



**FRUIT INDUSTRY VALUE CHAIN ROUND TABLE
TRANSFORMATION WORKING GROUP
ANNUAL REVIEW**

EXECUTIVE SUMMARY

JANUARY TO DECEMBER 2024



agriculture

Department:
Agriculture
REPUBLIC OF SOUTH AFRICA



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1. INTRODUCTION

The R86 billion South African fruit export industry remains a notable player in the South African economy, with transformation as one of the focus areas.

The Fruit Industry Value Chain Round Table (FIVCRT) is a dialogue platform structured around 6 core pillars, which was established by the Department of Agriculture and Fruit South Africa (Fruit SA). The Transformation Working Group (TWG) – one of the core pillars – is an integral part of the FIVCRT. It's where role-players collaborate, monitor and report on transformation progress within industry bodies.

This executive summary is based on the 2024 Transformation Annual Review, which reflects Fruit SA member associations' continued efforts to strengthen black participants' capacity along the fruit value chain. The document reflects the collective pursuit of the 2038 transformation goal for black people to participate across the entire fruit industry value chain on an equitable basis with Black Economic Empowerment (BEE) growers contributing at least 30% to fruit production and exports, respectively, and holding 15% ownership across the value chain.

Building a sustainable, inclusive industry is no mean feat. Hence, during the review period of 2024, role-players remained focused on the long-term transformation vision while harnessing important pillars linked to their transformation initiatives.

The industry transformation journey continues to be guided by the transformation strategy developed in 2018, and the FIVCRT remains a platform for robust, action-oriented dialogue.



1.1. Transformation statistics

During the 2024 review year, the area under production by black growers totalled 18 980 ha (↑12% from 2023), land owned by black growers 31 394 ha (↓0,05% decrease), volume of fruit produced by black growers 265 660 tonnes (↑4%), and the volume of export 184 523 tonnes (↑22%).

Some sectors have shown a decline in land under production, production, and export volumes. However, the overall increase highlights sustained progress, and the consistency in member associations' efforts to build a more inclusive fruit industry. This upward trajectory also underscores the industry's commitment to its transformation journey.

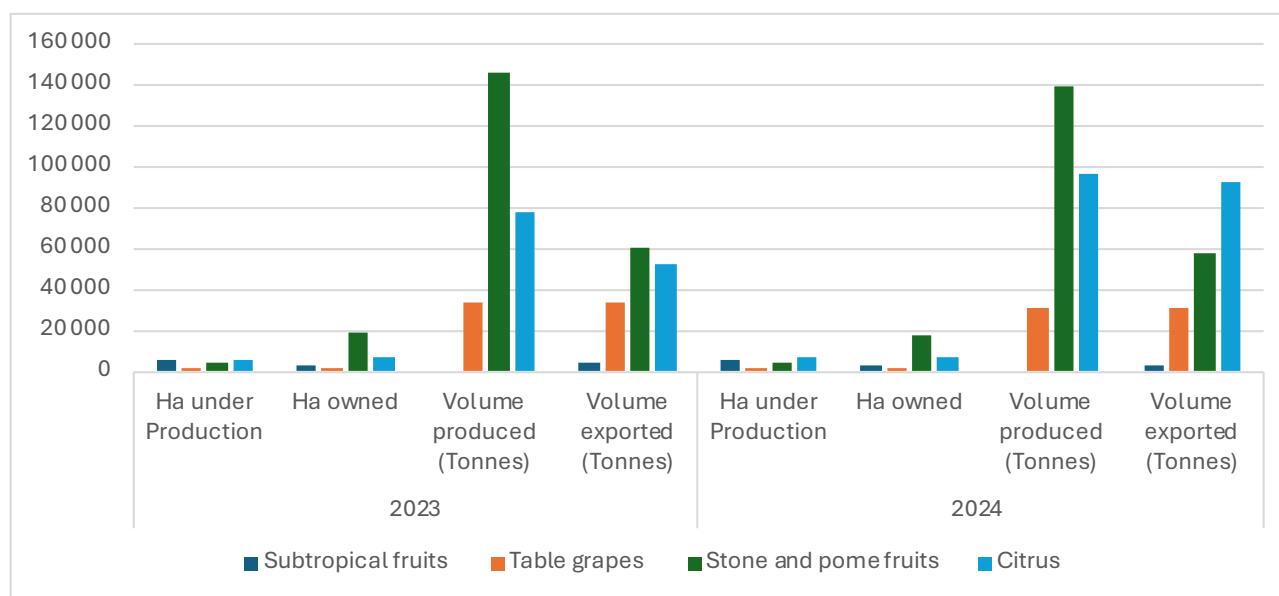


Figure 1: Black growers' performance in 2024

Table 1: A comparative y-o-y view of black growers' performance

Industry	2023				2024			
	Ha under Production	Ha owned	Volume produced (Tonnes)	Volume exported (Tonnes)	Ha under Production	Ha owned	Volume produced (Tonnes)	Volume exported (Tonnes)
Subtropical fruits	5 418	3 613	-	4 582	5 871	3 613	-	3 165
Table grapes	1 838	1 671	33 296	33 298	2 024	1 774	31 182	31 182
Stone and pome fruits	4 363	18 889	145 062	60 926	4 164	18 275	138 440	58 145
Citrus	5 331	7 236	77 061	52 500	6 921	7 732	96 038	92 031
TOTAL	16 950	31 409	255 419	151 306	18 980	31 394	265 660	184 523

2. INDUSTRY SNAPSHOT

In 2024, Fruit SA member associations continued to play a vital role in building the collective transformation success story of the South African fruit industry.

