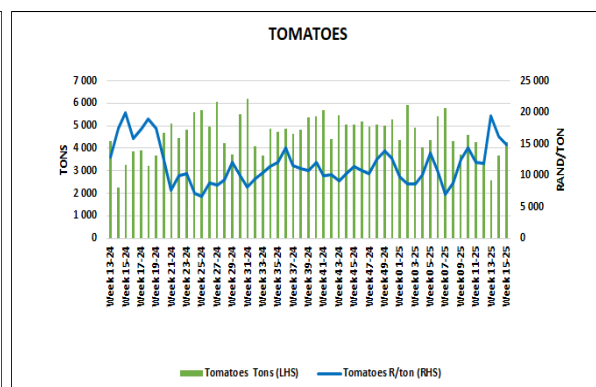
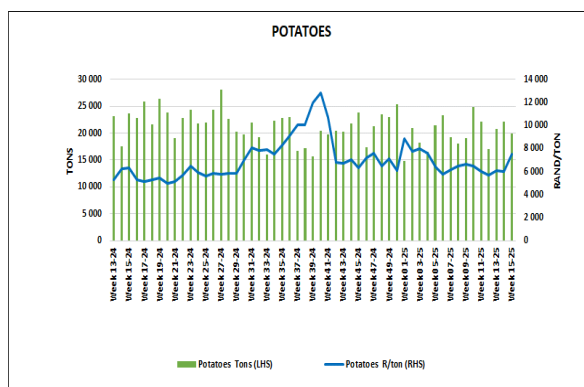




Summary

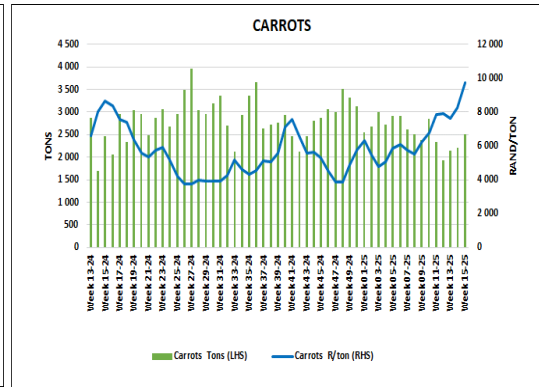
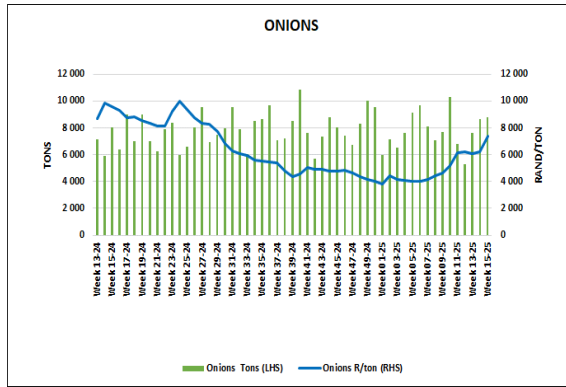
This week, Raisin South Africa released an update on the 2025 raisin harvest. According to the association, marketable deliveries have been revised downward due to the widespread rainfall received last month. The initial crop estimate that was released in December 2024 was projected at 104 000 tons. Factoring in the standard 6-9% allocation to industrial grade and product of no-value, the marketable portion was estimated at 96 720 tons. However, the March 2025 rainfall caused moisture-related challenges which resulted in the downward revision to a marketable estimate of 84 360 tons. As at week 15-2025, raisin producers had delivered 84 000 tons across all grades, which represents 81% of the initial crop estimate. Based on grading trends, approximately 81% of these deliveries (i.e., 68 040 tons) qualify as marketable. Approximately 20 000 tons of the projected crop is still to be delivered, which will potentially add 16 200 tons to the marketable portion, bringing the projected total to around 84 240 tons. This aligns with the outcome of the recent industry survey for the volume of fruit that is of export grade.

Potatoes and Tomatoes



- In week 15-2025, **potato** prices increased by 25% week-on-week (w/w) to R7 502/ton on the back of higher demand and market volumes that declined by 11% w/w to 19 832 tons. Availability declined due to last month's rainfall that delayed harvesting. Prices are expected to trend lower in the coming week from higher supply and lower expected demand.
- Tomato** prices declined by 8% w/w to R14 890/ton on the back of lower demand and market volumes that rose by 16% w/w to 4 269 tons. Prices are expected to rise in the coming week due to an improvement in demand.

Onions and Carrots



- **Onion** prices increased by 19% w/w to R7 377/ton from higher demand. Market supply increased by 1.6% w/w to 8 814 tons. Prices are expected to remain elevated until August 2025 on the back of tighter expected market volumes.
- **Carrot** prices rose by 17% w/w to R9 720/ton from higher consumer demand, even though market volumes firmed by 13% w/w to 2 497 tons. Prices are expected to remain firm due to Easter weekend demand, then they might decline due to higher expected market volumes.

