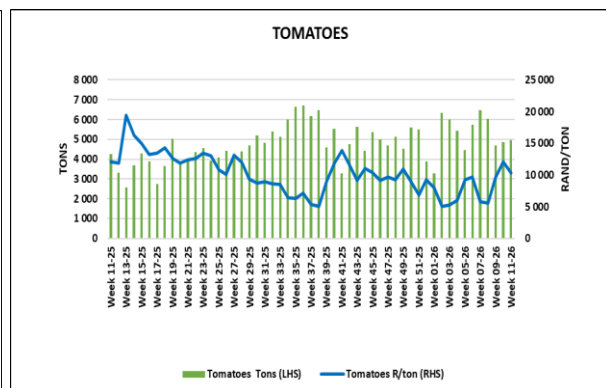
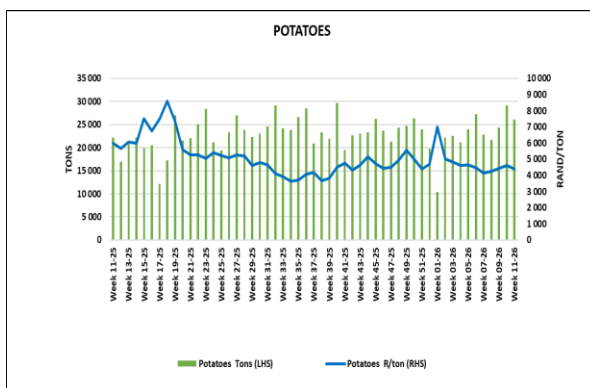




Summary

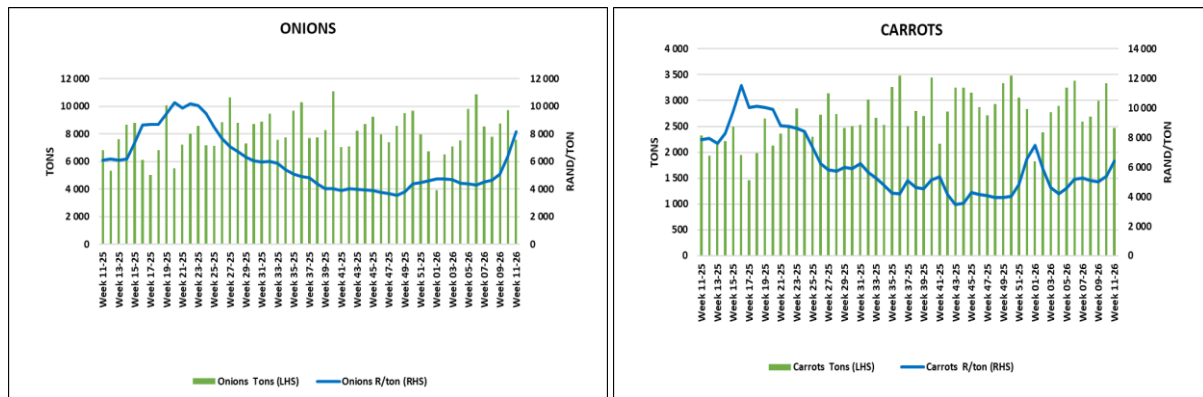
The Middle East war is disrupting South Africa's fruit exports, forcing exporters to initiate efforts to redirect shipments originally destined for Gulf markets to alternative markets. However, it must be noted that supply chains cannot be redirected overnight due to variations in phytosanitary requirements and logistical constraints. Approximately 90% of shipments to the region have been affected, with containers delayed at sea or held in storage due to port closures and security concerns in key hubs such as Saudi Arabia and the port of Jebel Ali (United Arab Emirates). Although the Middle East accounts for roughly 8.5% of South Africa's agricultural exports, it remains a strategically important market for citrus, pome, and stone fruit, among other products. Exporters are also facing rising logistical costs, longer transit times, and increased risk of deterioration, while alternative markets are becoming saturated, placing downward pressure on prices. In response, industry players are making efforts to diversify markets and reroute supply chains, despite regulatory and capacity constraints. Domestically, efforts to improve logistics are gaining momentum, including the establishment of the Container User Forum (CUF) to enhance coordination, reduce port inefficiencies, and address congestion. These interventions are expected to strengthen supply chain resilience and support export competitiveness over the medium term. Despite current challenges, the sector remains underpinned by strong global demand, although ongoing instability in key shipping routes poses a downside risk to near-term export performance.

Potatoes and Tomatoes



- In week 11-2026, **potato** prices decreased by 5% week-on-week (w/w) to R4 388/ton from weaker demand. Volumes also declined by 11% w/w to 26 085 tons. Prices could remain subdued in the coming week from higher supply and relatively weak demand. However, demand and prices could strengthen towards month-end ahead of the Easter weekend.
- **Tomato** prices declined by 15% w/w to R10 320/ton from sluggish demand and supplies that increased by 2% w/w to 4 956 tons. Prices should trend upwards in the coming weeks due to constrained harvesting following the recent rainfall received in key northern production regions.

