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Favourable Weather brings a Positive Outlook for SA's 2025/2026 Stone Fruit Export Season

The South African stone fruit industry is preparing for the 2025/2026 export season with optimism, thanks to favourable weather conditions during winter and blossoming, which led to good fruit set and fruit quality across most production regions. Overall export volumes are forecasted to rise by 6% compared to the previous season, indicating a healthy and balanced supply across all stone fruit categories.

Weather and production outlook

This season's outlook is shaped by good fruit sets and favourable blossom conditions, as well as the absence of significant weather events such as sleet, hail, or frost that impacted early nectarine varieties in the previous year. Although the season has just begun, it appears to be off to a promising start. Nectarine volumes are expected to recover to their normal levels.

Although we have experienced a cold winter, the rainfall has been relatively low. While the water situation is therefore not ideal, irrigation dams are expected to supply enough water for the upcoming warm and dry summer promising good eating and keeping quality.

Hectare trends and varietal developments

Over the past five years, orchard trends have shown a positive shift towards nectarines, with a 26% increase in total nectarine hectares. In contrast, the number of hectares of fresh apricots declined by 4%, dessert peaches by 18%, and plums by 6% over the same period. The continued investment in higher-yielding nectarine varieties is expected to support export growth in the years to come.

Logistics and market environment

While positive progress has been made in improving logistical performance, particularly at the Port of Cape Town, challenges remain and there is still room for productivity improvement. The introduction of new equipment and infrastructure upgrades is expected to enhance port efficiency in the upcoming season. Careful coordination among growers, exporters, and service providers will once again be essential to ensure efficient, on-time shipments and the delivery of

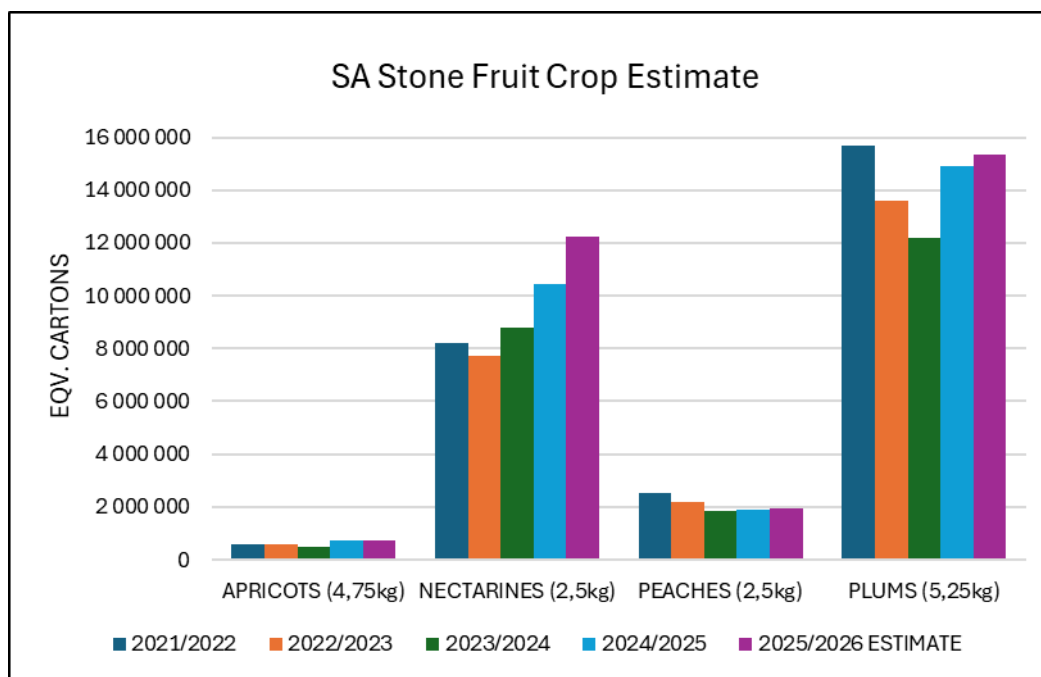


top-quality fruit. Improving port operational efficiency remains a key priority to increase overall throughput.

With apricots, peaches, nectarines, plums and fresh prunes recently gaining access to China, growers and exporters are eager to serve this market, while finalising the last administrative procedures. This will further diversify the stone fruit industry's markets.

Initial stone fruit export estimates (2025/2026):

- Apricots: Estimated at 720 000 cartons (4.75 kg equivalent), down 3% compared to the previous season's 740 000 cartons.
- Peaches: Expected to increase by 3%, reaching 1.94 million cartons (2.5 kg) compared to 1.88 million last season.
- Nectarines: Forecasted to grow by 18%, reaching 12.26 million cartons (2.5 kg), driven by favourable conditions for early varieties and higher-yielding orchards.
- Plums: Projected to increase by 3%, reaching 15.35 million cartons (5.25 kg) compared to 14.9 million last season.



Outlook

The 2025/2026 stone fruit season is projected to be positive overall, with good crop prospects and sustained confidence among growers and exporters. Favourable growing conditions, along with the introduction of new varieties into production, suggest a stable and balanced export season, provided logistical and trade challenges are managed effectively.