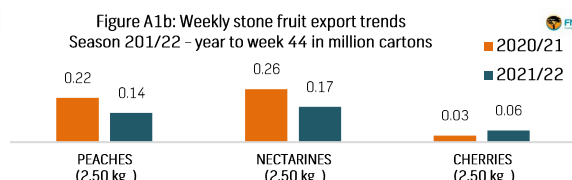
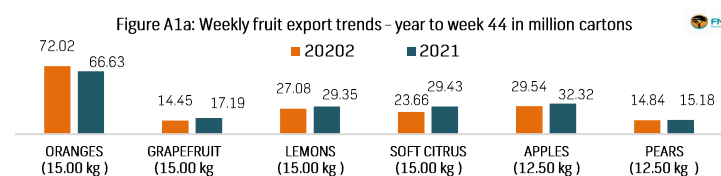




## Weekly update – Fruit and Vegetable Markets

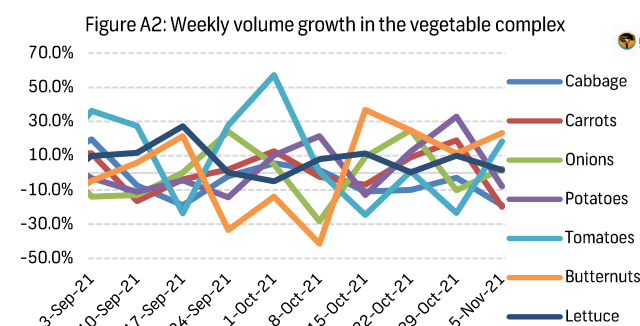
- Latest reports on the international markets indicate demand pressures for various commodities including citrus which has so far placed downward pressure on prices. In Europe, the Spanish citrus season began on a softer note with pedestrian sales amid increased availability of product.
- South Africa's citrus fruit exports so far show good progress as the export season tails off. Except for oranges, the rest of the citrus complex posted modest to sharp increases in volumes of fruit shipped. Orange exports for the year to week 44 of the export season reached 66.63 million (15kg) cartons which is 7% below the 2020 levels with volumes to Europe, the country's biggest market (36%), contracting by a whopping 16% year-on-year (y/y). However, exports to the Middle East which so far is the second biggest destination with a share of 22% surged by 15% y/y (see figure A1a).
- For grapefruit, the season ends with 17.19 million cartons shipped which is sharply higher by 19% y/y. The biggest markets were Europe and the South East Asia region both with shares of 34% and saw volumes increasing by 5% and 43% respectively y/y. Lemon volumes advanced by 8% y/y to 29.35 million cartons with Europe importing 18% more relative to last year while the Middle East which accounts for the second biggest share of 32% saw volumes dropping by 2% y/y (see figure A1a).
- In the case of soft citrus, the volume of exports surged by 24% y/y to 29.43 million cartons with Europe (26%), the Middle East (15%), and North America (12%) collectively accounting for the biggest share of 53%. The Middle East alone posted the biggest growth of 67% y/y in volumes of soft citrus imported from South Africa (see figure A1a).
- In the pome category, apples and pears are on course to finish the season on a high note with the number of cartons exported up 9% and 2% respectively y/y at 32.32m and 15.18m cartons. The Far East and Asia region is the leading destination for apples with 29% share of the total YT-week 44 and growth of 16% y/y. It is followed closely by Africa with a 25% share and growth of 12% y/y (see figure A1a).
- For stone fruits, cherries had a strong start to the 2021/22 marketing season as the volume of cartons exported in the first few weeks of marketing season are already 74% ahead of last year at 56,862 cartons (2.5kg). The Middle East is ahead of the pack with a 43% share of the total and an increase of 360% y/y. However, the UK which followed closely in the second place with a share of 41% had a slow start with volumes so far 7% lower relative to the same period last year (see figure A1b).



- Export progress for nectarines in the first few weeks of the season showed a massive contraction of a whopping 34% relative to last year at just 172,226 cartons (2.5kg). The main destination so far is the UK with 85% of the total but volumes are down 40% y/y. Europe comes in second with 11% share but still saw an exponential growth of 198% y/y.
- Peaches also saw a 34% contraction in volumes exported early in the 2021/22 season at 143,069 cartons. Volumes to the UK which so far accounts for the lion share (82%) saw a 28% decline in shipments relative to the same period last year.

