



Understanding the Fruit Value Chain

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Structure of the South African fruit industry



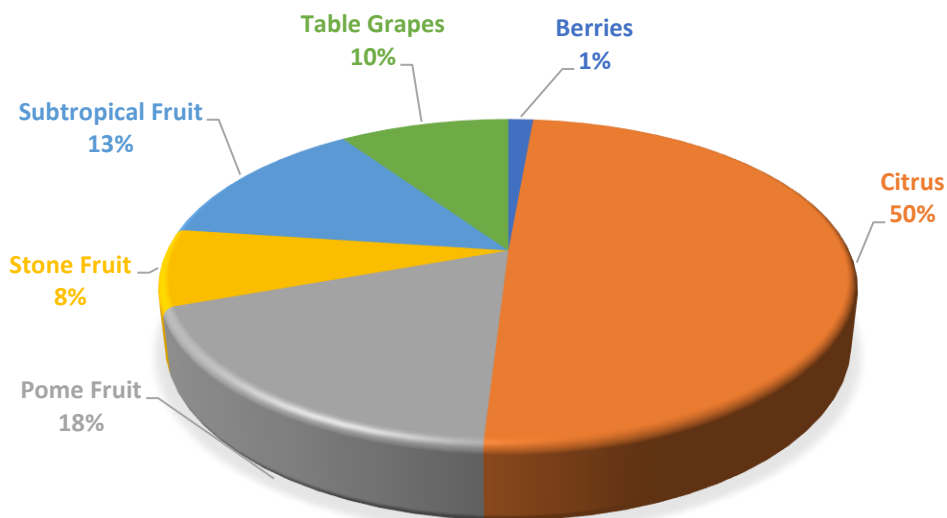
- Vision: Fruit SA strives for a competitive, equitable and sustainable South African fruit industry
- Mission: Fruit SA represents its members in providing advocacy, collaboration, coordination, and services relating to key industry matters
- Strategic Objectives:
 - Maintain Fruit SA as the collective platform for the SA fruit industry
 - Engage constructively with government and other strategic stakeholders on policy, legislation and other fruit industry matters
 - **Promote transformation through coordination of BEE, skills development, and training**
 - Collate and communicate key industry-related information to broader public and industry stakeholders
 - Provide a platform for electronic certification
- Key Priorities: **Transformation**, market access, government & stakeholder relations, and information management & communication



