

# Southern Hemisphere Association of Fresh Fruit Exporters Newsletter

June–July 2025

## Association update

### Webinars – Bioinputs

On 10 June, the Southern Hemisphere Association of Fresh Fruit Exporters (SHAFFE) organized a well-attended webinar on bioinputs – products of plants, animals or microbes, capable of enhancing crop productivity, quality, or health. Moderated by Albert Coetzee of the Citrus Growers' Association of Southern Africa and Nitasha Baijnath-Pillay of Hortgro, South Africa, the webinar featured presentations by:

- ✓ Hendrik Pohl (Holistic Horticulture, South Africa), on bioinputs, and how they can promote biodiversity and soil health ([presentation here](#));
- ✓ Jesica Monzon (Investment Centre, Food and Agriculture Organization of the United Nations), on regulatory frameworks for the registration and use of bioinputs in Latin America, and how legislators can promote investments in the bioinputs sector ([presentation here](#));
- ✓ Fabio Carlos Pevide (Biotrop, Brazil), on how Brazilian legislation stimulates the development and use of bioinputs ([presentation here](#));
- ✓ Debbie Matteucci (South African Bioproducts Organisation), on the barriers to and drivers behind the development of the bioinputs industry in the country ([presentation here](#)); and
- ✓ Thérèse Gohin (International Biocontrol Manufacturers Association) on the regulatory framework for biocontrol products in the European Union and how this framework contrasts with that in the United States of America, and on how the use of biocontrol products can help growers in the Southern Hemisphere comply with maximum residue levels in destination countries ([presentation here](#)).

**Save the date**  
**SHAFFE general members' meeting**

**1 October 2025**

**9–10.30 am**

**Fruit Attraction, Madrid**

[Click here for the webinar's main takeaways](#)

[Click here to view or download the webinar video](#)



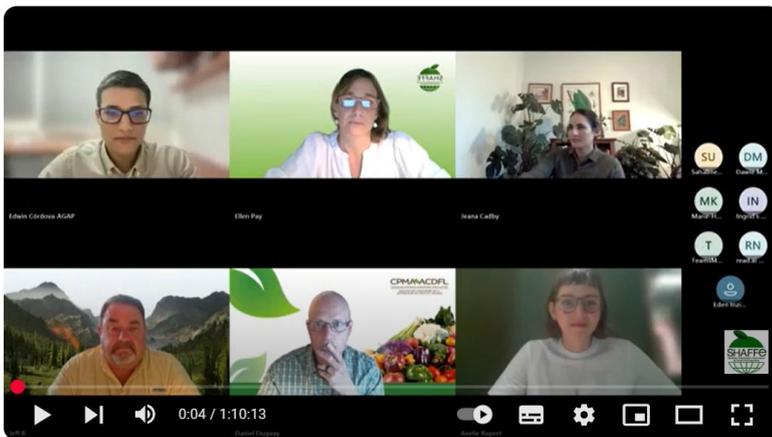
Coming together is a beginning. Keeping together is progress. Working together is success. *Henry Ford*



## Webinars – (Plastic) packaging

On Wednesday 2 July 2025, SHAFFE organized a second webinar on **(plastic) packaging: navigating the evolving regulatory landscape in major destination markets**. Moderated by Edwin Córdova of AGAP (Asociación de Gremios Productores Agrarios del Perú–Association of Agricultural Producers' Guilds of Peru) and Ellen Pay, General Secretary of SHAFFE, the webinar brought insights from:

- ✓ Axelle Rupert (Committee Linking Entrepreneurship-Agriculture-Development – COLEAD) on packaging regulations in the European Union ([presentation here](#));
- ✓ Jeana Colby (Western Growers, USA) on packaging regulations in the United States of America ([presentation here](#));
- ✓ Daniel Duguay (Canadian Produce Marketing Association) on packaging regulations in Canada ([presentation here](#)); and
- ✓ Jeffrey Brandenburg (Qfresh Lab, USA), on how exporters and producers can navigate the regulatory and functionality challenges related to produce packaging rules ([presentation here](#)).



