



Industry Study - International Trade Trends: Horticulture

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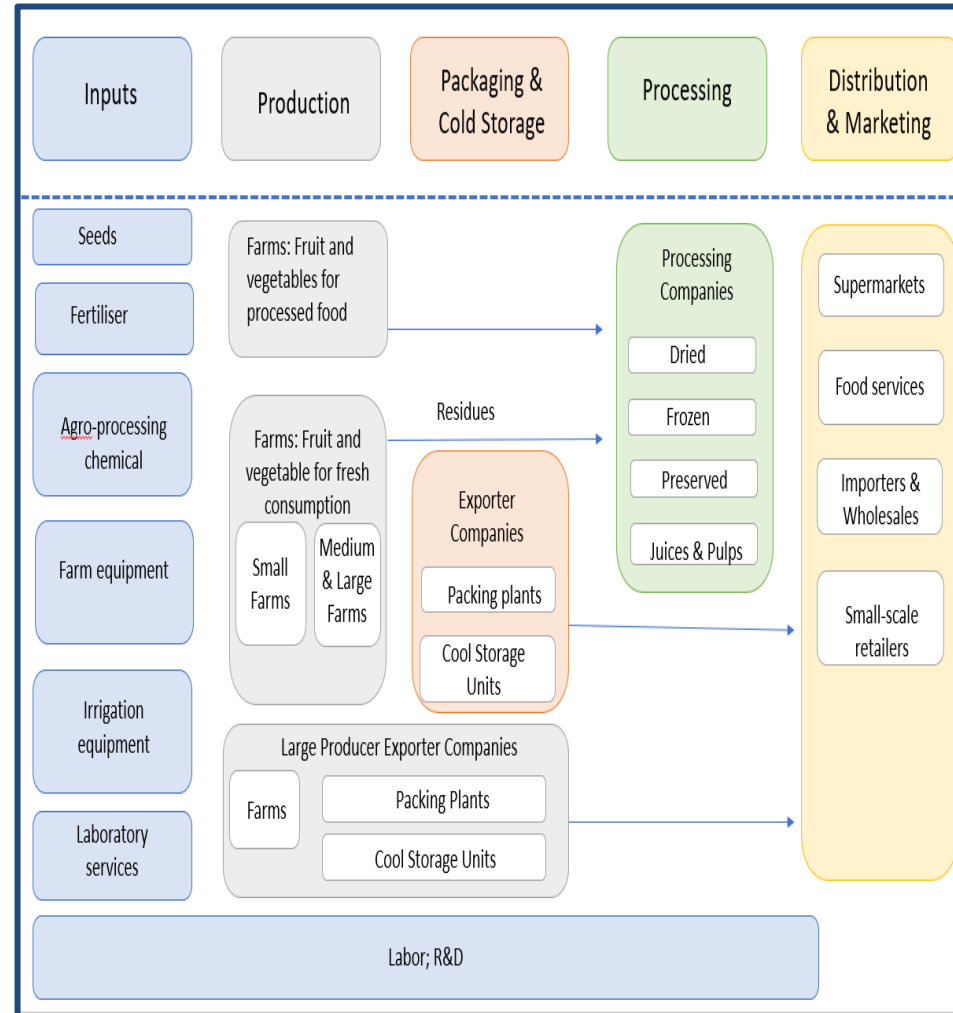
19 Nov 2025

Introduction

1. Overview Horticulture Value Chain
2. Global Trade in Horticulture
3. South Africa's Trade in Horticulture
4. Key Constraints and Implications
5. Conclusion and Outlook

Horticulture Value Chain

- ❑ Horticulture is a sub-sector and essential component of agriculture, manufacturing in some cases, and tourism
- ❑ Majorly comprised of products such as the growing and processing of fruit, vegetables, nuts, spice crops, coffee and tea.
- ❑ In addition, it involves the growing of trees as a second crop for farmers and ornamental horticulture (flowers)
- ❑ Because of the large nature, the paper concentrated on the top traded products
- ❑ **HS8 'Edible fruit and nuts'**
- ❑ **HS7 'Edible vegetables and certain roots and tubers'**
- ❑ **HS20 'Preparations of vegetables, fruit, nuts or Processed fruit and vegetables'**



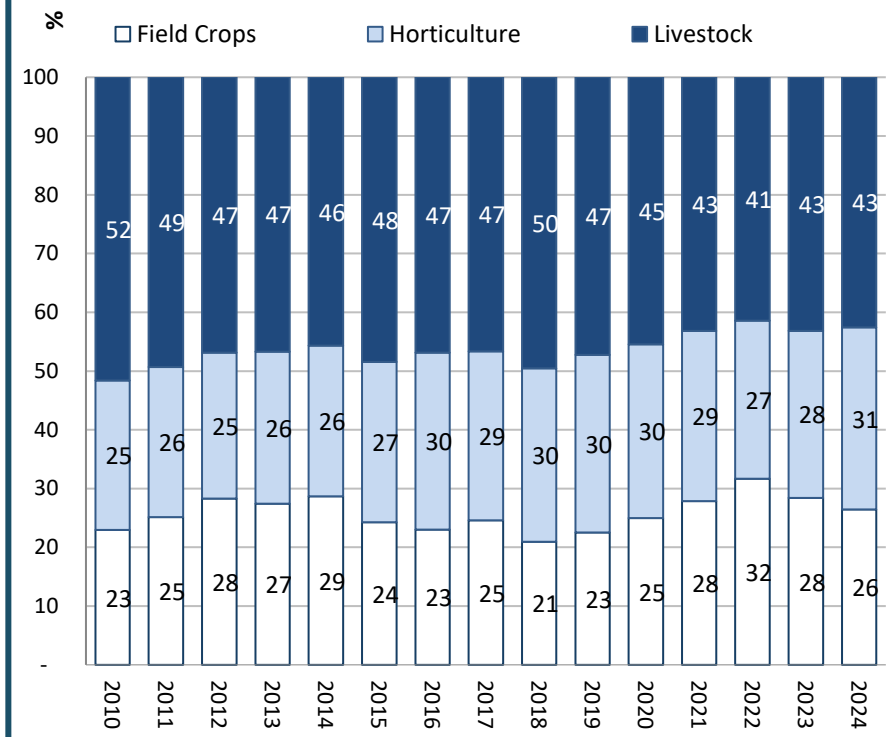
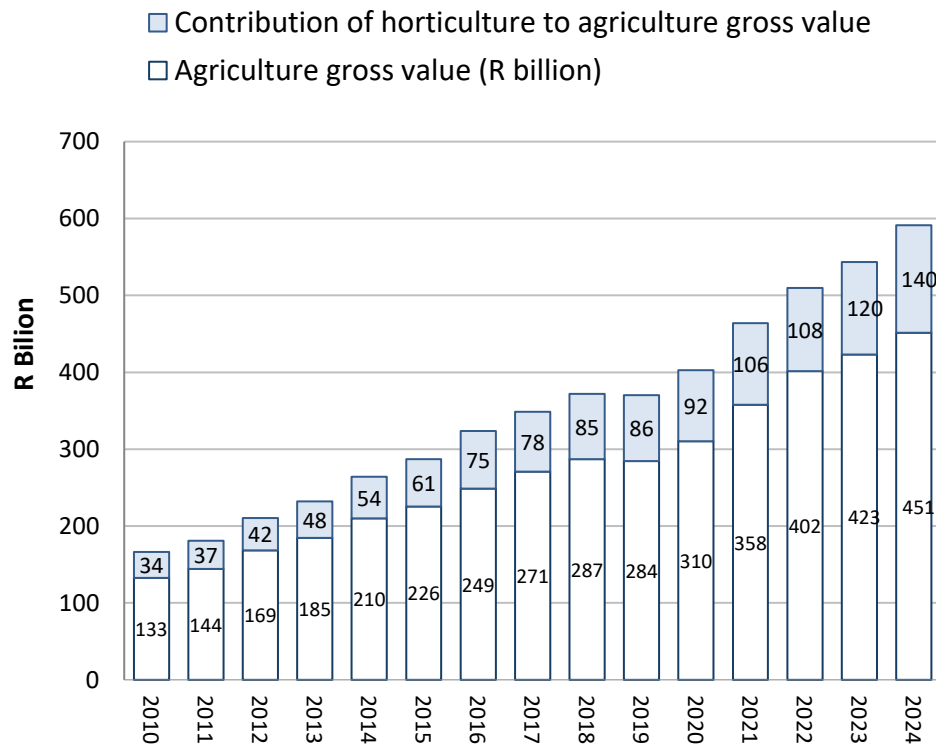
Overview & FDI