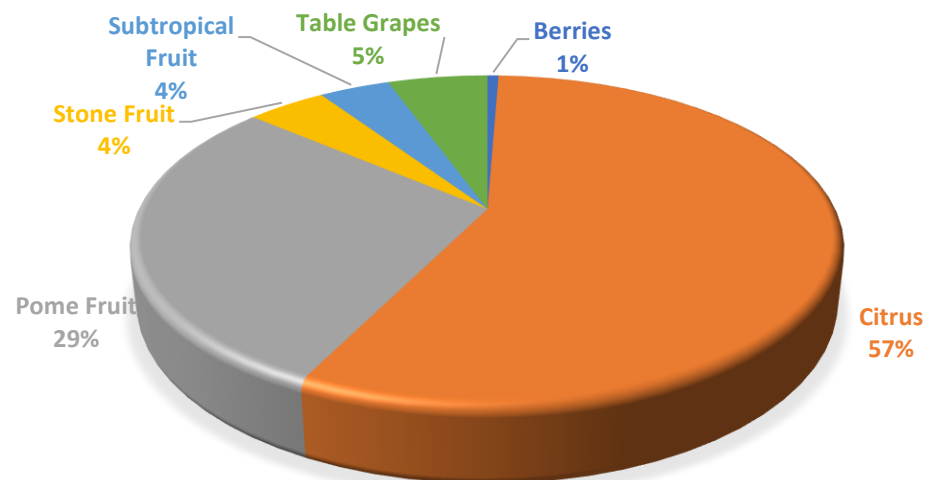
South African fruit production



Hectares Planted = 205 074



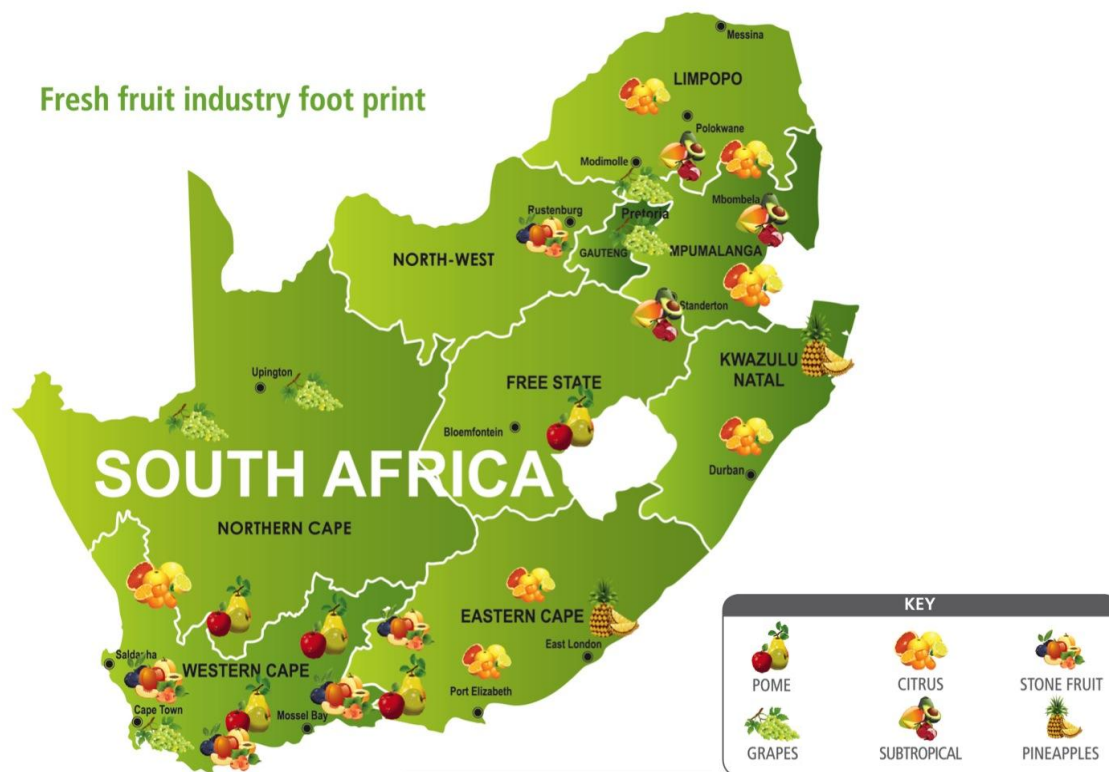
Tons Produced = 6 230 372



Fruit growing regions in SA



Fresh fruit industry foot print



“It involves science, research & innovation to produce high quality fruit according to international best practices and stringent food safety standards” - Hortgro

Production also follows ethical & Environmental standards



South African fresh fruit calendar



THE FRESH FRUIT PRODUCTION CALENDAR

	OCT	NOV	DEC	JAN	FEB	MAR	APR	MAY	JUN	JUL	AUG	SEP
Apples												
Apricots												
Avocados												
Easy Peelers												
Grapefruit												
Grapes												
Lemons												
Litchis												
Mangoes												
Melons												
Nectarines												
Oranges												
Peaches												
Pears												
Pineapples												
Plums												

