Bananas	6 750	7 350	9%	7 089	5 700	-20%
Oranges	4 400	5 340	21%	4 525	3 020	-33%
Avocados	14 400	15 150	5%	843	607	-28%

- **Apple** prices increased by 2% w/w to R8 680/ton from higher demand and market supply that declined by 10% w/w. Prices are expected to remain flat over the short-term.
- **Pear** prices increased by 2% w/w to R9 760/ton due to a rise in consumer demand. Market volumes also declined by 11% w/w. Prices are expected to remain firm over the short-term.
- **Banana** prices increased by 9% w/w to R7 350/ton due to higher demand. Market volumes dropped by 20% w/w. Prices are expected to move sideways for the rest of this month.
- **Orange** prices rose by 21% w/w to R5 340/ton due to higher demand and market supply that decreased by 33% w/w. Prices are expected to remain largely unchanged, with expectations of a recovery in September 2024.
- **Avocado** prices increased by 5% w/w to R15 150/ton due to increased demand. Market volumes decreased by 28% w/w. Prices are expected to remain at current levels due to higher expected market volumes, with the possibility of an increase in October 2024.

Pome Fruit Exports

Week 24 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	1 021 443	1 825 663	79%	22 208 026	24 448 480	10%
Pears	252 127	320 982	27%	12 856 786	14 255 076	11%

Week 24-2024 exports: (No update from Hortgro)

- South Africa exported 1.83 million cartons (12.5 kg) of **apples** in week 24-2024, increasing by 79% y/y. **Pear** exports increased by 27% y/y to 320 982 cartons. The cumulative export volumes of apples and pears rose by 10% and 11% y/y, respectively.
- The bulk of the consignment of apples was shipped to the Far East and Asia (22%), the Russian Federation (21%), the Middle East (20%), and Africa (20%). South African pears were mainly shipped to the Middle East (33%), the Russian Federation (25%), and the Far East and Asia (20%).
- 2024 projections are for apple exports to increase by 6% y/y and pears by 3% y/y.

Avocado Exports

Weekly Volumes 4kg Cartons	SA Exports to EU			EU Imports from the World		
	Week 28	Week 29	w/w Change	Week 28	Week 29	w/w Change
Hass	587 000	503 000	-14%	4 907 000	5 096 000	4%
Green Skin	317 000	235 000	-26%	539 000	400 000	-26%
Total	**904 000**	**738 000**	**-18%**	**5 446 000**	**5 496 000**	**1%**

Week 29-2024 exports:

- South Africa's **avocado** exports to the EU market are expected to decline by 18% w/w to 738 000 cartons (4 kg) in week 29-2024 based on seasonal trends. Hass exports will decrease by 14% w/w to 503 000 cartons, while Green Skins are expected to decline by 26% w/w to 235 000 cartons.
- A total of 5.49 million cartons of avocados will be received by the EU market in week 29-2024. This is a 1% increase w/w as Peruvian Hass exports remain on an upward trend this month.
- Peru will remain the dominant exporter to the EU market in week 29-2024, with a total of 3.53 million cartons expected to get shipped, making this a market share of 65% of total EU imports. In week 28-2024, the EU received the largest number of avocados for the season. A total of 940 containers were shipped. In the United States, Mexico has regained market share to reach 45%, displacing Californian avocados at 28%.

Citrus Exports

Week 27 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	11.6	**12.3**	**6%**	10.4	**10.7**	**3%**	**16.8**	**14.5**	14.7
Soft Citrus	20.4	**20.0**	**-2%**	15.9	**15.3**	**-4%**	**43.0**	**42.7**	38.0
Lemons	28.8	**26.3**	**-9%**	24.6	**21.5**	**-13%**	**37.9**	**35.1**	35.6
Navels	15.6	**14.2**	**-9%**	11.1	**10.6**	**-5%**	**25.7**	**21.6**	24.8
Valencia	9.1	**7.4**	**-19%**	5.1	**3.6**	**-29%**	**58.3**	**54.3**	52.0
Total	**85.5**	**80.2**	**-6%**	**67.1**	**61.7**	**-8%**	**181.7**	**168.2**	**165.1**

Week 27-2024 exports:

- **Grapefruit** exports rose by 3% y/y to 10.7 million cartons (15 kg). The latest grapefruit prediction remains 14% lower than the original estimate.
- **Soft citrus** shipments decreased by 4% y/y to 15.3 million cartons. The latest soft citrus prediction remains unchanged at 42.7 million cartons.
- **Lemon** exports decreased by 13% y/y to 21.5 million cartons. The latest lemon prediction has decline by 7% to 35.1 million cartons from the original estimate.
- **Navel** exports declined by 5% y/y to 10.6 million cartons, while the latest Navel prediction dropped by 16% from the original estimate of 25.7 million cartons.
- **Valencia** exports were down by 29% y/y to 3.6 million cartons. The latest Valencia prediction is almost 7% lower than the original estimate of 58.3 million cartons.
- Overall, total citrus exports for week 27-2024 declined by 8% y/y due to the cold front that recently made landfall in the Western Cape and limited port activity. The total citrus export projection is 7% lower than the original estimate of 181.7 million cartons. It may come under further downward revision due to the impact of the unfavourable weather in the Western Cape growing regions.

Sources

Agri-Market Trends.

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Subtrop.

South African Wine.