SHAFFE

The Southern Hemisphere Association for Fresh Fruit Exporters (SHAFFE) is an association founded in the early 1990s, which represents fresh fruit growers and exporters in the Southern Hemisphere. By John Edmonds

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The organisation comprises representatives from all significant southern hemisphere countries exporting fresh fruits including Argentina, Australia, Brazil, Chile, New Zealand, Peru, SA and Uruguay. It aims to promote free trade and improve market access in the northern hemisphere countries. SHAFFE has a yearly-elected president and a permanent secretariat based in Brussels. The current chairman in SA is Anton Kruger, CEO of the Fresh Produce Exporters' Forum (FPEF).

SHAFFE's activities focus mainly on relevant market access matters for fresh fruit trade such as sanitary and phytosanitary issues, as well as tariff and non-tariff barriers. The organisation also addresses other pertinent issues like globalisation, digitisation, climate change and increasing regulatory complexity.

SHAFFE members also participate in a joint initiative whereby members supply information of produce shipped by volume and destination to the SHAFFE secretariat. This is then collated and distributed to the participating SHAFFE members. In the case of citrus, members share data on tons shipped per main citrus commodity (oranges, grapefruit, lemons and soft citrus) to key markets of mutual interest. Not all participating SHAFFE members have the structures in place to supply this data – for example, Australia makes sporadic contributions due to limited capacity and Brazil does not participate in this exercise at all.

The sharing of data allows comparisons of weekly shipments of most of the citrus to the key markets during the northern hemisphere summer months. Whilst SA totally dominates the grapefruit sector, the only meaningful competition for our oranges is in the USA (where Chile dominates the import market) and Japan (led by Australia).

Northern Europe remains the leading importer of southern hemisphere oranges, followed by the Middle East and South East Asia.

Sharing in the spirit of "coopetition"