[Click here to view or download the webinar video](#)

[Click here for the main takeaways from the webinar](#)

## SHAFFE Working Group on Sustainability – 2 June 2025

SHAFFE's Working Group on Sustainability met on 2 June 2025. On the agenda were *inter alia* an update on the Environmental Sustainability Solution (ESS) of GlobalG.A.P., as well as a roundtable discussion on recent sustainability-related initiatives by SHAFFE members. The update on the ESS was given by Rene Capote of the GlobalG.A.P. secretariat, who thanked SHAFFE for its comments on the draft standard. These comments – submitted in February – are greatly reflected in the current, revised standard. For example, the revised ESS now recognizes that not all growers have the (financial and other) resources necessary to implement and certify compliance with the standard's requirements, and growers' needs for capacity building and financial support must be addressed; that the efforts towards sustainability that growers have been undertaking for years now must be acknowledged; and that the standard must allow for a flexible implementation of all requirements, based on local circumstances. Participants in the meeting further presented some recent initiatives related to sustainability, for example the work of [Hortgro's Packhouse Action Group](#) in South Africa, or AGAP's "[Sustainability Recognition](#)" award, given out during last month's [Agrofest](#) trade fair in Lima, to recognize innovation in the agro-industry. Also highlighted were AGAP's updated [Guide of Sustainability Projects](#), and Frutas de Chile's first "[Sustainability Report](#)" of the Chilean fruit industry. This report underlines the key contribution of the sector to the Chilean economy, the positive impact on job creation and its role in reducing multidimensional poverty in rural communes with a high presence of fruit activity.

## Hortgro, South Africa – Webinar on packaging

On 11 June, SHAFFE member Hortgro (South Africa) organized a webinar on sustainable packaging and plastics. Hosted by Nitasha Bajinath-Pillay, Hortgro's Resource Management and Sustainability Manager, the second webinar focused on the latest developments in plastics and packaging, understanding the EU's new Packaging & Packaging Waste Regulations (PPWR), circularity and meeting plastics targets and research into alternative packaging and post-harvest quality. The recording of the webinar is freely available at [Hortgro Footprint Webinars - YouTube](#).

