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SOUTH AFRICAN FRUIT TRADE FLOW

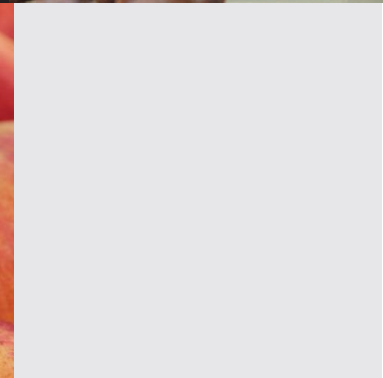
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SOUTH AFRICAN FRUIT TRADE FLOW

Issue No. 55: September 2024



Beautiful country, beautiful fruit

Compiled by Buhlebemvelo Dube, Lesedi Mokoena, Solly Molepo, Lucas Moswane, Thabile Nkunjana, and Bhekani Zondo

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1. Background

South Africa's diverse weather and climatic conditions across provinces enable the country to cultivate and produce a variety of fruits for domestic and international markets. The country is known as a key producer and exporter of citrus, deciduous and subtropical fruits. This issue of the Fruit Trade Flow Report looks at mangoes, peaches, apricots, plums, cherries, nectarines and figs. The report assesses the performance of these fruits in the current season and unpacks factors that allow South Africa to successfully supply both domestic and international markets. The report follows a trend analysis approach, comparing the 2024 fruit season with the 2023 season.

2. Overview of South Africa's Mango Trade Performance and Market Dynamics

By Buhlebemvelo Dube

2.1 Introduction

South Africa is known for its ability to produce as well as export a wide variety of fruits such as citrus, pome, table grapes, stone fruits, exotic fruits as well as subtropical fruits. Subtropical fruits include avocados, litchis, as well as mangoes. Subtropical fruits have a modest share of 5% in the fresh produce fruit exports, nonetheless, mangoes remain as one of the most resilient and often promising fruits when it comes to export opportunities and they have a strong presence in the subtropical fruits category. There is a need to intensify and explore market access opportunities for the industry, to further insulate the domestic market from dynamic international trade shocks, as well as ensuring that South African mango exporters compete effectively in the international market.

2.2 South African Mango Production

The mango season in South Africa normally begins in November and ends around late March thus making it the shortest season compared to other subtropical fruits such as avocados which stretch from February to November as well as litchis which stretch from November to late April (FPEF, 2024). Mango production is dominated by at least five provinces. **Figure 1** illustrates the major production areas for mangoes in South Africa. Limpopo (4280ha), Mpumalanga (1362ha), Western Cape (101ha), KwaZulu-Natal (16ha), North-West (15ha), and Gauteng (1ha) are respectively the leading

producers of mangoes in South Africa with a total of 5775ha of planted mangoes. This is because of the conducive climatic conditions in these provinces. Limpopo and Mpumalanga combined are responsible for at least 96% of all mango production in South Africa and the most productive region in Limpopo is located in Hoedspruit with a share of 44% of all production in the province and the most productive region in Mpumalanga is Onderberg with a share of 22%. Limpopo, interestingly dominates the Keitt cultivar and Mpumalanga dominates the Tommy Atkins cultivar thus highlighting their unique and even distribution as well as favourable growing conditions, with the Tommy Atkins harvested mostly in December making them ideal for the Middle-East market and most Keitt cultivars harvested from February to late April, thus supplying mostly Russian, African, as well as some Middle-East markets too.

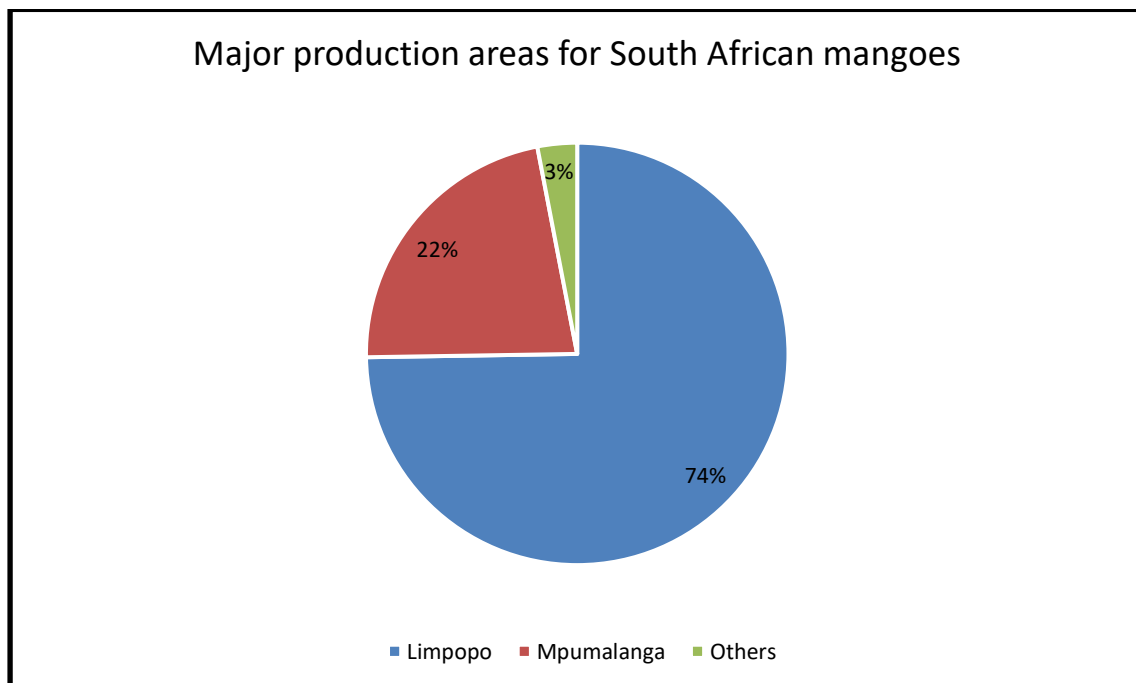


Figure 1: Major producers of mangoes in South Africa
Source: (SAMGA, 2024)

It is satisfactory to further note that the number of mango tree plantings increased from 5688ha in 2023 to 5775ha in 2024, which was an upsurge of 87ha and thus suggesting that the industry has improved its support for producers. Furthermore, such a boost in production is as a result of scientific research towards disease control, infrastructure development as well as other initiatives by both the industry and the government.

