



Industry Perspectives

DoA – Subtrop Special Markets Coordinating Meeting

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16 July 2026

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- **Avocado**
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Avocado



Litchi



Mango

Subtrop manages the affairs of the SA Avocado, Litchi and Mango Growers' Associations



BERRIES ZA
— SUPPORTING SOUTH AFRICAN GROWERS —



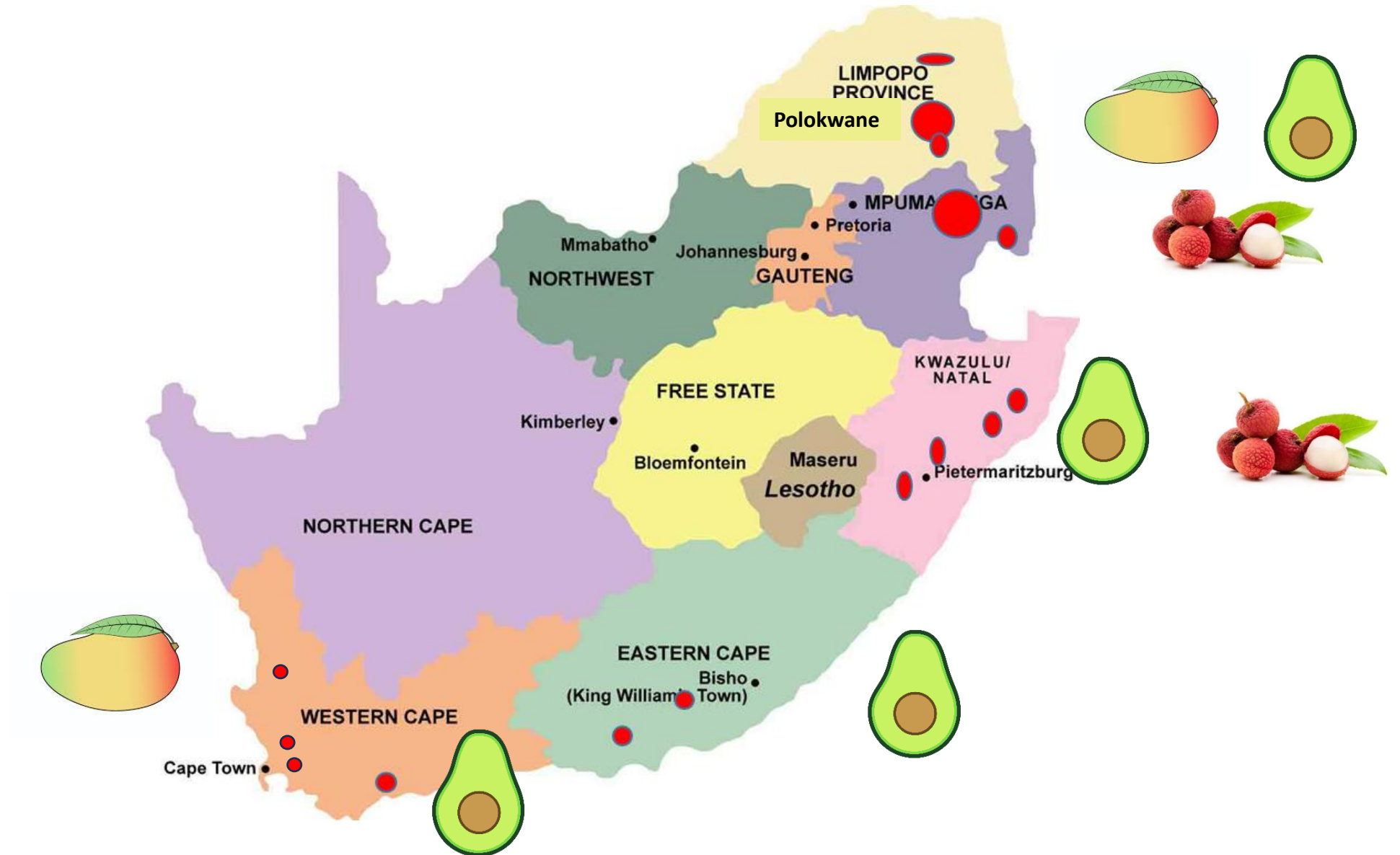
National avocado, mango & litchi statistics

