



*The process of gaining
access
to markets*

Jacques du Preez | Hortgro





The process of gaining access to markets

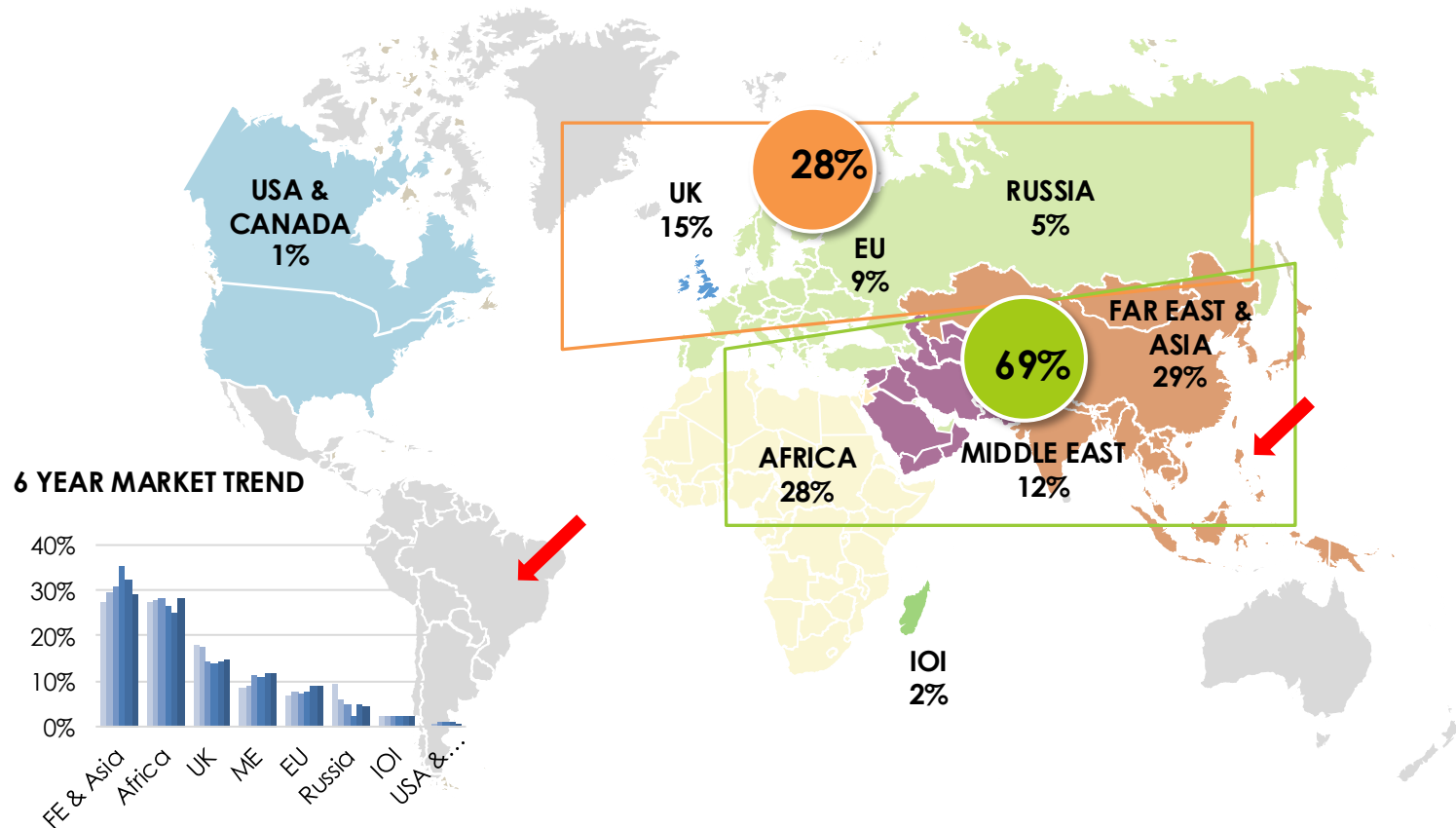


Why does market access matter?

