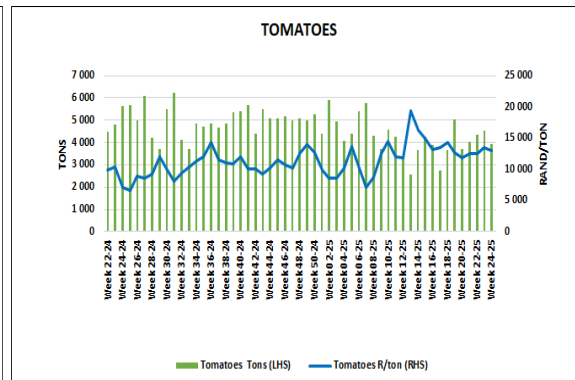
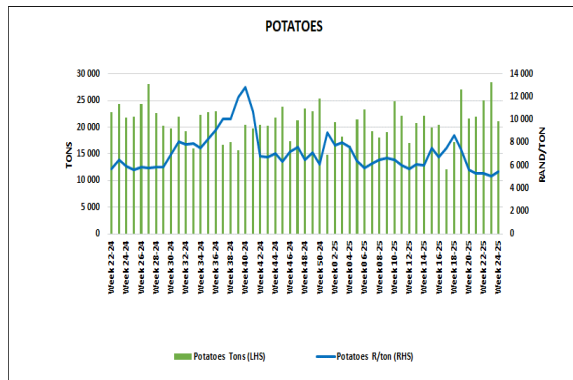




Summary

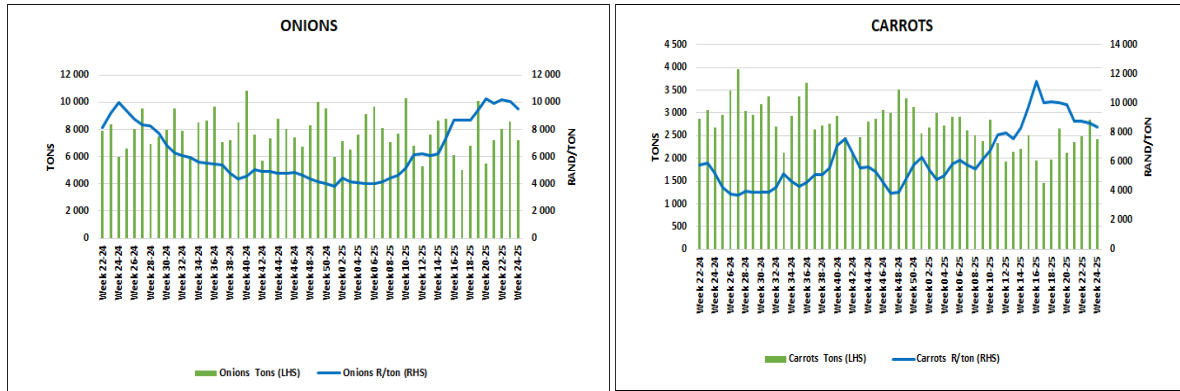
This week, Statistics South Africa released the headline consumer price index (CPI) for May 2025. The May 2025 CPI increased by 2.8% year-on-year (y/y) and by 0.2% month-on-month (m/m). The April 2025 CPI had also increased by 2.8% y/y and it increased by 0.3% m/m. The May 2025 food CPI increased by 4.4% y/y, up from a 4% y/y increase in April 2025. This increase in the May 2025 food CPI was mainly driven by higher prices of meat, fish, other seafood, oils and fats, fruit and nuts, and vegetables. The uptick in horticultural product prices was mainly occasioned by weather-related supply side disruptions over the past few months. However, consumers may get a reprieve over the coming months as the supply of products such as potatoes, tomatoes, and carrots on the fresh produce markets is recovering. South Africa's 2024/25 table grape export season concluded in the second quarter of 2025, in sync with the seasons of other Southern Hemisphere players such as Mexico and India. Global table grape exports increased by 11% y/y in the 2024/25 season, with Peru, Chile, and South Africa dominating the Southern Hemisphere's export volumes.

Potatoes and Tomatoes



- In week 24-2025, **potato** prices firmed by 8% week-on-week (w/w) to R5 418/ton due to stronger consumer demand and a 25% w/w supply decline to 21 134 tons. Prices are expected to decline in the coming week due to higher availability and lower demand. As a result, more potatoes may be diverted to processing for the rest of June 2025.
- Tomato** prices declined by 3% w/w to R13 030/ton due to lower demand. Market volumes decreased by 14% w/w to 3 923 tons. Subdued demand as well as higher expected market volumes may lead to even lower prices in the coming week.

Onions and Carrots



- **Onion** prices decreased by 5% w/w to R9 508/ton due to weaker midmonth demand. Market supply decreased by 16% w/w to 7 195 tons. Prices are expected to move sideways in the coming week.
- **Carrot** prices decreased by 3% w/w to R8 400/ton from lower consumer demand. Market volumes declined by 15% w/w to 2 419 tons. Prices are expected to trend lower in July and August 2025 as higher market supplies are anticipated.