Onions and Carrots



- **Onion** prices increased sharply by 29% w/w to R8 164/ton, driven by good demand and volumes that dipped by 22% w/w to 7 593 tons. Prices are likely to remain bullish next week as the Northern Cape's production winds down and Limpopo harvesting is not yet in full swing. Prices may peak around early April 2026 as the Easter demand surge wears off and Limpopo supplies pick up pace.
- **Carrot** prices went up by 19% w/w to R6 430/ton on account of stronger demand and a 26% w/w decline in supply to 2 474 tons. Prices are expected to remain elevated in the coming weeks as demand remains firm ahead of the Easter period.

Fruit Trends on all NFPMs in South Africa

Commodity	Rand per ton		% change (w/w)	Ton		% change (w/w)
	Week ending			Week ending		
	06 Mar	13 Mar		06 Mar	13 Mar	
Apples	10 240	8 850	↓ -14%	3 303	3 990	↑ 21%
Pears	8 430	9 210	↑ 9%	890	932	↑ 5%
Bananas	9 580	12 770	↑ 33%	6 316	4 544	↓ -28%
Oranges	9 390	7 790	↓ -17%	602	741	↑ 23%
Avocados	12 500	14 390	↑ 15%	809	720	↓ -11%

- **Apple** prices declined by 14% w/w to R8 850/ton due to weaker demand and market volumes that increased by 21% w/w. Prices are expected to continue trending lower through to June 2026, as elevated supply persists in the market.
- **Pear** prices increased by 9% w/w to R9 210/ton due to recovery in demand. Market supply also increased by 5% w/w. Prices could remain firm up to June 2026, supported by seasonal factors.
- **Banana** prices surged by 33% w/w to R12 770/ton, attributed to bullish demand and availability that receded by 28% w/w. Prices are expected to remain firm in the coming week, supported by lower weekly volumes. However, an increase in volumes from April 2026, as winter production gains momentum, is likely to place downward pressure on prices.
- **Orange** prices went down by 17% w/w to R7 790/ton, driven by weaker demand and supplies that increased by 23% w/w. Prices are expected to decline further next week, with a potential stabilisation expected over the Easter weekend as demand improves.
- **Avocado** prices improved by 15% w/w to R14 390/ton on the back of higher demand and an 11% w/w decrease in market volumes. Prices are forecast to remain flat over the coming weeks.

Table Grape Exports

Week 11 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	3 416 207	1 734 693	↓ -49%	72 850 073	76 102 413	↑ 4%

Week 11-2026 exports:

- South Africa exported 1.7 million cartons (4.5 kg) of table grapes in week 11 of 2026, representing a sharp decline of 49% y/y. Cumulative exports are up by 4% y/y.
- The bulk of the shipments were destined for the EU (52%), followed by the UK (24%), and the African region (11%).
- The top three exported varieties were Crimson Seedless (47%), Scarlotta Seedless (19%), and Autumn Crisp (18%).
- The export volumes were largely supported by key production regions, namely the Orange River (34%), Hex River (29%), and Berg River (25%).
- In terms of export transportation, only 0.2% of the export volume was transported by airfreight, while 99.8% was shipped by sea.

Stone fruit Exports

Weekly Volumes Week 10	Passed for Exports		
	2024/25 Exports (c)	2025/26 Exports (d)	y/y Change (c/d)
Apricots (4.75 kg carton)	737 990	749 852	↑ 2%
Nectarines (2.5 kg carton)	10 366 940	12 606 152	↑ 22%
Peaches (2.5 kg carton)	1 833 934	2 633 689	↑ 44%
Plums/Prunes (5.25 kg carton)	12 578 734	14 305 678	↑ 14%

Week 10-2026 exports:

- The volume of **apricots** passed for export increased by 2% y/y. The market mix was entirely supported by the Bebeco cultivar (100%).
- **Nectarines** passed for export rose by 22% y/y, with the EU (43%), UK (36%), and Middle East (15%) remaining the primary export destinations. Most consignments originated from the Ceres region (47%), followed by Berg River (23%), and the Klein Karoo (16%).
- **Peach** exports increased significantly by 44% y/y, with the bulk of volumes sourced from the Ceres, Berg River, Klein Karoo, and Wolseley regions. This growth was largely driven by varieties such as Burpeach 30 (34%), Burpeach 13 (29%), and Autumn Crunch (23%).
- **Plums** passed for export increased by 14% y/y, with export volumes mainly supported by the Angeleno/Suplumsix (49%), Ruby Star (24%), and September Yummy (13%) cultivars.

Sources

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South African Table Grape Industry.

South African Wine.

Subtrop.

Vinpro

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