Figure 2, is an illustration of the mango plantings in 2023 compared to 2024 from a provincial perspective. Limpopo and the Western Cape have increased by 86ha and 3ha respectively, with Mpumalanga decreasing by 53ha year on year.

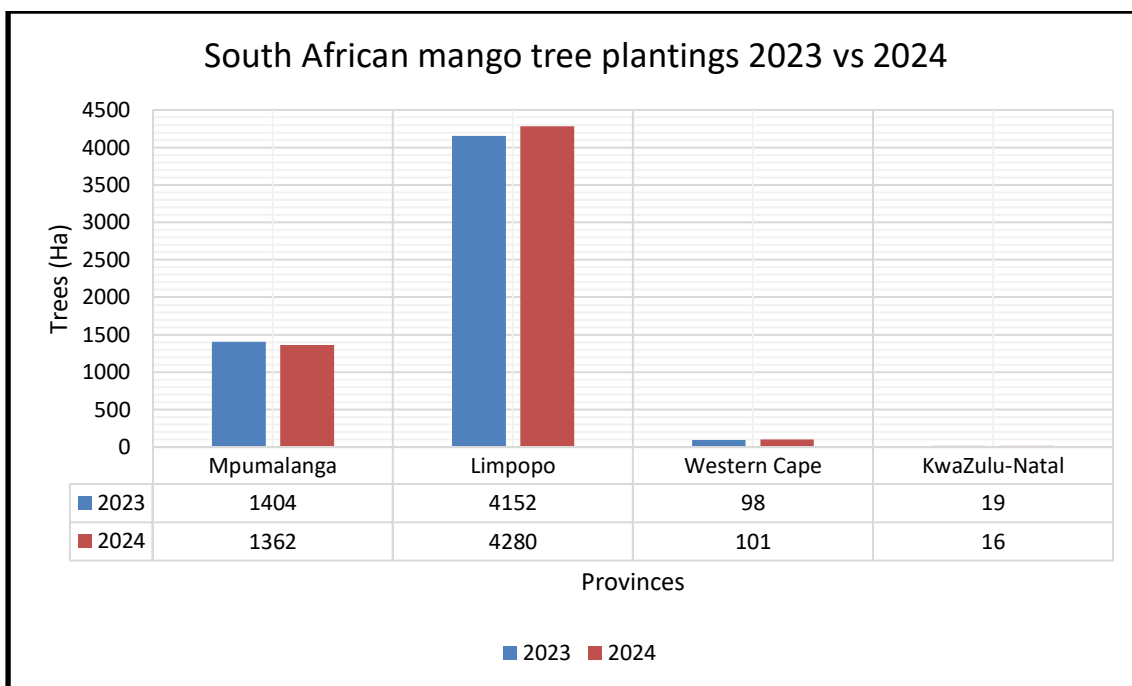


Figure 2: Mango tree plantings 2023 Vs 2024

Source: (SAMGA, 2024)

2.3 Trade performance analysis and market access for South African mangoes

Figure 3 illustrates the market analysis of South African mangoes. The recent improvements in terms of production as well as ripple effects from the international demand for mangoes have seen an increase of mango exports from 4752Tonnes in 2022/23 season to 6358Tonnes in 2023/24 season, and this has been a 2% increase in exports (SAMGA, 2024). Nonetheless, such a marginal increase is welcome, given that South Africa only exported 8% of production, processed 38% to achar, sold 23% to the National Fresh Produce Market (NFPM), processed 13% to juice, 13% was dried, and 6% directly sold. There has been a slow recovery since 2019/20 season, however, exports have more than doubled from 2020/21 season to 2023/24 season. Of the 79 517Tonnes produced, a modest 6358Tonnes was exported, compared to the 30 000Tons which was processed to achar. This speaks to the resilient domestic demand for achar.

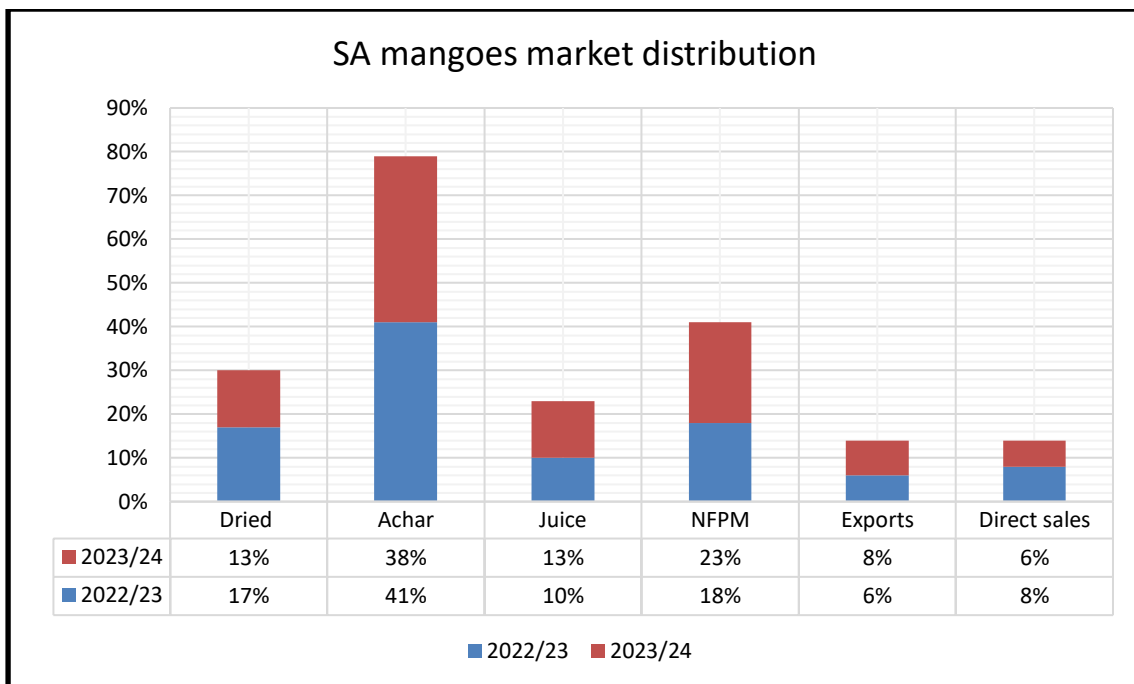


Figure 3: South African mango market distribution

Source: (SAMGA, 2024)