- ❑ **Well-developed** sector – linked to multinationals – global food chains
- ❑ Well-developed **associations** ie Hortgro, Fruit SA, Citrus Growers' Association (CGA) | Citrus Academy, Potato SA
- ❑ **Deciduous Hub** : - pome fruits - apples and pears | stone fruits - peaches, plums, | grapes **EC,EC**
- ❑ **Citrus Hub** | **LP, EC, MP, WC, KZN**
- ❑ **Vegetables Hub**: All around | **Nuts**: MP, LP, KZN
- ❑ **Quality and volume** are essential to maximise value
- ❑ **Fresh market X processing** | Estimated 72% of total fruit production is sold in the export market
- ❑ Sophisticated packaging and **cold storage** units to preserve the freshness and quality, shelf life
- ❑ **Employ**: The horticulture sub-sector had 221 990
- ❑ 114 152 are permanently employed, while the remaining 107 838 people are temporarily employed (AgriSETA 2024)
- ❑ **FDI** (both farming and processing | vertically integrated
- ❑ TIPS FDI Tracker 2016–2023Q3 | mainly brownfield | Greenfield TERRAGRN UK- 200 000 Hac MP – fruit, crops
- ❑ **Foreign companies**, European-parent companies based in the UK, France, Spain, Austria, Netherlands | USA | Mauritius

COMPANY	YEAR	HOST COUNTRY
Agrana Fruit South Africa (Pty) Ltd	1998	Austria
AMFRESH South Africa (Pty) Ltd	2003	Spain
Boschendal (Pty) Ltd	2002	Cyprus
Crookes Brothers Ltd	1913	Luxembourg
Del Monte Fruits (South Africa) (Pty)	2007	Netherlands
Delaire (Pty) Ltd	2003	United Kingdom
Eastern Produce Estates (Pty) Ltd	1963	United Kingdom
Fruit Farm Group (Pty) Ltd	1952	France
Haygrove Heaven (Pty) Ltd	1997	UK
Lanzerac Estate Investments (Pty) Ltd	1959	British
Libstar Holdings Ltd	2014	Mauritius
McCain Foods (South Africa)	2000	Canada
Morgenster (1711) (Pty) Ltd	1992	Switzerland
Munoz Group South Africa (Pty) Ltd	2011	United Kingdom
Pioneer Food Group (Pty) Ltd	1996	US Pepsico
Redsun Dried Fruit and Nuts (Pty) Ltd	2008	Mauritius
Safresco South Africa (Pty) Ltd	2010	Uruguay
Source Citrus Genesis (Pty) Ltd	2011	United Kingdom
Spring Valley Foods (Pty) Ltd	1994	United Kingdom
Stellenbosch Vineyards (Pty) Ltd	1997	France
Vergelegen Wines (Pty) Ltd	1954	USA

Source: WOW.2023; EastFruit, 2023; Fresh Delmonte, 2024; Amfresh, 2024; Libstar, 2023; Sunkist., 2023

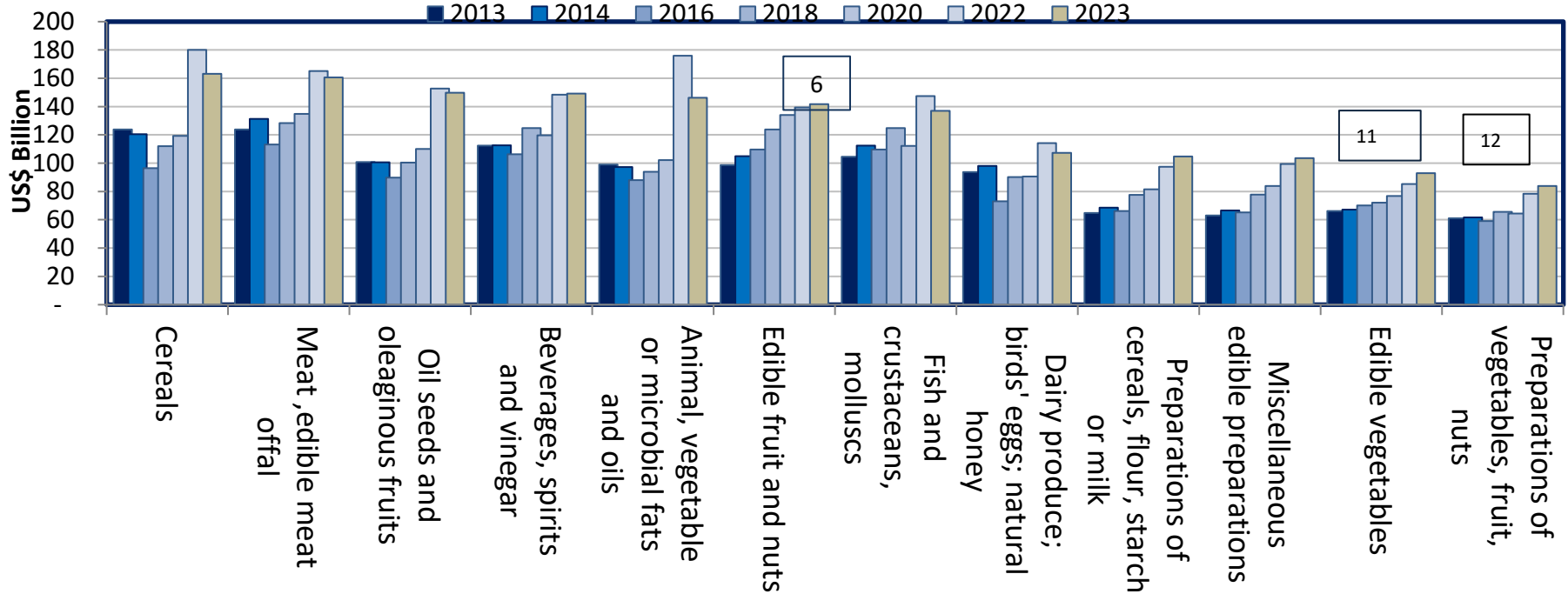
Contribution to Agriculture Gross Value



- ❑ Horticulture vital driver across many industries (Agric, Manuf, tourism)
- ❑ Supplies **fresh & processed fruits & vegetables** to retail, supports industries, ie **beverages, confectionery, dairy, baked goods, baby food, and cosmetics**
- ❑ Sector grew by **314% from 2010 to 2024**, with a current gross value of **R140 billion**
- ❑ 2nd largest contributor to South Africa's agriculture sector
- ❑ Share of total agricultural output rose from **27% in 2022 to 31% in 2024**, surpassing field crops
- ❑ **Citrus** industry drove growth with a **20% increase** in contribution to the 2023/2024 season, followed by **deciduous** fruit at **14%**
- ❑ And **vegetables at 7%** : potatoes, viticulture, subtropical fruit, nuts, dried fruit

