

Sector's strength lies in its adaptability

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Despite mounting global uncertainty and persistent logistics challenges, South Africa's perishable exports continue to demonstrate resilience, underpinned by strong production fundamentals, diversified markets and improving post-harvest practices. Record citrus volumes in the 2025 season, a positive start to the current table grape campaign and early signs of recovery in the grain sector point to a more constructive outlook for 2026. "The grain industry experienced an unfavourable export season in 2025, driven by volatile market conditions and pricing challenges. However, early indicators suggest a more positive outlook for the 2026 export year," said Vijan Chetty, general manager: coastal at the Perishable Products Export Control Board (PPECB). "This is supported by the carryover surplus of maize from the previous season, expectations of strong crop production and improved market conditions. Despite the global uncertainty, South African perishable exports remain strong, with a positive outlook in the short to medium term." According to Chetty, the citrus, berry and stone fruit industries in South Africa continue to demonstrate notable growth and increasing adaptability. "This trend is largely driven by new plantings reaching full production, which is expanding overall supply and allowing producers to meet both existing and emerging market demand," he told Freight News. "Improved cultivation techniques, investment in modern orchards, and enhanced post-harvest handling have contributed to higher yields and improved fruit quality, strengthening the industry's competitiveness." In addition, the sector's strength is reflected in its ability to adapt to challenges such as seasonal fluctuations, logistical constraints, inclement weather and changing market requirements. Chetty said southern Africa, particularly South Africa, continued to be competitive in established, high-value perishables such as citrus, table grapes, deciduous fruit and certain vegetables. "Europe remains the largest and most stable market, absorbing approximately 37% of South Africa's total perishables exports in 2025." According to Chetty, long-standing trade relationships, preferential access arrangements and strong compliance with

phytosanitary and sustainability standards underpin this competitiveness. The Middle East and Asia each account for roughly 16% of exports, offering diversification and growth opportunities, particularly for premium and counter-seasonal products. "Improved market access into Asia is likely to drive a meaningful shift in South Africa's export market mix, reducing reliance on traditional destinations and supporting long-term growth. Progress in negotiations, particularly around the relaxation of excessive and overly stringent cold treatment measures, is expected to materially improve competitiveness and unlock further diversification into these high-growth markets." As access conditions become more risk-based and aligned with international standards, South Africa would be better positioned to expand volumes, improve price realisation and compete more effectively with other southern hemisphere exporters in Asia. LV