	Avocado	Mango	Litchi
Number of commercial growers ¹	±390	±130	±80
Number of emerging growers ²	145	91	57
Area planted	21 240 ha	5 992 ha	1 374 ha
Annual expansion	±800 ha	±50 ha	±20 ha
Annual Production	± 160 000 tons	±82 000 tons	±6 600 tons
Annual Value (FOB Cape Town + Local)	± R3,57 billion	±R600 million	± R185 million
Employment (Seasonal + Permanent)	± 16 750	± 7 375	± 3 600

¹ Members and non-members of the Subtrop associations. Non-members are included

² Emerging growers that are members of the Subtrop associations. Non-members are excluded

Avocado, mango & litchi production regions





Avocado

South African avocado production

Export (fresh)	46%
Domestic market (fresh)	45.4%
Processing (oil & guacamole)	8.6%

Export markets:

EU & Russia: 75%

UK: 22%

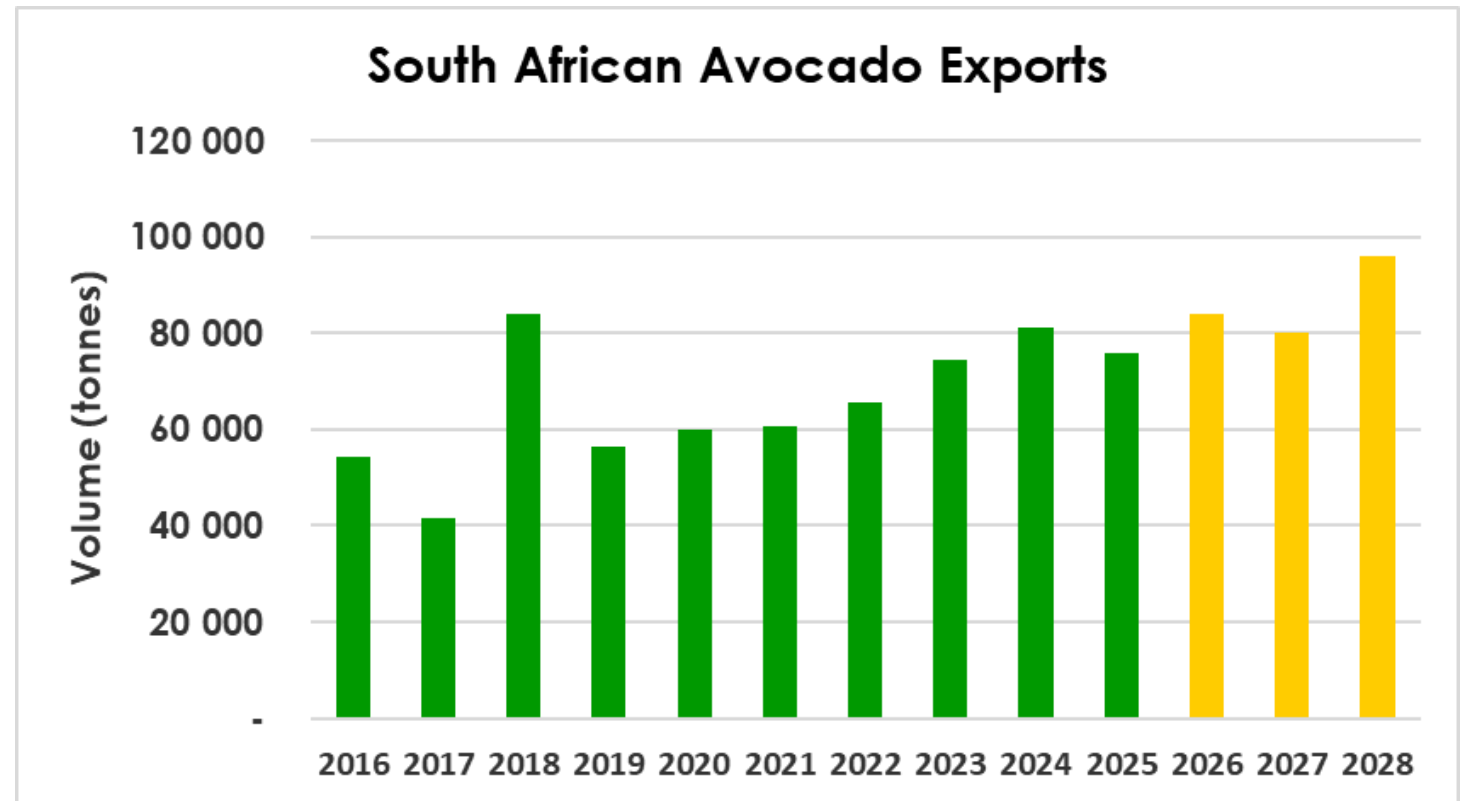
Other: 3%

New: China, India, Japan

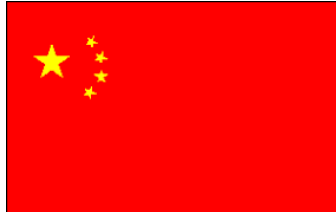
Total production:
±160 000 t p.a. and growing

Hass & Hass-types: 80% of
new plantings and 65%-70%
of exports.

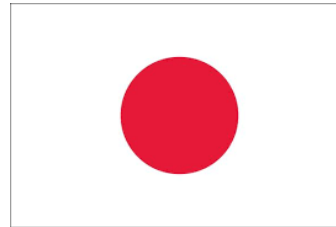
Total area: 21,240 ha
Annual expansion ±800 ha



New Market Access



- **China – First shipment 2024**
- **Competition from Peru, Mexico**
- **Developing market**
- **Only 3 containers exported in 2025**
- **No exports in 2026**
- **Import tariff reduced from 7% to 0%**
- **Alternative to methyl bromide fumigation needed**



- **Japan – First shipment 2024**
- **No exports in 2025, none expected in 2026**
- **Cold treatment is restrictive**