#### Local fresh produce market trends

- The first week of November saw a surprisingly modest rebound in prices across the fruit and vegetable complex sold on the fresh produce markets. The biggest gainers in the fruit category were the mangoes with a weekly increase of almost 39% at R16.47/kg which is 19% higher y/y in last week's trade.
- In the vegetable category, lettuce was in the lead with a 49% increase relative to the week earlier at R13.53/kg and was 54% higher y/y. Other commodities that recorded sharp increases were carrots, tomatoes, and cabbages with weekly increases of 26%, 18%, and 16.4% respectively week-on-week (w/w) at R2.73/kg, R7.38/kg, and R3.04/kg. The reduced volume of supplies underpinned the post month end gain in vegetable prices on markets. Weekly growth trends in vegetable and fruit volumes are illustrated in figures A2 and A3.
- On the weather front, the good rains recently bode well for production as it lowers the irrigation costs and boost dryland crops across the producing areas. The positive weather outlook means another fantastic agriculture year ahead.



Source: FNB AgriCommodities

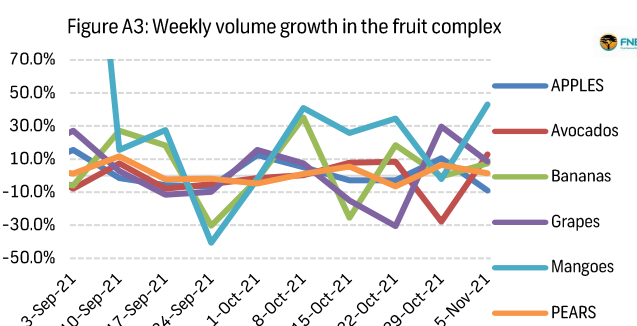
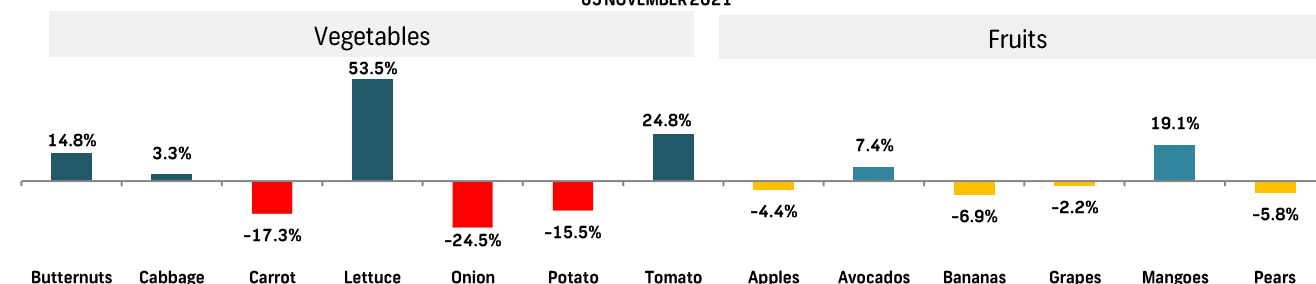


Figure A4: Changes in average monthly fruit and vegetable prices on South Africa's major Fresh Produce Markets (%▲y/y)  
05 NOVEMBER 2021

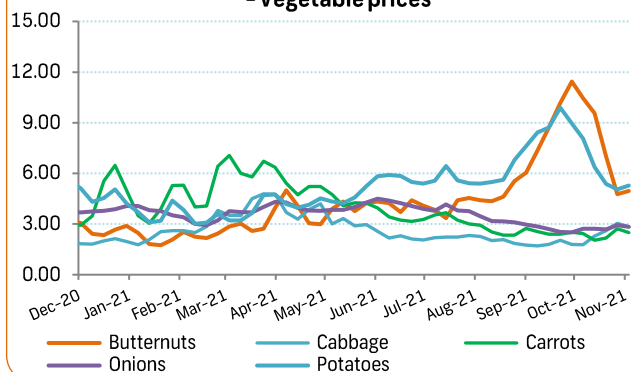
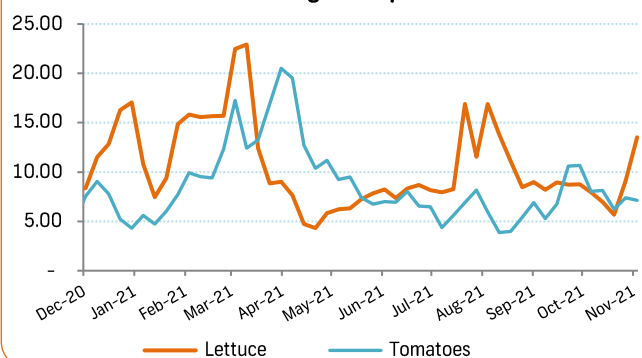


Source: Own calculations from FNB AgriComms.