Mango export performance has been relatively gloomy compared to other fresh produce fruits. This is partly because of limited market access opportunities, despite strong domestic demand for processed mangoes, in the form of achar and juice. Market access opportunities imply entry into the market of another country that has demand, through the reduction of tariffs as well as negotiations for favourable trade agreements. Market access is key to unlocking international markets as it addresses tariffs and non-tariffs measures. The use of tariffs, special safeguards, and tariff rate quotas , as well as non-tariff barriers such as quantitative restrictions, export subsidies, or subsidization of industries by international competitors can have a negative impact on the ability of the domestic industry to effectively compete in the international markets.

Figure 4 below, highlights the major export destinations for South African mangoes. The Middle-East, Africa, Far-East and Asia, as well as Russia are the dominant importers of South African mangoes. The mango export sales are at their highest point recorded in history with exports reaching at least 1 589 588 (4kg) boxes in 2023/24 season compared to the 1 188 060 (4kg) boxes in 2022/23 season. This suggests that there has been great advancement towards market access. Market access is key for mango producers as it enables them to export and benefit through generating foreign

revenue and it enables them to diversify their income. Regardless of the limited export share for producers, there is an upward trend which suggests that South African mango exports will continue improving.

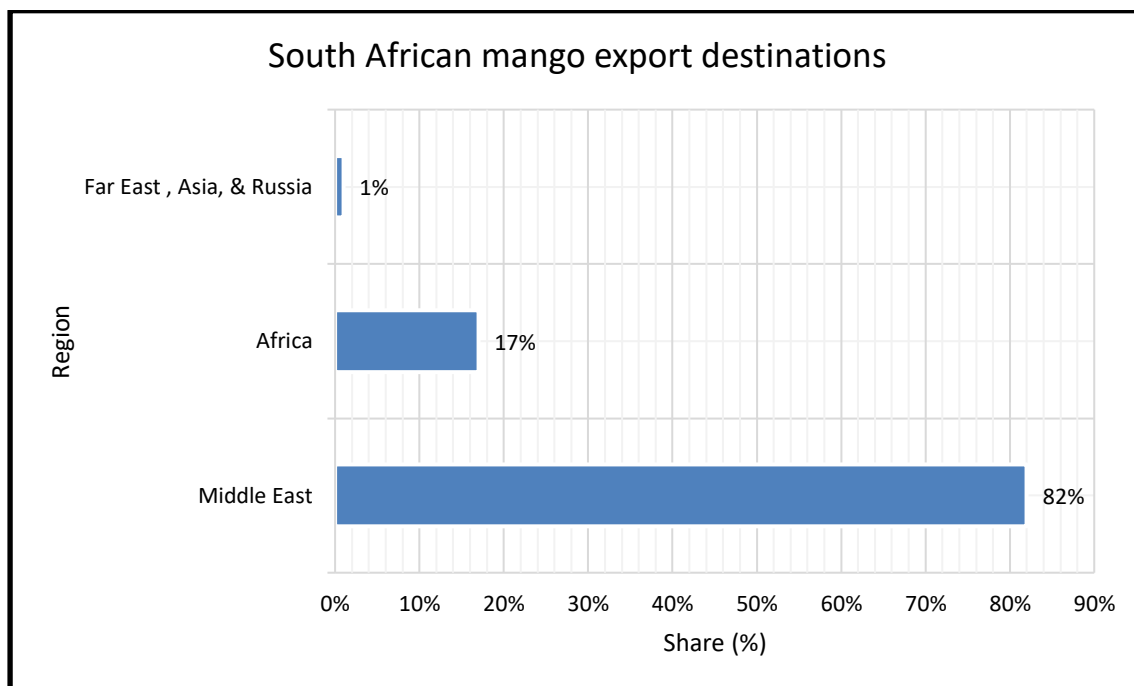


Figure 4: Major export destinations for South African mangoes

Source: (FPEF, 2024)

2.4. Conclusion and recommendations

There is great optimism with the recent upward trajectory for South African mangoes exports as a result of market access coupled with the growth in production areas. This underscores the efforts made by the public and private sector partnerships towards ensuring that there is infrastructure development from irrigation systems, dams and drainage improvement as well as port facilities, logistics and dealing with load shedding. It is important to boost mango exports and intentionally intensify market access in lucrative markets. The Middle-East region is an important market for mango exports and it still has immense potential, thus, its critical to strengthen and leverage existing trade initiatives in the region. This is a vital aspect of the overall economic activity as it generates income for producers, reduces unemployment, and generates revenue and foreign exchange for the sector. Furthermore, its critical to focus assistance for producers to be export-driven, to direct more research towards pest and disease control and ensure that orchards have higher yields for a longer period of time.

3. Exploring market opportunities in the South African peach industry: The global trade perspective

By Lucas Moswane and Solly Molepo

3.1 Introduction

The production seasons of peaches in South Africa are between October and March depending on the variety and the region of production. The main varieties in South Africa are cling peaches (cling stones) and the dessert peaches (fresh stones), this classification is based on whether the skin of the fruit attaches to the stone or not. The cling stones are described as those peaches with stones that is attached to the flesh of the peach, these types of variety are mostly processed and sold as canned, freestone cultivar on the other hand is characterised by the ability of the stone to easily detach from the flesh of the fruit which makes it convenient to be consumed as fresh.