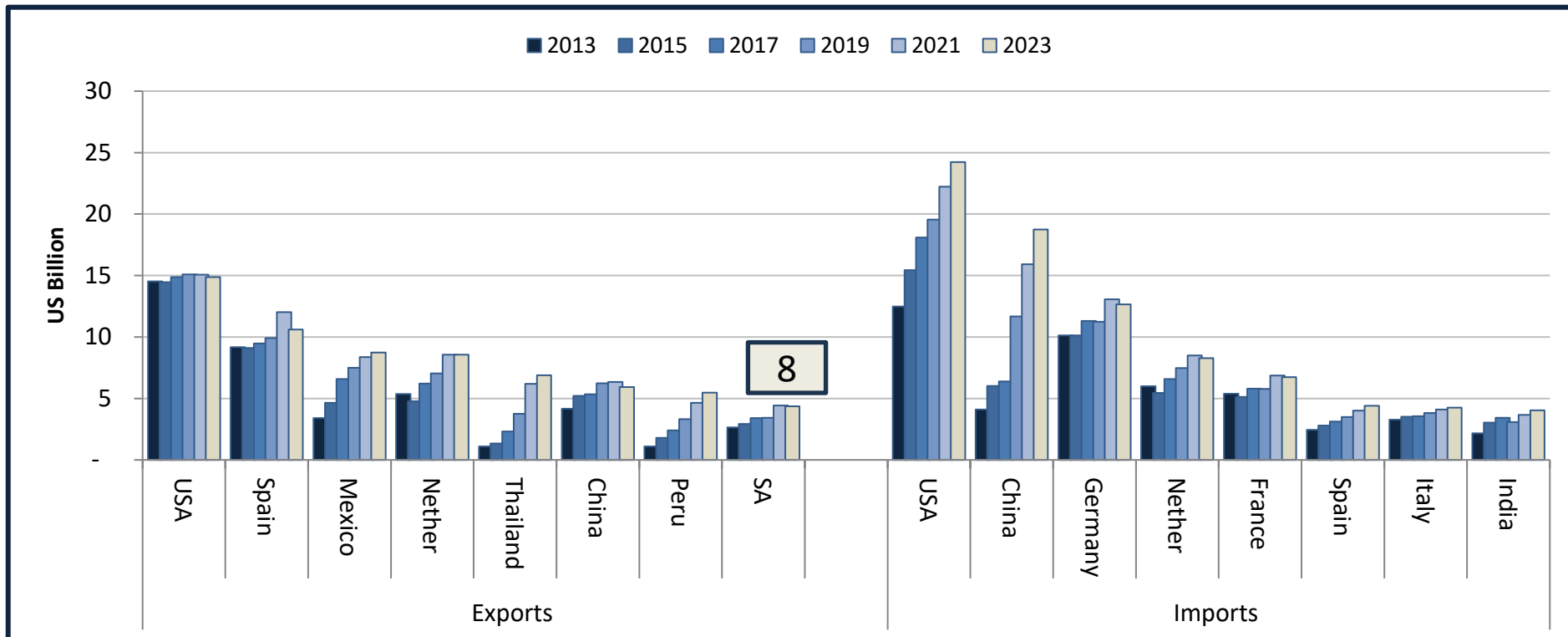
Global Trade in Horticulture

Exports of Consumable Primary and Processed Products



- ❑ Within **consumable agricultural products**:- 8th largest traded horticultural products are HS8 Edible fruit and nuts, HS7 'Edible vegetables and' and HS20 'Preparations of vegetables, fruit, nuts'.
- ❑ **All Global traded goods**, Edible fruit and nuts - 33rd largest traded product
- ❑ Edible fruit and nuts accounted for **US\$142 billion** or 0.6%
- ❑ Edible fruits and nuts have grown by 35% in the last 10 years
- ❑ Edible vegetables accounted for **US\$93 billion** or 0.4%
- ❑ Preparations of vegetables and fruit accounted for **US\$84 billion** or 0.4%.

Global Trade HS 8 Edible Fruit and Nut



South Africa

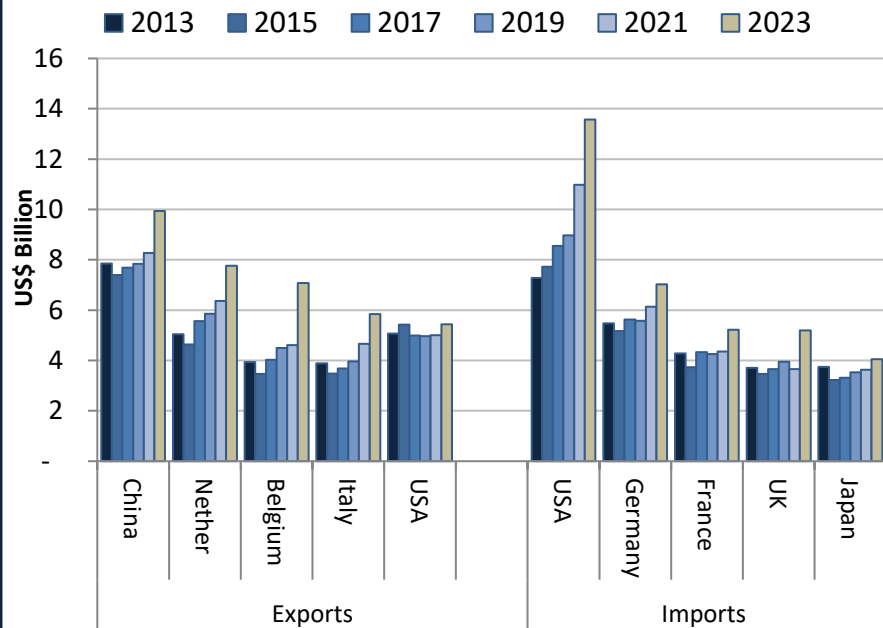
- 1st largest exp of fresh or dried macadamia nuts
- 2nd largest exp of HS0805 Citrus fruit, fresh or dried,
- 4th largest exp Apples, pears, quinces, fresh
- 7th of HS 0806 Grapes, fresh or dried
- 8th largest exp HS0809 Apricots, cherries, peaches
- 13th largest exporter of HS0813 Dried apricots, prunes, apples, peaches