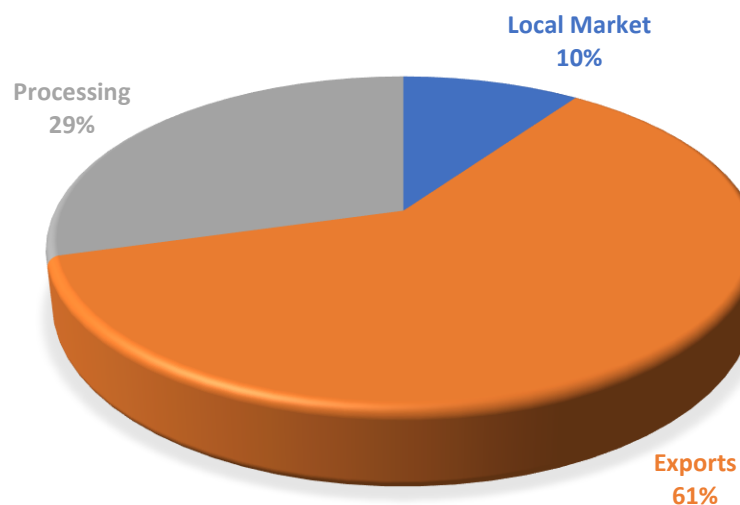
(Source: FPEF)