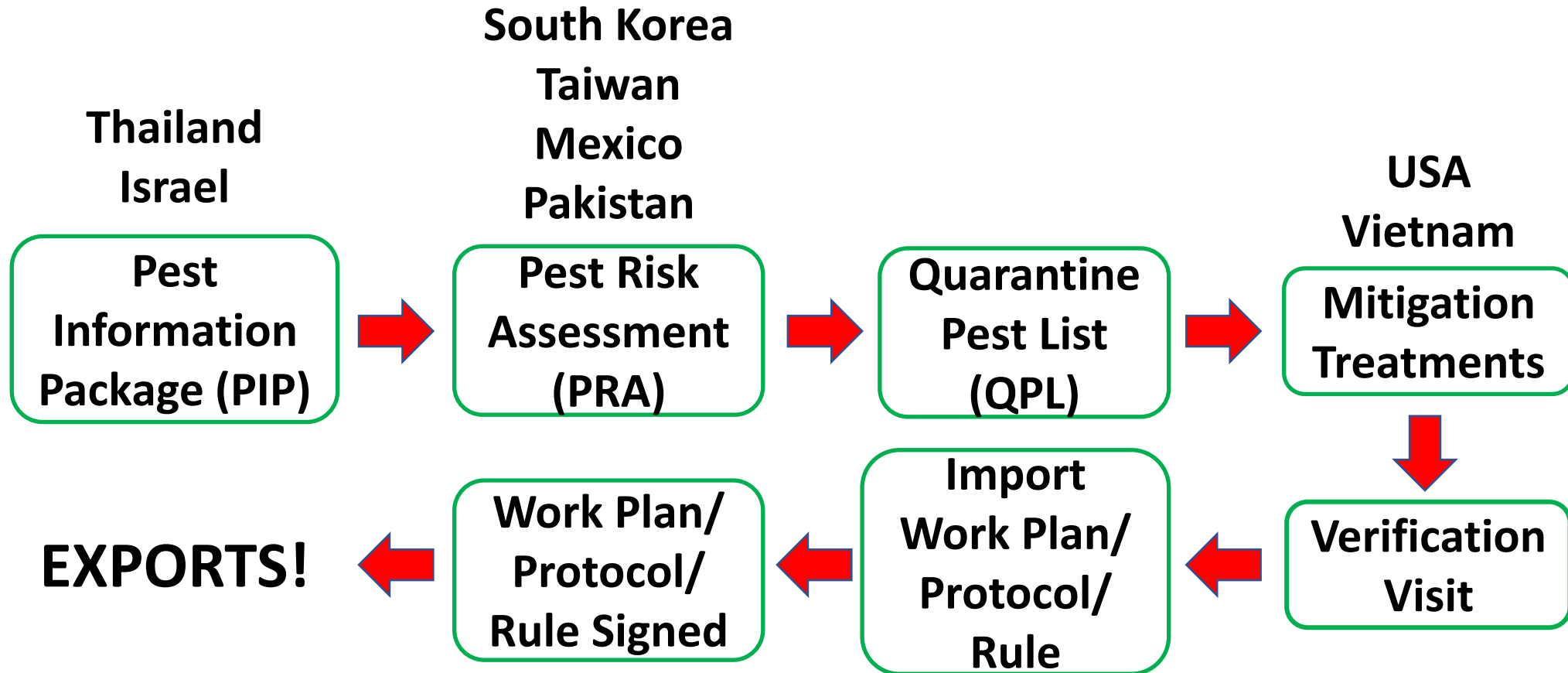


- **India – First shipment 2024**
- **Very low volumes exported in 2025 (16 632 cartons)**
- **Import tariff – 30%**
- **Competition from Tanzania (0% as LDC)**