Top Traded Products HS 8

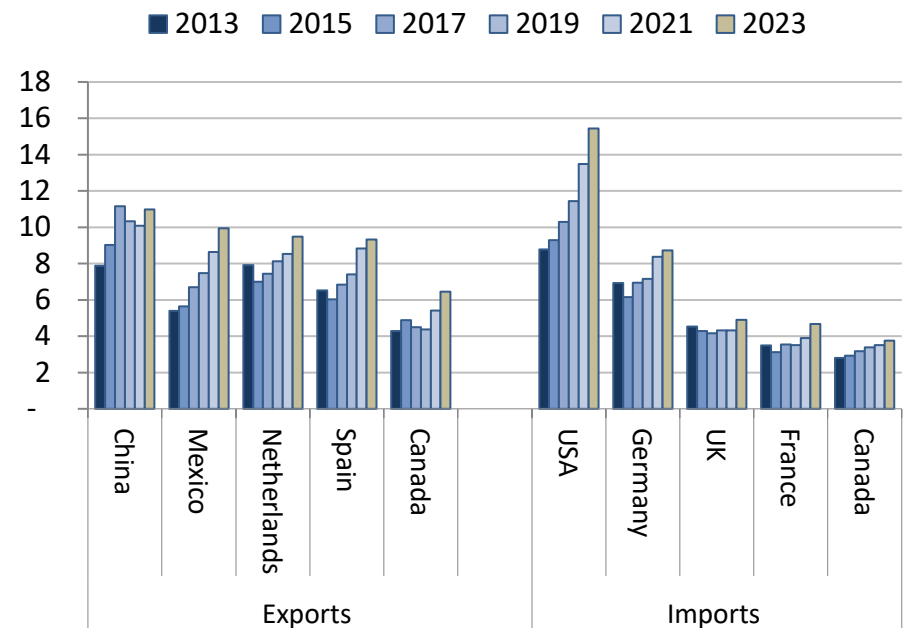
- Berries: strawberries, raspberries, etc, fresh
- Other nuts, fresh or dried
- Dates, figs, pineapples, avocados, etc, fresh or dried
- Citrus fruit, fresh or dried
- Bananas, incl. plantains, fresh or dried

Global Trade HS 7 and HS 20 US\$ Bn

HS 20 Preparations of Vegetables and Fruits



HS 7 Edible Vegetables, Roots , Tubers



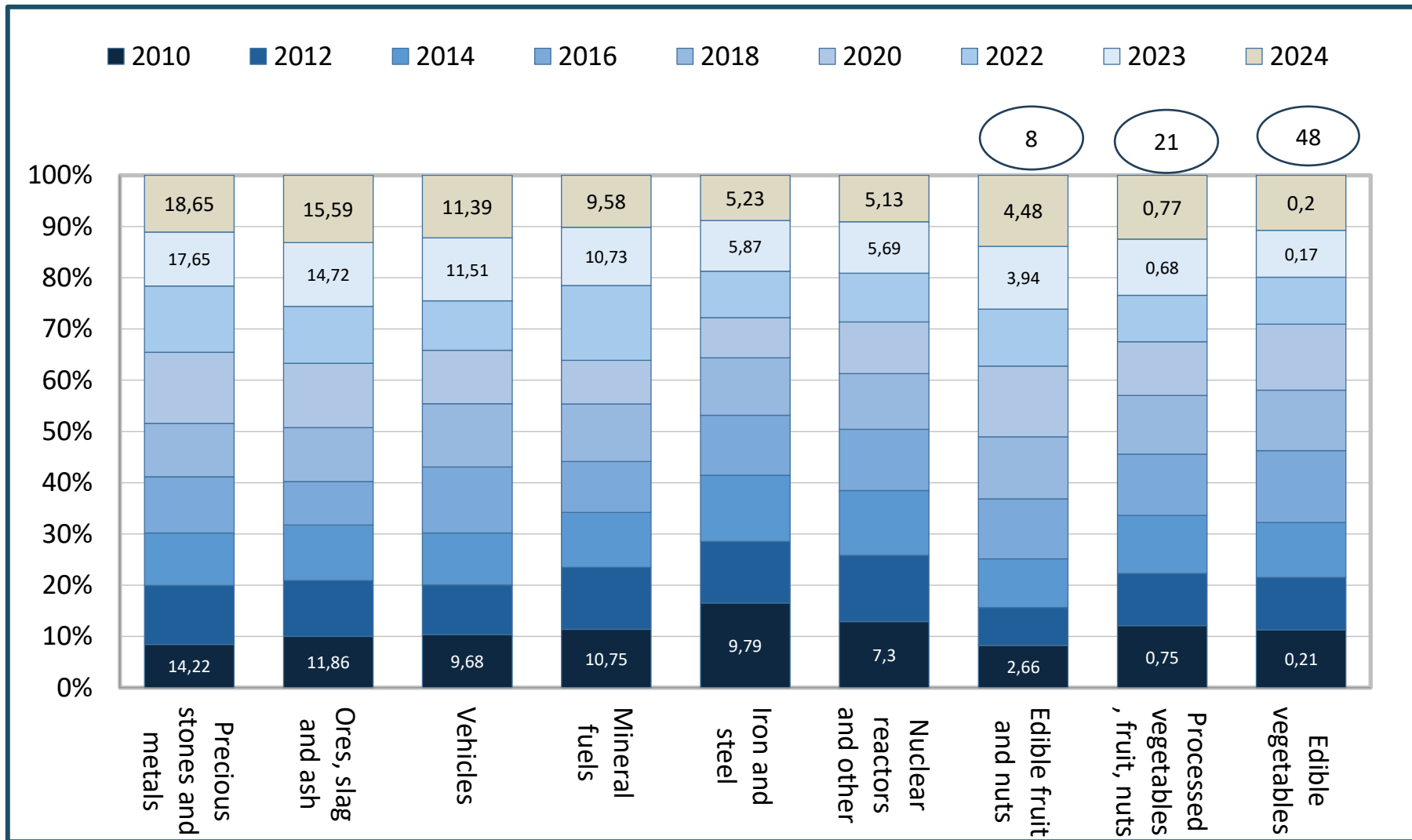
Top Traded Products HS 20

- ☐ Fruits, nuts, other edible parts of plants, prepared or preserved
- ☐ Fruit juices, incl. grape must, and Vegetables prepared or preserved
- ☐ Other vegetables prepared or preserved
- ☐ Tomatoes prepared

Top Traded Products HS 7

- ☐ Other vegetables, fresh or chilled
- ☐ Dried leguminous vegetables, tomatoes, fresh or chilled
- ☐ Onions, shallots, garlic, other fresh or chilled
- ☐ Vegetables, uncooked or cooked