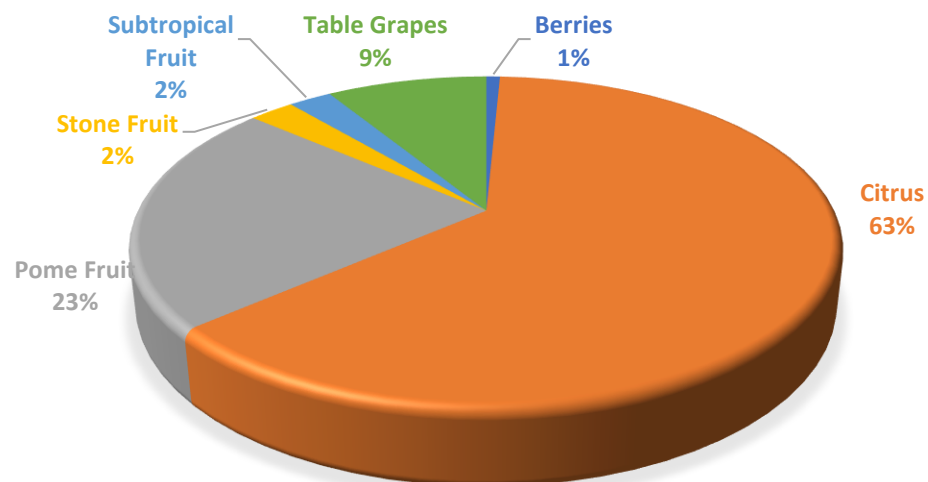
SA fruit markets



Market Segments



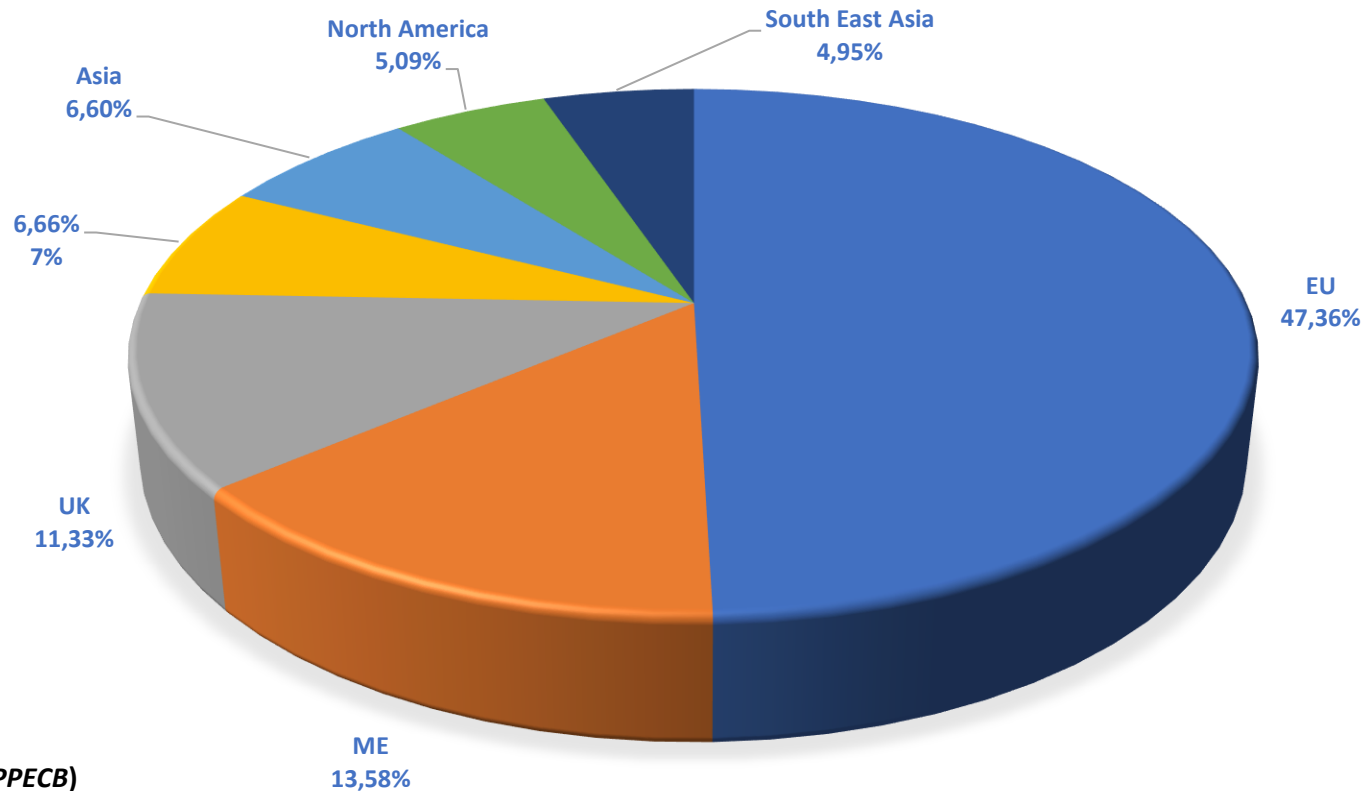
Fruit Types Exported – Volume Comparison