3.2. South Africa s peaches production

Figure 5 below shows the annual production volumes of South African peaches. South African peach industry is ranked number ten amongst the peach producers around the globe with the production that is valued at one billion rands, peaches contributed 6.4% of the total gross value of deciduous fruits in South Africa during the 2018/2019 season. The total annual production of peaches in South Africa was 201 254 tons for the period 2021/2022 which is an increase of 11.11% from the 2020/2021 season and the country contributed approximately 2.2% of the total world's exports in the year 2023. The South African peach industry lean more on the processing market with more than half of the total annual production being channelled through the processing facilities. The leading exporter of peaches is Spain which accounted for 40.83% of the global exports in the year 2023.

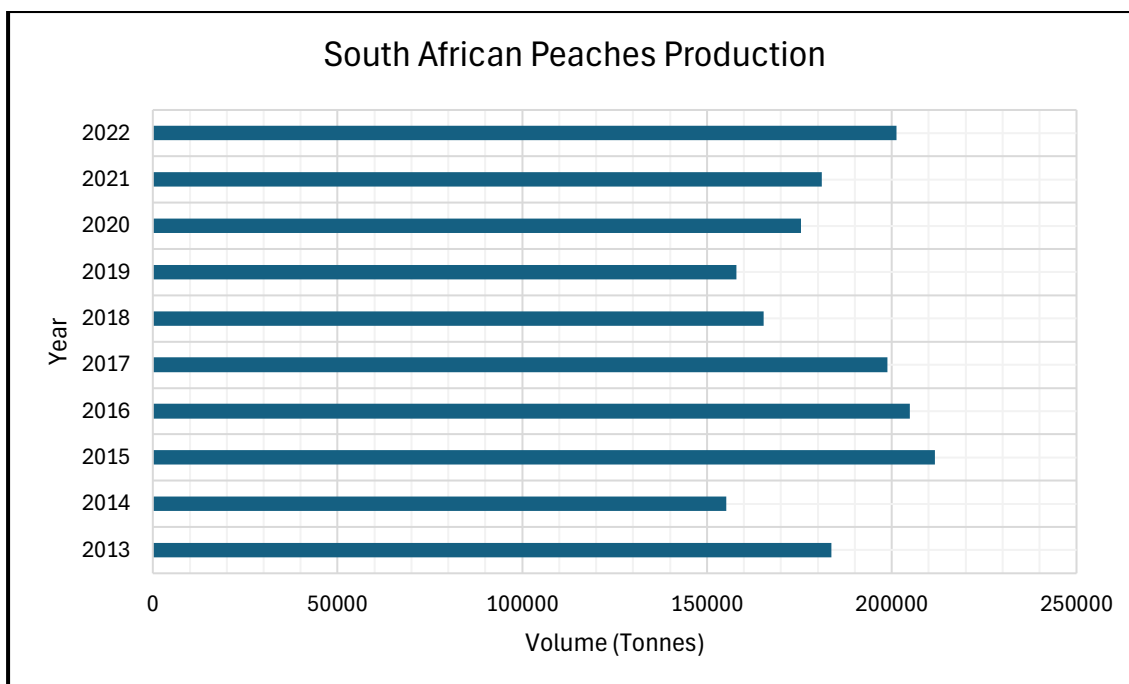


Figure 5: The annual production volumes of peaches in South Africa

Source: DALRRD (2024)

Figure 5 above depicts the total annual production of all the cultivars of peaches in the country. It shows that there has been a 16% decline in the annual production volume of peaches in South Africa between the 2012/2013 and 2013/2014 season, however it increased again by 36% in the 2014/2015 season. From the 2015/2016 season the production volume started to decline slightly, this reduction continued for four years until 2020 where it began to rise again. The reduction in the production volumes may be attributed to the changes in various climatic conditions and the reduction of planted area under which these peaches are produced.

3.3. Analysis of the export performance for peaches

Figure 6 below reflects the export value of peaches from the top five countries that import from South Africa, the country that is the leading importer of peaches from South Africa is the United Kingdom which accounted for over 150 000 (000) Rand of the total exports value of peaches in the year 2014. In the following year the exports values to the United Kingdom have been 7% compared to the previous year, this was followed by a 3% decline. The second country that led in terms of export value of peaches from South Africa is Netherlands, followed by the United Arab Emirates and the country with the least export value are Germany and Canada respectively.