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Market Access Applications

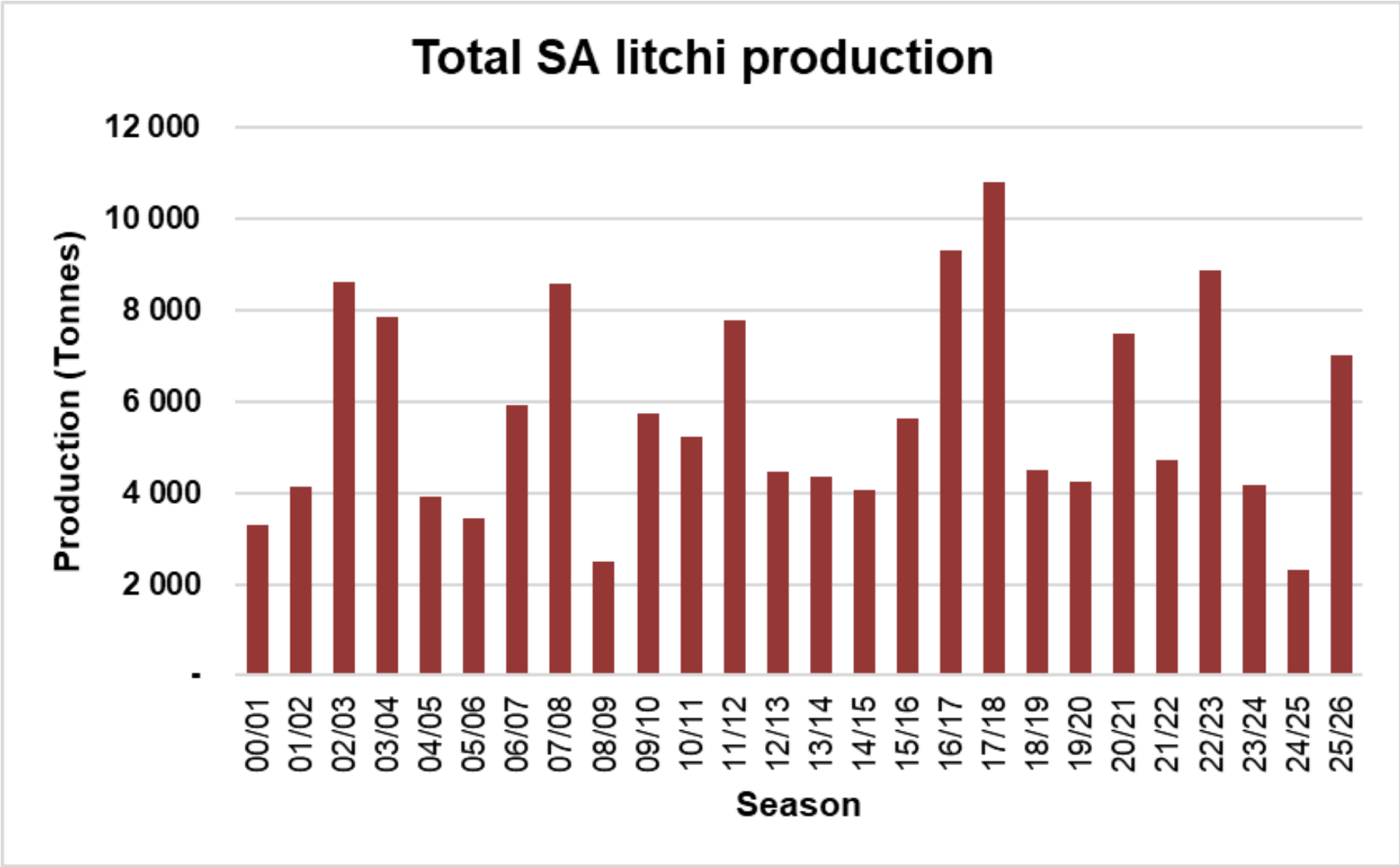


