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South Africa, Republic of
Canned Deciduous Fruit
Semi-Annual
2003

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Report Highlights:

South Africa's 2002/03 fresh fruit sent for processing reached about 17% more than last year. This is a total of about 35,000 MT of apricots, 150,000 MT of peaches, 66,000 MT of pears, and 251,000 MT of fruit mixtures. The season was dominated by good rains and conducive weather resulting in a higher crop. Exports are expected to grow by 6%.

Includes PSD changes: Yes
Includes Trade Matrix: Yes
Unscheduled Report
Pretoria [SF1], SF

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Executive Summary

The 2002/03 crop for processing is estimated at 17% more than the last year crop. The fruit expected to be delivered for processing comprises about 35,127 MT of apricots, 149,866 MT of peaches, 66,749 MT of pears, and fruit mixtures 251,000 MT. This increase is expected to result in a 29% increase in canned fruit production (canned peaches, pears, apricots, and mixtures). Exports of canned fruit in 2002/3 are expected to grow by 6%. The main export product is canned peaches and it is expected that export will increase from 63,581 MT in 2001/02 to 70,000 MT in 2002/03.

Production

The 2002/03 crop for processing is estimated at 17% more than the last year crop. The fruit expected to be delivered for processing comprises about 35,127 MT of apricots, 149,866 MT of peaches, 66,749 MT of pears, and fruit mixtures 251,000 MT. This increase is expected to result in a 29% increase in canned fruit production (canned peaches, pears, apricots, and mixtures). Exports of canned fruit in 2002/3 are expected to grow by 6%. The main export product is canned peaches and it is expected that export will increase from 63,581 MT in 2001/02 to 70,000 MT in 2002/03.

The 2003/04 season is promising with enough rainfall and conducive temperatures. Fresh peaches intake for canned processing is expected to increase about 4%. We expect a slight rise (3%) for apricots and fruit mixtures at a high of 6%, and expect pears to remain steady.

South Africa's fruit industry exports about 60% of canned production annually, of which 50% is destined for Europe. The industry's annual growth rates for pears and apricots are low.

Note: The 2002/03 intakes and production figures are the official industry estimates.

PSD Canned Peaches

PSD Table						
Country	South Africa, Republic of					
Commodity	Canned Peaches				(MT)(MT, Net Weight)	
	2001	Revised	2002	Estimate	2003	Forecast
	USDA Official [Old]	Post Estimate [New]	USDA Official [Old]	Post Estimate [New]	USDA Official [Old]	Post Estimate [New]
Market Year Begin		01/2002		01/2003		01/2004
Deliv. To Processors	149866	116619	150000	149866	0	155800
Beginning Stocks	20033	45200	8170	18182	7051	15432
Production	77259	61313	97997	96000	88000	90000
Imports	112	250	50	250	100	250
TOTAL SUPPLY	97404	106763	106217	114432	95151	105682
Exports	63581	63581	73000	73000	67651	70000
Domestic Consumption	25653	25000	26166	26000	26500	26000
Ending Stocks	8170	18182	7051	15432	1000	9682
TOTAL DISTRIBUTION	97404	106763	106217	114432	95151	105682

Trade

Exports, Canned Peaches

Export Trade Matrix			
Country	South Africa, Republic of		
Commodity	Canned Peaches		
Time period	Jan-Dec	Units:	MT
Exports for:	2001		2002
U.S.	7,737	U.S.	8,621
Others		Others	
Japan	13,001	Japan	15,005
Netherlands	7,877	Netherlands	4,935
Germany	4,045	Germany	4,909
Hong Kong	4,207	Hong Kong	4,463
Switzerland	2,985	United Kingdom	3,519
Canada	1,963	Switzerland	3,480
Taiwan	1,625	Canada	3,353
United Kindom	1,610	Korea, South	2,080
Korea, South	1,555	Taiwan	1,501
Austria	1,229	Austria	1,335
Total for Others	40097		44580
Others not Listed	7,186		10,380
Grand Total	55020		63581

Source: Dept. of Customs & Excise

PSD Canned Pears

PSD Table						
Country	South Africa, Republic of					
Commodity	Canned Pears				(MT)(MT, Net Weight)	
	2001	Revised	2002	Estimate	2003	Forecast
	USDA Official [Old]	Post Estimate [New]	USDA Official [Old]	Post Estimate [New]	USDA Official [Old]	Post Estimate [New]
Market Year Begin		01/2002		01/2003		01/2004
Deliv. To Processors	66749	57637	70000	66749	0	67000
Beginning Stocks	1062	9508	1862	1062	4062	1462
Production	28000	20816	30000	26600	25000	26800
Imports	0	0	0	0	0	0
TOTAL SUPPLY	29062	30324	31862	27662	29062	28262
Exports	25000	27062	25000	24000	23000	24000
Domestic Consumption	2200	2200	2800	2200	2500	2800
Ending Stocks	1862	1062	4062	1462	3562	1462
TOTAL DISTRIBUTION	29062	30324	31862	27662	29062	28262

