

Fruit and Vegetable Facts

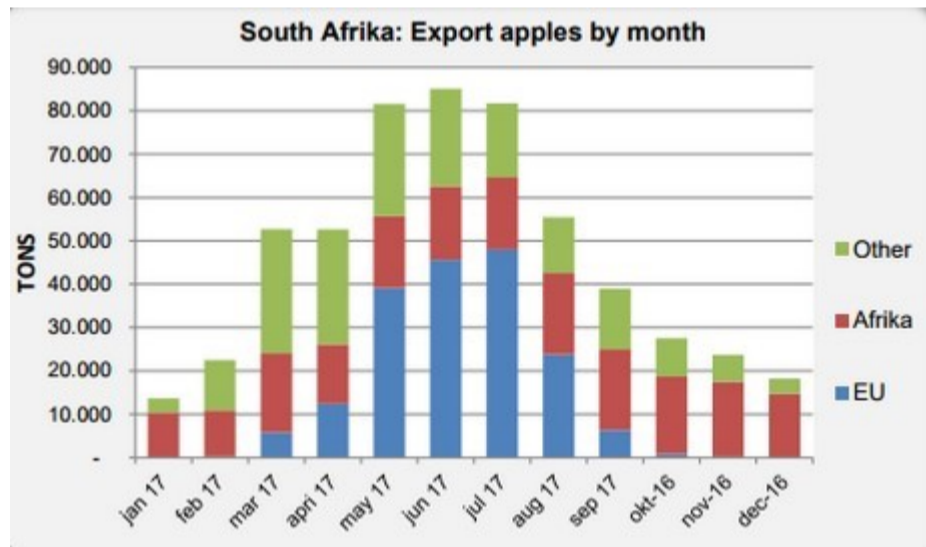
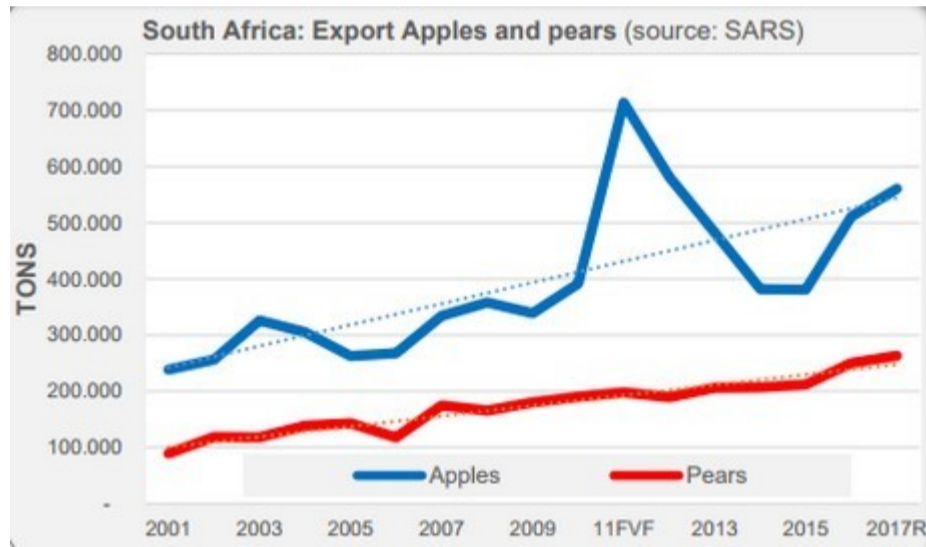
Exports of apples and pears from South Africa growing steadily

The South African export of apples and pears is growing. In 2017, 560,000 tonnes of apples and over 260,000 tonnes of pears were exported. This is 10% more than last year for apples and a few percent more for pears. This is according to The South African Revenue Service (SARS). This source publishes figures on the total South African import and export based on figures from customs. According to the South African branch organisation of fruit growers (Hortgro) the export of both apples and pears was around the same size as last year. Throughout the year, the South African export of top fruit has also been rising, according to this source, but at a lower level than SARS.

The total value of the South African top fruit export is estimated to be an amount of around half a billion Euro (apples and pears at 325 and 175 million Euro respectively). This makes South Africa the number 7 exporter of apples and number 6 exporter of pears globally, according to figures by Fruit and Vegetable Facts.

Area seems to be stabilising

Until the previous season (September 2016 - August 2017) the area of both apples and pears in South Africa has consistently grown (slightly). In 2016/17 the area of apples remained the same at 24,200 ha, of which 21,000 ha was in production. That production area was slightly less than the season before. The pears remained constant at 13,000 ha, of which 11,600 tonnes was in production. This is also slightly less than in the season before.