2.1. Enterprise development



Area planted:

74 ha



Funds leveraged:

R53 million



Funds invested:

R48.9 million

2.2. Skills Development



Bursaries:

R7 million

to 108 bursary recipients



Graduate placements:

53 beneficiaries



Internships:

41 beneficiaries

2.3. Socio-economic development



23 farmworkers
enrolled in NQF level 4
learnerships.



3. SECTOR HIGHLIGHTS

This section lists Fruit SA member associations' key initiatives in 2024.



3.1. Fresh Produce Exporters' Forum



Market access:

The Western Cape Department of Agriculture (WCDoA) partnered with the Fresh Produce Exporters' Forum (FPEF) to deliver a targeted training session for emerging growers. The session equipped participants with a clear understanding of the export value chain, market requirements, core economic considerations, and the role of agents, ultimately strengthening their capacity to build informed partnerships and to access international markets.



Top of the Class programme:

In 2024, the Top of the Class (TOC) training programme targeted reached 119 participants. The TOC imparts knowledge from across the fruit export value chain – from harvest to home. It's aimed mainly at employees in junior to middle management within fruit export companies, packhouses, and logistics companies. The programme has reached a cumulative number of **1 367 individuals** since its inception in 2004.



The Graduate Placement Programme

placed **14 graduates** in 2024. The total number of placements since 2016 is 82, with **69%** securing permanent roles.

FPEF has helped expand the pool of black exporters and export-ready growers, strengthening transformation beyond the primary production, into the secondary part of the value chain.



3.2. South African Subtropical Growers' Association



Market development: The market development initiative has grown from a single participating grower at its inception to 10 growers now actively marketing their produce through Amondale. Four have progressed to full commercial status. This trajectory reflects Subtrop's strong commitment to creating meaningful market access for emerging farmers.



Agricultural Research Council Mango Cultivar Day: This project involves showcasing new Agricultural Research Council (ARC) mango cultivars, promoting agro-processed mango products, empowering smallholder growers, and implementing a collaborative training initiative in rural Limpopo communities.



One-Hectare Development Project: Since its launch in 2020, this project has expanded to **12 ha**, including **7.5 ha** of avocado orchards established in Limpopo, and a further **1.5 ha** developed in 2024 for three farmers in Mpumalanga.



Bursaries: Three students from disadvantaged backgrounds, studying in the field of agriculture, were supported.

3.3. Hortgro



Expanding the footprint:

Black-owned primary production now accounts for **8%** of total industry output, with black growers managing 4 161 ha of pome and stone fruit orchards.



Transformation through partnerships:

Hortgro invested **R3.3 million** in orchard development, successfully leveraging an additional **R15 million** through private and government partnerships.



Bursaries:

Fifty-three bursaries valued at **R4.1 million** were awarded to undergraduate and postgraduate students in agricultural studies.



Internships:

In 2024, **36 interns** were placed across the pome and stone-fruit value chain.



Capacity building and enterprise development:

Twenty-seven black-owned agribusinesses received structured support to strengthen their operations.



Skills development:

Twenty-three farmworkers enrolled in NQF Level 4 learnerships through Hortgro's skills support programmes.

Collectively, these initiatives enhanced the commercial viability of emerging growers, secured new hectares for future production, and contributed to a more skilled and capable workforce across all levels of the value chain.

3.4. South African Table Grape Industry

R600 000 was allocated to the Vine Academy Model Farm in Kakamas, an initiative designed to upskill young professionals and emerging growers, equipping them with the practical knowledge needed to transition more efficiently into commercial farming.

The South African Table Grape Industry (SATI) strengthened industry transformation through support to Hortfin's ringfenced Broad-Based Black Economic Empowerment (BBBEE) financing, with R184 million disbursed to table-grape farms to date, including SATI's R15 million interest-free loan.

A total of **R4.9 million** was invested in BBBEE initiatives, subsidising the establishment of 37 hectares.

Eight black agricultural students were supported in 2024, with SATI investing **R692 000** toward tuition, accommodation, and living costs to help build a more inclusive and skilled sector workforce.

SATI continues to drive socio-economic development in the table-grape industry, including support for Agri's Got Talent – an agricultural workers' singing and life-skills programme – as well as direct engagement with agri-workers, such as the study tour to Cape Town port for the Paarl farm worker group.

3.5. Citrus Growers' Association



Through its Economic Transformation for Black Citrus Growers (ETBCG) initiative, the Citrus Growers' Association Grower Development Company (CGA-GDC) has invested R274.5 million, supporting 14 projects over four years (since 2020).