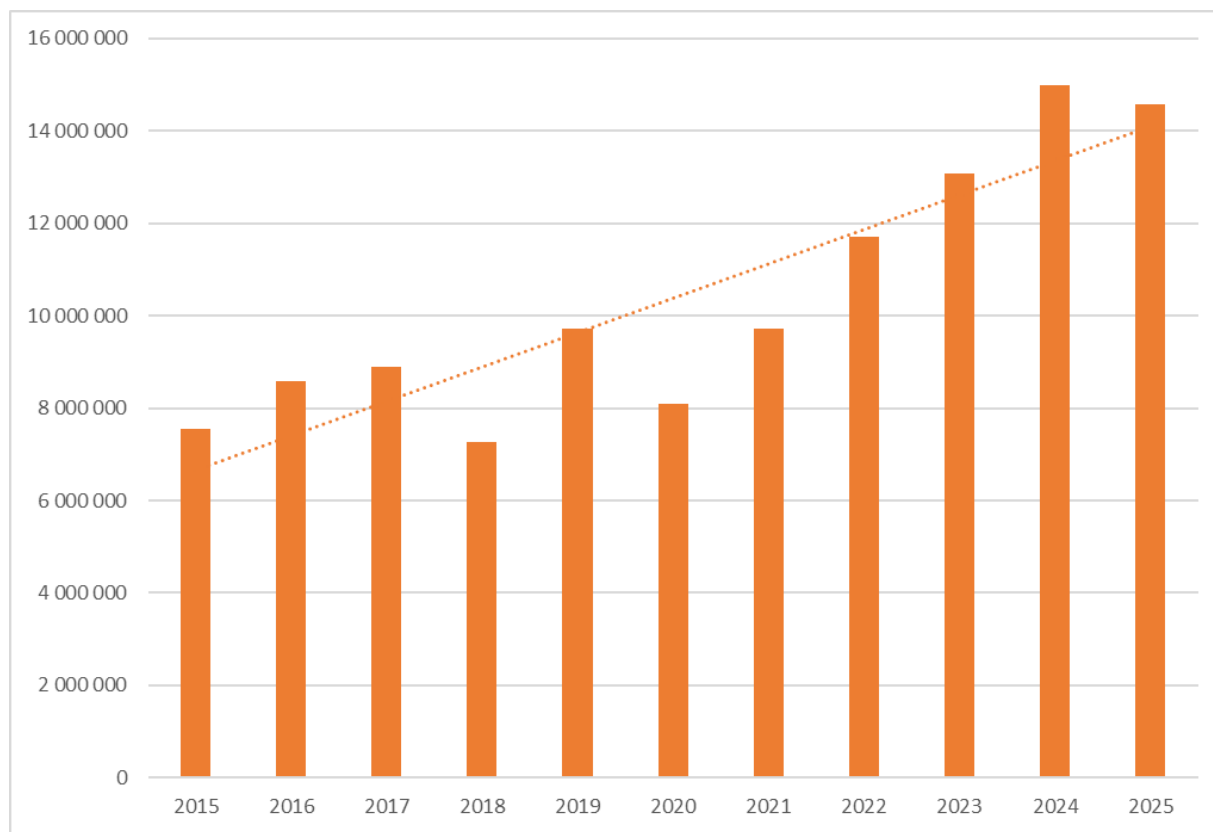
- **±50%** of SA deciduous fruit exported
- Turnover of **± R25bn** (90% fresh)
- On-farm Agri Workers: **± 64 000 FTE** (+25% in VC)
- Dependants: 256 000

- Growth depends on access

2025 Apple Export Main regions (2024 vs 2025) (2023 vs 2024)

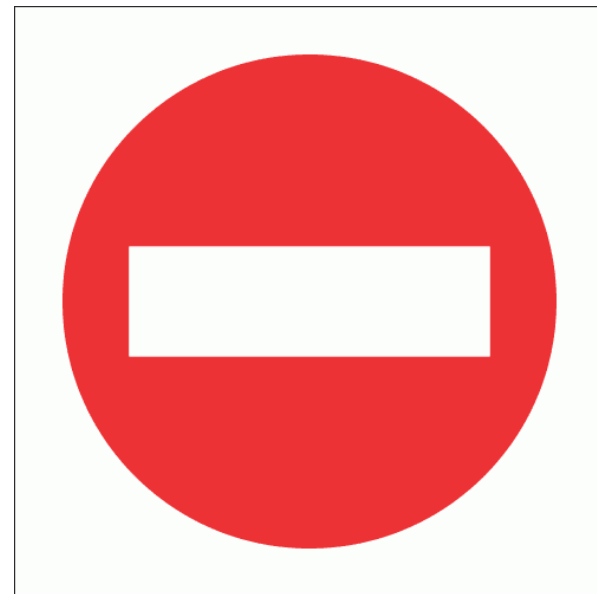


Apple Exports Far East & Asia (12.5kg eq cartons)



Why does market access matter?