Fruit Trends on all NFPMs in South Africa

Commodity	Rand per ton		% change (w/w)	Ton		% change (w/w)
	Week ending			Week ending		
	04 Apr	11 Apr		04 Apr	11 Apr	
Apples	10 270	9 990	🔴 -3%	2 475	3 010	🟢 22%
Pears	8 070	8 110	🟢 0.5%	1 080	1 122	🟢 4%
Bananas	9 920	10 490	🟢 6%	4 212	4 680	🟢 11%
Oranges	5 170	5 110	🔴 -1%	1 550	1 851	🟢 19%
Avocados	10 620	12 060	🟢 14%	923	803	🔴 -13%

- **Apple** prices decreased by 3% w/w to R9 990/ton from lower demand and market volumes that increased by 22% w/w. Prices are expected to stabilise at current levels over the short-term.
- **Pear** prices rose marginally by 0.5% w/w to R8 110/ton due a slightly stronger demand as market volumes rose by 4% w/w. Prices are also expected to remain flat over the short-term.
- **Banana** prices increased by 6% w/w to R10 490/ton, supported by higher demand. Market volumes firmed by 11% w/w. Bearish prices are projected for the coming week due to lower expected demand and stable market volumes.
- **Orange** prices decreased by 1% w/w to R5 110/ton on lower demand and a 19% w/w increase in market supply. Prices are expected to move sideways and possibly decline next month from higher availability.
- **Avocado** prices increased by 14% w/w to R12 060/ton due to higher consumer demand and market volumes that decreased by 13% w/w. Prices are expected to remain largely unchanged until May 2025.

Table Grape Exports

Week 15 Weekly Volumes 4.50 kg Cartons	2023/24 Exports (a)	2024/25 Exports (b)	y/y Change (a/b)	Cumulative Volumes YTD 2023/24 (c)	Cumulative Volumes YTD 2024/5 (d)	y/y Change (c/d)
Table Grapes	141 987	96 837	↓ -32%	73 667 048	77 651 365	↑ 5%

Week 15-2025:

- South Africa exported nearly 96 837 cartons (4.5 kg) of table grapes in week 15-2025, a decrease of 32% y/y as the season winds down. Cumulative exports are up by 5% y/y at 77.65 million cartons.
- The bulk of the consignment of table grapes was shipped to African (49%), the European Union (27%), and the Middle East (21%).
- The top three exported varieties include Crimson Seedless, Scarlotta Seedless®, and Redglobe. Last week, the South African Table Grape Association (SATI) held their season wrap-up session. Overall, the 2024/25 season had fewer challenges compared to the previous year, with minimal disruptions on farms and at ports. Notable achievements mentioned at the session were the total volume of table grapes packed for inspection that reached a new record at 78.9 million cartons and the securing of market access into the Philippines market. The first consignment to the Philippines is pencilled for the 2025/26 season.

Avocado Exports

Weekly Volumes 4kg Cartons	SA Exports to EU			EU Imports from the World		w/w Change
	Week 15	Week 16	w/w Change	Week 15	Week 16	
Hass	611 000	1 022 000	↑ 67%	5 035 000	5 203 000	↑ 3%
Green Skin	262 000	440 000	↑ 68%	1 204 000	1 240 000	↑ 3%
Total	873 000	1 462 000	↑ 67%	6 239 000	6 443 000	↑ 3%

Week 16-2025 exports:

- South Africa's **avocado** exports to the EU market are forecast to increase by 67% w/w and peak at 1.4 million cartons (4 kg) in week 16-2025. Hass and Green Skin exports are both projected to rise by 67% w/w to 1.02 million cartons and 440 000 cartons, respectively.
- The EU's avocado imports from the world are forecast to rise by 3% w/w to 6.4 million cartons as Brazilian Hass volumes reach a peak.
- Peruvian shipments to the EU have improved thus far. In week 15-2025, 68% of Peruvian avocados were shipped to the EU, this is a 64% increase y/y. So far this season, prices in the EU are stable. However, we expect a slight price dip in the next four weeks as supplies from both Peru and South Africa gradually increase.

Sources

Agri-Market Trends.

AVOBOOK.

BerriesZA.

Citrus Growers Association.

Department of Agriculture Land Reform and Rural Development.

Fresh Plaza.

Fresh Produce Exporters Forum.

GPA.

Hortgro.

South African Avocado Growers Association.

South African Table Grape Industry.

South African Wine.

Subtrop.

Disclaimer: *This report is for information purposes only and The Standard Bank of South Africa Limited makes no representations or warranties in respect of such information. The Standard Bank of South Africa Limited, its holding company and subsidiaries and their subsidiaries (Standard Bank Group) accepts no responsibility for any application, use or interpretation of the information contained in this report and the Standard Bank Group, and its employees, agents and representatives are not liable for any loss, damage or claim resulting from the use of this report. This report or any portion hereof may not be reprinted, sold, redistributed, edited, amended, reproduced, disseminated or used for any purpose without the written consent of the Standard Bank Group.*