



USDA Foreign Agricultural Service

GAIN Report

Global Agriculture Information Network

Template Version 2.09

Required Report - public distribution

Date: 10/5/2004

GAIN Report Number: SF4039

South Africa, Republic of

Canned Deciduous Fruit

Semi-Annual

2004

Approved by:

Scott Reynolds
U.S. Embassy

Prepared by:

Patricia Mabiletsa

Report Highlights:

South Africa's MY 2003/04 total fresh fruit deliveries to canners are expected to decrease slightly to reach 568,000 MT as compared to 580,000 MT of last year because of increased demand in the fresh market. Exports are forecast to increase to 170,000 MT due to scarcity of fruit occasioned by the failure of the European crop. Domestic consumption is forecast to drop by 4% as exports are prioritized over the domestic market. Imports will continue at significantly low levels because of reduced local demand for canned fruit products.

Includes PSD Changes: Yes
Includes Trade Matrix: Yes
Semi-Annual Report
Pretoria [SF1]
[SF]

Table of Contents

Executive Summary **3**
Production **3**
 Production Subcategory 3
Consumption..... **5**
 Consumption Subcategory 5
Trade..... **5**
 Trade Subcategory 6
Stocks **11**
 Stocks Subcategory 11
Policy **11**
 Policy Subcategory 11
Marketing **11**
 Marketing Subcategory 11

Executive Summary

South Africa's total canned fruit production is expected to reach about 202,000 MT in MY 2003/04, a slight increase from 199,000 MT of last year because of a bumper apricot crop. Exports are forecast to increase by 4% to 170,000 MT due to international scarcity of fruit occasioned by the failure of the European crop. Domestic consumption is forecast to drop by 4% as exports are prioritized over the domestic market. Imports will continue at significantly low levels because of reduced demand for canned fruit products.

Production

South Africa's MY2003/04 total fresh fruit deliveries to canners are expected to decrease slightly to reach 568,000 MT as compared to 580,000 MT of last year because of increased demand in the fresh markets. Deliveries are expected to decrease by 13% to reach 135,000 MT for peaches, by 10% to reach 88,000 MT for pears, and by 2% to reach 284,000 MT for mixed fruit. Deliveries for apricots are expected to increase massively by 65% to amount to 45,000 MT because of a huge crop.

Canned fruit production is forecast to drop by 12% for peaches, by 5% for pears, and to increase by 55% for apricots and by 2% for mixed fruit.

Production Subcategory

South Africa, Republic of Peaches, Canned							
	2001	Revised	2002	Estimate	2003	Forecast	UOM
	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	MM/YYYY
Deliv. To Processors	116619	116619	154508	154508	134733	134733	(MT)
Beginning Stocks	45200	45200	18182	30912	13212	20634	(MT, Net Weight)
Production	61313	77293	98885	99887	86230	88200	(MT, Net Weight)
Imports	112	0	117	3	100	3	(MT, Net Weight)
TOTAL SUPPLY	106625	122493	117184	130802	99542	108837	(MT, Net Weight)
Exports	63581	63581	77168	77168	66400	70300	(MT, Net Weight)
Domestic Consumption	24862	28000	26804	33000	23280	30500	(MT, Net Weight)
Ending Stocks	18182	30912	13212	20634	9862	8037	(MT, Net Weight)
TOTAL DISTRIBUTION	106625	122493	117184	130802	99542	108837	(MT, Net Weight)

NB: All POST ESTIMATES ARE REVISED

South Africa, Republic of							
Pears, Canned							
	2001	Revised	2002	Estimate	2003	Forecast	UOM
	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	MM/YYYY
Deliv. To Processors	57637	57637	98254	98254	88135	88135	(MT)
Beginning Stocks	2800	9508	2500	1079	2284	1393	(MT, Net Weight)
Production	28940	20816	32420	32420	31000	30800	(MT, Net Weight)
Imports	48	17	61	9	20	20	(MT, Net Weight)
TOTAL SUPPLY	31788	30341	34981	33508	33304	32213	(MT, Net Weight)
Exports	23588	27062	27197	29465	26100	28000	(MT, Net Weight)
Domestic Consumption	5700	2200	5500	2650	5500	2800	(MT, Net Weight)
Ending Stocks	2500	1079	2284	1393	1704	1413	(MT, Net Weight)
TOTAL DISTRIBUTION	31788	30341	34981	33508	33304	32213	(MT, Net Weight)

NB: ALL POST ESTIMATES ARE REVISED

South Africa, Republic of							
Canned Apricots							
	2001	Revised	2002	Estimate	2003	Forecast	UOM
	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	MM/YYYY
Deliv. To Processors	41310	41810	36994	36994	60867	60867	(MT)
Beginning Stocks	14794	14794	8442	13022	8743	11415	(MT, Net Weight)
Production	22586	29166	28573	29145	46870	45220	(MT, Net Weight)
Imports	0	0	44	44	20	20	(MT, Net Weight)
TOTAL SUPPLY	37380	43960	37059	42211	55633	56655	(MT, Net Weight)
Exports	23938	23938	23596	23596	37500	37500	(MT, Net Weight)
Domestic Consumption	5000	7000	4720	7200	7740	7740	(MT, Net Weight)
Ending Stocks	8442	13022	8743	11415	10393	11415	(MT, Net Weight)
TOTAL DISTRIBUTION	37380	43960	37059	42211	55633	56655	(MT, Net Weight)