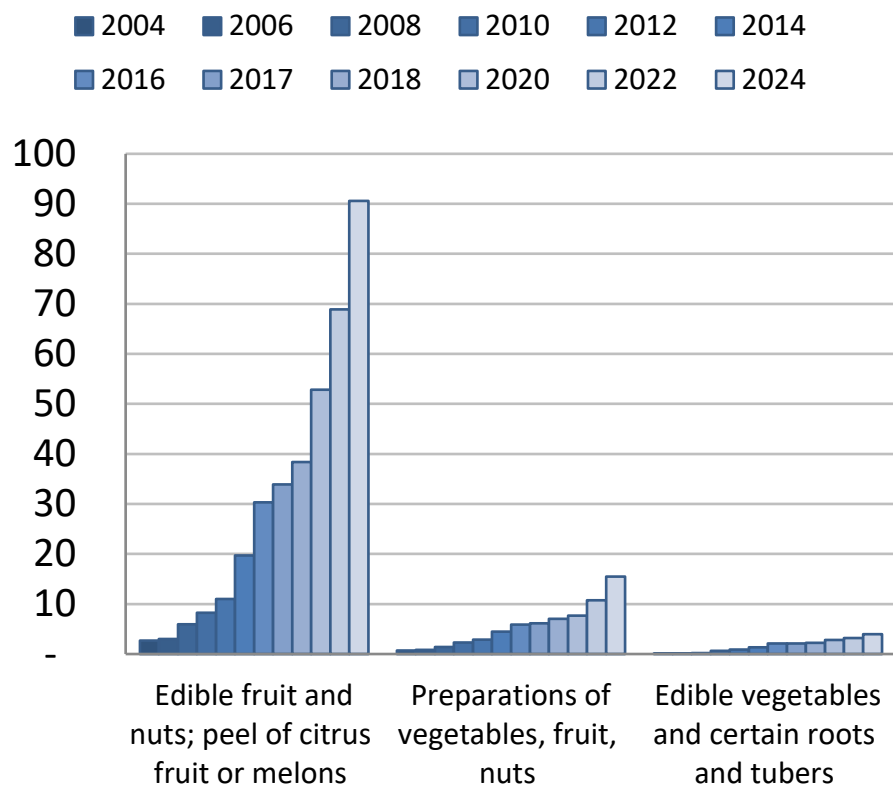
Top Exports of South Africa and Horticulture



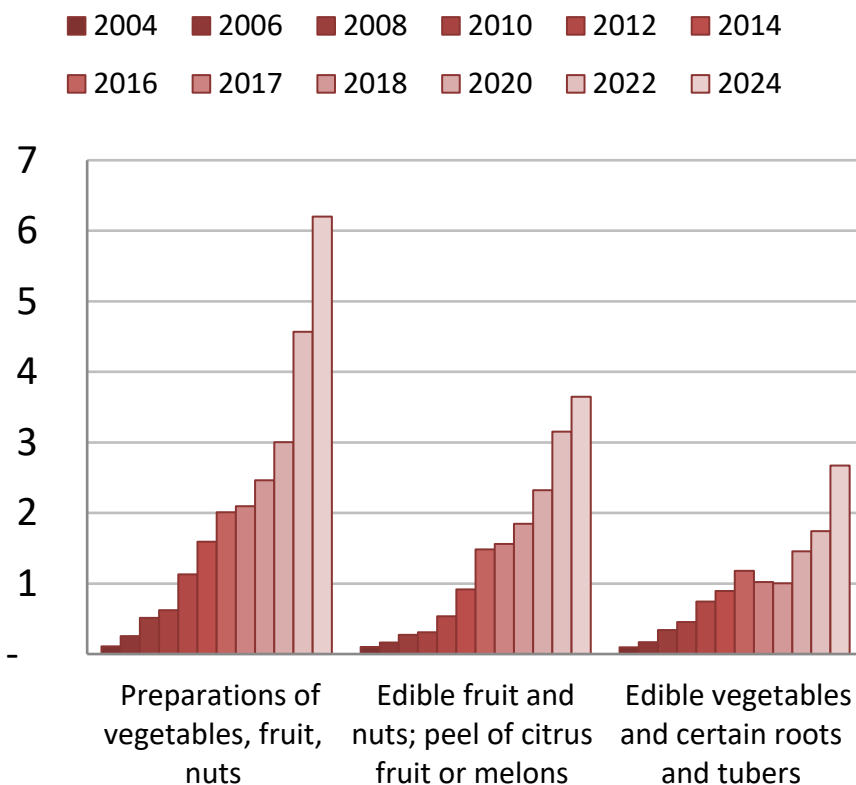
HS 8 Edible Fruit and Nut contributes 4.48% from 3.94 % previous year to total exports

SA Value of Imports & Exports in Horticulture R billion (constant rands)

Exports



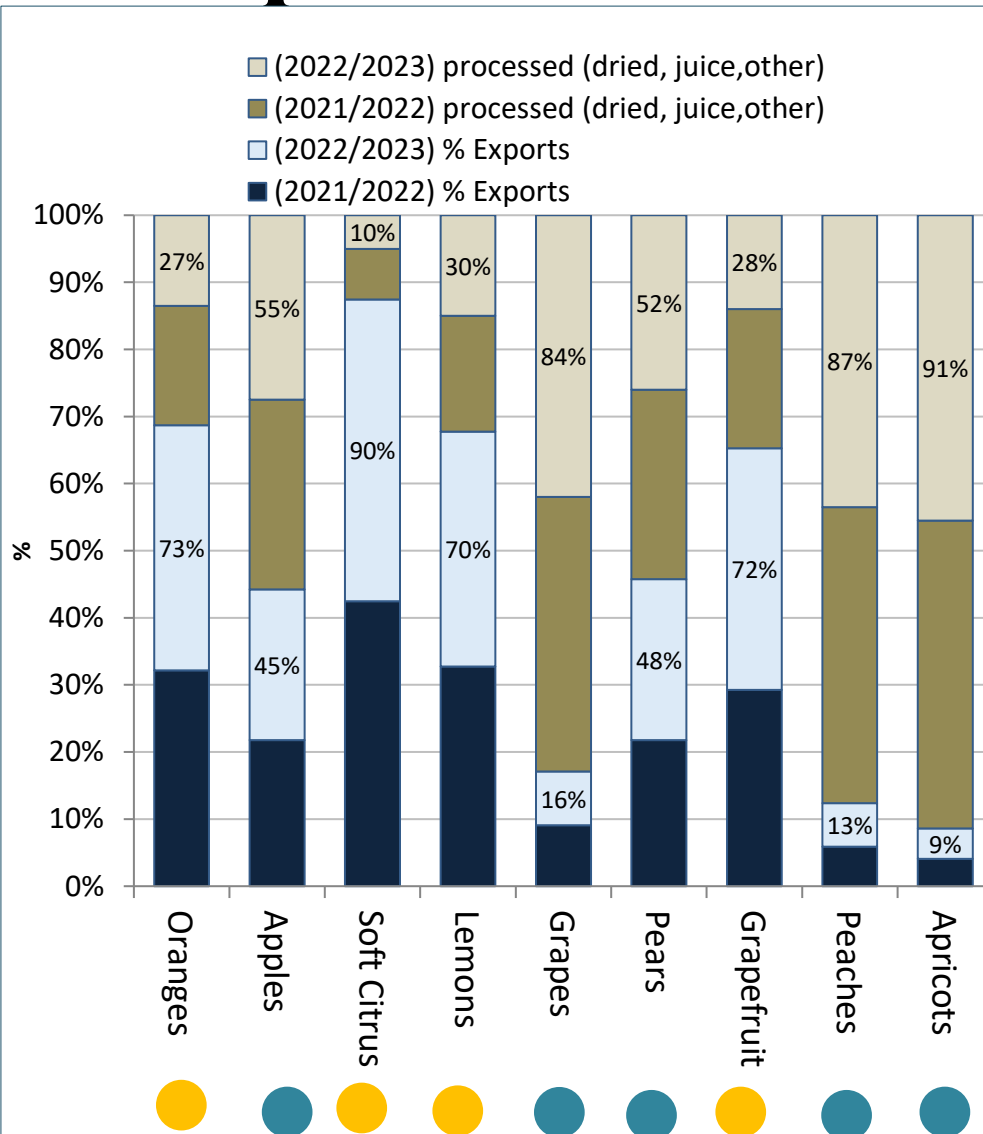
Imports



- ❑ South Africa's exports of edible fruit and nuts grew from **R2.7 billion in 2004 to R90 billion in 2024**, a 3873% growth
- ❑ In 2024, exports of **Preparations of vegetables and fruit R 15 billion | Edible Vegetables R 4 Billion**
- ❑ Largest imports: Preparations or processed vegetables and nuts **R 6 billion in 2024**