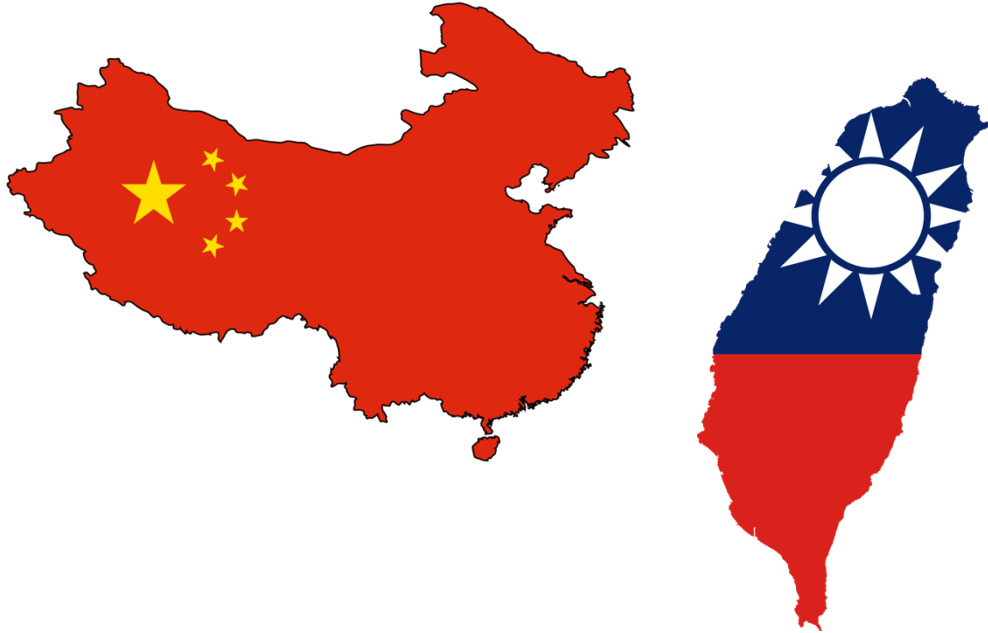
- Increasing global barriers
 - Logistics
 - Remedies, Agro-chemicals, MRL's
 - Conflict & Politics
 - Tariff & Non-tariff (quotas, permits, etc.)
 - Ethical & Environmental requirements
 - Private (retail, certifications)



Need options/alternatives

Geopolitics, World Order

- Protectionism & others (2022)



HORTGRO

Growing Fruit IQ



Geopolitics, World Order



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Growing Fruit IQ



Why does it matter?

- New order emerging (BRICS?)
- Conflict, tariffs = disruptive, neg impact
- But also positive spin-offs (MA, TA)
- New relationships & growing



What is Market Access?

- Ability to export under agreed conditions
- **SPS** + tariffs + regulatory conditions
 - NB to distinguish
- FTA, PTA, TA = **NOT** access
- Access = SPS requirements



Different Layers

- It is a multi-year, multi-stakeholder process
 - It combines:
 - Science, Research, Technical
 - Diplomacy, Politics
 - Compliance
 - Commercial readiness
- 

Market access is a strategic capability — not just a regulatory hurdle.



Different Layers

- Government-to-Government / NPPO-NPPO
 - Industry expertise, support, capacity



Different Elements

- Lobby, Facilitate (behind the scenes)
- **But science & research = Foundation**
- Capacity constraints
 - Applications from countries & products across the globe to process
 - Traditionally one fruit type at a time



Process Overview

1. Market selection
2. Request per fruit type to target country + PIP
3. PRA (Pest Risk Assessment)
4. On-site virtual or physical inspection
5. Protocol negotiation
6. System setup
7. Pilot
8. Commercialisation



Stage 1: Market Selection

- Demand & pricing
- Seasonality
- Right product profile
- Logistics
- Likely mitigation requirements
- Commercial & compliance realities
 - Treatment
 - Tariffs