Table 1: Vegetable prices – South Africa's Major Fresh Produce Markets – (Average Pretoria, Bloemfontein, Johannesburg, Cape Town, and Durban)

Week ending 05 NOVEMBER 2021	Average Price (R/Kg)	Price change w/w	Price change y/y	Total Volume (t)	Volume change w/w	Volume Change y/y
Butternuts**	4.95	3.8%	14.8%	1418	-29.4%	-23.9%
Cabbage	3.04	16.4%	3.3%	1,184	-19.0%	-29.5%
Carrot	2.73	25.7%	-17.3%	2,387	-19.9%	1.2%
Lettuce**	13.53	48.7%	53.5%	309	-12.2%	-24.6%
Onion	2.93	9.2%	-24.5%	6,758	-10.2%	10.0%
Potato	5.06	-5.8%	-15.5%	8,057	-7.9%	-53.8%
Tomato	7.38	18.4%	24.8%	4,241	-29.3%	-15.9%

Source: FNB AgriComms \*\* including all other markets

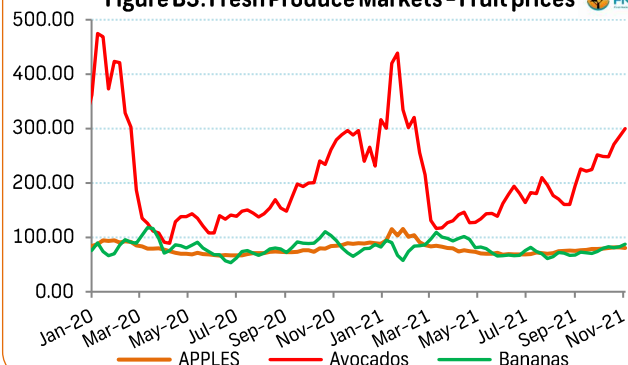
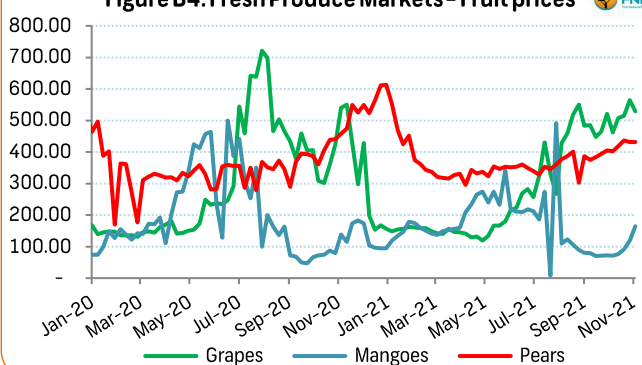
**Figure B1: Fresh Produce Markets  
- Vegetable prices****Figure B2: Fresh Produce Markets  
- Vegetable prices**

Source: FNB AgriComms

**Table 2: Fruit prices – South Africa's Major Fresh Produce Markets –**  
(Average Major Markets: Pretoria, Bloemfontein, Johannesburg, Cape Town, and Durban, & other markets)

Week ending 05 NOVEMBER 2021	Average Price (R/Kg)	Price change w/w	Price change y/y	Total Volume (t)	Volume change w/w	Volume Change y/y
Apples	8.07	-0.8%	-4.4%	2,289	-9.0%	-2.9%
Avocados	30.00	5.0%	7.4%	212	-20.5%	-3.3%
Bananas	8.76	5.6%	-6.9%	3,238	-9.8%	18.8%
Grapes	52.86	-6.4%	-2.2%	74	35.6%	107.6%
Mangoes	16.47	38.5%	19.1%	35	41.5%	-30.4%
Pears	43.13	0.0%	-5.8%	587	-15.6%	2.3%