Source: Calculated from Trade Map 2024

SA Exports of Fresh vs Processed Fruits



Most citrus is exported as fresh fruit

Most Pome and Stone Fruit processed

73% of oranges are exported fresh vs 27% processed

Soft Citrus 90% vs 30% processed

Value addition / agroprocessing vs exports of raw or semi-processed

Industrialisation of freshness :

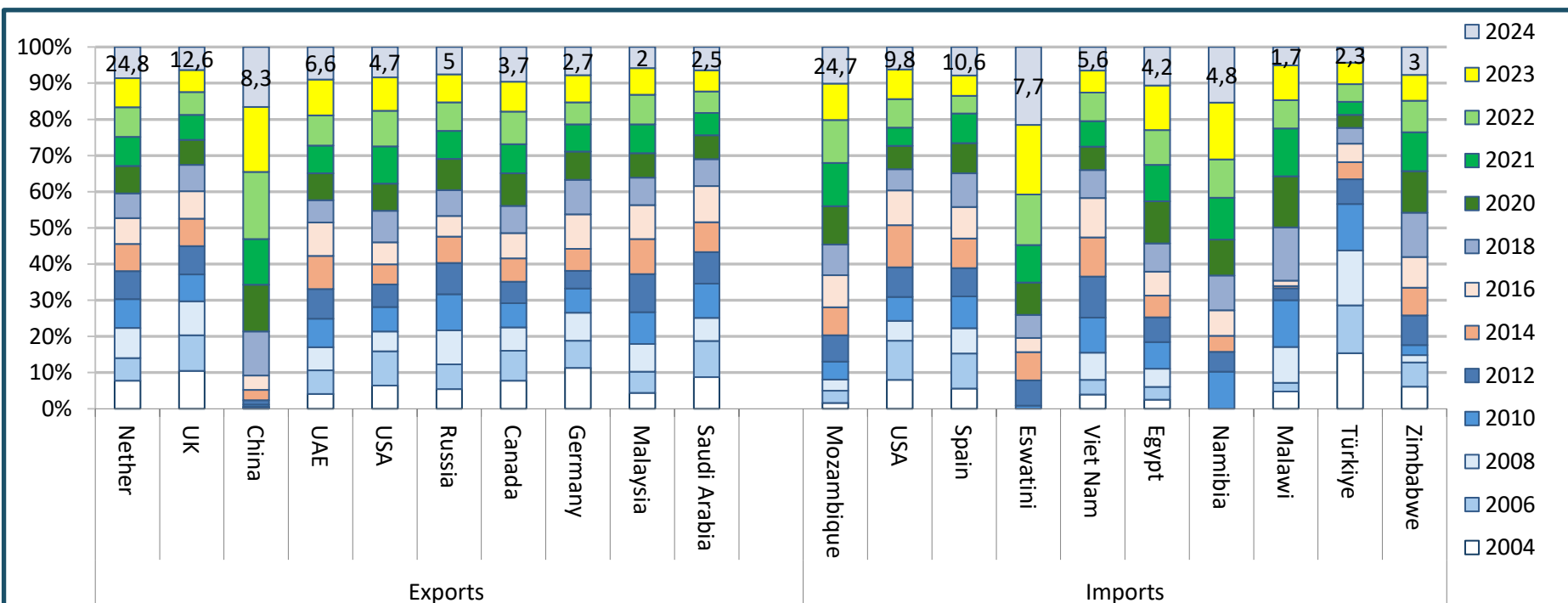
Technologically intensive value addition

Digital monitoring, biotechnology creates complex layers of value addition - price premiums

Advanced technologies cold-chain infrastructure, sorting, packaging, ripening control, residue testing,

Consumer preferences

SA Top Imp & Exp HS8 edible fruit & nuts 2004 to 2023



Top Export Products

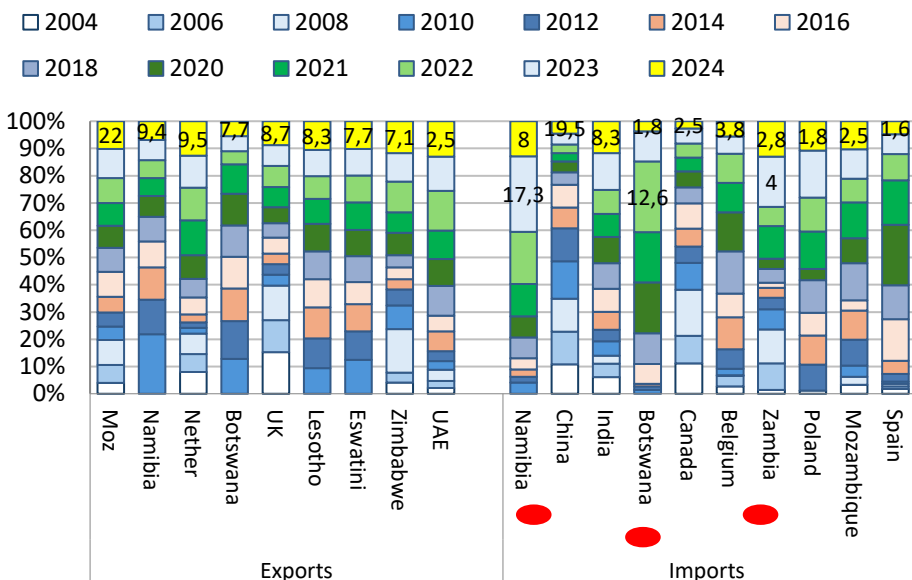
- ☐ Citrus fruit, fresh or dried
- ☐ Grapes, fresh or dried
- ☐ Apples, pears and quinces, fresh
- ☐ Other nuts, fresh or dried,
- ☐ Fresh strawberries, raspberries, blackberries, black, white or red currants, gooseberries

Top Imported Products

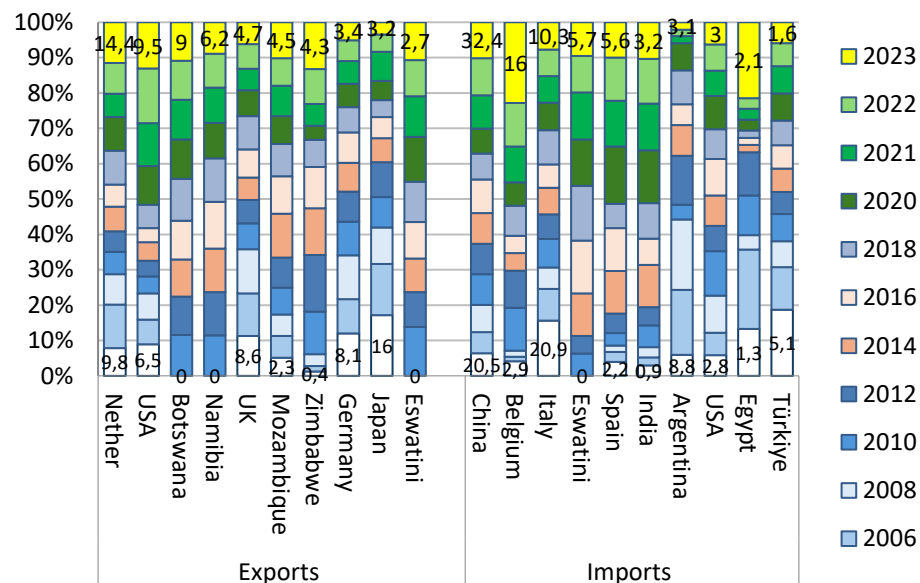
- ☐ Bananas, incl. plantains, fresh or dried
- ☐ Other nuts, fresh or dried, whether or not shelled or peeled
- ☐ Coconuts, Brazil nuts and cashew nuts, fresh or dried
- ☐ Grapes, fresh or dried
- ☐ Dates, figs, pineapples, avocados, guavas, mangoes and mangosteens, fresh or dried