Changes to protocols

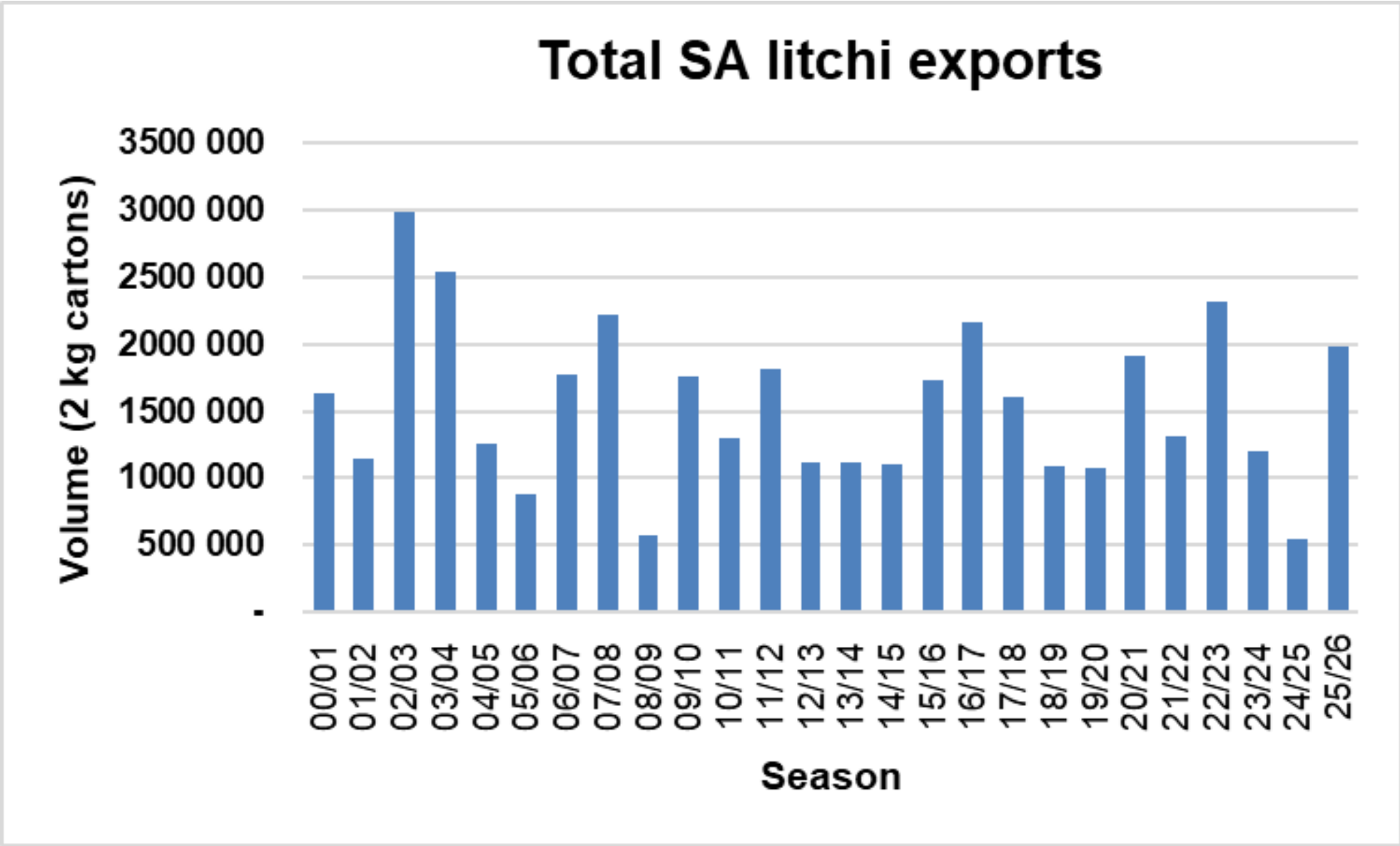
- China
- Japan

SALGA

Litchi



SA Litchi Exports