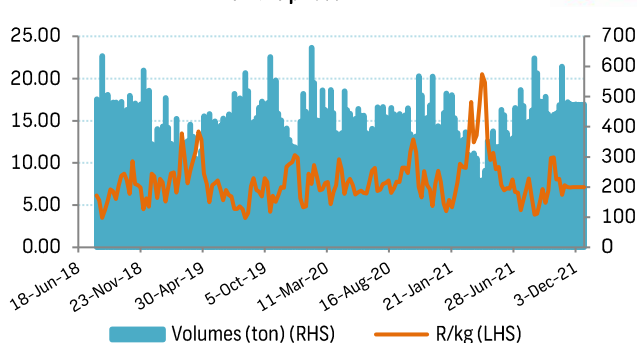
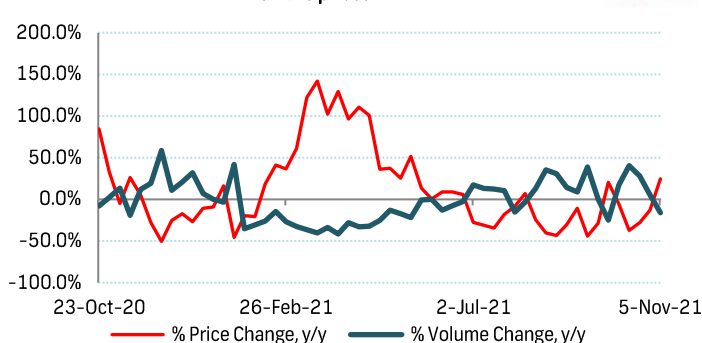
Source: FNB AgriComms

