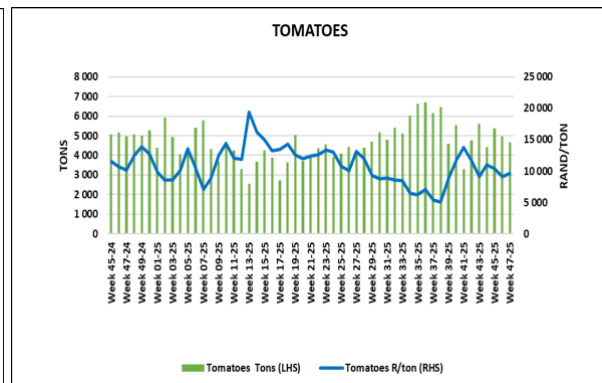
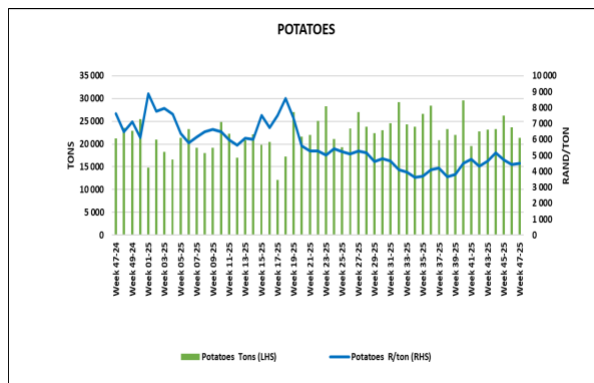




## Summary

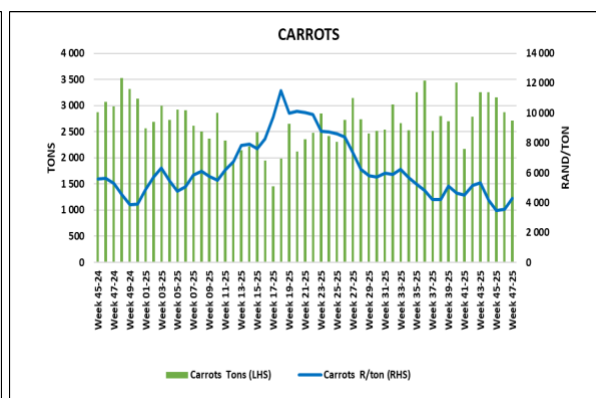
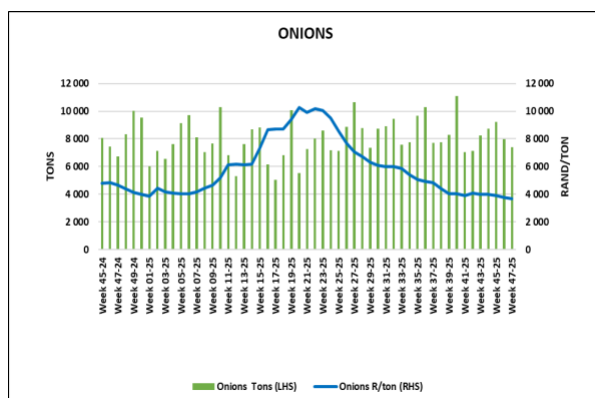
The South African Table Grape Industry Association (SATI) has expressed concern at how the latest United States (US) blanket tariff adjustments did not include South African table grapes, among the agricultural products that were granted relief. SATI explained that table grapes remain subject to elevated duties, placing South African exporters at a competitive disadvantage in the US market. The organisation underscored the importance of the US as a premium destination, with the US market absorbing an estimated 2.2 million cartons (4.5 kg) in the 2024/25 season, valued at approximately R360 million. In addition, SATI highlighted that the high blanket tariff increases exporting costs and weakens South Africa's position relative to other Southern Hemisphere suppliers such as Peru and Chile, which currently face more favourable tariff rates. These South American countries already hold strong commercial footholds in the US market, which intensifies the competitive pressure on South African shipments. SATI continues to engage with the South African government and relevant stakeholders to negotiate for fairer trading conditions, improve alignment with international competitors, and secure access to long-term growth opportunities. The organisation reaffirms its commitment to keep growers, exporters, and partners informed of any developments.

## Potatoes and Tomatoes



- In week 47-2025, **potato** prices increased by 1% week-on-week (w/w) to R4 496/ton. This was from recovering demand and market volumes that decreased by 10% w/w to 21 326 tons. Prices are likely to remain firm in the following week, supported by lower expected deliveries.
- Tomato** prices firmed by 6% w/w to R9 650/ton on account of market volumes that declined by 6% w/w to 4 677 tons. Prices are anticipated to increase in the week ahead, driven largely by stronger month end demand

# Onions and Carrots



- **Onion** prices decreased by 3% w/w to R3 666/ton due to weaker demand. Market supply decreased by 7% w/w to 7 386 tons. Prices are expected to decline in the coming week due to the recent G20 clean-up, which restricted informal traders from operating and ultimately resulted in inventory accumulation.
- **Carrot** prices receded by 2% w/w to R4 050/ton from lower demand. Market volumes decreased by 5% w/w to 2 712 tons. Recovery in demand is expected to support prices next week.