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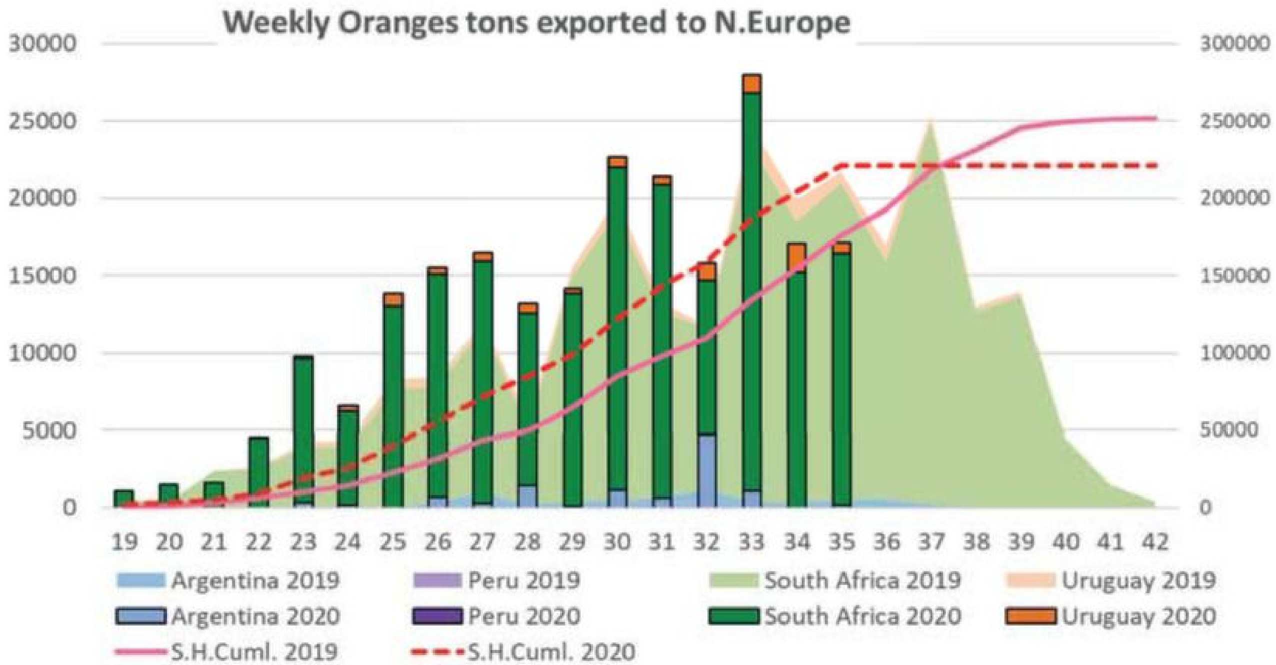