**Figure B3: Fresh Produce Markets – Fruit prices****Figure B4: Fresh Produce Markets – Fruit prices**

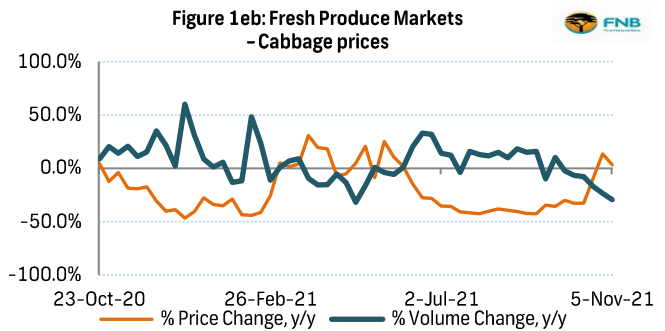
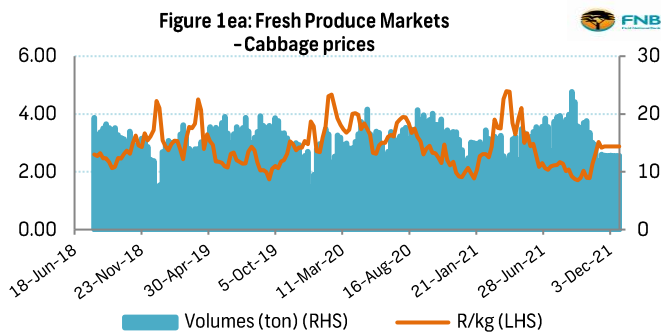
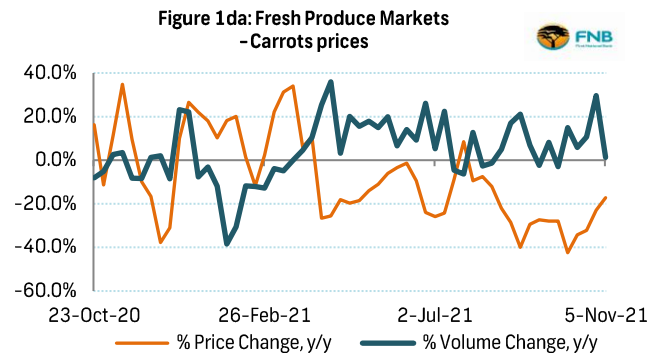
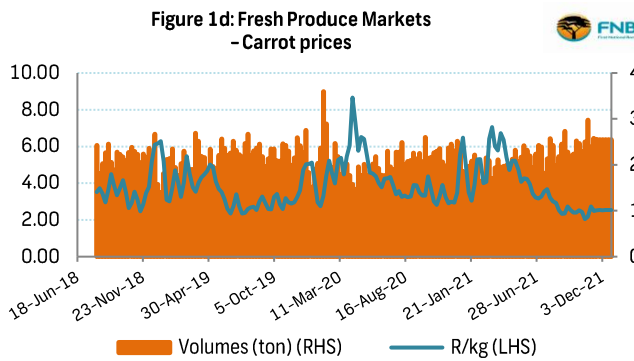
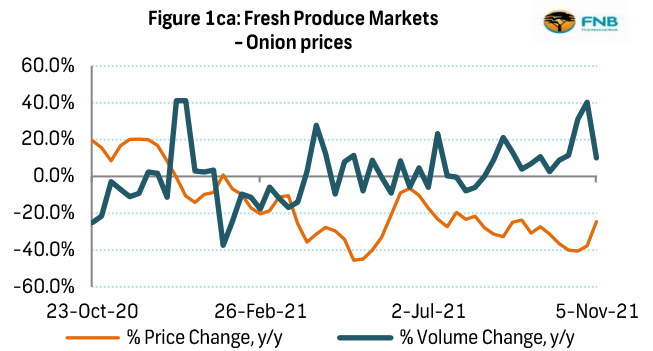
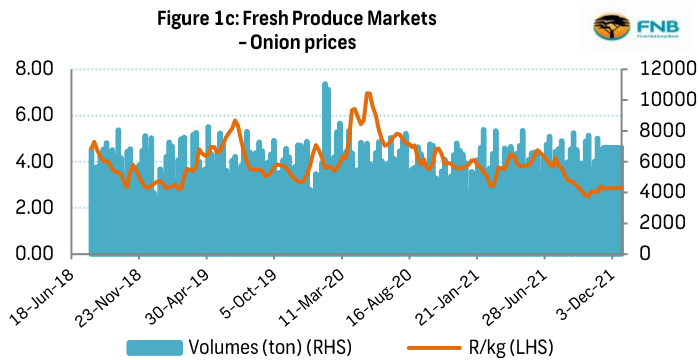
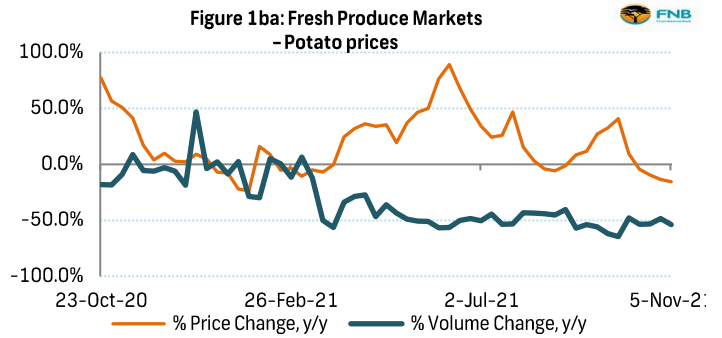
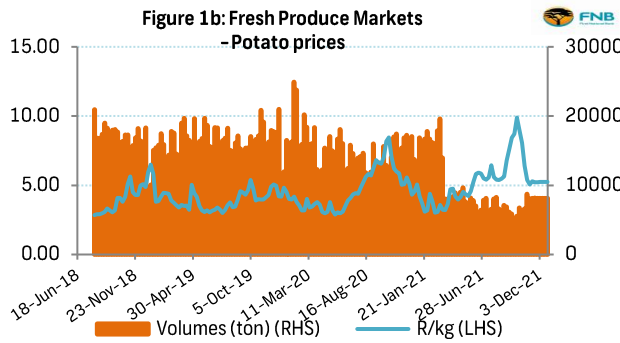
Source: FNB AgriComms