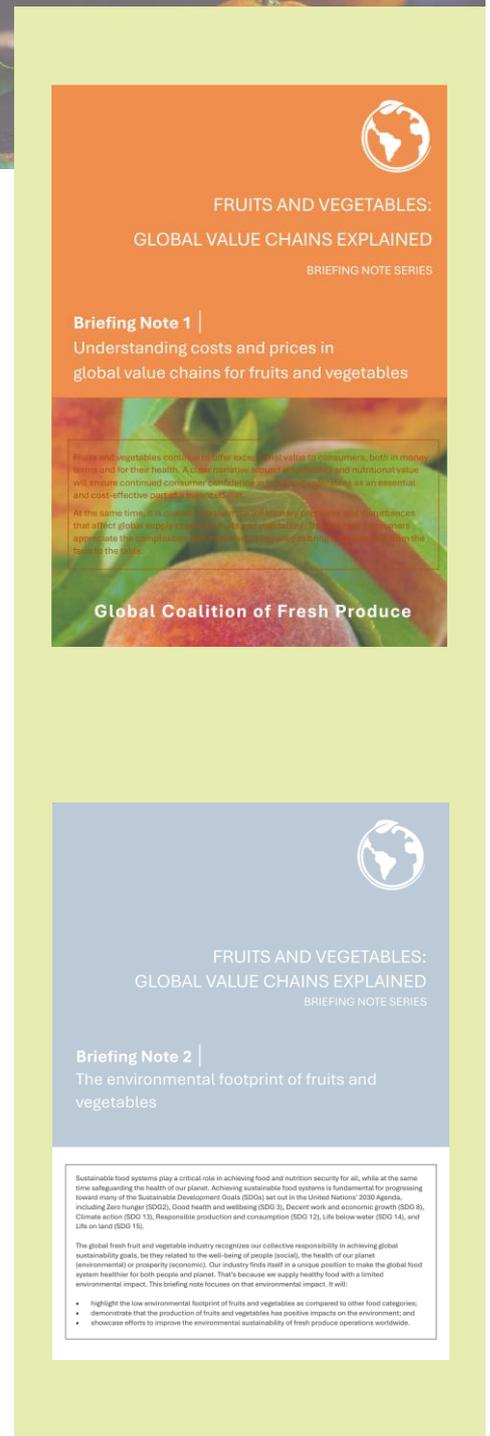


## Global Coalition of Fresh Produce – Briefing Note Series: *Fruits and Vegetables - Global Value Chains Explained*

The Global Coalition of Fresh Produce (of which SHAFPE is a founding member) offers a vital series of briefing notes on "Fruits and Vegetables: Global Value Chains Explained", accessible through their publications section (<https://producecoalition.net/publications/>). These notes serve as comprehensive resources designed to illuminate the complexities and interconnectedness of the fresh produce industry on a global scale. By delving into various aspects of the value chain, from production and distribution to consumption and environmental impact, these briefings aim to provide stakeholders with in-depth understanding and promote informed discussions on the industry's role in achieving global sustainability and food security.

Briefing Note 2, *The Environmental Footprint of Fruits and Vegetables* (issued in June), articulates the fresh produce industry's profound commitment to environmental stewardship. This note emphatically demonstrates the remarkably low environmental footprint of fruits and vegetables when compared to other food categories, particularly meat and dairy. Drawing on comprehensive meta-analyses, it presents compelling data on significantly lower greenhouse gas (GHG) emissions, land use, and water consumption associated with plant-based foods. For instance, GHG emissions from plant-based foods are 10 to 50 times lower than those from animal products, primarily due to the inefficient energy conversion in animal agriculture and methane emissions. The report illustrates these differences with specific examples: citrus and bananas generate a fraction of the CO<sub>2</sub> equivalents per kilogram compared to beef or cheese, and require substantially less land and water. This section strongly advocates for dietary shifts toward greater consumption of fruits and vegetables as a powerful strategy for mitigating climate change and conserving natural resources. Beyond minimizing negative impacts, the second briefing note highlights the positive environmental externalities generated by fruit and vegetable production. Woody perennial crops, such as fruit trees, are identified as effective carbon sinks, actively sequestering atmospheric carbon in their biomass. Furthermore, fruit orchards foster biodiversity by creating microhabitats for essential pollinators like bees and butterflies, contributing to ecosystem resilience. The industry's proactive engagement in sustainability is showcased through numerous global examples, including precision agriculture, agroecology, efficient water usage techniques, food waste reduction, eco-friendly packaging, and the adoption of renewable energy. Case studies from Canada (e.g., Lufa Farms' hydroponics, Highline Mushrooms' energy optimization), Africa (e.g., Africado Ltd.'s biodiversity protection, East African Growers' smart irrigation), Latin America (e.g., Mexico's avocado sustainability initiative, Agrícola Famosa's regenerative agriculture), and Aotearoa New Zealand (e.g., Zespri Global's climate adaptation plan, Auckland Council's food waste-to-energy project) exemplify these innovative efforts.

The note also critically examines the concept of "food miles," arguing that transport's contribution to a food's total GHG emissions is often minor compared to production methods, and emphasizes the crucial role of international produce trade in supporting livelihoods in developing countries. In conclusion, these two briefing notes collectively present a robust argument for the indispensable role of the fresh fruit and vegetable industry in building a sustainable future. While acknowledging the significant economic challenges and inflationary pressures that threaten its viability, they simultaneously illuminate the industry's inherent environmental advantages and its unwavering commitment to pioneering sustainable practices. The Coalition's Briefing Notes illustrate that understanding both the economic complexities and environmental leadership of our sector is paramount. Continued collaboration, innovation, and supportive policy frameworks are essential to ensure the industry's economic resilience, enhance its environmental contributions, and ultimately secure a healthy and affordable supply of fresh produce for a growing global population, aligning with the ambitious targets of the United Nations' Sustainable Development Goals and other industry initiatives.