Fruit Trends on all NFPMs in South Africa

Commodity	Rand per ton		% change (w/w)	Ton		% change (w/w)
	Week ending			Week ending		
	06 Jun	13 Jun		06 Jun	13 Jun	
Apples	9 330	9 310	🔴 -0.2%	3 195	2 711	🔴 -15%
Pears	9 090	9 150	🟢 0.7%	1 079	867	🔴 -20%
Bananas	7 660	7 210	🔴 -6%	5 892	5 164	🔴 -12%
Oranges	4 710	4 690	🔴 -0.4%	4 151	3 445	🔴 -17%
Avocados	15 410	16 160	🟢 5%	695	623	🔴 -10%

- **Apple** prices declined marginally by 0.2% w/w to R9 310/ton from lower demand. Market volumes declined by 15% w/w. Prices may recover in the coming week as demand improves.
- **Pear** prices saw a slight increase of 0.7% w/w to R9 150/ton on the back of higher consumer demand and market volumes that contracted by 20% w/w. Lower demand is expected to pressure prices in the coming week.
- **Banana** prices decreased by 6% w/w to R7 210/ton due to slower midmonth demand. Market volumes decreased by 12% w/w. Prices are expected to remain subdued due to higher expected volumes until August 2025.
- **Orange** prices decreased fractionally by 0.4% w/w to R4 690/ton on back of weaker consumer demand. Market supply declined by 17% w/w as exports took off. Prices are expected to trend sideways for the next three months due to harvesting pressure.
- **Avocado** prices rose by 5% w/w to R16 160/ton supported by higher consumer demand. Market volumes declined by 10% w/w. Prices are forecast to remain elevated until October 2025 due to tighter supply.

Citrus Exports

Week 23 Million 15kg Cartons	Packed 2024	Packed 2025	Packed Difference y/y	Shipped 2024	Shipped 2025	Shipped Difference y/y	Original Annual Estimate 2025	Latest Annual Prediction 2025	Final Annual Packed 2024
Grapefruit	10.2	10.2	0%	8.1	8.8	9%	15.3	15.1	14.4
Soft Citrus	13.1	15.2	16%	9.4	11.9	27%	44.9	45.3	41.6
Lemons	18.5	21.1	14%	15.4	19.2	25%	32.9	34.1	34.7
Navels	7.9	8.0	1%	3.5	5.3	51%	26.1	26.0	25.1
Valencia	0.7	1.6	129%	-	0.6	100%	52.0	52.0	48.8
Total	50.4	56.1	11%	36.4	45.8	26%	171.2	172.5	164.6

Week 23-2024 exports:

- Grapefruit** exports rose by 9% y/y to 8.8 million cartons (15 kg). The latest grapefruit prediction has declined by 1.3% from the original estimate.
- Soft citrus** shipments increased by 27% y/y to 11.9 million cartons. The latest soft citrus prediction has increased by almost 1% from the original estimate.
- Lemon** exports increased by 25% y/y to 19.2 million cartons. The latest lemon prediction is now 3.6% higher than the original estimate.
- Navel** exports increased by 51% y/y to 5.3 million cartons. This comes as more fruit is being diverted to export markets rather than processing when compared to a year ago. The latest Navel prediction has decreased by 0.4% from the original estimate. **Valencia** exports began earlier than in the previous season with 600 000 cartons being shipped. The latest Valencia prediction is on par with the original estimate.
- Citrus harvesting in the Western and Northern Cape provinces is now in full swing, with all citrus categories showing a positive outlook. It is the peak harvesting season in the Eastern Cape and higher production is anticipated as Navel oranges gain traction. In the Limpopo, Mpumalanga, and KwaZulu-Natal region, mandarin production is expected to peak in week 30-32, while Valencia orange production is anticipated to peak in week 28-36.

Avocado Exports

Weekly Volumes 4kg Cartons	SA Exports to EU			EU Imports from the World		
	Week 25	Week 26	w/w Change	Week 25	Week 26	w/w Change
Hass	210 000	382 000	82%	5 261 000	5 711 000	9%
Green Skin	122 000	165 000	35%	461 000	442 000	-4%
Total	332 000	547 000	65%	5 722 000	6 153 000	8%

Week 26-2025 exports:

- South Africa's **avocado** exports to the EU market are forecast to increase by 65% w/w to 547 000 cartons (4 kg) in week 26-2025. Hass exports are estimated to rise by 82% w/w to 382 000 cartons. Green Skin exports are projected to rise by 35% w/w to 165 000 cartons.
- The EU's avocado imports from the world are forecast to increase by 8% w/w to 6.15 million cartons despite a 4% w/w decline in Green Skin exports.
- In week 26-2025, Peruvian shipments should dominate the EU market with a total of 4.8 million cartons. Hass avocados will make up the bulk of Peru's shipments with a total of 4.5 million cartons. Peruvian exports are anticipated to peak in week 27-2025, hence, export prices for the rest of June 2025 will be slightly lower due to higher supply volumes.

Sources

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Vinpro

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