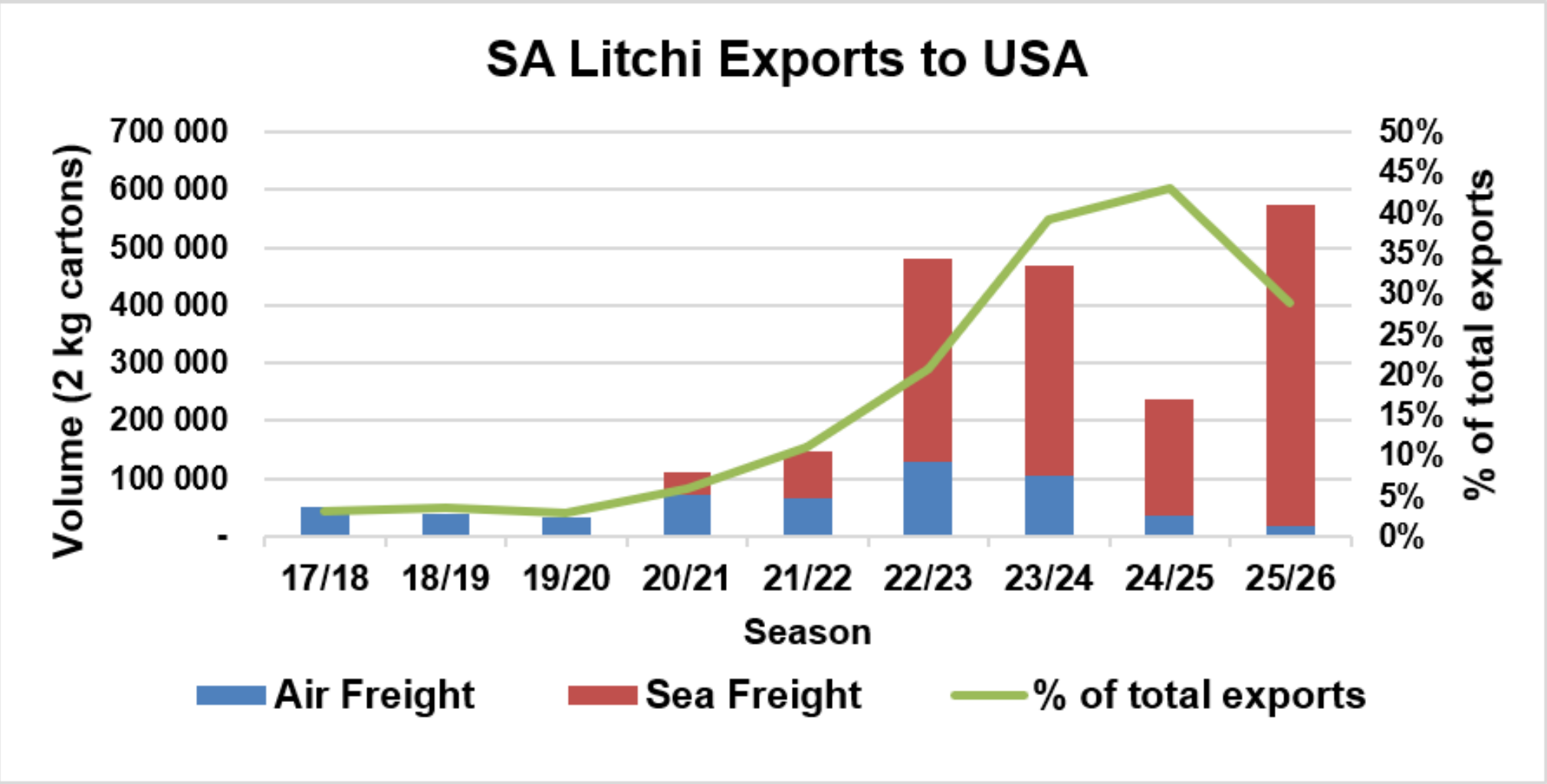
SA Litchi Exports 20254/2026

Total: 1.982 million 2 kg carton equivalents (3 974t):