100 export destinations



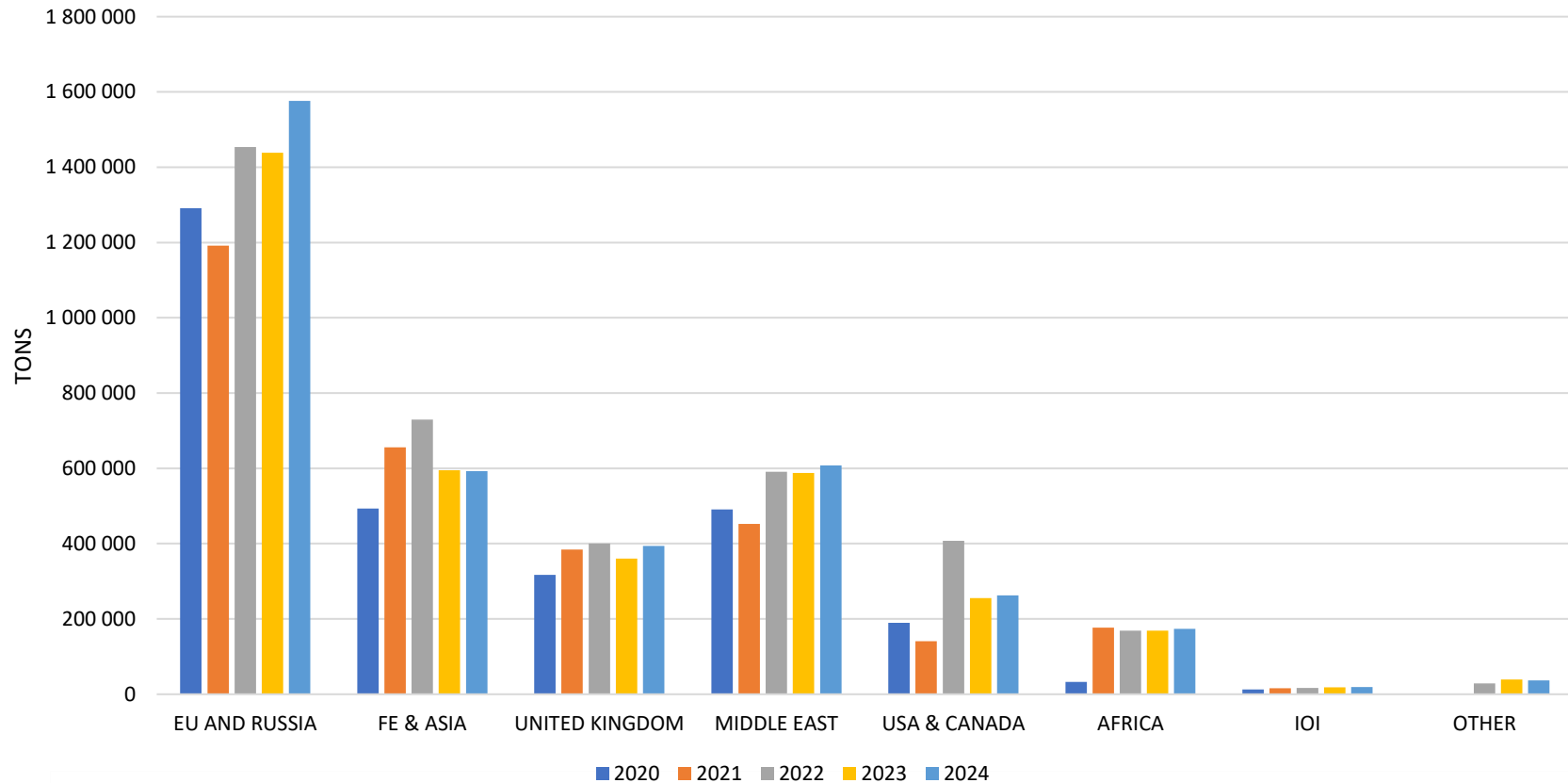
Export destinations



(Source: PPECB)