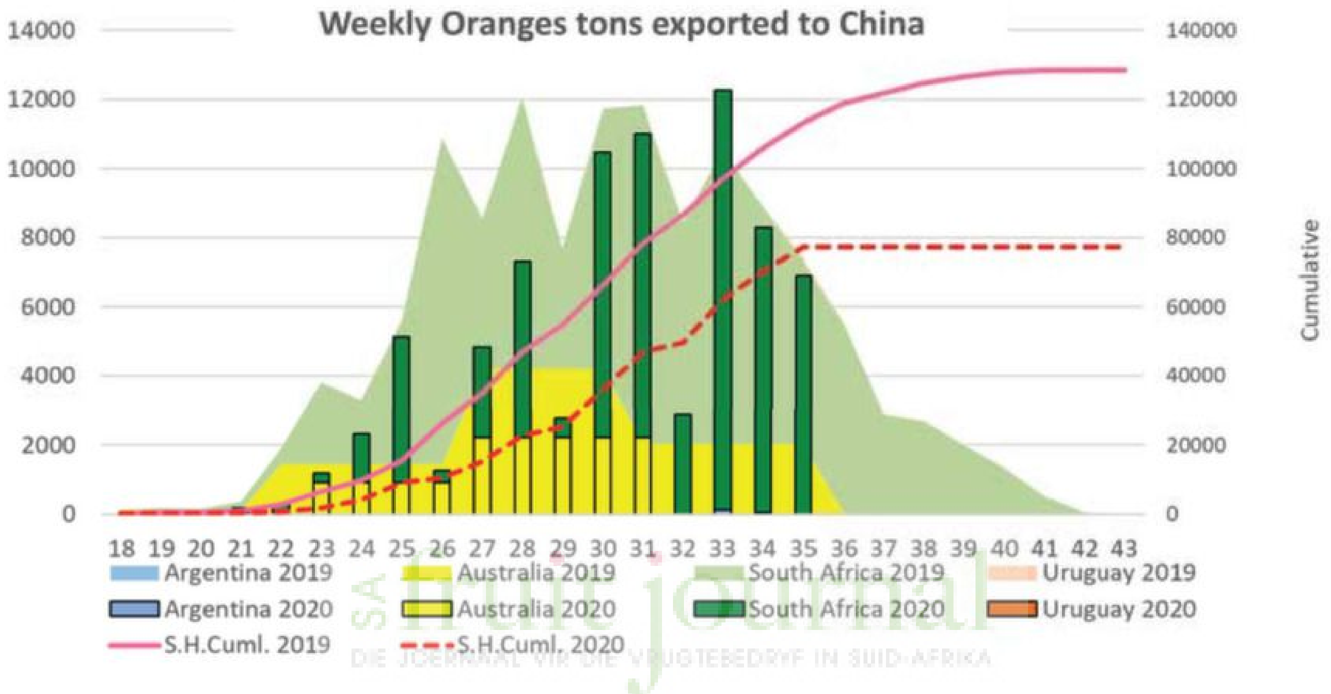
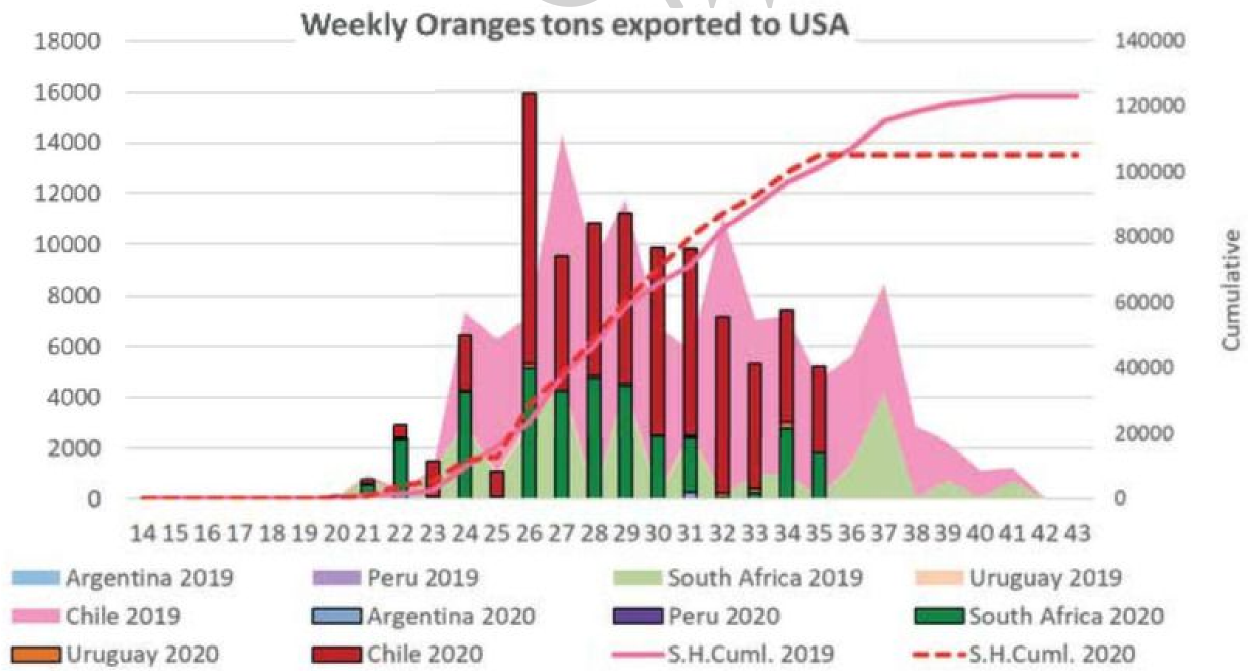