## Fruit SA – Newsletter May–June 2025

In its latest Newsletter (May–June 2025), Fruit SA provides a performance snapshot of the 2024/5 season. In the 2024/5 season, the citrus subsector saw the EU absorbing the lion's share once again with 36% imported, followed by the Middle East (19%) and Asia (10%). The South African Table Grape Industry (SATI) body recorded a 5% year-on-year seasonal increase, with 77.8 million export cartons (4.5 kg equivalent). Europe and the UK remain dominant export markets, collectively absorbing 76% of South African table grapes. North America (Canada and the USA) also showed growth, reflecting a 28% increase (7.5 million cartons) from the previous season. The stone-fruit subsector showed a mixed bag of export numbers. At 22%, plums and prunes boasted the highest export growth rate for stone fruit, with Europe importing 44% of the 13.8 million exported cartons. Nectarine and apricot exports climbed respectively by 16% and 50% (the strongest relative rate). And the Middle East led demand for apricots, importing 60%, and Europe for nectarines with a 45% import rate. Cherry exports reflected a modest uptick of 2%, whilst the number for peaches fell by 4%. And, continuing a steady 20-year upward trajectory, blueberry exports for the 2024/5 season showed a 4% uptick from the previous season to 22 538 tonnes. Once again, Europe and the UK showed the highest imports of 8 908 and 9 311 tonnes respectively.

Source: Fruit SA.

Citrus exports, 2024 season

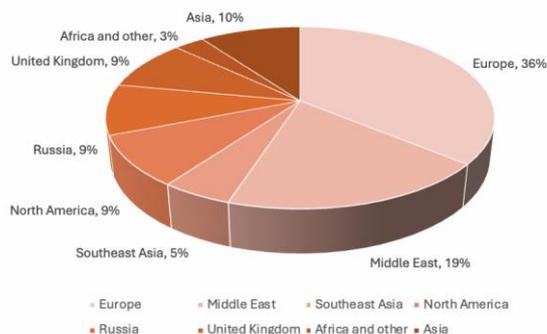
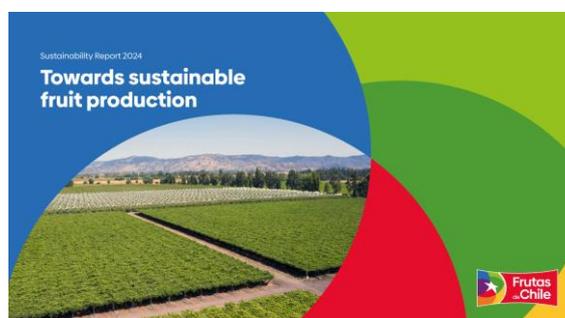


Table grape exports, 2024/5



## Frutas de Chile publishes Sustainability Report

Frutas de Chile has now officially presented its first “Sustainability Report” of the Chilean fruit industry. The report highlights the key contribution of the sector to the Chilean economy, the positive impact on job creation and its role in reducing multidimensional poverty in rural communities with a high presence of fruit activity. It also sets out a roadmap with short-, medium- and long-term commitments of the Chilean fruit industry towards increased sustainability. To consult the document, visit Frutas de Chile’s website at <https://frutasdechile.cl/responsabilidad-social-empresarial-rse/>.



## Global markets for table grapes, blueberries, cherries - iQonsulting

iQonsulting has recently published its annual statistical reports on global markets for table grapes, blueberries and cherries. To view the report, visit their website at <https://iqonsulting.com/yb/>.





## Brazil – Adoption of innovative technologies in the fruit industry

Brazil is one of the largest producers and exporters of fruits in the world, with emphasis on mangoes, melons, grapes and papayas. In recent years, the adoption of innovative technologies has profoundly transformed the production chain, from the field to the consumer's table, promoting gains in productivity, sustainability, and quality. Precision agriculture has been one of the main levers of modernization in Brazilian fruit growing. With the use of sensors, drones, and analysis software, producers can monitor soil conditions, climate, and plant health in real time, allowing for more assertive and efficient decisions. More sustainable agricultural practices have led to the widespread adoption of bioinputs in Brazilian fruit growing. These products, derived from microorganisms and plant extracts, replace chemical fertilizers and pesticides, promoting soil and plant health. In addition, drip irrigation systems have been implemented to optimize the use of water by supplying it directly to plant roots in a controlled manner, which is especially important in semi-arid regions such as the São Francisco Valley. Efficiency in the distribution of fruits has also been improved with the use of sustainable packaging and traceability technologies. Apeel Sciences, for example, is developing an edible coating that doubles storage time, reducing waste. She explains that the coating of fruits, totally plant-based and without chemical additives, creates an invisible, colorless and odorless film, slowing down the fruit ripening process.