## Fruit Trends on all NFPMs in South Africa

Commodity	Rand per ton		% change (w/w)	Ton		% change (w/w)
	Week ending			Week ending		
	14 Nov	21 Nov		14 Nov	21 Nov	
Apples	12 880	13 180	⬆️ 2%	2 590	2 150	⬇️ -17%
Pears	9 820	10 060	⬆️ 2%	974	921	⬇️ -5%
Bananas	11 160	11 490	⬆️ 3%	5 530	5 280	⬇️ -5%
Oranges	8 300	8 610	⬆️ 4%	628	511	⬇️ -19%
Avocados	29 250	29 260	⬆️ 0.03%	350	357	⬆️ 2%

- **Apple** prices increased by 2% w/w to R13 180/ton from stronger consumer demand and market volumes that contracted by 17% w/w. Prices are expected to decrease in the coming week due to lower availability.
- **Pear** prices increased by 2% w/w to R10 060/ton on stronger consumer demand and supply that declined by 5% w/w. Bearish prices are expected from next week due to a recovery in market volumes.
- **Banana** prices increased by 3% w/w to R11 490/ton, supported by higher demand and market supply that dipped by 5% w/w. Prices are expected to remain firm over the next few weeks as tighter availability and good market demand persist.
- **Orange** prices went up by 3.7% w/w to R8 610/ton due to recovering consumer demand and supply that plunged by 19% w/w. Prices are expected to decline in the following week due to slower demand.
- **Avocado** prices increased fractionally by 0.03% w/w to R26 260/ton from a slight demand recovery. Volumes supplied increased by 2% w/w. Tighter volumes are expected to support prices up to early next year as the season draws to a close.

# Citrus Exports

Week 47 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	Y/Y change
Grapefruit	14.4	15.3	↑ 6%	14.1	15.0	↑ 6%	15.3	15.3	14.4	6.3%
Soft Citrus	41.7	53.5	↑ 28%	41.2	52.0	↑ 26%	44.9	53.5	41.7	28.3%
Lemons	34.7	41.5	↑ 20%	34.5	40.9	↑ 19%	32.9	41.5	34.7	19.6%
Navels	25.1	31.5	↑ 25%	24.7	31.0	↑ 26%	26.1	31.5	25.1	25.5%
Valencia	48.7	61.9	↑ 27%	48.2	59.8	↑ 24%	52.0	61.9	48.7	27.1%
Total	164.6	203.7	↑ 24%	162.7	198.7	↑ 22%	171.2	203.7	164.6	23.8%

## Week 45-2025 exports:

- **Grapefruit** exports increased by 6% y/y to 15 million cartons (15 kg equivalent). The latest grapefruit prediction remains the same as the original estimate.
- **Soft Citrus** shipments increased by 26% y/y to 52 million cartons. The latest soft citrus prediction is now 19% higher than the original estimate.
- **Lemon** exports increased by 19% y/y to 40.9 million cartons. The latest lemon prediction is now 26% higher than the original estimate.
- **Navel** exports increased by 26% y/y to 31 million cartons. The latest Navel prediction is now 21% higher than the original estimate. **Valencia** exports increased by 24% y/y to 59.8 million cartons. The latest Valencia prediction is now 19% higher than the original estimate.
- The latest **total annual citrus** prediction is now 19% higher than the original estimate of 171.2 million cartons. South Africa's citrus industry recorded a new export milestone in 2025, packing 203.7 million cartons to international markets, a 23.8% increase y/y. The citrus industry also regained duty-free access for oranges into the US market. While this development was welcomed, soft citrus was not included on the list of agricultural commodities that received duty free access. According to the Citrus Growers Association of South Africa (CGA), this may lead to reduced availability and inflationary pressure on US consumers.

# Avocado Exports

Weekly Volumes  4kg Cartons	SA Exports to EU			EU Imports from the World		
	Week 47	Week 48	w/w Change	Week 47	Week 48	w/w Change
Hass	52 000	27 000	↓ -48%	3 621 000	3 263 000	↓ -10%
Green Skin	0	0	→ 0%	641 000	618 000	↓ -4%
Total	52 000	27 000	↓ -48%	4 262 000	3 881 000	↓ -9%

## Week 48-2025 exports:

- South Africa's **avocado** exports to the EU market are forecast to decline by 48% w/w to 27 000 cartons (4 kg) in week 47-2025. This is solely due to a 48% w/w decrease in Hass exports to 27 000 cartons. There were no Green Skin exports as South Africa winds down its season.
- The EU's avocado imports are forecast to decline by 9% w/w to 3.9 million cartons, this is due to a decrease in both Hass and Green Skin imports.
- In week 48-2025, Chile remained the leading avocado supplier to the EU, shipping 1.13 million cartons (a 29% market share). The EU ended the week with 635 container arrivals, reflecting a decline of 3% w/w and 13% y/y. Chile contributed 311 containers, followed by Colombia with 152 containers, Israel sent 89 containers, and Morocco delivered 50 containers.

# Table Grape Exports

Week 47 Weekly Volumes 4.50 kg Cartons	2024/25 Exports (a)	2025/26 Exports (b)	y/y Change (a/b)	Cumulative Volumes YTD 2024/25 (c)	Cumulative Volumes YTD 2025/26 (d)	y/y Change (c/d)
Table Grapes	829 395	46 615	↓ -94%	972 418	80 747	↓ -92%

## Week 47-2025 exports:

- South Africa exported 46 615 cartons (4.5 kg) of table grapes in week 47-2025, a decrease of 94% y/y. Cumulative exports are behind by 92% y/y due as the season began later than usual.
- The bulk of the consignment of table grapes was shipped to the Middle East (93%).
- The top three exported varieties include Early Sweet, Prime, and ARRA Honey Pop.
- Regarding the export split by mode of transportation, 7% of exports were transported by airfreight, while 93% were shipped.

## Sources

Agri-Market Trends.

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Subtrop.

Vinpro

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