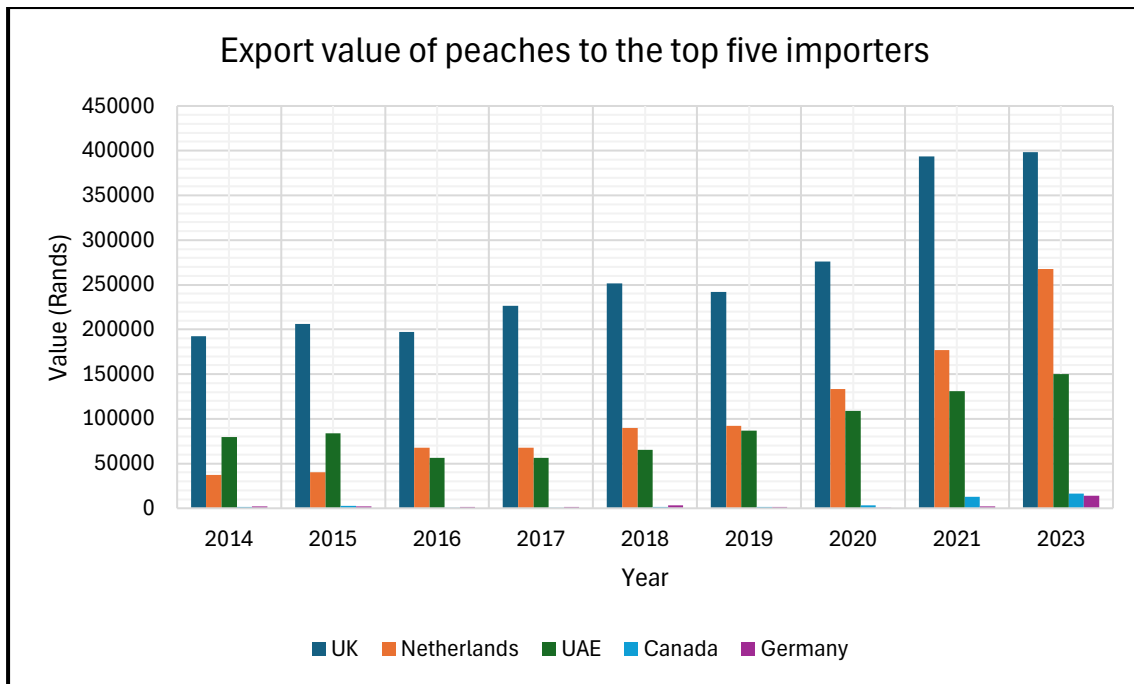


Figure 6: South African exports in value terms to the top 5 export destinations

Source: (Trade Map , 2024)

3.4. Conclusion and Recommendations

Production in South African peach has been fluctuating for the past decade which is partly caused by the dynamic climate aspect as well as inflation, however it shown an improvement towards the end of the decade with a continuous increase rate for over three years. The industry has the potential to explore market opportunities in the middle of the East, Asia as well as China however the industry also faces an ever-growing competition from the Southern Hemisphere counterparts such as Chile which accounted for 6.1% of the total world's exports in the year 2023, Australia, Brazil as well as Argentina.

4. Positive prospects for the 2024/25 stone fruit season: An outlook of apricots, peaches, and plums exports

By Bhekani Zondo

4.1. Introduction

Globally, South Africa holds its position as one of the major producers and exporter of wide range of fresh fruits, ranging from citrus, deciduous fruits, tropical and subtropical fruits, and table grapes, among others. The South African deciduous fruit (including stone fruits) industry generates its export revenue from approximately 40% of domestic production (Hortgro, 2023). The South African stone fruit sector produces an approximately 350 000 tons per year, comprising of plums, peaches, apricots, nectarines, and cherries (Hortgro, 2024a). Moreover, the industry generates over 80% of its revenue through fresh sales (Hortgro, 2024b). The aim of this article is to analyze the trade performance of the selected stone fruits (apricots, peaches, and plums) over the past two seasons and to explore the outlook for the 2024/25 season.

4.2. South African trade performance for selected stone fruits

Table 1 below depicts South Africa's trade performance of the selected stone fruits over the past two export seasons. After a challenging 2023/24 export season which saw a decline in export volumes of the selected stone fruits, the upcoming 2024/25 season is forecast to be positive. In the previous 2023/24 season, the season concluded with about 480 301 cartons (of 4.75kg equivalent) of apricots exported, showing a decline of 19% compared the previous season. Similarly, peaches and apricots also recorded a decline of 14% and 10%, respectively.

This was largely attributed to unfavorable climatic conditions as well as port operational inefficiencies, especially in the Port of Cape Town. Estimates for the upcoming 2024/25 season shows that exports of plums and apricots will increase significantly. The initial estimate for the upcoming season shows that about 523 000 cartoons and about 13.7 million cartoons of plums will be exported. This is equal to an increase of 9% and 12% increase compared to the previous season for both export apricots and plums.

Table 1: Trade performance of South Africa's stone fruit

	2022/23	2023/24	2024/25*	Growth Rate 2022/23 vs 2023/24	Growth Rate 2023/24 vs 2024/25*
APRICOTS (4.75kg)	593433	480301	523,000	-19%	9%
PEACHES (2.5kg)	2173469	1865417	1750000	-14%	-6%
PLUMS (5.25kg)	13583182	12208440	13700000	-10%	12%

Source: Hortgro (2024b), Hortgro (2024c)

Figure 7 below shows the percentage share of South Africa's stone fruits export volumes by region, in 2023. South Africa's apricots are mostly destined for Asia which accounts for a share of about 51% of apricot export volumes. On the other hand, Asia accounts for a share of about 20% for both plums and peaches. South Africa's exports of apricots are mostly destined to the Middle East with a share of 49% followed by peaches (19%), and plums (17%). On the other hand, the European Union (27) is currently the leading export market for South Africa's plums, with a share of about 42%, followed by Asia (20%), Middle East and UK (17%). Moreover, 38% of exports of peaches are destined for the UK market, followed by the EU (31%), Asia (20%), and the Middle East (19%), respectively. The diversification of export markets underscores the resilience and adaptability of South Africa's stone fruit industry amid global trade dynamics.