The technical manager of Abrafrutas, Jorge de Souza, closely follows the development of technologies for the Brazilian sector and sees the new solutions with good eyes. "Brazil works year after year on innovations to improve the sector. This is evident in the growth of production and exports in recent years," he said. According to Souza, the country should continue to be the main supplier of fruits in the world due to the new markets with countries in Asia and the negotiations on new trade routes. All the investments join the recent investments in port infrastructure in the Northeast, marking a new era in Brazilian fruit growing. The inauguration of a direct maritime route between Brazil and China, connecting the ports of Salvador (BA) and Santana (AP) to the port of Gaolan, in the Chinese city of Zhuhai, promises to reduce the time for transporting goods from 60 to approximately 30 days. This initiative will speed up the flow of fresh fruits, such as melons and grapes, in addition to reducing logistics costs by up to 30%, increasing the competitiveness of Brazilian products in the Asian market.

Source: Frutas do Brasil Platform, 9 July 2025

## Brazil's fruit exports may reach new records in 2025

Jorge de Souza, Technical Manager at Abrafrutas and SHAFFE vice-president, takes stock of the results of the first half and projects a positive second part of the year for Brazilian shipments: watch the YouTube video at [https://youtu.be/BeUIdQ\\_wnbQ](https://youtu.be/BeUIdQ_wnbQ).

Source: Abrafrutas, 1 July 2025.



## Australian horticulture's strategic engagement with Japan – an update from Hort Innovation

Australia is the number one citrus import partner for Japan, holding a 27% market share. This has continued to grow steadily since 2021 (20%), demonstrating a strong performance in a competitive and mature market. The partnership between Australia and Japan is highly complementary and counter-seasonal, allowing both countries to support each other's markets effectively. Japan is Australia's third-largest trading partner in horticulture, with exports valued at \$175.6 million in 2025. Leading exports are oranges, which account for 42% of exports and this figure continues to grow for the whole citrus industry. In fact, Australian citrus export value and volume to Japan grew by 24% and 15% respectively compared to the previous year, suggesting improved pricing and stronger returns per unit, or a shift toward higher-value products in market. There has also been particularly strong growth in the grapefruit, lemon and lime categories with grapefruit recording an average of 17% year-on-year growth over five years and lemons and limes showing even stronger performance with 54% average year-on-year growth over the same period.

*While every attempt has been taken to ensure that the information contained in this Newsletter has been obtained from reliable sources, the Southern Hemisphere Association of Fresh Fruit Exporters is not responsible for any errors or omissions, or for the results obtained from the use of this information. All information in this site is provided "as is", with no guarantee of completeness, accuracy, timeliness or of the results obtained from the use of this information.*



### Key insights from Japan:

1. Price sensitivity and quality preference: Fresh produce prices in Japan have increased by 19%, making Japanese consumers more price conscious, however, with a high preference for quality and premium produce remaining strong, Australian fruit, vegetables and nuts – which are seen as clean, green, and safe – continue to enhance Australia's reputation in the market.
2. Strategic partnership: Given the high level of uncertainty that is happening at a global level, the Japanese Government is looking to work with a strong and consistent partner. Given Australia's counter-seasonal offering and mutual interest in joint production for third-country markets and value chain collaboration, Australia is seen to be a critical partner.
3. Sustainability creates opportunity: Sustainability is becoming increasingly important in Japan this provides an opportunity for Australia to showcase its sustainability efforts and future-focused initiatives in the horticulture space.
4. Brand Australia: Growers are encouraged to support the 'brand Australia' image to increase brand awareness of produce exported to the market.
5. Alignment on significance of agriculture: Agriculture is an integral part of both Australia and Japan's cultural fabric.

Source: Citrus Australia, 16 May 2025.