**Vegetable trends on 5 Major Fresh Produce Markets in SA (Figures 1a to 1e)**

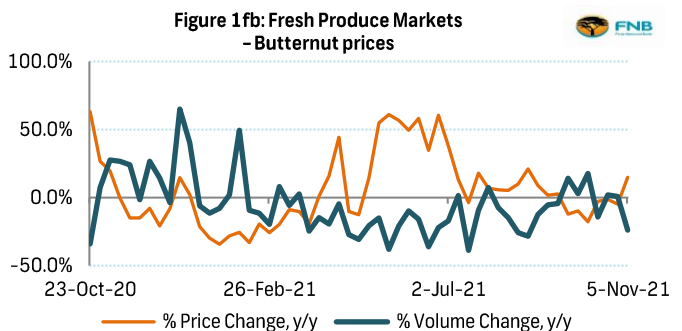
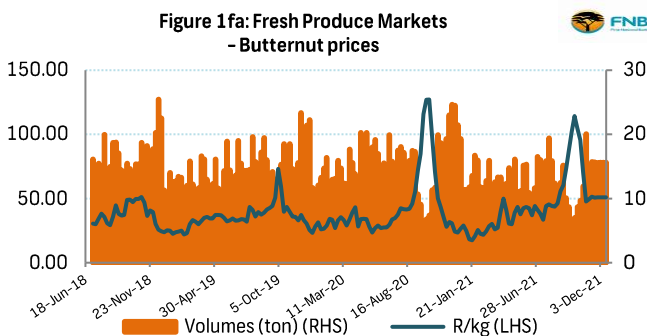
(Average 5 major markets – Pretoria, Bloemfontein, Johannesburg, Cape Town, and Durban)

*\*Note: The last six data points are preliminary for all vegetable prices and quantity graphs.***Figure 1a: Fresh Produce Markets  
- Tomato prices****Figure 1aa: Fresh Produce Markets  
- Tomato prices**

Source: FNB AgriComms

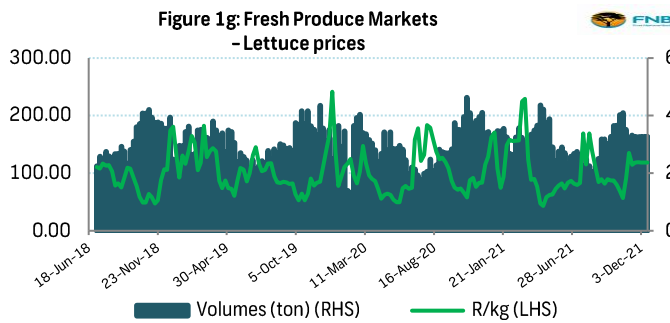


Source: FNB AgriComms

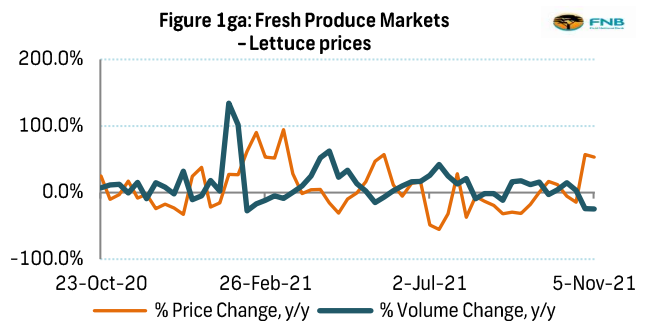




**Figure 1g: Fresh Produce Markets  
-Lettuce prices**



**Figure 1ga: Fresh Produce Markets  
-Lettuce prices**

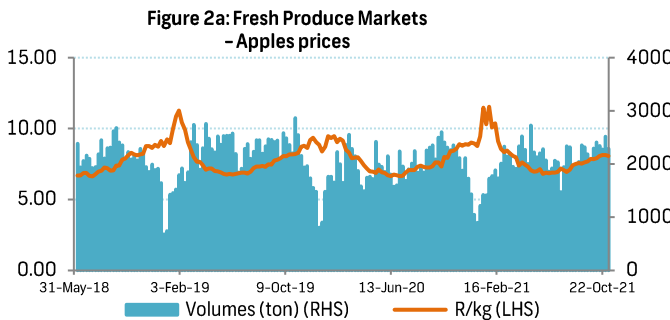


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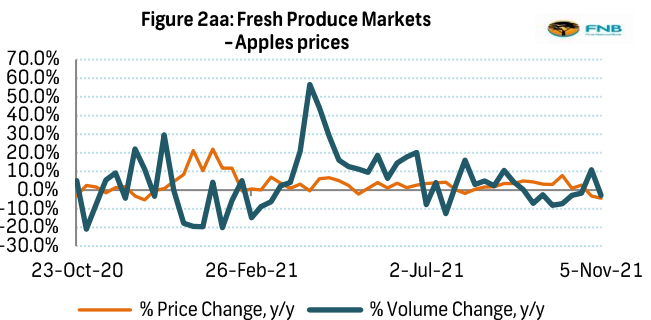
## Fruit trends on Major Fresh Produce Markets in SA (figures 2a to 2f)

