CANNING FRUIT PRODUCERS' ASSOCIATION

CANNING FRUIT INTAKE FOR THE 2025/2026 HARVEST

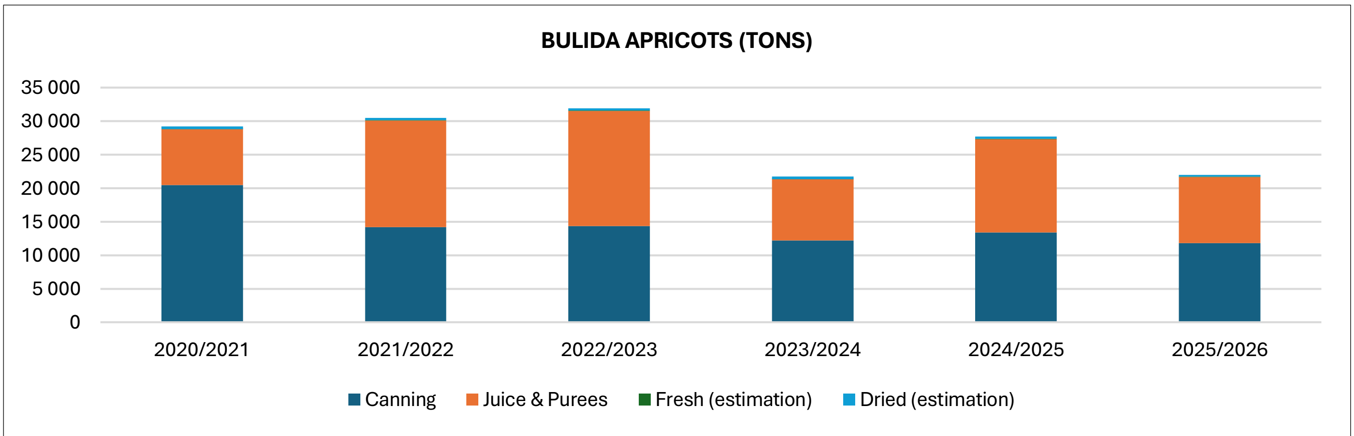
South Africa's 2025/2026 canning fruit intake reflected a notable decline across all major categories.

This could be ascribed to:

- Langeberg Foods only taking in fruit from its' producer shareholders
- A historically short and early apricot season impacting crop size and logistics
- Extensive hail damage to pears during the season
- Turmoil in the American market due to economic pressure and the closure of Del Monte Foods
- A lack of appetite from South African canneries for peaches and pears to American markets
- The unprecedented strengthening of the rand to the major international currencies