Trade

Exports, Canned Pears

Export Trade Matrix			
Country	South Africa, Republic of		
Commodity	Canned Pears		
Time period	Jan-De	Units:	MT
Exports for:	2001		2002
U.S.	3,847	U.S.	5,373
Others		Others	
Japan	3,555	Japan	3,491
United Kingdom	3,153	United Kingdom	3,344
Switzerland	2,163	Germany	2,751
Germany	2,033	Switzerland	2,163
Canada	1,010	Belgium	1,987
Belgium	843	Netherlands	1,444
Austria	824	Canada	1,227
Italy	618	Greece	842
France	483	France	664
Netherlands	415	Austria	491
Total for Others	15097		18404
Others not Listed	1,759		3,285
Grand Total	20703		27062

Source: Dept. of Customs & Excise

PSD Canned Apricots

PSD Table						
Country	South Africa, Republic of					

Commodity	Canned Apricots		2002	Estimate	(MT)(MT, Net Weight)	
	2001	Revised			2003	Forecast
	USDA Official[Old]	Post Estimate[New]	USDA Official[Old]	Post Estimate[New]	USDA Official[Old]	Post Estimate[New]
Market Year Begin		01/2002		01/2003		01/2004
Deliv. To Processors	41310	41310	43800	35127	0	45000
Beginning Stocks	8500	14794	2480	16506	1680	13506
Production	22480	32650	35000	28100	0	28800
Imports	0	0	0	0	0	0
TOTAL SUPPLY	30980	47444	37480	44606	1680	42306
Exports	23500	23938	30000	24000	0	24600
Domestic Consumption	5000	7000	5800	7100	0	7200
Ending Stocks	2480	16506	1680	13506	0	10,506
TOTAL DISTRIBUTION	30980	47444	37480	44606	0	42306

Exports, Canned Apricots

Export Trade Matrix			
Country	South Africa, Republic of		

Commodity	Canned Apricots		
Time period	Jan-Dec	Units:	Tons
Exports for:	2001		2002
U.S.	648	U.S.	537
Others		Others	
Germany	9,522	Germany	9,665
Netherlands	3,019	United Kingdom	2,375
United Kingdom	2,551	Netherlands	2,071
Japan	2,207	Japan	1,998
Belgium	1,323	Switzerland	1,477
Switzerland	1,057	Belgium	1,315
Austria	909	France	767
France	881	Austria	747
Australia	682	Italy	629
Italy	497	Israel	614
Total for Others	22648		21658
Others not Listed	1,986		1,743
Grand Total	25282		23938

Source: Dept. of Customs & Excise

PSD Canned fruit mixtures

PSD Table						
Country	South Africa, Republic of					
Commodity	Canned Mixtures				(MT)(MT, Net Weight)	
	2001	Revised	2002	Estimate	2003	Forecast

	USDA Official [Old]	Post Estimate [New]	USDA Official [Old]	Post Estimate [New]	USDA Official [Old]	Post Estimate [New]
Market Year Begin		01/2002		01/2003		01/2004
Deliv. To Processors	24047	215566	218800	251742	0	267800
Beginning Stocks	5979	13841	3468	5925	3648	2767
Production	29609	29014	33000	36000	0	40000
Imports	80	57	80	80	0	80
TOTAL SUPPLY	35668	42912	36548	42005	3648	42847
Exports	28300	31987	29000	35000	0	35100
Domestic Consumption	3900	5000	3900	4238	0	4300
Ending Stocks	3468	5925	3648	2767	0	3447
TOTAL DISTRIBUTION	35668	42912	36548	42005	0	42847

Exports, Canned fruit Mixtures

Export Trade Matrix			
Country	South Africa, Republic of		
Commodity	Canned Mixtures		
Time period	Jan-Dec	Units:	MT

Exports for:	2001		2002
U.S.	2,548	U.S.	1,355
Others		Others	
Japan	4,605	Japan	4,847
United Kingdom	2,739	United Kingdom	3,256
Austria	2,723	Canada	2,518
Switzerland	1,830	Switzerland	2,324
Singapore	1,745	Singapore	2,153
Germany	1,652	Germany	2,064
Canada	1,291	Austria	1,863
Belgium	1,203	Phillipines	1,357
Netherlands	1,191	Belgium	1,256
Phillipines	846	Lebanon	1,006
Total for Others	19825		22644
Others not Listed	5,597		7,988
Grand Total	27970		31987

Source: Dept. of Customs & Excise

Policy

In September 2000, the South African government published a document on the Standards and Requirements for exports of Canned Fruit, in the context of the Agricultural Product Standards Act, 1990 (Act No.119 of 1990) which ensures that only fruit of the highest quality is used for canning, especially for apricots.

Marketing

South Africa's canned fruit exports to Europe are still important although sales to the Far East and the rest of the world are constantly rising as a result of South Africa's shift in marketing strategy from Europe to other regions. Under the SA/EU Trade Agreement, which became effective in January 2000, the South African canners have closely monitored their EU shipments to get the maximum possible benefit from their allocated tariff quota.

There has also been close liaison with government departments and the South African Revenue Service (SARS) regarding the management of the quotas. The 2003 tariff quotas to the EU are as follows,

* canned pears, apricots and peaches - 43600 tons GW

* canned mixed fruit (excluding tropical) - 19620 tons GW

* canned mixed fruit (including tropical) - 2180 tons GW

About 20% of the quota is expected to be used by new entrants.

The South African Fruit and Vegetable Canners Association (SSFVCA) will carefully monitor canners usage of their permits and liaise with the National Department of Agriculture(NDA) to ensure optimum benefit from the quota.

South African canned fruit continues to benefit from duty-free treatment under the African Growth and Opportunity Act (AGOA).