## Limón lidera exportaciones de cítricos argentinos con fuerte demanda en Europa y Rusia

La campaña cítrica 2025 avanza en Argentina con un panorama mixto, marcado por una menor producción general, pero con un notable impulso en las exportaciones de fruta fresca, especialmente de limón. José Carbonell, presidente de la Federación Argentina del Citrus (Federcitrus), José Carbonell, analizó la situación del sector y subrayó el buen desempeño de los envíos hacia la Unión Europea y Rusia, donde la demanda ha superado ampliamente la del año anterior. En entrevista con Portalfruticola.com explicó que hasta la fecha la campaña más avanzada, es la del limón, con cerca de la mitad del volumen total de fruta, "que es un poco menos que el año anterior, pero se está exportando fresco en cantidades bastante mayores, sobre todo a la Unión Europea y a Rusia". Puntualizó que la fruta está llegando a mercados más demandantes, "y hasta el momento estamos superando lo que se exportó el año pasado, en la misma fecha a la Unión Europea". Respecto a Estados Unidos, explicó que al comienzo de la campaña, el mercado estaba poco demandante de fruta, situación que se revirtió: «Ahora empezó a reclamar fruta, por lo que se está normalizando la exportación hacia ese mercado». En relación a la naranja, detalló que se ha exportado un poco. «Las cantidades son menores porque el grueso de la exportación argentina es de la Valencia tardía, que recién está lista para la cosecha a mediados de julio», dijo, subrayando que solo se exporta la mejor calidad, los mejores calibres y la fruta sana.

El presidente de Federcitrus, acotó que "es cierto que la naranja se ha desarrollado tanto para fresco, como para fábrica en los mercados de Paraguay y Brasil que han sido muy demandantes de tus últimos años. Este año se mandará fruta para moler a Brasil hasta bien entrado el año". Explicó que lo anterior se debe a la caída en la producción de Brasil, "por lo que creemos que va a ser también una temporada de buen volumen y atractiva para la naranja". En cuanto a las mandarinas, dijo que se ha exportado algo de las variedades tempranas, ya que "el mayor de volumen de exportación es en julio". Los mercados de fruta

## Lemon leads Argentine citrus exports with strong demand in Europe and Russia

The 2025 citrus campaign is progressing in Argentina with a mixed outlook, marked by lower overall production, but with a notable boost in fresh fruit exports, especially lemons. José Carbonell, president of the Argentine Citrus Federation (Federcitrus), José Carbonell, analyzed the situation of the sector and underlined the good performance of shipments to the European Union and Russia, where demand has far exceeded that of the previous year. In an interview with Portalfruticola.com he explained that to date the most advanced campaign is that of lemons, with about half of the total volume of fruit, "which is a little less than the previous year, but it is being exported fresh in much larger quantities, especially to the European Union and Russia." He pointed out that the fruit is reaching more demanding markets, "and so far we are exceeding what was exported last year, on the same date to the European Union." Regarding the United States, he explained that at the beginning of the campaign, the market was in little demand for fruit, a situation that was reversed: "Now it has begun to demand fruit, so exports to that market are normalizing." In relation to oranges, he explained that some has been exported. "The quantities are smaller because the bulk of Argentine exports are from late Valencia, which is only ready for harvest in mid-July," he said, stressing that only the best quality, the best sizes and healthy fruit are exported. The president of Federcitrus said that "it is true that oranges have been developed both for fresh and for the factory in the markets of Paraguay and Brazil, which have been very demanding in recent years. This year fruit will be sent to Brazil to be milled until well into the year." He explained that this is due to the drop in production in Brazil, "so we believe that it will also be a season of good volume and attractive for oranges." As for mandarins, he said that some of the early varieties have been exported, since "the largest export volume is in July."



fresca tienen precios diferentes. Carbonell indicó que en ese sentido algunos exportadores tienen que cumplir contratos preestablecidos y mantener relaciones comerciales de muchos años, que son muy importantes. "Más allá de que a lo mejor puntualmente le convenga más procesar la naranja".

Consultado sobre los factores que han incidido en la baja en volumen de la campaña cítrica, explicó "la producción pudo haber sido impactada probablemente por un mes de febrero que fue muy caliente y seco, que afectó a todas las producciones; esto pasó en todo el norte argentino". En el caso del limón, los organismos técnicos han estimado una caída de entre el 10 y el 12% de la producción, "que es probable que así sea, dado lo que se ve actualmente en la cosecha avanzada y en naranja, en el nordeste argentino, también se estima una caída proporcional".