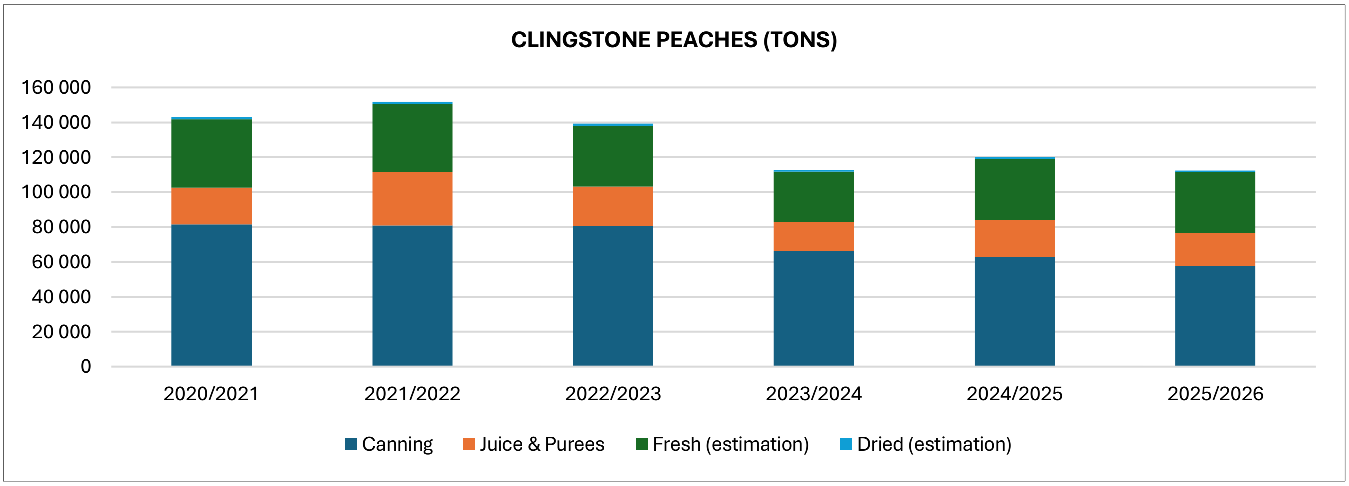
Bulida Apricots: The Bulida Apricot intake volumes decreased by 20%, largely due to warm and dry soil and weather conditions in the 1st half of the season. A smaller harvest was expected from the outset with fewer fruit on the trees and the short season resulting in smaller fruit sizes. The apricot season was short and intense, with fruit ripening and ready for picking within a week. The harvest began about 10 days earlier than last year, and most deliveries were essentially completed by the first week of December. These large volumes that came through within a single week caused enormous logistical pressure on the farms and in the factories. However, the fruit was generally healthy, with no pit burn or scuff marks.

BULIDA APRICOTS						
	Final 2020/2021	Final 2021/2022	Final 2022/2023	Final 2023/2024	Final 2024/2025	Final 2025/2026
Canning	20,467	14,148	14,325	12,229	13,426	11,823
Juice & Purees	8,339	15,970	17,200	9,085	13,889	9,851
Sub-Total	**28,806**	**30,118**	**31,525**	**21,314**	**27,315**	**21,673**
Fresh (estimation)	33	35	39	29	25	25
Dried (estimation)	350	350	332	382	325	300
TOTAL	**29,189**	**30,503**	**31,896**	**21,725**	**27,665**	**21,998**



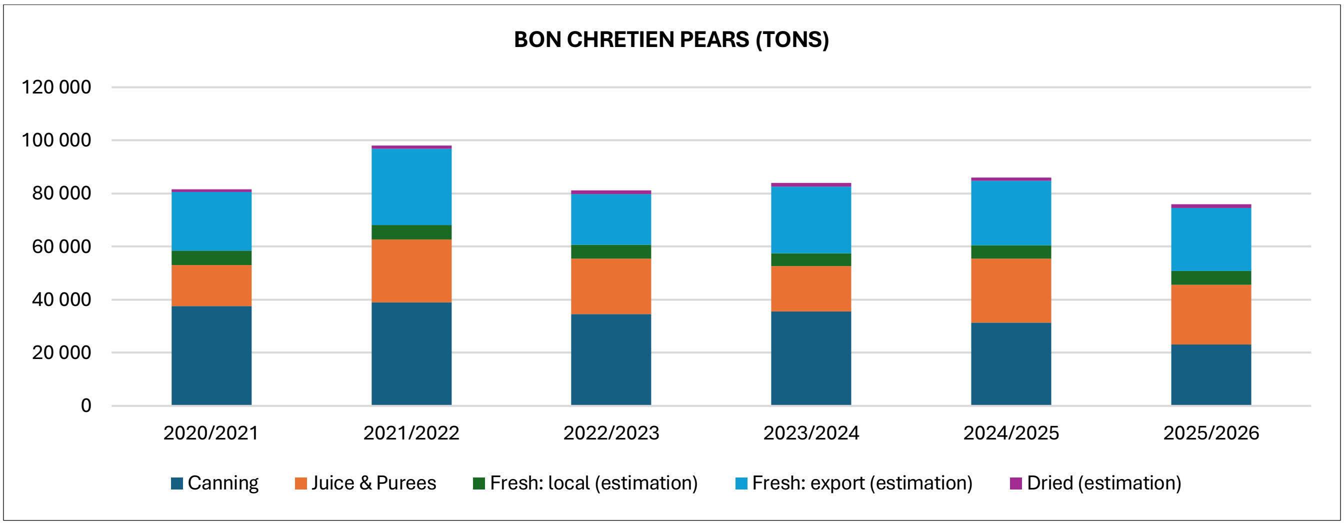
Clingstone Peaches: In contrast to apricots the Clingstone Peach crop looked promising from the beginning. The season could be divided into two halves. Dry and warm conditions early in the season leading to exceptional fruit quality and a marginal decrease in fruit size. However, widespread rain during the first week of February contributed to improved soil moisture conditions but had a negative effect on fruit quality. The final figures indicated a 6% decrease in clingstone peach volumes compared to the previous year.