Export destinations – 5-year trend



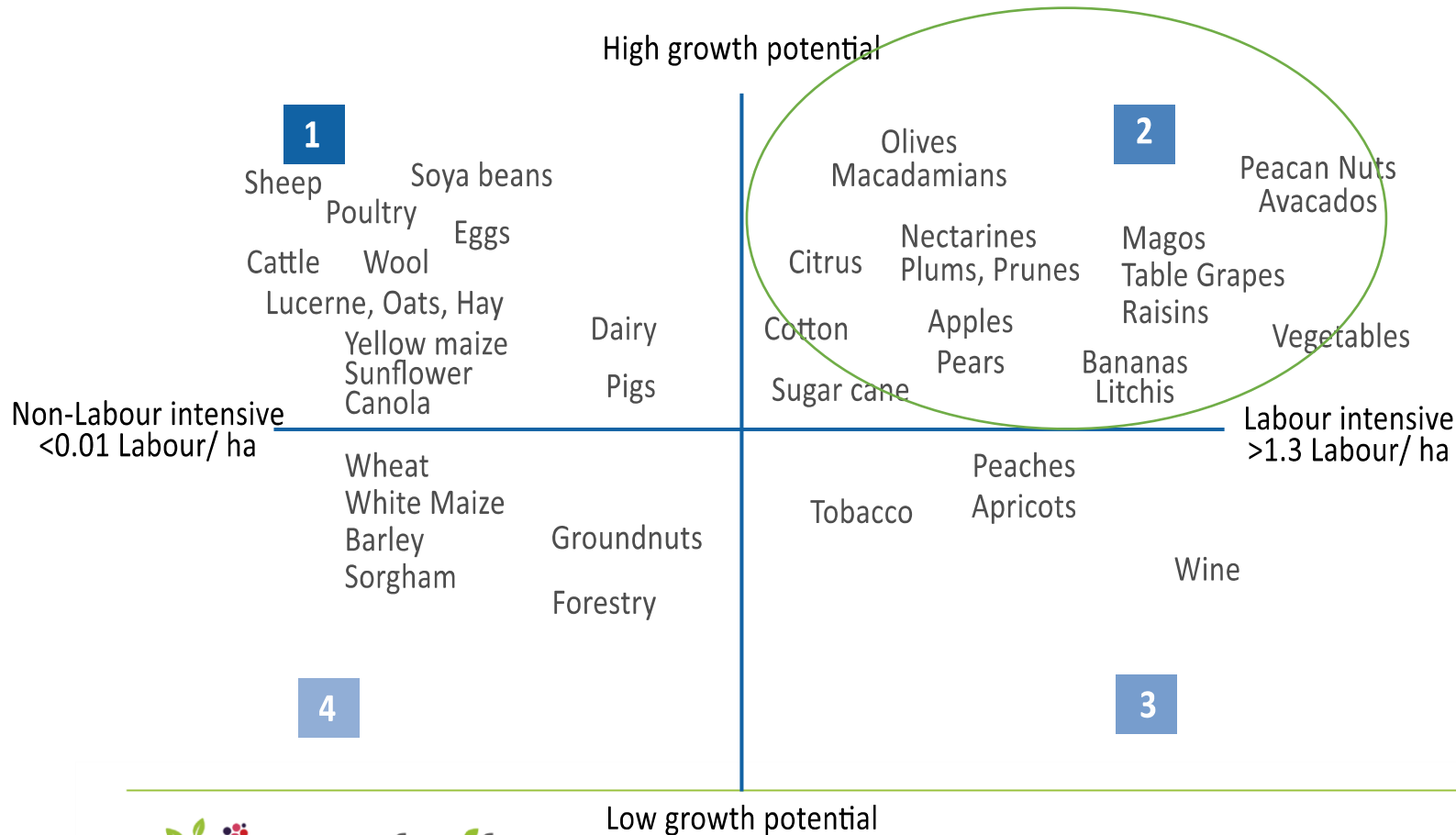
Significance of the South African fruit industry



- **Industry** value = **R86.7 bn**
- **320 387** on-farm jobs (FTE); **1 279 556** dependents
- **Social contribution:** on-farm housing, basic health-care, school programmes etc.
- **35%** of SA's agricultural exports
- Projected to grow by 35% in the next few years (2032)
- Largest **SH** exporter by volume = 44%