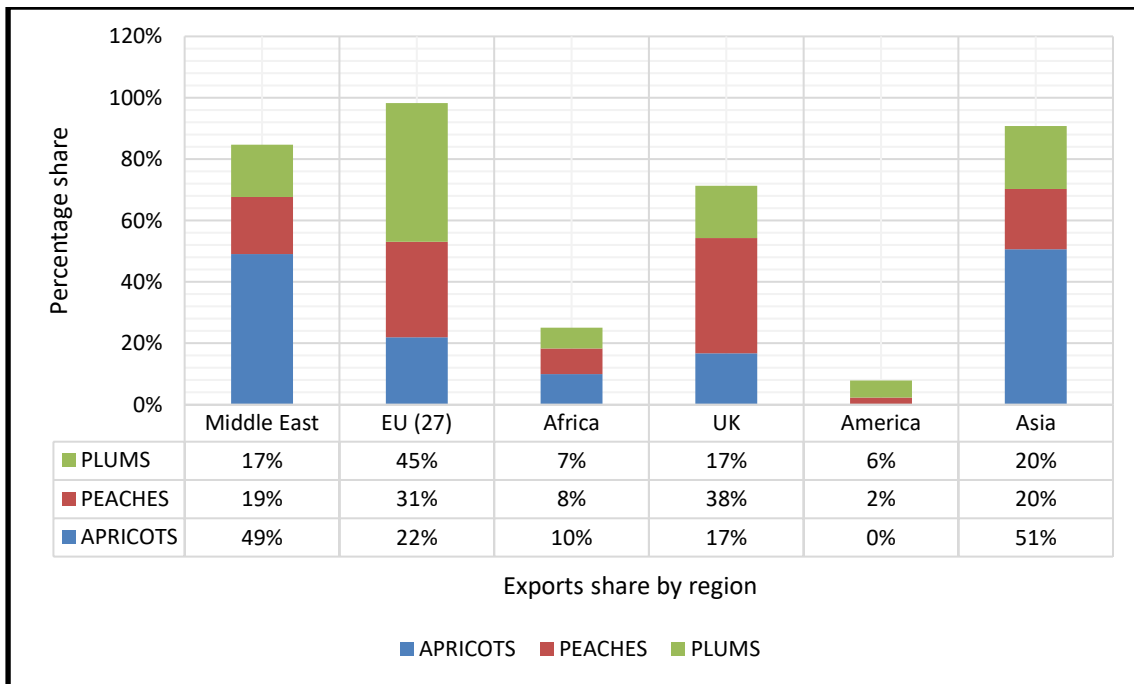


Figure 7: South Africa’s stone fruit exports share by region in 2023

Source: Trade Map (2024)

While the stone fruit industry is dominant in terms of exports, the domestic market remains integral to the sector's overall performance. **Table 2** provides insights into the sales of apricots, peaches, and plums within National Fresh Produce Markets (NFPMs) over the past five seasons. The data highlights fluctuations in both volume and average prices, reflecting broader industry trends and domestic demand dynamics. For instance, apricot volumes in NFPMs peaked at 1,034 tons during the 2020/21 season but declined to 842 tons in 2022/23. However, the average price per ton has steadily increased, reflecting robust local demand and supply constraints. Similar trends are observed for peaches and plums, where volumes have varied while prices have generally trended upward.

Table 2: Sales of stone fruits in National Fresh Produce Markets (NFPMs) over the past five seasons

Export Season	APRICOTS		PEACHES		PLUMS	
	Volume (tons)	Average Price (R/ton)	Volume (tons)	Average Price (R/ton)	Volume (tons)	Average Price (R/ton)
2018/19	834	15845	19929	15514	12352	9666
2019/20	727	18065	22949	14571	13339	9524
2020/21	1034	15326	24564	15294	18379	8669
2021/22	383	17144	26897	14733	20979	8202
2022/23	842	18170	24692	15759	16110	9609

Source: DALRRD (2024)

4.3. Conclusion and recommendations

In conclusion, the upcoming stone fruit season shows a promise for recovery and growth, especially for apricots and plums, as climatic growing conditions improve, and logistical challenges are addressed. The industry's ability to diversify export markets and maintain strong domestic demand underscores its resilience and strategic importance to South Africa's agricultural economy. Continued investment in climate-resilient practices, efficient logistics, and market diversification will be key to sustaining growth and competitiveness for the industry.

5. Exploring the nectarine industry in the 2024/25 season

By Lesedi Mokoena

5.1. Introduction

As the first blossoms of spring signal a season of renewal, nectarines arrive in their golden-red glory, marking the transition to the warmth and bounty of summer. These smooth-skinned cousins of the peach are a delight in both the domestic and global markets, and a testament to the hard work of South African farmers. The 2024/25 nectarine season has experienced dynamic shifts, with notable changes in production, domestic consumption, and export trends.

5.2. South African domestic market and production trends

South African nectarine production has continued an upward trend driven by an increase in cultivated hectares, particularly with higher-yielding varieties, and producers have increased plantings due to higher demand and higher profits at producers' level (Collen, 2024). According to Hortgro, the overall number of nectarine hectares increased by about 2% annually, this growth is attributed not only to favorable climatic conditions but also to strategic shifts toward improved yield varieties (Hortgro, 2024).

5.3. South African export market dynamics for nectarines

Globally, South Africa ranks as a mid-tier exporter of nectarines and peaches, taking the 12th spot among exporters of fresh stone fruit (HS 080930), according to the 2023 data from the World Integrated Trade Solutions (WITS). (Hortgro, 2024).

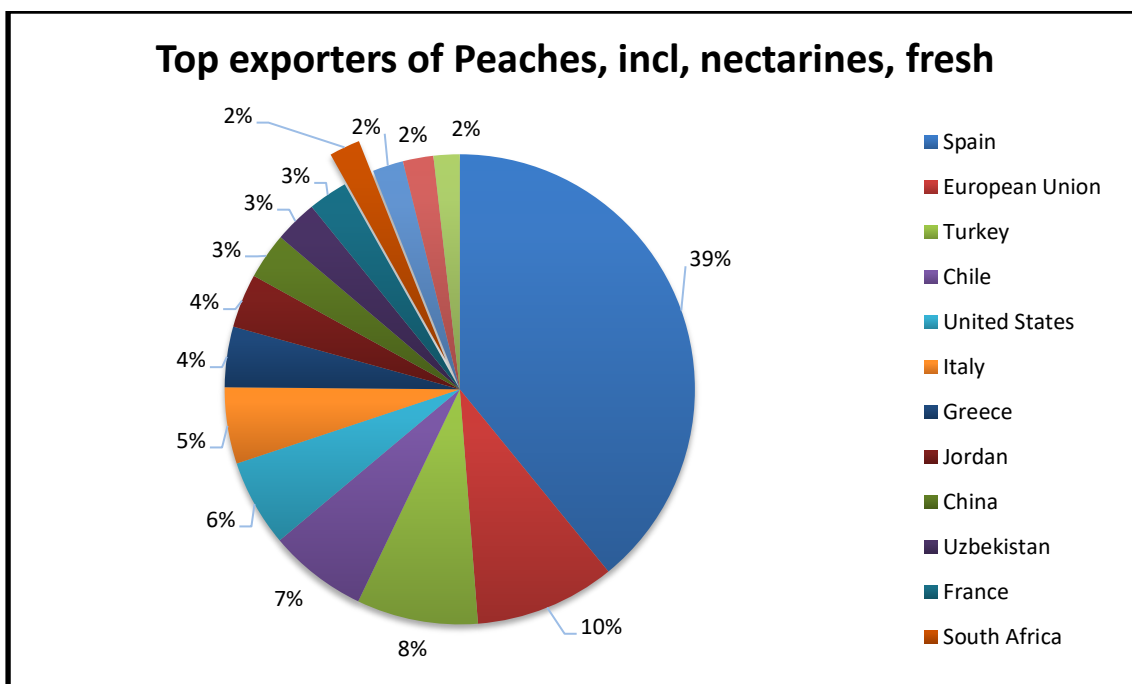


Figure 8: Leading global exporters of nectarines

Source: (WITS, 2024)