#### *Mercados para los cítricos Argentinos*

Asia se va desarrollando lentamente. "No es fácil", dijo. En algunos casos por los aranceles que nos imponen, como el caso de India». Nos comentó que están tratando de abrir el mercado de Vietnam, mientras siguen enviando fruta a Medio Oriente. A juicio de Carbonell, hasta ahora la Unión Europea ha lucido muy demandante, mucho más que los años anteriores. "Por lo que a mayor demanda, significa mejores precios. Esto dado por la caída de la producción de Turquía y también un poco de la española".

Consultado sobre las medidas para mejorar más la competitividad a nivel internacional de los cítricos argentinos, fue claro y directo al decir: "que nos bajen un poco más los impuestos, que tengamos una logística marítima con precios un poquito más acomodados, parecidos a los de pre pandemia". Además, explicó que Argentina está en un proceso de reacomodamiento de variables macro económicas que era imprescindible y que tiene sus costos y que naturalmente va a beneficiar a algunos sectores más que otros. "Estábamos conscientes de eso y estamos esperando que los esfuerzos que ha significado para toda la sociedad y para toda la economía argentina, estos años de sinceramiento y de acomodamiento de normalización de la economía, empiecen a verse el año que viene".

#### *Proyección*

Con una mirada al corto y mediano plazo del sector, Carbonell argumentó: "soy optimista, creo que vamos a seguir manteniendo un rol importante va a crecer la producción de naranjas con seguridad". Con el limón, "espero que se haya llegado a un piso de producción", dijo. «No olvidemos que sobre todo en la provincia de Tucumán se erradicaron muchos miles de hectáreas de limón que impacta en la baja de la producción final, por la sobreoferta que hubo todos estos años que llevó obviamente a la crisis del sector, no solamente en Argentina". "Hagamos las cosas lo mejor posible, cuidemos mucho nuestras plantaciones, seamos capaces de ser lo más eficientes posible y que, por supuesto, vayamos teniendo la elasticidad para adecuarnos a las demandas y a los mercados", concluyó.

Fuente: Federcitrus, 4 de julio de 2025

Fresh fruit markets have different prices. Carbonell indicated that in this sense, some exporters have to comply with pre-established contracts and maintain commercial relationships of many years, which are very important. "Beyond the fact that it may be more convenient for him to process the orange."

Asked about the factors that have influenced the drop in volume of the citrus campaign, he explained "production could have probably been impacted by a month of February that was very hot and dry, which affected all productions; this happened throughout northern Argentina." In the case of lemons, technical bodies have estimated a drop of between 10 and 12% in production, "which is likely to be the case, given what is currently seen in the advanced harvest and in oranges, in the Argentine northeast, a proportional drop is also estimated."

#### *Markets for Argentine citrus fruits*

Asia is developing slowly. "It's not easy," he said. In some cases because of the tariffs imposed on us, as in the case of India." He told us that they are trying to open the Vietnam market, while continuing to ship fruit to the Middle East. In Carbonell's opinion, the European Union has been very demanding so far, much more so than in previous years. "Therefore, higher demand means better prices. This is due to the drop in production in Turkey and also a slight drop in Spanish production."

When asked about measures to further improve the international competitiveness of Argentine citrus fruits, he was clear and direct when he said: "They should lower our taxes a little more, and we should have maritime logistics with slightly more affordable prices, similar to those before the pandemic." He also explained that Argentina is undergoing a process of readjusting macroeconomic variables, which was essential and has its costs, and which will naturally benefit some sectors more than others. "We were aware of this, and we hope that the efforts that these years of openness and adjustment to normalization of the economy have meant for all of Argentine society and the entire economy will begin to be reflected next year."

#### *Projection*

Looking at the short and medium term of the sector, Carbonell argued: "I am optimistic, I believe that we will continue to maintain an important role, the production of oranges will grow for sure." With lemons, "I hope that a production floor has been reached," he said. Let's not forget that especially in the province of Tucumán, many thousands of hectares of lemons were eradicated, which has an impact on the drop in final production, due to the oversupply that there was all these years that obviously led to the crisis of the sector, not only in Argentina." "Let's do things as well as possible, take great care of our plantations, be able to be as efficient as possible and, of course, have the elasticity to adapt to demands and markets," he concluded.

Source: Federcitrus, 4 July 2025