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## Impact of the drought on the South African Fruit Sector 15 Dec 2017

South African fruit farmers have been under immense pressure with the current localised drought compromising optimal productions levels. The drought has predominantly affected the Western and Eastern parts of the country in varying degrees resulting in unequal drought effects across the regions.

### **Table Grapes Subsector**

Although the Western Cape, with its three production regions is affected by the persistent drought, the effect on the estimate at a national level is expected to be less pronounced. This expectation is ascribed to the climatically diverse industry, increased hectares in production, the continued shift to higher yielding new generation varieties and the resilience and adaptation of table grape farmers as noted by South African Table Grapes Industry (SATI) in a press release on the third of October 2017. SATI released the first Crop Estimate for the 2017/18 table grape season estimated to be between 58,9 million and 63 million cartons, which is marginally above the 5-year average (2012/13 – 2016/17 seasons) of about 57,9 million cartons.

### **Deciduous Fruit Subsector**

Stone fruit production for the 2016/2017 season increased compared to the 2015/2016 season, while pome fruit indicated only marginal decreases. For the deciduous fruit producers, the season has just begun which promises to be quite challenging with very little relief from the drought to date. Over the past five years, numerous new orchards have been established which will have a significant impact on the total export estimate as these trees come into bearing this season. The increase in production

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will counter the expected decrease as a direct result of the drought. In a normal year stone fruit trees would have added 1.4 million cartons to the plum export estimates, 420 000 cartons to the nectarine export estimate and 235 000 cartons to the peach export estimate. Because of the drought, these increases will unfortunately not materialise but will minimise the overall decline in exports. For the 2017/18 season, a decrease of only 6% is expected for the plum exports and 2 - 4% for the nectarines and peaches when compared to 2016/17 season. Apricots are expected to decrease by 17% as a down alternate bearing year is likely to come into play as well. Table 1 below illustrates the expected changes in stone fruit export volumes. Estimates for pome fruit are still unavailable at present, however minimal decrease in production is expected.

TABLE 1: STONE FRUIT EXPORT ESTIMATE

| Product    | Carton eqv (kg) | 2013/2014  | 2014/2015  | 2015/2016  | 2016/2017  | 3 yr avg   | 2017/2018 ESTIMATE | 2017/2018 vs Previous |
|------------|-----------------|------------|------------|------------|------------|------------|--------------------|-----------------------|
| Apricots   | 4.75            | 971 581    | 810 619    | 699 864    | 774 240    | 761 575    | 640 473            | -17% -133 768         |
| Nectarines | 2.5             | 2 949 206  | 3 740 896  | 4 017 425  | 4 122 833  | 3 960 385  | 4 052 341          | -2% -70 492           |
| Peaches    | 2.5             | 1 571 234  | 1 984 663  | 2 212 478  | 2 169 010  | 2 122 050  | 2 082 993          | -4% -86 017           |
| Plums      | 5.25            | 10 512 857 | 11 507 330 | 11 074 170 | 12 349 114 | 11 643 538 | 11 428 343         | -7% -920 771          |

SOURCE: PPECB/AGRIHUB

The general feeling is that the early production regions and cultivars will have enough water to raise good crops while pressure is expected on cultivars to be harvested from February 2018 onwards, should the current conditions persist. On the bright side, great tasting fruit with high sugar levels are expected and the prevalence of pests and diseases is also likely to be very low to the dry and hot conditions.

### Citrus Subsector

Citrus producers in the Northern areas of the country experienced their own localised drought in 2016 which saw their export Valencia oranges and grapefruit crop volumes shrink while soft citrus, lemons and navel oranges grown predominantly in the Eastern Cape and Western Cape were not much affected in 2016. In 2017, Valencia oranges and grapefruit managed to bounce back to their 2015 levels as the North recovered from the drought. Navel oranges in the Eastern Cape (mainly Sunday's



River Valley) mainly suffered due to two intense climatic occurrences which saw a lot of fruit splitting happening. Although the Northern citrus producers have recovered, the Western Cape region is currently suffering a prolonged drought, the effects of which will only be measured after the 2018 export crop estimate in March have been released. The table below gives an overview of the citrus exports for the past three years as well as predictions of the 2017 losses however the actual effects will can only be confirmed after the 2018 crop estimates in March.

TABLE 2: CITRUS EXPORTS

| To End Week 44<br>Million 15 Kg<br>Cartons | Packed  | Packed | Packed | Shipped | Shipped | Original<br>Estimate | Latest<br>Prediction | Final<br>Packed |
|--------------------------------------------|---------|--------|--------|---------|---------|----------------------|----------------------|-----------------|
|                                            | 2015    | 2016   | 2017   | 2016    | 2017    | 2017                 | 2017                 | 2016            |
| <b>Grapefruit</b>                          | 16.1 m  | 13.8 m | 15.7 m | 13.2 m  | 15.4 m  | 15.6 m               | 15.7 m               | 13.8 m          |
| <b>Soft Citrus</b>                         | 10 m    | 12.2 m | 13.4 m | 11.3 m  | 13 m    | 13.2 m               | 13.4 m               | 12.2 m          |
| <b>Lemons</b>                              | 15 m    | 15 m   | 19 m   | 14.6 m  | 18.8 m  | 17.5 m               | 19 m                 | 15 m            |
| <b>Navels</b>                              | 24.5 m  | 26.2 m | 21.1 m | 25.5 m  | 21.1 m  | 26.3 m               | 21.1 m               | 26.2 m          |
| <b>Valencia</b>                            | 52.5 m  | 41.8 m | 53.8 m | 39.8 m  | 50.8 m  | 50.1 m               | 53.8 m               | 41.8 m          |
| <b>Total</b>                               | 118.1 m | 109 m  | 123 m  | 104.4 m | 118.9 m | 122.7 m              | 123 m                | 109 m           |

SOURCE: PPECB/AGRIHUB

### Subtropical Fruit Subsector

Subtropical fruits grow minimally in the Western Cape where the persistent drought is prevalent. Very negligible impact will be experienced in the production levels of mango, avocados, macadamia nuts and litchi crops.

### Fruit Industry Mitigation Strategies

Producers have been forced to implement drastic and ingenious plans to counter climatic conditions necessary to see the season through. On-farm actions implemented include; mulching, improved irrigation management practises, installing netting structures, stumping and extending the full-bearing age.

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