EU & UK	65.27%
USA	28.85%
Russia	4.3%
Other	1.58%



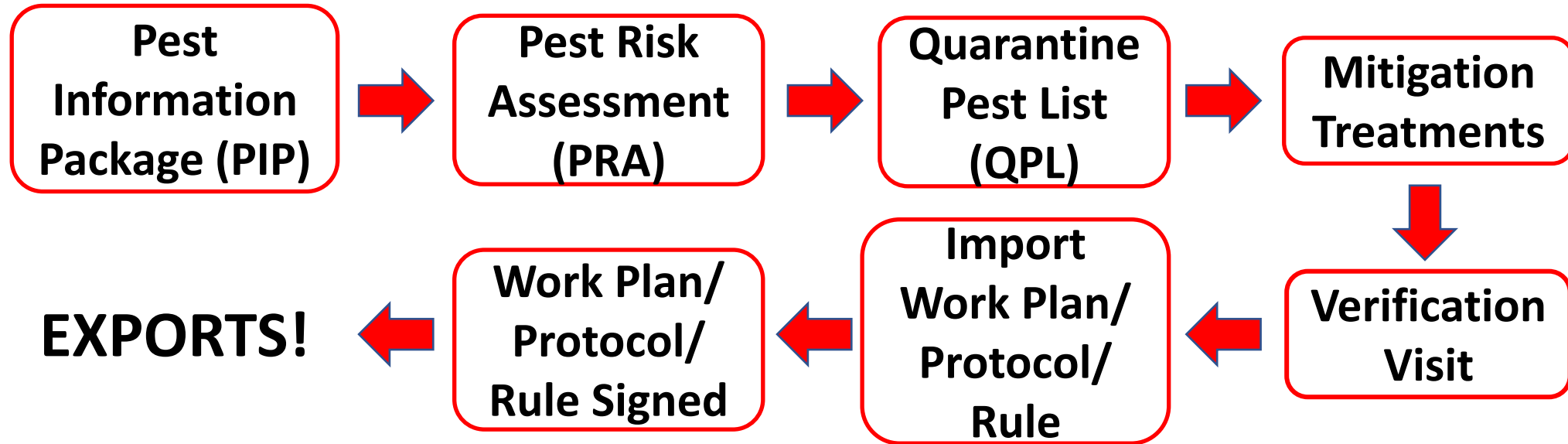
SA Litchi Exports - USA



Market Access Applications

China
South Korea
Vietnam
Mexico

Jamaica



India

Changes to protocols

- USA



Mango

SA Mango Production



Year	ACHAR	%	DRIED	%	JUICE	%	NATIONAL FRESH PRODUCE MARKETS	%	EXPORT	%	DIRECT SALES ¹	%	TOTAL
15/16	29 000	47%	5 382	9%	11 303	18%	13 942	23%	2 258	4%	-	0%	61 885
16/17	30 000	32%	15 526	16%	15 289	16%	27 772	29%	4 674	5%	1 072	1%	94 333
17/18	30 000	35%	12 695	15%	10 087	12%	22 726	26%	4 497	5%	5 956	7%	85 961
18/19	25 000	28%	9 906	11%	15 547	18%	29 655	34%	6 039	7%	2 224	3%	88 371
19/20	30 000	33%	17 218	19%	9 087	10%	22 900	25%	3 925	4%	6 821	8%	89 951
20/21	25 000	35%	12 648	18%	7 111	10%	19 383	27%	2 954	4%	4 564	6%	71 661
21/22	15 000	24%	13 397	22%	6 176	10%	18 264	29%	3 250	5%	6 176	10%	62 263
22/23	35 000	41%	14 744	17%	8 499	10%	14 910	17%	4 305	5%	8 499	10%	85 957
23/24	30 000	35%	9 784	11%	10 578	12%	18 427	21%	6 358	7%	10 578	12%	85 725
24/25	30 000	41%	7 864	11%	5 990	8%	16 810	23%	6 136	8%	6 720	9%	73 520
25/26	35 000	38%	4 816	5%	8 996	10%	29 168	31%	9 435	10%	5 311	6%	92 726

Note: Figures in italics are estimates. The 2025/2026 Juice and Drying figures are not yet finalised.