(Average 5 major markets – Pretoria, Bloemfontein, Johannesburg, Cape Town, and Durban)

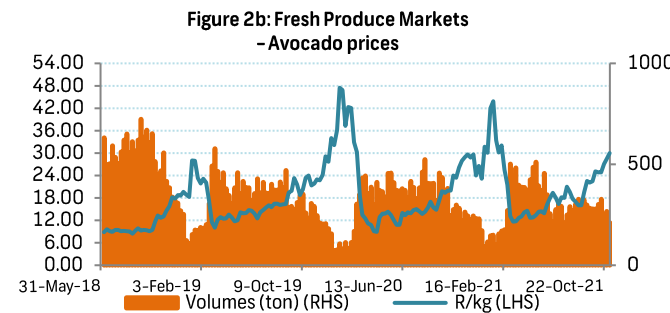
**Figure 2a: Fresh Produce Markets  
-Apples prices**



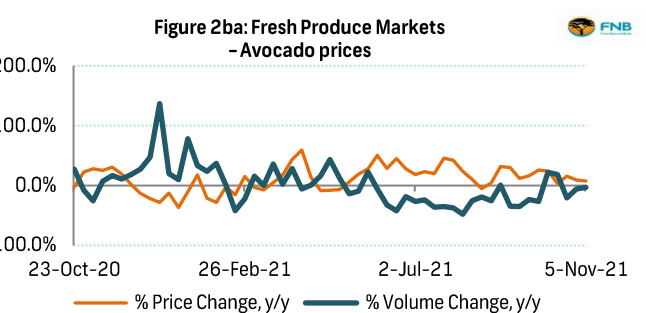
**Figure 2aa: Fresh Produce Markets  
-Apples prices**



**Figure 2b: Fresh Produce Markets  
-Avocado prices**

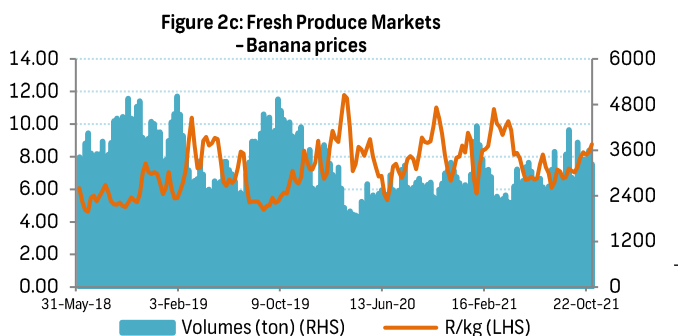


**Figure 2ba: Fresh Produce Markets  
-Avocado prices**

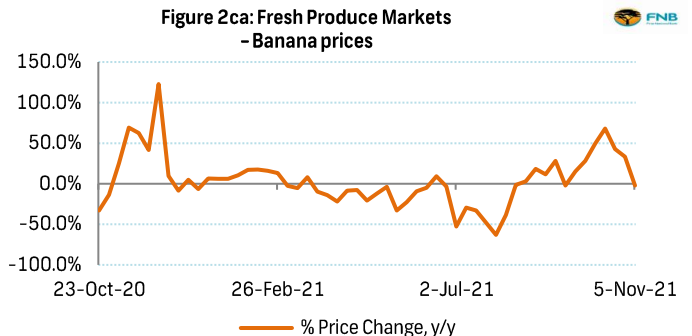


Source: FNB AgriComms

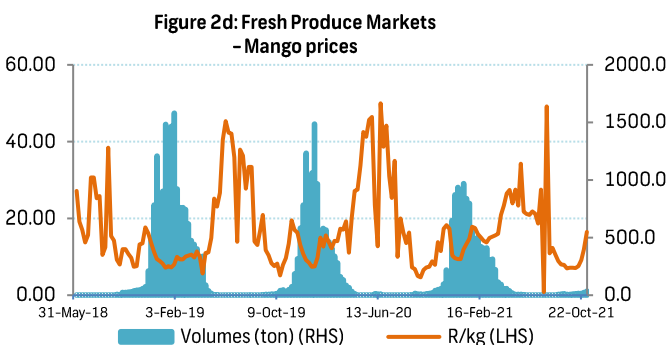
**Figure 2c: Fresh Produce Markets  
-Banana prices**