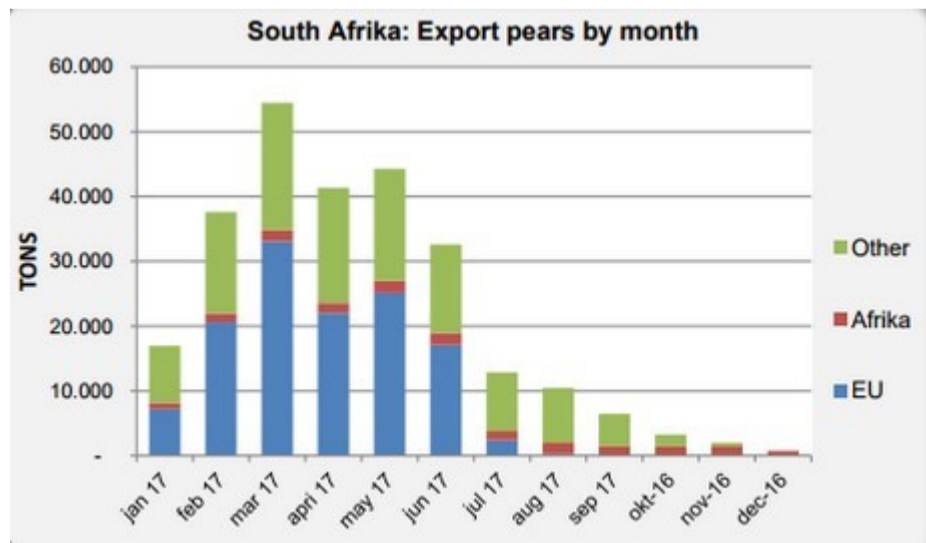


Smaller production in season 2017/18

The total production in 2016/17 was over 900,000 tonnes of apples and 430,000 tonnes of pears. For the current season, 2017/18, the USDA also expects a decrease in production due to a shortage of water.

Year round apple export to Afrika

Over the entire season South Africa exported most of their apples to countries on their own continent. The export of apples to EU countries gets going at the end of March and runs until the start of September. The export to African countries takes place all year round but mainly when little or nothing is being exported elsewhere. This comes down to the period of March - June. The South African pear season gets going in January. The export to the EU runs until the start of July. The season of the export to other countries is mostly parallel to this.



Importance of EU decreasing

The export of both apples and pears has grown in the long term. The export to the EU countries is also growing, but the importance of the EU is decreasing. In 2005 the EU share of apples was still over 60%, in 2016 it was still over a quarter. In pears this was over 70% and around 50% respectively. This year over 180,000 tonnes of apples and around 130,000 tonnes of pears was exported to EU countries. According to Eurostat data on the total import from South Africa to the EU countries it concerned 80,000 tonnes of apples and 90,000 tonnes of pears this year.

The South African export to African countries in apples has grown in particular. On an annual basis considerably more apples now go to African countries compared to EU countries, namely over 200,000 tonnes. South and East Asian countries now also buy considerably more South African apples. In 2016 it concerned over 110,000 tonnes and this year the export there will grow another small 10%. The Gulf States were worth 34,000 tonnes in 2016. This year they were less important. There is a strong growth to be seen in the export to Russia.

United Kingdom main buyer of apples

When it comes to individual countries, the United Kingdom is the main buyer of South African apples. According to SARS figures over 150,000 tonnes has been sent to the United Kingdom as of September this year, compared to a small 110,000 tonnes last year. Figures from growers organisation Hortgro show that around 70,000 tonnes was export to the United Kingdom this year. According to Eurostat data around 65,000 tonnes has been imported from South Africa this year. The other big buyers of South African apples are: Malaysia, Nigeria, Bangladesh, the Emirate, Kenya and the Netherlands. According to SARS figures the export to the Netherlands was 15,000 tonnes this year. This is slightly less than the 16,800 tonnes in 2016. The export to the Netherlands varies from year to year, but has been over 30,000 tonnes in the past. The SARS data doesn't usually deviate much from the Dutch Eurostat data, however this year Eurostat has recorded an import in the Netherlands of 11 to 12,000 tonnes.

South Africa: Key figures apples

Source: USDA	Unit	2014/15	2015/16	2016/17	2017/18
Area planted	ha	23.625	23.932	24.212	24.200
Area harvested	ha	21.638	21.919	21.900	21.000
Bearing trees	x 1000	26.337	26.679	27.200	27.300
Non-bearing trees	x 1000	3.287	3.330	3.100	3.100
Total trees	x 1000	29.624	30.009	30.300	30.300
Production	ton	920.406	924.162	902.129	850.000
Import	ton	4	62	130	130
Total supply	ton	920.410	924.224	902.259	850.130
Domestic consumption	ton	213.058	221.580	210.501	205.000
Export	ton	485.695	510.897	525.000	500.000
Processing	ton	241.657	191.747	166.758	145.130