Growth Potential: National Development Plan



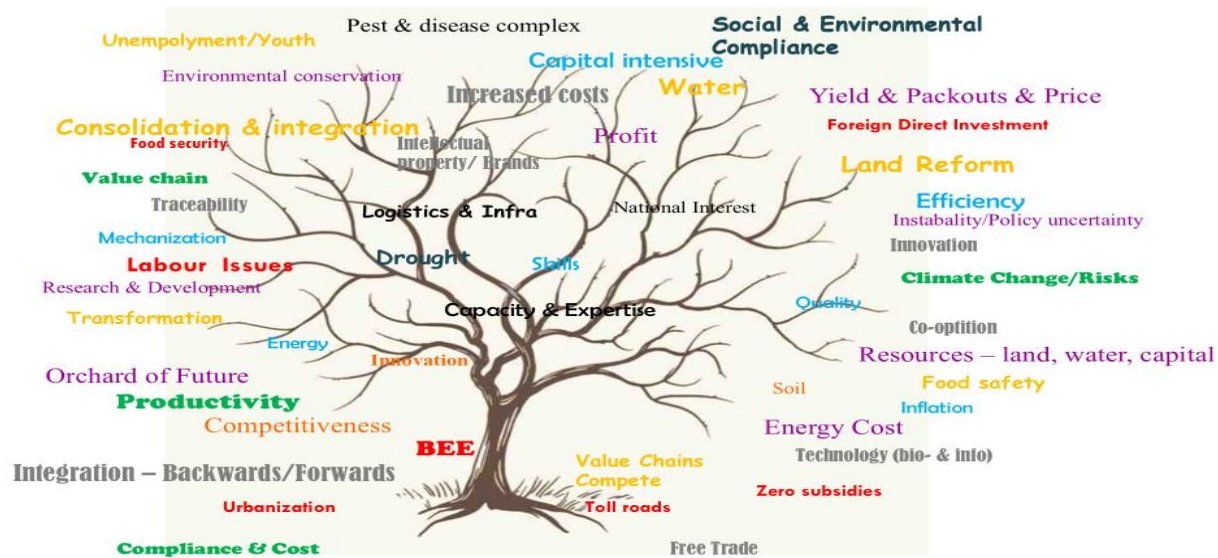
Blueberries –
3.7/ha labour
factor



The operational environment



Agri Business environment



Credit - Hortgro



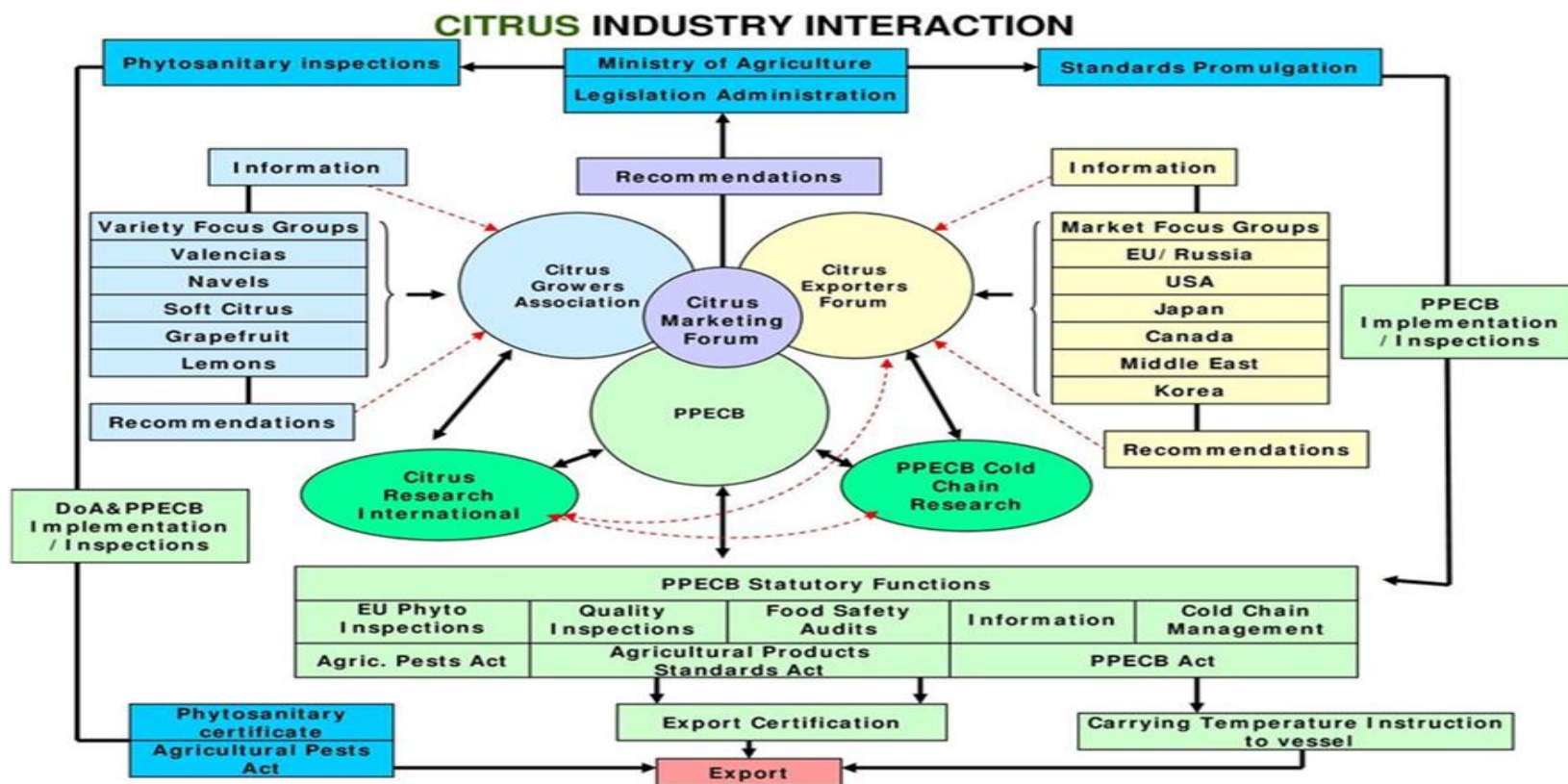
Export value chain



(Source: FPEF/PPECB)



Industry stakeholders interaction



Industry issues



- Infrastructure constraints vs industry growth
- Rising production costs
- Geo-politics
- High tariffs
- Effects of climate change
- Declining consumer purchasing power
- Protracted market access application process
- Increasing trend to use non-tariff barriers to impede trade