NB: ALL POST ESTIMATES ARE REVISED

South Africa, Republic of Canned Mixtures							
	2001	Revised	2002	Estimate	2003	Forecast	UOM
	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	MM/YYYY
Deliv. To Processors	215566	248047	289756	289756	283735	283735	(MT)
Beginning Stocks	13841	13841	5925	11071	3982	8028	(MT, Net Weight)
Production	29014	33860	37289	37289	36890	38000	(MT, Net Weight)
Imports	57	57	115	115	150	90	(MT, Net Weight)
TOTAL SUPPLY	42912	47758	43329	48475	41022	46118	(MT, Net Weight)
Exports	31987	31987	35247	35247	34300	35900	(MT, Net Weight)
Domestic Consumption	5000	4700	4100	5200	4000	5320	(MT, Net Weight)
Ending Stocks	5925	11071	3982	8028	2722	4898	(MT, Net Weight)
TOTAL DISTRIBUTION	42912	47758	43329	48475	41022	46118	(MT, Net Weight)

NB: ALL POST ESTIMATES ARE REVISED

Consumption

South Africa's CY 2004 canned fruit domestic consumption is expected to decrease by about 4% because more products will be exported to Europe. More fresh fruit will also be consumed locally compared to canned fruit products because of competitive prices due to the strong Rand.

Consumption Subcategory

Average Local Prices for Fresh fruit sent for Canning (US \$/TON)			
	2002	2003	2004*
Pears	43.82	74.60	138.46
Apricots	141	107.41	124.92
Peaches	116.92	149.34	174.31

* = Estimates

Trade

Exports are forecast to continue to increase and are at 170,000 MT in CY 2004, due to high international canned fruit demand. Exports in CY 2003 totaled 165,000 MT.

Historically, Europe has been the traditional market for South African canned peaches. However, in CY 2003, Japan became a very important market, and is still a leading export market from January to June 2004.

South Africa's canned pear exports are expected to reach about 28,000 MT, 5% lower than last year resulting from reduced amount of deliveries. Most canned pears were exported to United Kingdom followed by Japan by June 2004, though lower than the same period to the UK last year.

Exports of canned apricots in the MY 2003/04 increased by 59% compared to a year earlier, mostly due to an expansion of area harvested. By June 2004, the bulk of South African canned apricots reached Germany, though at a lower rate than the same period last year.

Trade Subcategory

South Africa, Republic of Peaches, Canned			
Time Period	Jan-Dec	Units:	MT
Imports for:	2002		2003
U.S.	0	U.S.	0
Others		Others	
		China	3
Total for Others	0		3
Others not Listed	0		0
Grand Total	0		3

Source: WTA

South Africa, Republic of Peaches, Canned			
Time Period	Jan-Dec	Units:	MT
Exports for:	2002		2003
U.S.	8,621	U.S.	7,656
Others		Others	
Japan	15,004	Japan	17,208
Netherlands	4,935	Germany	10,871
Germany	4,909	United Kingdom	6,528
Hong Kong	4,463	Hong Kong	5,256
Unitedkingdom	3,519	Canada	3,700
Switzerland	3,480	Switzerland	3,111
Canada	3,353	Greece	2,282
Korea, South	2,080	Korea, South	2,079
Taiwan	1,501	Netherlands	1,821
Austria	1,335	Belgium	1,796
Total for Others	44579		54652
Others not Listed	10,381		14,860
Grand Total	63581		77168

Source: WTA

South Africa, Republic of Canned Peaches			
Time Period	January-June	Units:	MT
Exports for:	2003		2004
United States	3,967	United States	938
Japan	10,442	Japan	9,737
Germany	5,985	Thailand	6,605
United Kingdom	3,321	Germany	4,863
Hong Kong	2,143	United Kingdom	3,243
Canada	2,143	Hong Kong	2,789
Total Listed	28,001	Total Listed	28,175
Others not Listed	11,368	Others not Listed	16,531
Grand Total	39,369	Grand Total	44,706

Source: WTA

South Africa, Republic of Pears, Canned			
Time Period	Jan-Dec	Units:	MT
Imports for:	2002		2003
U.S.		U.S.	0
Others		Others	
Spain	16	Spain	6
		Lebanon	2
Total for Others	16		8
Others not Listed	1		1
Grand Total	17		9

Source: WTA

South Africa, Republic of Pears, Canned			
Time Period	Jan-Dec	Units:	MT
Exports for:	2002		2003
U.S.	5,373	U.S.	2,802
Others		Others	
Japan	3,491	Germany	4,609
Unitedkingdom	3,344	Unitedkingdom	4,329
Germany	2,751	Japan	3,686
Switzerland	2,163	Netherlands	3,002
Belgium	1,987	Canada	2,312
Netherlands	1,444	Switzerland	2,208
Canada	1,227	Belgium	1,610
Greece	842	Thailand	1,197
France	664	France	839
Austria	491	Austria	612
Total for Others	18404		24404
Others not Listed	3,285		2,259
Grand Total	27062		29465