**Figure 2ca: Fresh Produce Markets  
-Banana prices**



**Figure 2d: Fresh Produce Markets  
-Mango prices**



**Figure 2da: Fresh Produce Markets  
-Mango prices**

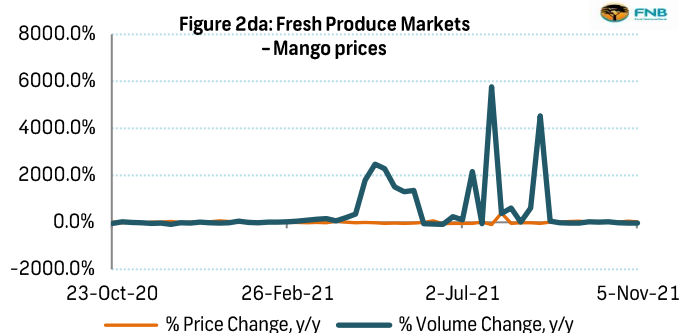


Figure 2e: Fresh Produce Markets  
- Pear prices

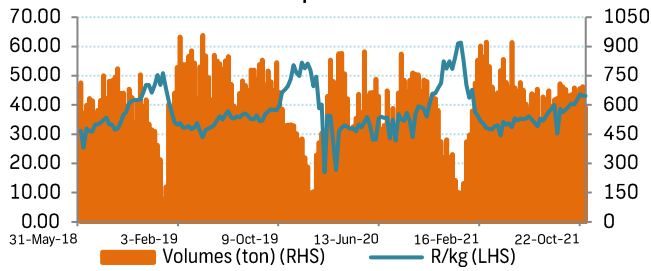


Figure 2bb: Fresh Produce Markets  
- Pear prices

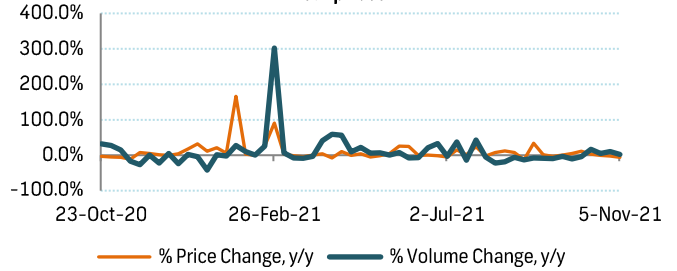


Figure 2d: Fresh Produce Markets  
- Grapes prices

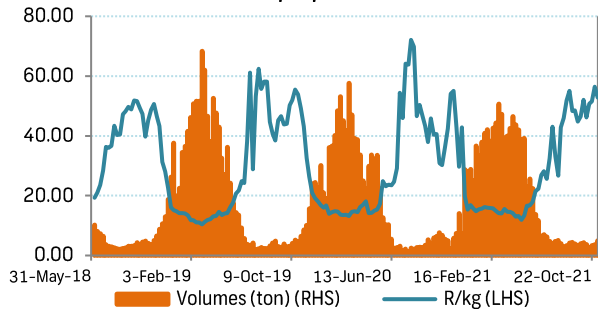
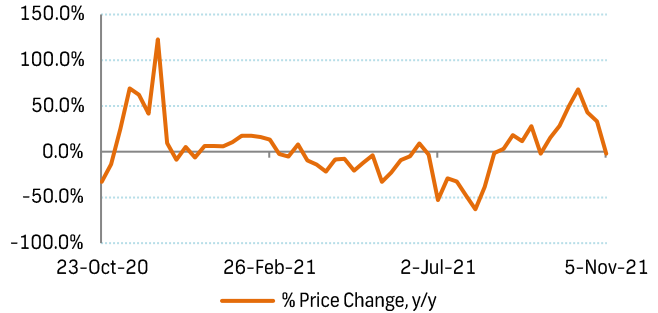


Figure 2bb: Fresh Produce Markets  
- Grape prices



Source: FNB AgriComms.

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