Figure 8 illustrates the global hierarchy of nectarine and peach exporters, with Spain leading at 39% of global exports, followed by significant contributions from Turkey, Chile and the United States. South Africa contributes a modest 2% to global exports but is recognized for its premium quality, which enables it to secure and retain market access in high-value destinations such as the United Kingdom.

5.4. Comparative performance between 2023/24 season and 2024/25 season

The 2023/24 season presented significant hurdles, with extreme weather, including prolonged drought conditions, storms, and heavy winds, which impacted volumes and delayed export shipments. This season, however, has shown a marked improvement, with water availability attributable to winter rains replenishing dams and reservoirs. The projected increase in exports this season reflects a positive shift, due to improved production levels and yield forecasts indicate a recovery from the previous year's constrained export levels (Fresh Plaza , 2024).

Port challenges persist as a primary concern, particularly in Cape Town where logistical bottlenecks have delayed shipments, impacting the freshness and quality of perishable stone fruits like nectarines. Industry stakeholders including, Hortgro and other logistics providers such as Transnet, have implemented alternative shipping strategies for the 2024/25 such as the use of specialized reefer vessels and diversions

to Eastern Cape and Durban ports. While these adaptations incur higher costs, they are essential to maintaining the South African nectarine industry's reputation with timely deliveries in the export markets.

5.5. Conclusion and recommendations

The South African nectarine industry is on an optimistic trajectory, with projected increases in both domestic production and exports in comparison to the past seasons. The industry's resilience in adapting to climate impacts and logistics challenges has reinforced its ability to compete in the international market. While South Africa remains a relatively small producer globally, the country's focus on quality, yield optimization, and market diversification supports a stable position within niche high-value markets. Moving forward, sustained infrastructure improvements at key ports and continued investment in resilient crop varieties will be critical for enhancing SA's competitiveness in a demanding global landscape.

6. Ten years of Figs Trends: An Economic Analysis of South Africa's fig industry developments

By Buhlebemvelo Dube and Thabile Nkunjana

6.1. Introduction

The past decade has been challenging for international fruit trade and the South African fig fruits have not been an exception given that they are export orientated. The agricultural sector had numerous obstacles during the decade, including disruptions in the fruit trade, climate-related events that impacted productivity in important production areas, changes in growing seasons, trade policies, labour shortages, and logistical issues. This led to a dynamic shift in the multilateral trading systems, which has affected market access opportunities, domestic support for the fig industry, and export rivalry for South African fig exports. Despite these challenges South Africa remains a major exporter of figs to the international market and is one of the leading exporters in Africa.

6.2. South African figs export market

Figure 9 is an illustration of the South African exports for the past ten years. South Africa is a net exporter of the fig fruit and has an export value of at least R42 million which was an increase of almost 23% from the R32 million export value ten years ago. Beginning in 2020, there has been a distressing decline in production of nearly 94,000 tonnes over the last ten years. This suggests that production from the major production areas concentrated in the Western Cape, including the Swartland area, Paarl, Worcester, Napier in the Overberg, and the Klein Karoo, may have decreased (SAFPA, 2024). An increase in export value is underpinned by the global demand, however, there is a need to also improve production. Additionally, there has been a 12% decline in the export quantities in the past five years. Regardless of the reduced export quantities compared to ten years ago, there has been an increase of 39% p.a, in the value of fig fruits exports between 2022 and 2023, despite a 9% decrease in exports value for the past five years (International Trade Centre, 2024).

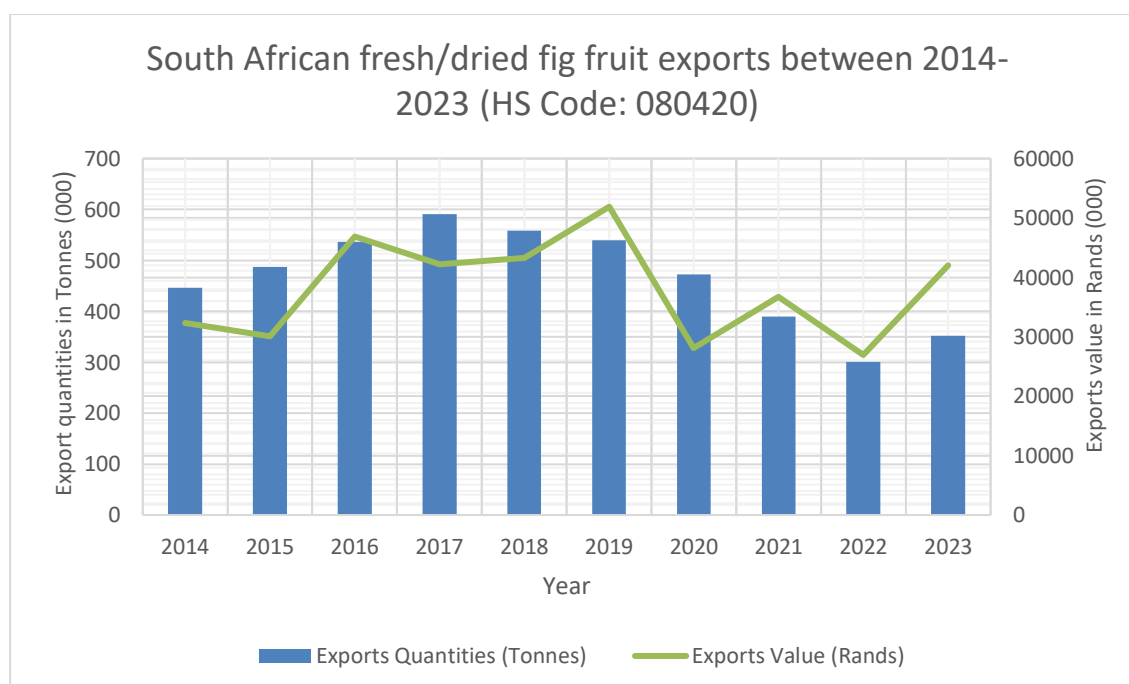


Figure 9: South African fresh/dried fig fruit exports for the past ten years (2014-2023)

