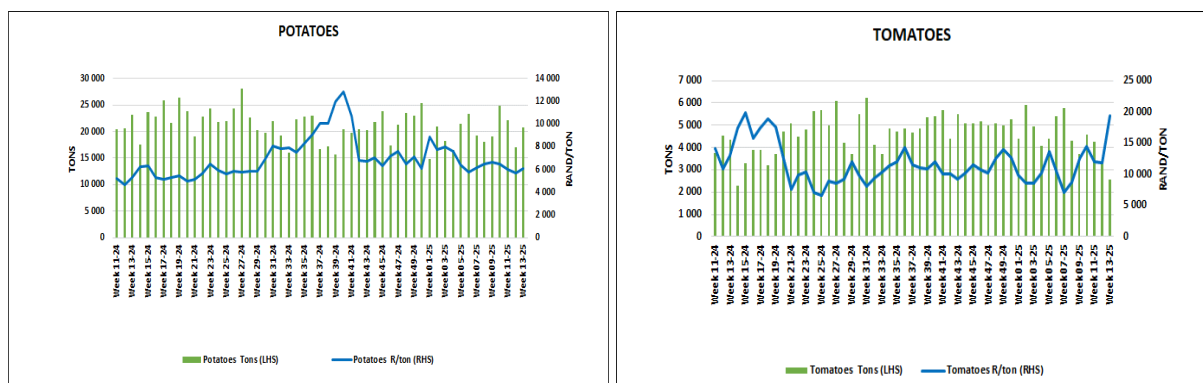




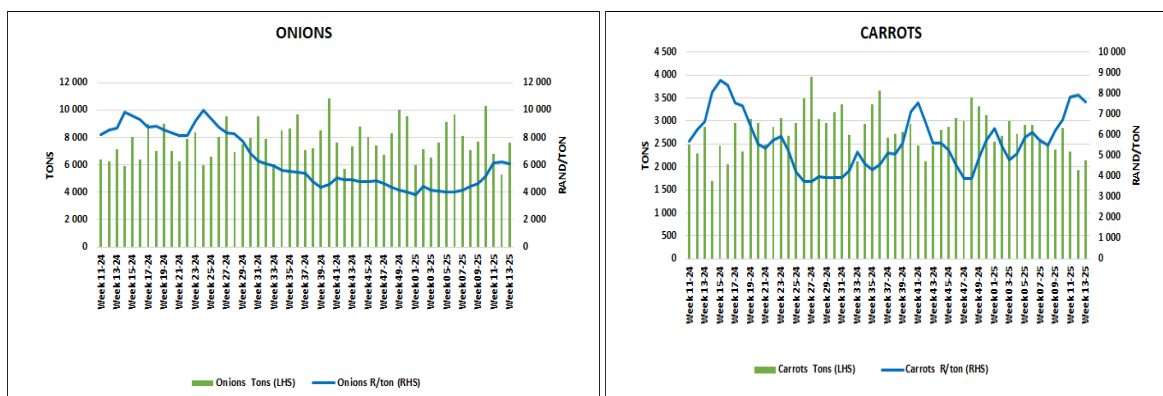
# Summary

The 2025 avocado export season began at the end of February, with the export crop estimated at 23 million cartons (4kg). This is an approximately 13.9% increase year-on-year (y/y) from the 20.2 million cartons exported in 2024. Currently, South Africa's total avocado orchard area measures 19 500 hectares (ha), with about 800 ha being planted annually. As a result of this steady growth, the expansion of current, and exploration of new markets, is crucial for the domestic avocado industry's viability. Last year, the avocado industry achieved the milestone of sending the first shipments of avocados to both China and India. While achieving access to both markets is a big win for the industry, there are some challenges that still need to be resolved. For instance, the high import tariff applied by India reduces South Africa's competitive advantage against avocado producers such as Tanzania, which have tariff-free access to the Indian market. Additionally, South Africa faces stiff competition in China from South American exporters who have been exporting to China for longer. According to the South African Avocado Growers Association (SAAGA), we should not expect high volumes to be exported to these markets in 2025. This is because exports to new markets are usually slow in the initial years as exporters work to gain a foothold and develop relationships with importers and retailers.

## Potatoes and Tomatoes



# Onions and Carrots



- **Onion** prices declined by 1% w/w to R6 107/ton on the back of lower demand. Market supply rose by 44% w/w to 7 626 tons. Prices are expected to remain elevated over the next two weeks as wet fields could slow down harvesting activity.
- **Carrot** prices decreased by 4% w/w to R7 600/ton from lower demand and market volumes that firmed by 11% w/w to 2 142 tons. Prices are expected to remain firm up to Easter due to higher expected demand.