CLINGSTONE PEACHES						
	Final 2020/2021	Final 2021/2022	Final 2022/2023	Final 2023/2024	Final 2024/2025	Final 2025/2026
Canning	81,400	81,011	80,448	66,263	62,705	57,643
Juice & Purees	21,236	30,563	22,740	16,609	21,333	18,836
Sub-Total	**102,636**	**111,574**	**103,188**	**82,872**	**84,038**	**76,479**
Fresh (estimation)	39,000	39,000	35,000	29,000	35,000	35,000
Dried (estimation)	1,409	1,227	1,149	938	1,032	1,000
TOTAL	**143,045**	**151,801**	**139,337**	**112,810**	**120,070**	**112,479**



Bon Chretien Pears: The Bon Chretien Pear harvest ended 12% down compared to the previous season, making this season the lowest total production recorded in the past five years. This decline is primarily attributed to smaller fruit sizes in the Breede River, Robertson, and Ladismith areas and significant hail damage in the Koue Bokkeveld and Ceres area on the 8th of February. Canning pear exports to the American market has been struggling due to tariffs applied to South Africa. As a result, some intake volumes have been adjusted to cope with these unforeseen events.

BON CHRETIEN PEARS						
	Final 2020/2021	Final 2021/2022	Final 2022/2023	Final 2023/2024	Final 2024/2025	Final 2025/2026
Canning	37,672	39,044	34,576	35,585	31,257	23,159
Juice & Purees	15,279	23,653	20,790	16,959	24,130	22,359
Sub-Total	**52,951**	**62,697**	**55,367**	**52,544**	**55,387**	**45,518**
Fresh: local (estimation)	5500	5,500	5,300	5,000	5,000	5,220
Fresh: export (estimation)	22,080	28,545	19,168	25,062	24,295	23,850
Dried (estimation)	1081	1236	1,252	1,369	1,300	1,300
TOTAL	**81,612**	**97,978**	**81,087**	**83,975**	**85,982**	**75,888**



Internationally, the market is coming from a high carryover stock situation during the 2024/2025 season and even though stocks levels are much less this season, the canning fruit markets stayed under pressure. With international markets under pressure, canners did not have a very high appetite for cling peaches. With the closure of Del Monte Foods in the USA an amount of $10.5 million has been made available to uproot clingstone peach trees with a combined production of 50 000 tons. This should relieve some pressure from that market over the medium term.

This was the first season for **Langeberg Foods,** taking over the Ashton factory from Tiger Brands, and all indications are that the new team shows a strong desire to make a success of the business and that they are faring relatively well. However, they only took in fruit from its producer shareholders and many producers who decided not to buy into the new business had to shift their fruit towards the fresh market. This had an influence on the total peach volumes utilised for canning and purees. Another major development during the season was that **Premier Foods** acquired the **Rhodes Food Group** which includes the other major fruit cannery in Tulbagh.

We trust that these changes and realignments will create new opportunities for the canning industry and canning fruit producers in South-Africa.

Compiled by Jacques Jordaan