Top Imports & exports HS7 edible vegetables and HS 20 prepared vegetables, fruit

HS 7 Edible Vegetables



HS 20 Prepared Veggies and Fruit



Top Export Products

- ☐ Potatoes, fresh or chilled
- ☐ Other vegetables, fresh or chilled,
- ☐ Onions, shallots, garlic, leeks vegetables, etc, fresh or chilled
- ☐ Dried leguminous vegetables,
- ☐ Carrots, turnips, salad beetroot, similar edible roots,

Top Imported Products

- ☐ Dried leguminous vegetables, shelled,
- ☐ Dried vegetables, whole, cut, sliced, broken or in powder,
- ☐ Onions, shallots, garlic, leeks and other, fresh or chilled
- ☐ Vegetables, uncooked or cooked
- ☐ Tomatoes, fresh or chilled

Top Export Products

- ☐ Fruit juices
- ☐ Fruits, nuts and other edible parts of plants
- ☐ Other vegetables prepared or preserved
- ☐ Jams, fruit jellies, marmalades, fruit or nut purée and fruit or nut pastes,
- ☐ Vegetables, fruit, nuts and other edible parts of plants

Top Imported Products

- ☐ Fruit juices
- ☐ Vegetables prepared or preserved
- ☐ Tomatoes, prepared or preserved
- ☐ Fruits, nuts and other edible parts of plants,
- ☐ Other vegetables prepared or preserved

Constraints

Production

Climate change

❑ Droughts

- ❑ 2015–18 Drought (El Niño): National (esp. NW, FS, KZN)

❑ Floods

- ❑ April 2019, 2022 Floods: KwaZulu-Natal

❑ Heat waves

- ❑ Nationwide Heatwave in Nov 2023-March 2024
- ❑ Esp Northern Cape, Northwest and Free State

❑ Diseases

- ❑ Pests (netting also creates optimal conditions for pests)

Infrastructure

❑ Road, Rail, Ports

❑ Shipping cost, delays

❑ Sustainable electricity

❑ Oranges shipped to the EU must pre-cooled below 2°C & then maintained for 20 days

❑ Cold storage, volumes, \$

❑ Water resources

❑ SA is water-scarce global 30th driest.

❑ Agriculture accounts for 61% water use in SA

❑ Horticulture high-demand

❑ Water license

Non-Tariff Barriers

❑ SPS false codling moth, a citrus pest commonly found in Sub-Saharan Africa

❑ Citrus black spot, a fungal disease which leaves dark spots on fruit

❑ CBS a lot of countries accept fruit without leaves

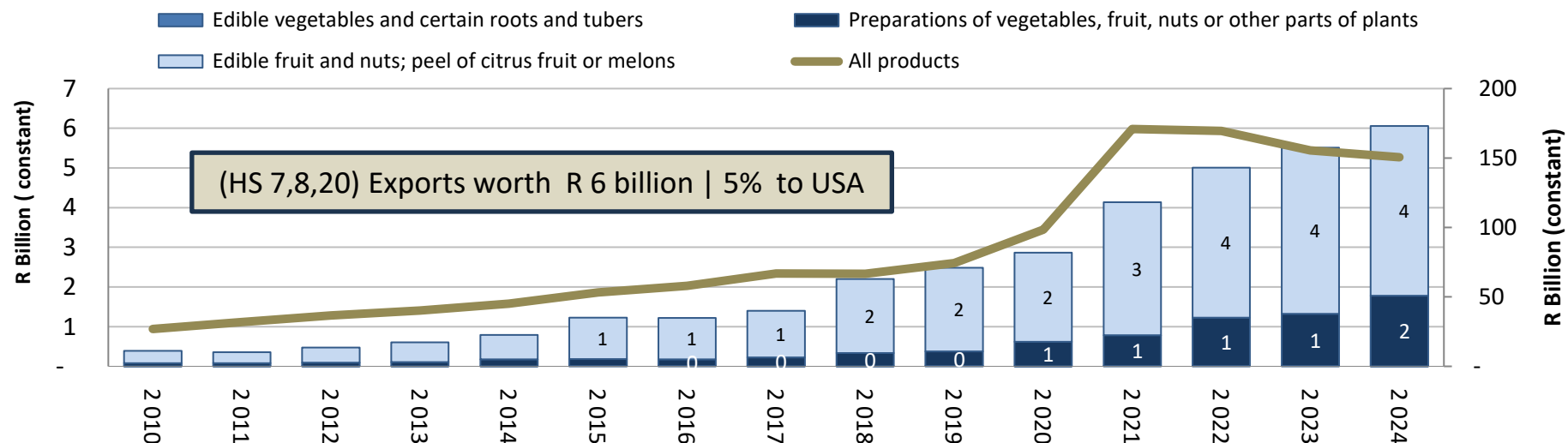
❑ 2024 WTO –Dispute SA X - EU | 2025 EU - 3 yr CBS extension

❑ Restrictive than necessary

❑ Fails to account for regional differences pest



Constraints: Exports USA | AGOA | GSP



U.S. Foreign Policy: AGOA and GSP

- ☐ AGOA preferential access for about 5 604 of the US's roughly 11 219 total tariff lines
- ☒ 75% – Share of SA total agricultural exports benefited from AGOA/GSP
- ☐ SA largest utilizer overall, horticulture benefited from citrus, wines, nuts, grapes, fruit Juice, preserved vegetables and fruits
- ☒ Expired in Sept 2025
- ☐ Generalised System of Preferences (GSP) providing preferential access to an additional 3 534.
- ☐ (GSP) free access to create an enabling trading environment for developing countries (by EU, Japan, Russia, NZ, USA, Switzerland)
- ☒ SA - US GSP is currently not active. It expired in December 2020. But still active for Russia, etc.