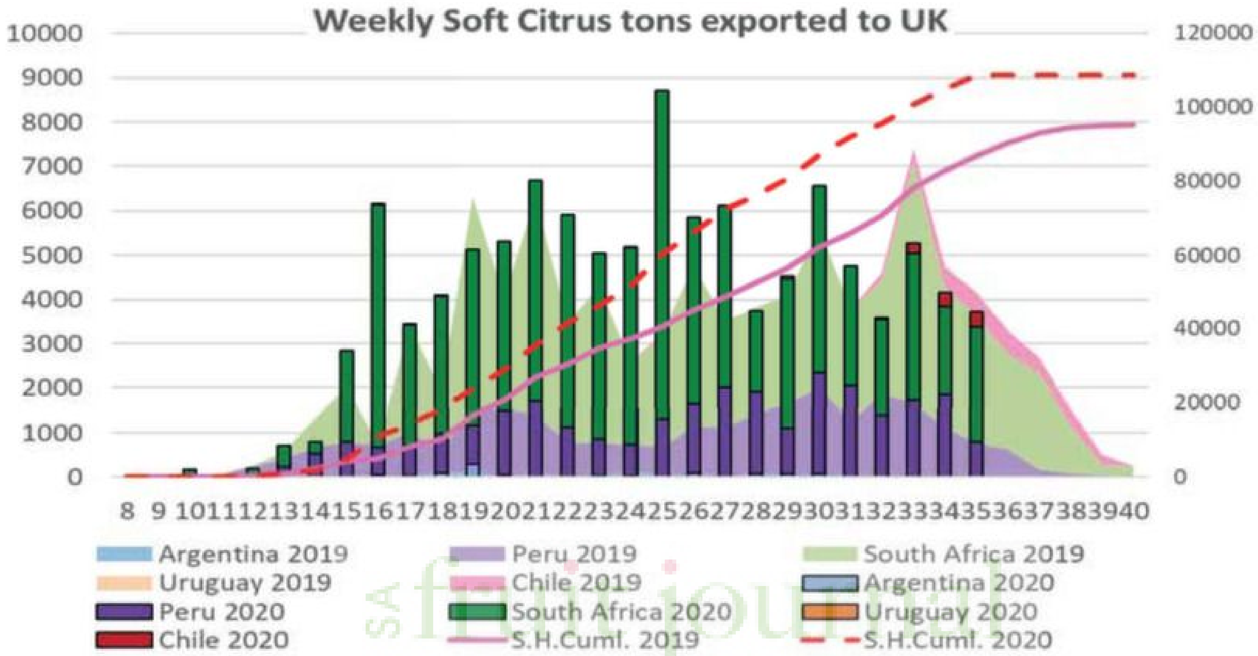
The graph below illustrates the importance of Australia in China (and other Far Eastern markets), but also the distorted message yielded by irregular updates.