Stage 1: Market Selection

- Prioritisation
- Competition within

STONE FRUIT MARKET PRIORITIZATION MATRIX - March 2016

MARKET	MARKET ACCESS STATUS			EXISTING EXPORTS	EXISTING EXPORTS (by Volume 2015/16)			COMMERCIAL INTEREST			PERIOD			DEMAND SPECIFICS			MITIGATION			TARIFFS (%)			ISSUES			NOTES / ACTIONS		
	PRIORITY				PRIORITY			PRIORITY			PRIORITY			PRIORITY			PRIORITY			PRIORITY			PRIORITY			PRIORITY		
	BT	BT	BT		BT	BT	BT	BT	BT	BT	BT	BT	BT	BT	BT	BT	BT	BT	BT	BT	BT	BT	BT	BT	BT	BT	BT	
China	✓	✓	✓	✓	✓	✓	✓	✓	✓	✓	✓	✓	✓	✓	✓	✓	✓	✓	✓	✓	✓	✓	✓	✓	✓	✓		
India	✓	✓	✓	✓	✓	✓	✓	✓	✓	✓	✓	✓	✓	✓	✓	✓	✓	✓	✓	✓	✓	✓	✓	✓	✓	✓		
Taiwan	✓	✓	✓	✓	✓	✓	✓	✓	✓	✓	✓	✓	✓	✓	✓	✓	✓	✓	✓	✓	✓	✓	✓	✓	✓	✓		
Iran	✓	✓	✓	✓	✓	✓	✓	✓	✓	✓	✓	✓	✓	✓	✓	✓	✓	✓	✓	✓	✓	✓	✓	✓	✓	✓		
Israel	✓	✓	✓	✓	✓	✓	✓	✓	✓	✓	✓	✓	✓	✓	✓	✓	✓	✓	✓	✓	✓	✓	✓	✓	✓	✓		
Thailand	✓	✓	✓	✓	✓	✓	✓	✓	✓	✓	✓	✓	✓	✓	✓	✓	✓	✓	✓	✓	✓	✓	✓	✓	✓	✓		
Indonesia	✓	✓	✓	✓	✓	✓	✓	✓	✓	✓	✓	✓	✓	✓	✓	✓	✓	✓	✓	✓	✓	✓	✓	✓	✓	✓		
Egypt	✓	✓	✓	✓	✓	✓	✓	✓	✓	✓	✓	✓	✓	✓	✓	✓	✓	✓	✓	✓	✓	✓	✓	✓	✓	✓		
Morocco	✓	✓	✓	✓	✓	✓	✓	✓	✓	✓	✓	✓	✓	✓	✓	✓	✓	✓	✓	✓	✓	✓	✓	✓	✓	✓		
Turkey	✓	✓	✓	✓	✓	✓	✓	✓	✓	✓	✓	✓	✓	✓	✓	✓	✓	✓	✓	✓	✓	✓	✓	✓	✓	✓		
USA	✓	✓	✓	✓	✓	✓	✓	✓	✓	✓	✓	✓	✓	✓	✓	✓	✓	✓	✓	✓	✓	✓	✓	✓	✓	✓		
Canada	✓	✓	✓	✓	✓	✓	✓	✓	✓	✓	✓	✓	✓	✓	✓	✓	✓	✓	✓	✓	✓	✓	✓	✓	✓	✓		
Scandinavia	✓	✓	✓	✓	✓	✓	✓	✓	✓	✓	✓	✓	✓	✓	✓	✓	✓	✓	✓	✓	✓	✓	✓	✓	✓	✓		
Greece	✓	✓	✓	✓	✓	✓	✓	✓	✓	✓	✓	✓	✓	✓	✓	✓	✓	✓	✓	✓	✓	✓	✓	✓	✓	✓		
Africa (Excluding Egypt and Af	✓	✓	✓	✓	✓	✓	✓	✓	✓	✓	✓	✓	✓	✓	✓	✓	✓	✓	✓	✓	✓	✓	✓	✓	✓	✓		
Reunion	✓	✓	✓	✓	✓	✓	✓	✓	✓	✓	✓	✓	✓	✓	✓	✓	✓	✓	✓	✓	✓	✓	✓	✓	✓	✓		
Mauritius	✓	✓	✓	✓	✓	✓	✓	✓	✓	✓	✓	✓	✓	✓	✓	✓	✓	✓	✓	✓	✓	✓	✓	✓	✓	✓		
Singapore/Malaysia	✓	✓	✓	✓	✓	✓	✓	✓	✓	✓	✓	✓	✓	✓	✓	✓	✓	✓	✓	✓	✓	✓	✓	✓	✓	✓		
Hong Kong	✓	✓	✓	✓	✓	✓	✓	✓	✓	✓	✓	✓	✓	✓	✓	✓	✓	✓	✓	✓	✓	✓	✓	✓	✓	✓		
Saudi Arabia/UAE	✓	✓	✓	✓	✓	✓	✓	✓	✓	✓	✓	✓	✓	✓	✓	✓	✓	✓	✓	✓	✓	✓	✓	✓	✓	✓		
De-prioritised	✓	✓	✓	✓	✓	✓	✓	✓	✓	✓	✓	✓	✓	✓	✓	✓	✓	✓	✓	✓	✓	✓	✓	✓	✓	✓		
Eastern Europe	✓	✓	✓	✓	✓	✓	✓	✓	✓	✓	✓	✓	✓	✓	✓	✓	✓	✓	✓	✓	✓	✓	✓	✓	✓	✓		
Ex-USSR	✓	✓	✓	✓	✓	✓	✓	✓	✓	✓	✓	✓	✓	✓	✓	✓	✓	✓	✓	✓	✓	✓	✓	✓	✓	✓		
Vietnam	✓	✓	✓	✓	✓	✓	✓	✓	✓	✓	✓	✓	✓	✓	✓	✓	✓	✓	✓	✓	✓	✓	✓	✓	✓	✓		
Sri Lanka	✓	✓	✓	✓	✓	✓	✓	✓	✓	✓	✓	✓	✓	✓	✓	✓	✓	✓	✓	✓	✓	✓	✓	✓	✓	✓		
Korea	✓	✓	✓	✓	✓	✓	✓	✓	✓	✓	✓	✓	✓	✓	✓	✓	✓	✓	✓	✓	✓	✓	✓	✓	✓	✓		