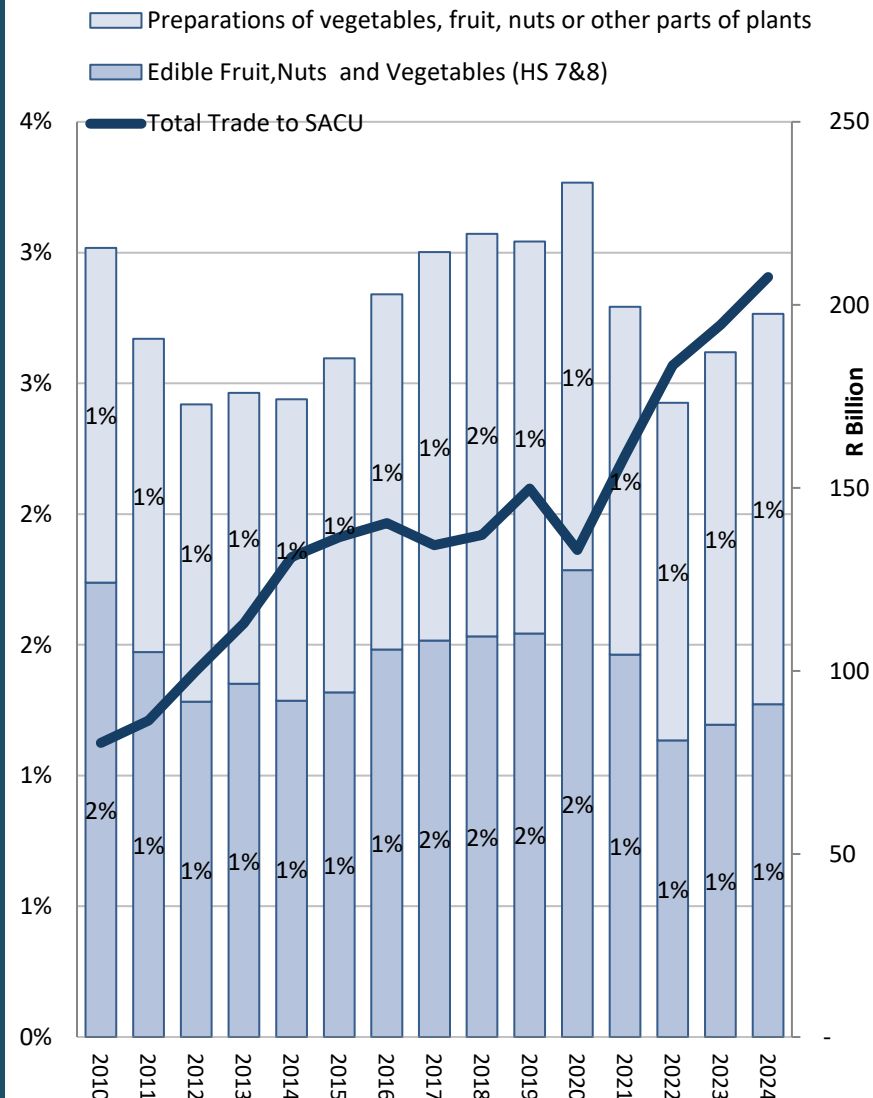
U.S. Foreign Policy Pres Trump Tariffs

- ☐ 7 Aug 25, US imposed tariffs on SACU
- ☐ Sharp departure preferential treatment
- ☐ The tariffs, set at 30% for South Africa, 37% for Botswana,
- ☐ 21% for Namibia, 10% for Eswatini, and 50% for Lesotho,
- ☐ Impact Western & Northern Cape that export about 7 million cartons of citrus to the U.S. annually

Constraints: SACU Import Restrictions

- ❑ SA exported R 5.7 billion to SACU in 2024 of HS 7,8,20) accounts for 2% of total trade to SACU
- ❑ SA hit with export bans to SACU in 2024.
- ❑ SA Exports of vegetables to Botswana and Namibia have been banned to protect local farm producers.
- ❑ Banned products: tomatoes, beetroot, carrots, cabbage, lettuce, potatoes, garlic, onions, ginger...
- ❑ Botswana has lifted its vegetable import restrictions in two phases.
- ❑ Phase 1 (Dec 2024) reopened imports, ie turmeric, pumpkins, sweet potatoes, broccoli, etc
- ❑ Phase 2 (April 2025) eased restrictions on key staples, potatoes, onions, tomatoes, carrots, cabbage, butternut, garlic, lettuce, etc
- ❑ Namibia bans X SA continues onions, cabbages, English cucumbers, and carrots
- ❑ Frequent trade disputes SA and the northern borders
- ❑ New tomato wars: SA withdrew Namibia export permits (SPS issues)
- ❑ Other SACU bans 2024/2024 maize and sorghum

South Africa Exports to SACU R Bn



(1) Conclusion: Outlook

USA: Tariff Adjustments for Aligned Partners 14 Nov 25

- ❑ Partial reprieve: The US announced a rollback of an additional 30% tariffs
- ❑ On agriculture and a range of imported crops and food products
- ❑ Decision exempts numerous coffee and tea, **nuts, fruit juices**, cocoa and spices, **avocados, bananas**, guavas, limes, oranges, **mangoes, pineapples, various peppers and tomatoes**, etc.
- ❑ Macadamia nuts and pecans (big for SA)
- ❑ Farms in Limpopo and Mpumalanga
- ❑ **Table grape export season**
- ❑ **Wine producers and table grape farmers remain exposed, tariff stands (R 820 million export to USA in 2024)**
- ❑ **USA is South Africa's 4th-largest wine export market, after the UK, Germany, Nether**

Market Expansion Initiatives

- ❑ NAMC: drive and target markets with huge populations (Asia)
- ❑ DTIC: enhancing export certification capacity and aligning biosecurity standards to diversity
- ❑ CGA: 2021-2025
 - ❑ Export of citrus to the Philippines
 - ❑ Vietnam's additional volumes of citrus
 - ❑ Japan: Pipelines, avocados, and citrus
 - ❑ India: soft citrus
 - ❑ Taiwan, Thailand, and South Korea: inputs into SPS and working procedures for citrus
- ❑ Hortgro: Stone fruit to China, peaches, plums, prunes

(2) Conclusion: Outlook

Environmental and Support

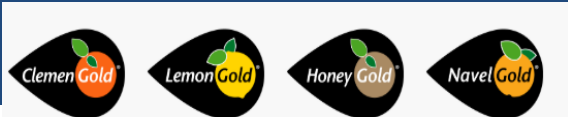
- ❑ Counter seasonality and climate change
- ❑ **Quality and brand recognition (ClemenGold)**
- Rigorous R&D**
- ❑ CSIR-ARC-DSI - Precision Farming with AI/ML, big data
- ❑ Hortgro Science has Farming Technology Research
- ❑ Banks provide finance for technology
- ❑ Universities

Technological changes

- ❑ Improved and Advanced Cold chain and transportation systems
- ❑ **Cold chain** - The Post-Harvest Innovation Programme PPP variety of cold technological solutions
- ❑ **Delta Trak** cold chain Modified Atmosphere Packaging (MAP)
- ❑ Quality preservation: retain original colour, texture,
- ❑ Flavour and nutritional content.
- ❑ **Biotechnology**:-delayed ripening, Delta Trak produces Ethylene Absorption Packaging (EAP).
- ❑ Improved breeding and propagation systems
- ❑ **Market reach expansion: longer shelf life.**

Consumer Preferences

- ❑ The increasing awareness of healthy eating habits
- ❑ **Plant-based food** accelerated during the COVID-19 pandemic and continues to rise in some countries.
- ❑ Growth **snackification** diet-friendly alternatives
- ❑ Such as fruit snacks, fruit and vegetables
- ❑ Growth of **superfoods** vegetable- and superfruit-based juices:-
- ❑ Blueberries, pomegranate and kale



Trade and Industrial Policy Strategies

**Supporting policy development
through research and dialogue**

Thank you

[Link](#)

Industry Study: Horticulture Value Chain
Technological Changes in the Horticulture Industry
International Trends in the Horticulture Industry
Sustainability Trends in Horticulture – forthcoming
Industry Study: Update of the Horticulture – forthcoming

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