SOURCE: HORTGRO	2014	2015	2016	2017
Production	ton	792.324	924.162	902.129
Domestic consumption	ton	210.303	213.931	211.554
Export	ton	339.096	413.757	425.325
Processing	ton	239.795	293.724	265.050
Dried	ton	3.160	2.750	200

South Africa: Key figures pears

Source: USDA	Unit	2014/15	2015/16	2016/17	2017/18
Area planted	ha	12.697	12.894	13.000	13.000
Area harvested	ha	11.682	11.863	12.000	11.600
Trees in production	x 1000	14.838	15.068	15.300	15.400
Non bearing trees	x 1000	1.107	1.124	1.000	800
Total trees	x 1000	15.945	16.192	16.300	16.200
Production	ton	410.840	429.582	431.535	405.000
Import	ton	144	89	100	100
Total supply	ton	410.984	429.671	431.635	405.100
Domestic consumption	ton	45.879	47.255	46.250	43.000
Export	ton	205.199	250.254	257.000	250.000
Processing	ton	159.906	132.162	128.385	112.100

SOURCE: HORTGRO	2014	2015	2016	2017
Production	ton	413.913	414.571	431.535
Domestic consumption	ton	48.535	52.264	49.118
Export	ton	203.112	192.009	222.192
Processing	ton	150.694	156.738	146.946
Dried	ton	11.592	13.560	13.280

The Netherlands as the main pear buyer

The Netherlands is the main buyer of South African pears by far. According to SARS data it concerns almost 70,000 tonnes this year, a record. According to Eurostat figures the Netherlands imported around 45,000 tonnes of pears from South Africa this year. Compared to the previous years this is slightly less. Other important buyers of South African pears are: the Emirates, Russia and the United Kingdom. As with apples considerably more pears went to Russia this year. The large increase in the export to the United Kingdom isn't confirmed by import figures in the United Kingdom (Source: HM Revenue & UK customs, or Eurostat).

Golden still most important

Golden Delicious is still the main variety in South Africa. Of the total area, Golden Delicious covers around a quarter. In recent years the share of Golden has been declining very slowly. Granny Smith is still just the second variety, but the importance of this variety is fast declining. Royal Gala/Gala is strongly on the rise. The share in the total South African apple area is now 17%. Pink Lady, Fuji and Cripps Red/Joya in particular are on the rise. The area of Kanzi in South Africa is now 266 ha. In export Golden is still the main variety but the share is now quickly decreasing. The share of Royal Gala/Gala was still 23% in 2015, but then decreased slightly. Grannies are still worth 18% of the total apple export from South Africa. The shares in the export of the other varieties are: Cripps Pink/Pink Lady 12%, Fuji 8.4%, Starking 6.7%, Braeburn 4.0%, Cripps Red/Joya 3.0% en Kanzi 0.3%.

Grannies to Africa; Pink to Europe and Red to Asia.

The green varieties primarily go to African countries. The (Bi)Pink varieties mostly go to Europe. A relatively high amount of (Bi)Red varieties go to the UK. They also go to far and middle East. Of the total apple production, an important share is sold abroad. Based on SARS/USDA data the export quote could even be up to 60%. Based on Hortgro data this is a small half.

South Africa: Export apples by cultivar

Source: PPECB	2013	2014	2015	2016
Total	100%	100%	100%	100%
Golden Delicious	30%	29%	25%	25%
Royal Gala/Gala	18%	20%	23%	21%
Granny Smith	21%	19%	17%	18%
Cripps Pink/Pink Lady®	11%	12%	13%	12%
Fuji	5,6%	6,2%	7,1%	8,4%
Topred/Starking	6,6%	7,1%	6,9%	6,7%
Braeburn	5,0%	3,8%	4,1%	4,0%
Cripps Red/Joya®	2,4%	2,9%	3,2%	3,0%
African Carmine	0,0%	0,1%	0,2%	0,3%
Kanzi	0,0%	0,0%	0,2%	0,3%
Other	0,3%	0,0%	0,2%	0,4%

According to Hortgro a lot more (100,000 tonnes) apples go to industry compared to the estimates of the USDA.

Packham's main pear variety

In pears Packham's Triumph is the main variety and the share is still increasing. Nowadays this variety represents a third of the South African pear area. Forelle is the second variety by a distance and Williams is the third. The share of Forelle is stable but that of Williams decreased strongly. Rosemarie and Cheeky in particular are on the rise. In South African the pear export the share of Packham's is still slightly more than a third. Forelle is the second export varieties with over 20%. SARS/USDA data shows that around 60% of the South African pear harvest is sold abroad. According to Hortgro figures this is over half. According to Hortgro a lot more pears go to the industry compared to the estimates by the USDA.

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