Source: WTA

South Africa, Republic of Canned Pears			
Time Period	January-June	Units:	MT
Exports for:	2003		2004
United States	945	United States	459
United Kingdom	2,575	United Kingdom	1,890
Germany	2,146	Japan	1,848
Canada	1,866	Thailand	1,590
Netherlands	1,861	Germany	1,463
Japan	1,709	Switzerland	776
Total Listed	11,102	Total Listed	8,026
Others not Listed	4,498	Others not Listed	4,004
Grand Total	15,600	Grand Total	12,030

Source: WTA

South Africa, Republic of Canned Apricots			
Time Period	Jan-Dec	Units:	MT
Imports for:	2002		2003
U.S.	0	U.S.	0
Others		Others	
		China	19
		Belgium	19
		Australia	2
		Saudi Arabia	2
Total for Others	0		42
Others not Listed	0		1
Grand Total	0		43

Source: WTA

South Africa, Republic of Canned Apricots			
Time Period	Jan-Dec	Units:	MT
Exports for:	2002		2003
U.S.	537	U.S.	177
Others		Others	
Germany	9,665	China	10,995
United Kingdom	2,375	Belgium	2,526
Japan	2,071	Australia	2,077
Switzerland	1,477	Saudi Arabia	1,180
Belgium	1,315		908
France	767		853
Austria	747		771
Italy	629		681
Israel	614		605
Australia	420		530
Total for Others	20080		16778
Others not Listed	3,321		6,641
Grand Total	23938		23596

Source: WTA

South Africa, Republic of Canned Apricots			
Time Period	January-June	Units:	MT
Exports for:	2003		2004
United States	101	United States	36
Germany	7,973	Germany	5,015
United Kingdom	1,468	United Kingdom	1,665
Japan	1,254	Netherlands	1,411
Netherlands	936	Australia	1,275
Austria	563	Japan	1,018
Total Listed	12,295	Total Listed	10,420
Others not Listed	3,431	Others not Listed	4,293
Grand Total	15,726	Grand Total	14,713

Source: WTA

South Africa, Republic of Canned Mixtures			
Time Period	Jan-Dec	Units:	MT
Imports for:	2002		2003
U.S.	0	U.S.	0
Others		Others	
Netherlands	50	Turkey	99
Taiwan	3	Lebanon	13
United Kingdom	2	Thailand	3
Total for Others	55		115
Others not Listed	2		0
Grand Total	57		115

Source: WTA

South Africa, Republic of Canned Mixtures			
Time Period	Jan-Dec	Units:	MT
Exports for:	2002		2003
U.S.	1,355	U.S.	872
Others		Others	
Japan	4,847	Japan	5,443
United Kingdom	3,256	United Kingdom	4,603
Canada	2,517	Germany	3,848
Switzerland	2,324	Switzerland	2,976
Singapore	2,153	Canada	2,794
Germany	2,064	Singapore	1,935
Austria	1,863	Austria	1,929
Philippines	1,357	Belgium	1,425
Belgium	1,256	Netherlands	1,190

Lebanon	1,006	Philippines	1,181
Total for Others	22643		27324
Others not Listed	7,990		7,051
Grand Total	31988		35247

Source: WTA

South Africa, Republic of Canned Mixtures			
Time Period	January-June	Units:	MT
Exports for:	2003		2004
United States	293	United States	404
United Kingdom	2,668	Japan	2,955
Japan	2,405	United Kingdom	1,469
Germany	1,669	Switzerland	1,262
Canada	1,400	Canada	1,150
Switzerland	1,298	Germany	961
Total Listed	9,733	Total Listed	8,201
Others not Listed	5,858	Others not Listed	7,976
Grand Total	15,591	Grand Total	16,177

Source: WTA

Stocks

South Africa's CY 2004 canned deciduous fruit stocks are expected to reach about 25,000 MT, a significant drop from 41,000 MT of last year because of lower deliveries for peaches, pears, and mixed fruit. Huge amounts of fruit are expected for sale in the fresh produce markets due to good quality and high demand in Europe.

Stocks Subcategory

None

Policy

South African fruit industry and the government are adhering to requirements and guidelines of the international export markets. Fruit producers are proactively adopting the internationally acclaimed good agricultural practice (GAP) production standards and good manufacturing practice (GMP) in pack-houses. These are controlled under Hazard Analysis Critical Control Points (HACCP) systems. Pilot projects for the International Fresh Produce traceability standards are also implemented.

Policy Subcategory

None

Marketing

Food safety is currently the biggest issue affecting marketing of South African fruits and canned fruit products internationally and within the domestic markets as consumers are becoming more health conscious. In CY 2004, South African consumption of canned fruit products is expected to decrease because of more demand and availability of fresh fruit.

Marketing Subcategory

None