Source: (International Trade Centre, 2024)

Figure 10 is an illustration of the major export destinations for South African figs. The United Kingdom, China (Hong-Kong), Singapore, Switzerland, Malaysia, Netherlands, Qatar, France, United Arabs Emirates (UAE), as well as Botswana are the dominant

importers of South African figs fruits. With over half of all figs going to the UK, it is now the largest market for South African figs, suggesting room for growth. The U.K.'s exit from the EU (Brexit) introduced new customs procedures and tariffs for fruit imports from the EU and had ripple effects for the fig fruit exporters from South Africa since they export to the market.

Expanding market access and opening up promising global markets are also necessary to make the sector considerably more profitable and sustainable. The most prospective regions for South African figs are North America, the European Union (West Europe), and East Asia. The United States of America, Germany, and China have the greatest market potential, the USA has a large absolute difference between the actual exports and potential exports amounting to \$444 000 due to its strong demand. China also has unrealized export potential estimated at \$258 000, and the major barrier towards accessing the market are existing tariffs at almost 30%. (International Trade Centre, 2024)

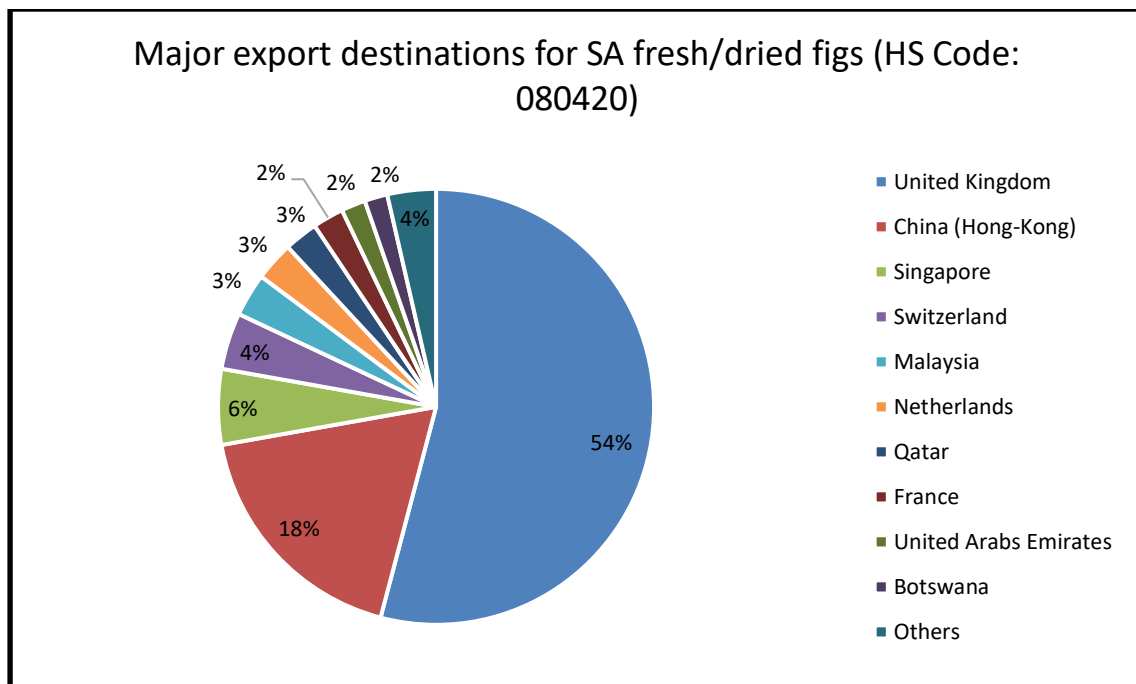


Figure 10: Major export destinations for South African figs

Source: (International Trade Centre, 2024)

6.3. Conclusion and recommendations

In the past decade South Africa has maintained its status as a net exporter of figs and continues to be export driven. This is the case even if the quantity of figs exported by South Africa has decreased, primarily as a result of production issues and other trade-related setbacks. The export value of fig fruits has increased over the last ten years, which is encouraging and suggests that it has significant potential in developed markets. More work needs to be done to help the sector become more export competitive and open up new markets like China, which still has tariff hurdles, and the USA, which has a large demand potential.

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Useful Links

Agrihub	<u>www.agrihub.co.za</u>
Bureau for Food and Agricultural Policy (BFAP)	<u>www.bfap.co.za</u>
Citrus Growers' Association (CGA)	<u>www.cga.co.za</u>
Department of Agriculture, Forestry and Fisheries (DAFF)	<u>www.daff.gov.za</u>
Food and Agriculture Organisation (FAO)	<u>www.fao.org/docrep</u>
Fresh Produce Exporters' Forum (FPEF)	<u>www.fpef.co.za</u>
Hortgro Services	<u>www.hortgro.co.za</u>
National Agricultural Marketing Council (NAMC)	<u>www.namc.co.za</u>
Perishable Products Export Control Board (PPECB)	<u>www.ppecb.com</u>
Quantec Easy Data	<u>www.quantec.co.za</u>
South African Subtropical Growers' Association (Subtrops)	<u>www.subtrop.co.za</u>
South African Table Grape Industry (SATGI)	<u>www.satgi.co.za</u>



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