Priority	MARKET
1	China
2	India
3	Taiwan
4	Iran
5	Israel
6	Thailand
	Indonesia
	Egypt
	Morocco
	Turkey
	USA
	Canada
	Scandinavia
	Greece
	Africa (Excluding Egypt and Af
	Reunion
	Mauritius
	Singapore/Malaysia
	Hong Kong
	Saudi Arabia/UAE
	De-prioritised
	Eastern Europe
	Ex-USSR
	Vietnam
	Sri Lanka
	Korea

Prioritisation

- Fighting for positions

China				
Current TWG New ACCES	MA Work Group New ACCESS	Combined New ACCES	MA Work Group Improved ACCESS	Combined Improved ACCES
Stone fruit	Stone fruit	Stone fruit (incl Cherries)	Exemption of lemons from the cold treatment (FCM and fruit fly non-hosts status)	Exemption of lemons from the cold treatment (FCM and fruit fly non-hosts status)
Cherries	Cherries	Cherries	Table Grape Protocol Review	Table Grape Protocol Review
Mangoes	Persimmons	Mangoes	Clarification on citrus protocol	Clarification on citrus protocol
Persimmons	Mangoes	Persimmons	Table Grapes: Review on pre-cooling	Table Grapes: Review on pre-cooling
Litchis	Litchis	Litchis		
Blueberries		Blueberries		

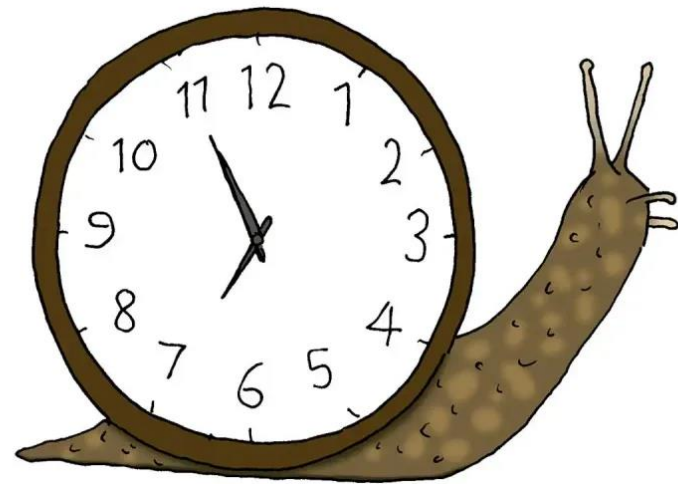
Stage 2: Request & Phytosanitary Information Package