Twenty-four farms were supported with funds to augment their compliance costs. 11 entities were assisted with Global Good Agricultural Practice (Global G.A.P.) accreditations, three entities with SIZA Ethical Standard accreditations, nine SIZA Environmental Standard accreditations, and one with Tesco compliance costs.



In 2024, the project provided 52 permanent jobs and 548 seasonal jobs. A total of 148 permanent jobs and 1 583 seasonal jobs were supported through the Jobs Fund project, from inception to date.



The Citrus Secondary Programme expanded substantially, enrolling 317 learners across 13 Eastern Cape schools. This marked strong progress in addressing youth unemployment and building a future talent pipeline.

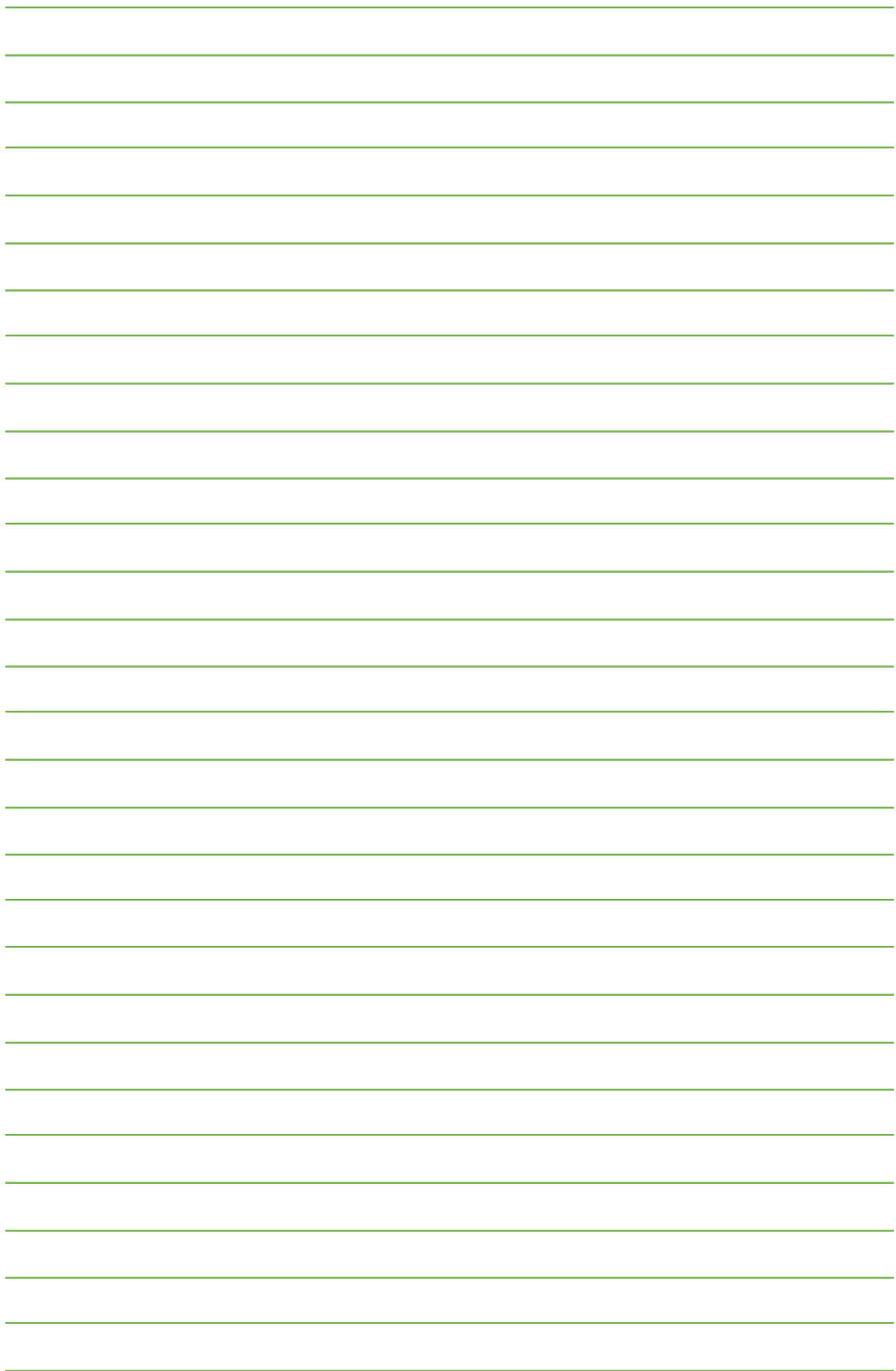


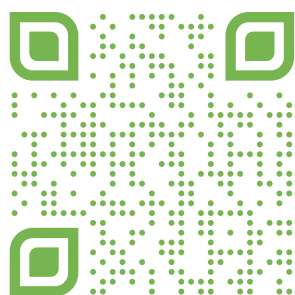
The Citrus Academy launched the Citrus SuperPower Programme, focused on strengthening supervisory skills and supporting career advancement opportunities within the sector.



The Citrus Academy awarded a total of 1 093 bursaries to the value of R34 million to 388 beneficiaries toward developing skilled professionals for the citrus industry by 2024.







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