## Fruit Trends on all NFPMs in South Africa

Commodity	Rand per ton		% change (w/w)	Ton		% change (w/w)
	Week ending			Week ending		
	21 Mar	28 Mar		21 Mar	28 Mar	
Apples	10 880	10 310	↓ -5%	2 463	2 671	↑ 8%
Pears	8 160	6 950	↓ -15%	798	1 154	↑ 45%
Bananas	11 340	9 890	↓ -13%	3 416	4 411	↑ 29%
Oranges	7 500	5 810	↓ -23%	955	1 476	↑ 55%
Avocados	10 190	10 030	↓ -2%	723	921	↑ 27%

- **Apple** prices decreased by 5% w/w to R10 310/ton from lower demand and market volumes that increased by 8% w/w. Prices are expected to recede further over the next two months as higher market volumes are projected.
- **Pear** prices declined by 15% w/w to R6 950/ton due lower demand and market volumes that rose by 45% w/w. Prices are expected to remain largely unchanged over the coming weeks.
- **Banana** prices decreased by 13% w/w to R9 890/ton on the back of lower demand. Market volumes rebounded by 29% w/w. Prices are expected to decline further as lower demand is expected to persist.
- **Orange** prices decreased by 23% w/w to R5 810/ton as market supply increased by 55% w/w. Prices are expected trend lower due to the uptick in market supply and orange juice prices that have declined.
- **Avocado** prices decreased by 2% w/w to R10 030/ton as increases in market volumes continue to exceed consumer demand. Prices are expected to stabilise at current levels for the rest of this month.

# Table Grape Exports

Week 13 Weekly Volumes 4.50 kg Cartons	2023/24 Exports (a)	2024/25 Exports (b)	y/y Change (a/b)	Cumulative Volumes YTD 2023/24 (c)	Cumulative Volumes YTD 2024/5 (d)	y/y Change (c/d)
Table Grapes	1 539 475	2 405 837	↑ 56%	73 406 979	77 056 242	↑ 5%

## Week 13-2025:

- South Africa exported nearly 2.5 million cartons (4.5 kg) of table grapes in week 13-2025, an increase of 56% y/y. Cumulative exports are up by 5% y/y at 77 million cartons.
- The bulk of the consignment of table grapes was shipped to the European Union (66%) and the United Kingdom (UK) (23%).
- The top three exported varieties include Crimson Seedless, Scarlotta Seedless®, and Autumncrisp®. As exports wind down, inspection volumes in the following regions have achieved over 100% progress to estimates: the Berg River (103.9%), Hex River (108.2%), Olifants River (100.7%), and Orange River (102.6%).

# Stone Fruit Exports

Weekly Volumes Week 13	2023/24 Exports (a)	2024/25 Exports (b)	y/y Change (a/b)	Cumulative Volumes YTD 2023/24 (c)	Cumulative Volumes YTD 2024/25 (d)	y/y Change (c/d)
Nectarines (2.5 kg carton)	0	91 175	-	8 161 765	9 437 537	↑ 16%
Peaches (2.5 kg carton)	0	3 060	-	1 651 213	1 586 851	↓ -4%
Plums/Prunes (5.25 kg carton)	376 140	978 048	↑ 160%	11 275 890	12 237 802	↑ 9%

## Week 13-2025 exports:

- **Nectarine** shipments in week 13-2025 totalled 91 175 cartons (2.5 kg) as the season has taken longer to wind down than the 2023/24 season. Major market destinations included the UK (57%) and the EU (43%). Cumulative volumes are up by 16% year-to-date (YTD).
- **Peach** exports totalled 3 060 cartons in week 13-2025 and the season has also been longer than the 2023/24 season. Peaches were mainly shipped to the UK (82%) and the Middle East (18%). The total cumulative volumes YTD are down by 4%.
- The volume of **plums** shipped increased by 160% YTD to 978 048 cartons (5.25 kg). Major plum markets included the EU (47%) and the UK (20%). Cumulative plum volumes YTD are up by 9%.

# Avocado Exports

Weekly Volumes 4kg Cartons	SA Exports to EU			EU Imports from the World		
	Week 13	Week 14	w/w Change	Week 13	Week 14	w/w Change
Hass	260 000	503 000	↑ 93%	3 862 000	4 224 000	↑ 9%
Green Skin	218 000	335 000	↑ 54%	834 000	1 200 000	↑ 44%
Total	478 000	838 000	↑ 75%	4 696 000	5 424 000	↑ 16%

## Week 14-2025 exports:

- South Africa's **avocado** exports to the EU market are forecast to increase by 75% w/w to 838 000 cartons (4 kg) in week 14-2025. Hass exports are projected to rise by 93% w/w to 503 000 cartons, while Green Skins are expected to rise by 54% w/w to 335 000 cartons.
- EU avocado imports from the world are forecast to rise by 16% w/w to 5.4 million cartons as both Peruvian and South African exports gain momentum.
- South Africa's major competitor, Peru, is reporting a 20% y/y increase in its export crop, so there are concerns that the EU market will be under pressure. It is hoped that Peru will produce an official export estimate for the Europe market in the near future, which will provide a bit more certainty. On a positive note, it is reported that the European market continues to grow. The World Avocado Organisation's generic promotion of avocados in the EU and UK is one of the factors stimulating this growth.

## Sources

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