Demand for oranges has been strong in the USA this year, with SA faring far better than expected.



The UK and Europe are the biggest markets for South African soft citrus, where we compete with Peru.



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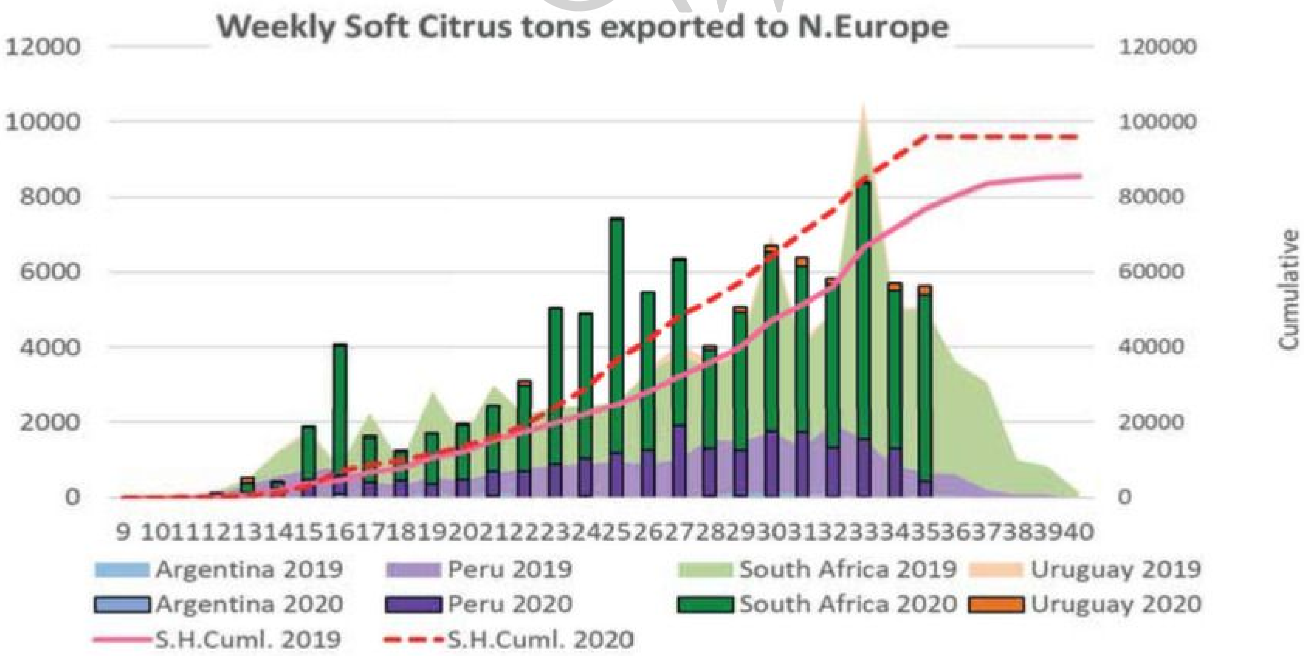
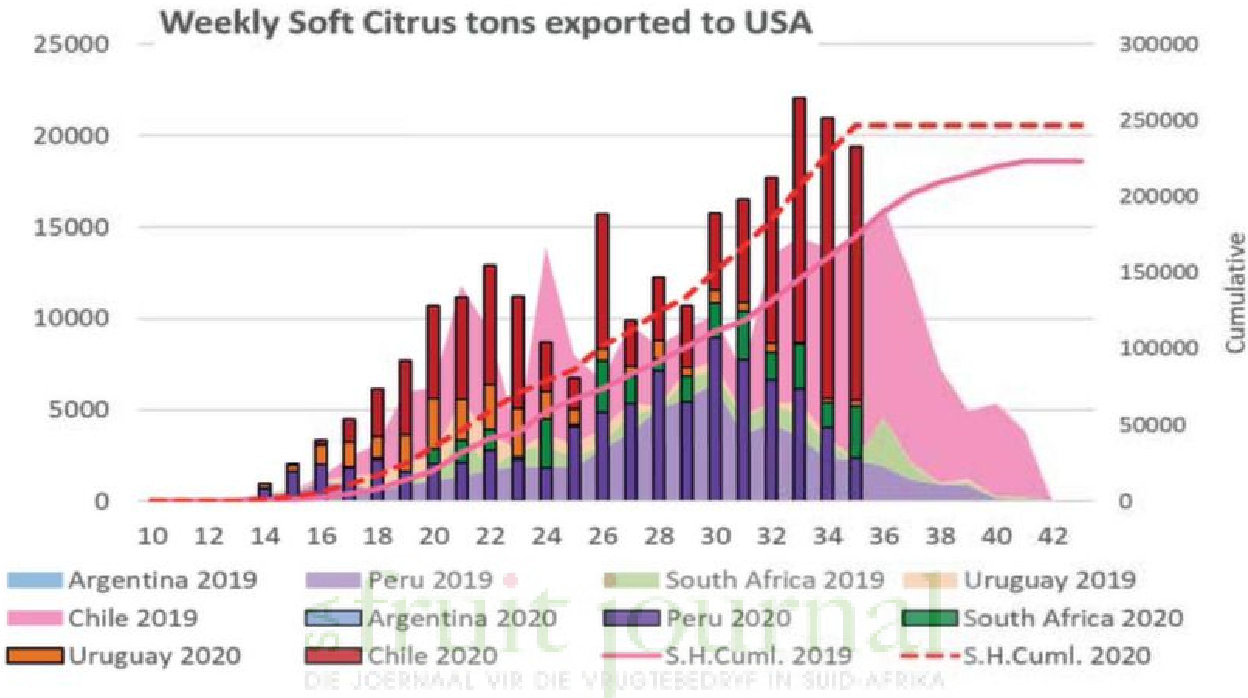
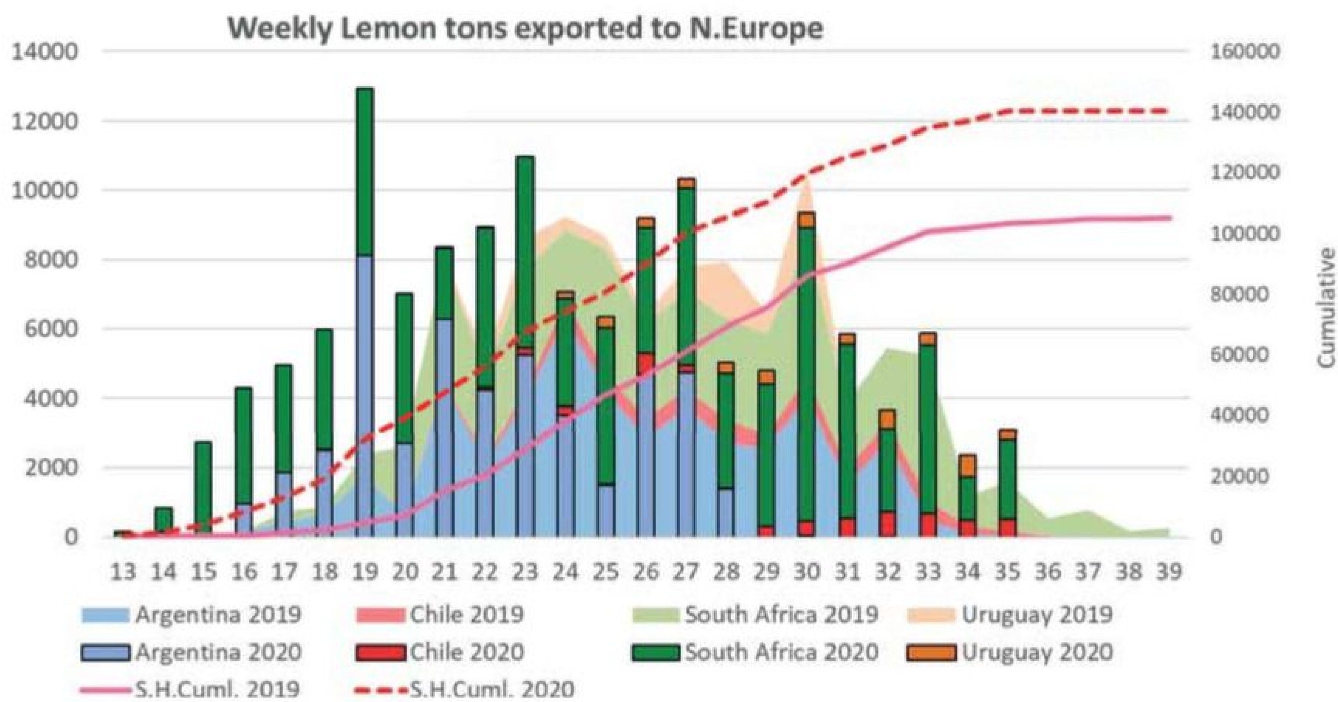
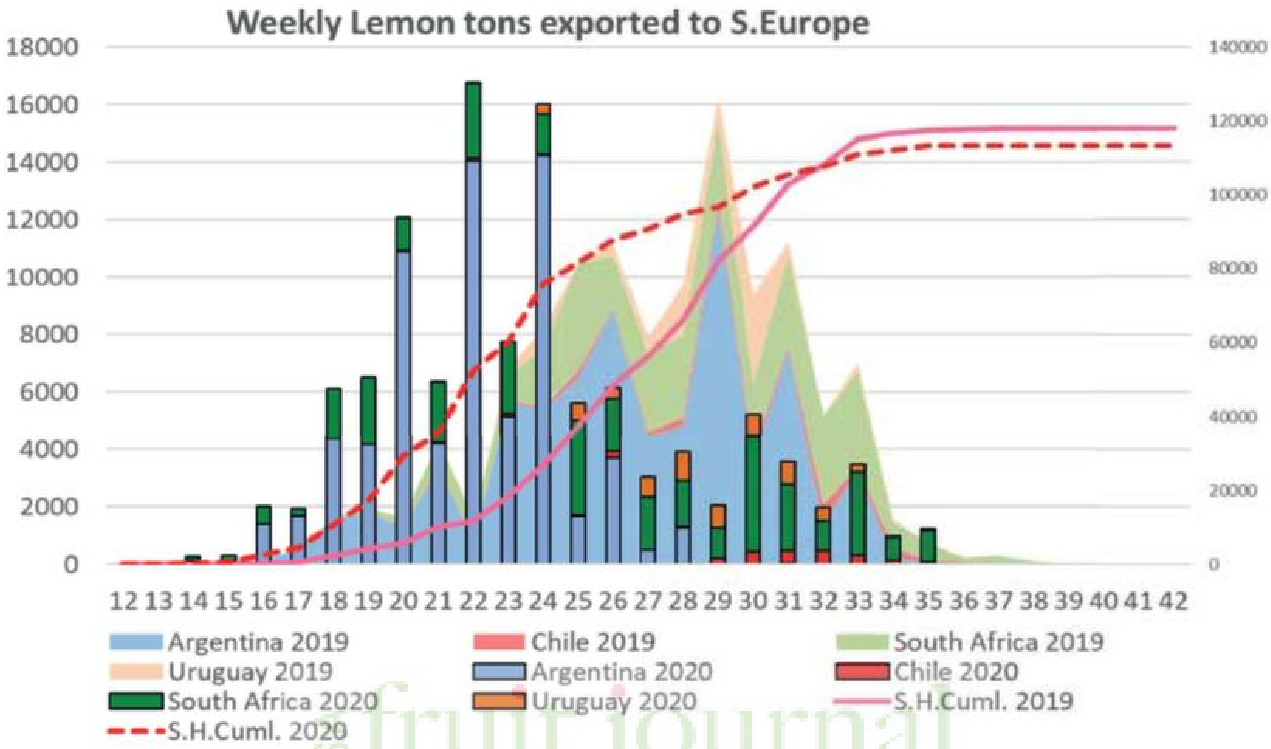


The USA has shown strong growth in soft citrus consumption in the last few years. SA competes here, but it is a natural market for the South American members.



The Middle East and Europe are the main markets for South African lemons, but while we dominate the Middle East market, Argentina competes head-on in Northern Europe and is stronger in Southern Europe.





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The growth in world lemon production and particularly in SA, has put pressure on us to find new markets for our product. China has huge potential, but the current cold-steri shipping regime prevents SA from participating in this market in a meaningful way. The chart below shows how Chile has been quick to take advantage of their newly gained access to this market.