- Sustainability requirements
 - Remain committed to compliance
 - Absence of a common standard, resulting in waste and inefficiencies in the supply chain and moving goalposts are an issue



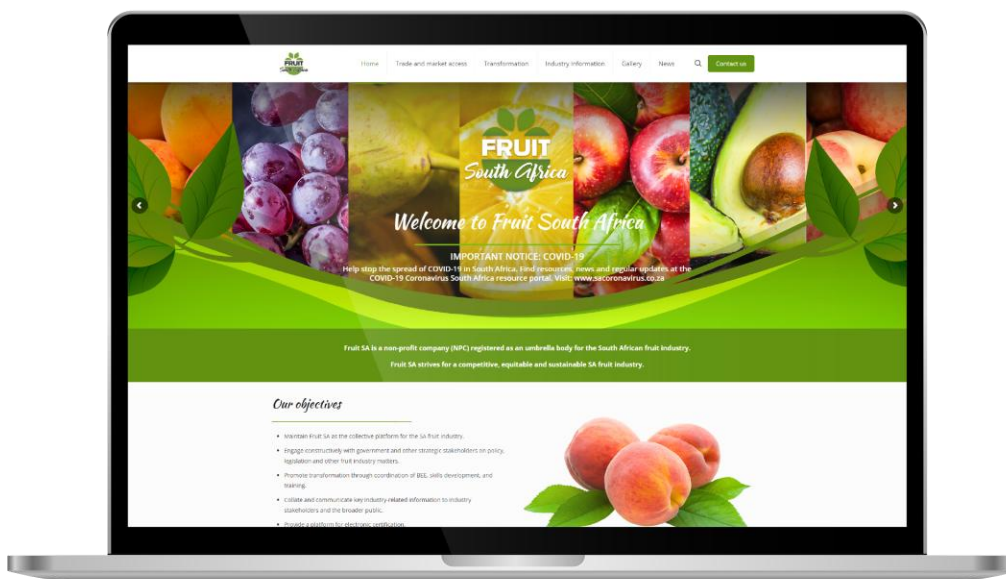
Conclusion



- An important contributor to SA's economy
 - **Earnings, employment and sustenance of rural economies**
- “The fruit value chain is more than a production process — it’s a network that sustains livelihoods, strengthens trade, and drives sustainable growth.”



Thank you



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