SA Mango Exports 2025/2026

Total: 2.358 million 4 kg carton equivalents (9 435 t):

Middle East 89.61%

UK 4.52%

Africa 4.29% (Majority to Ghana for fresh cut – exported to UK)

Asia 1.37%

Russia 0.21%



Exports to Middle East 2024/2025 & 2025/2026



Filters

Clear All

STD Growth +55.6% 2025/2026 vs 2024/2025	2025/2026 STD Total 2 349 010 CTN	2024/2025 STD Total 1 509 290 CTN	Avg Weekly Volume 138 177 2025/2026: 138 177 vs 2024/2025: 107 806	Peak Week 294 078 2025/2026: W50 (294 078)	Active Weeks 17 2025/2026: 17 vs 2024/2025: 14
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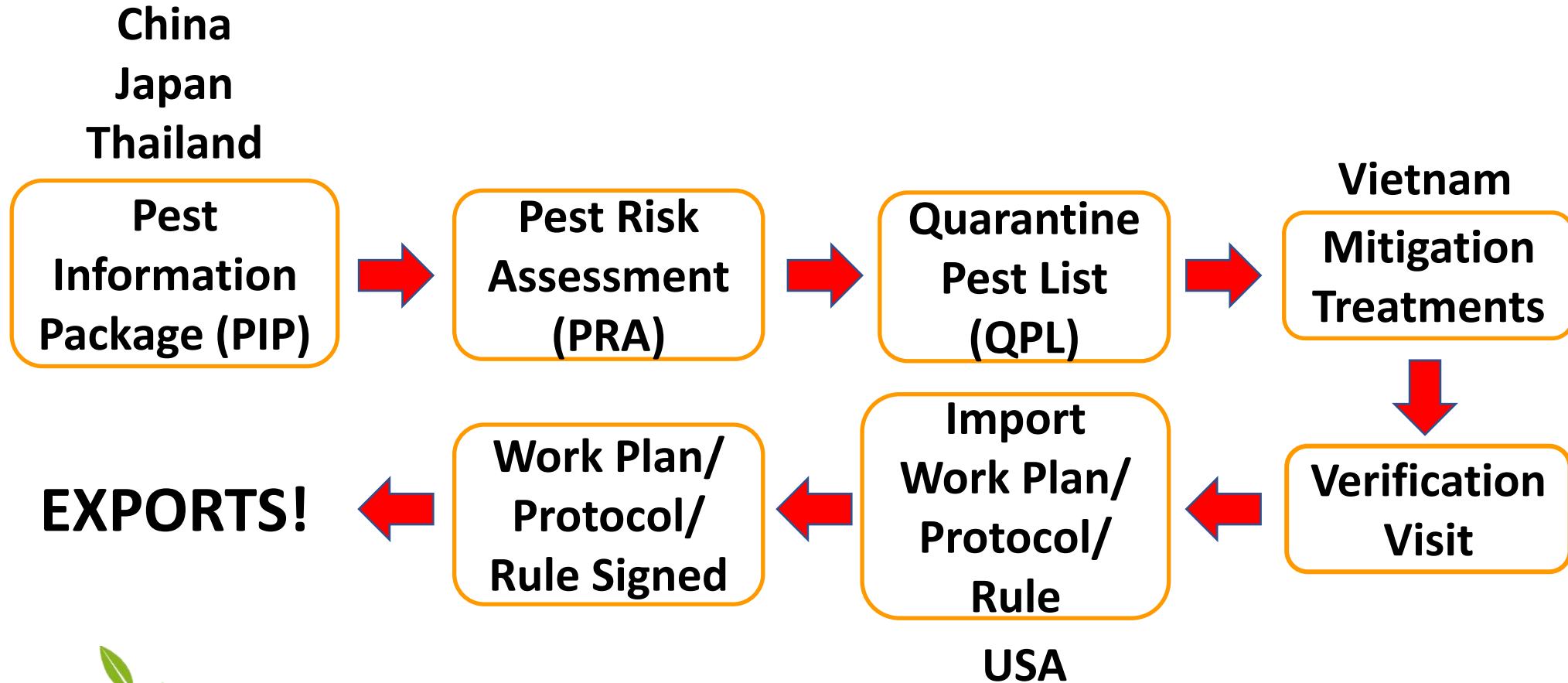
Exports to India



- **Market access granted in 2016**
- **Negligible volumes exported to India**
- **Import tariff - 30%**



Market Access Applications



**September
2027**



Early Bird registration opens 1 September 2026