- PIP compiled by industry experts, sent to DoA
- DoA sends request & PIP to target country



Stage 3: Pest Risk Analysis

- Scientific assessment
- Importing country driven
- 2–10 years (shorter recently)



Stage 4: Verification visit



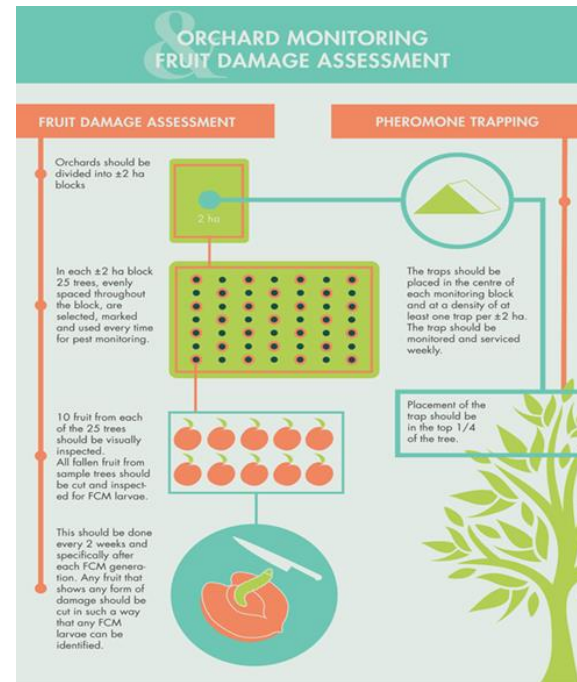
Stage 5: Protocol Negotiation

- Back-and-forth between experts
- Bilateral engagement, agreement
- Define mitigation measures



Stage 6: System Readiness

- Orchard, Packhouse, Treatment facility registration
- PUC & PHC compliance
- Traceability
- Systems approach, cold treatment, fumigation, (irradiation) & others



Stage 7: Pilot Phase

- Trial shipments
- Compliance validation

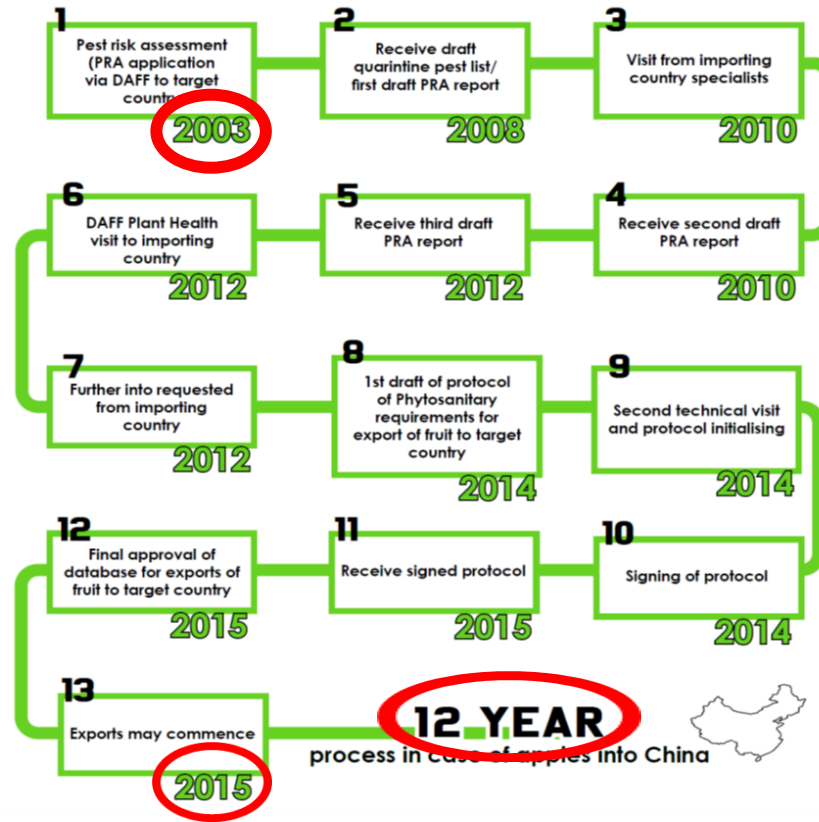


Stage 8: Commercial Access

- Scale exports & develop market
- **Continuous compliance**



China Apple Case Study



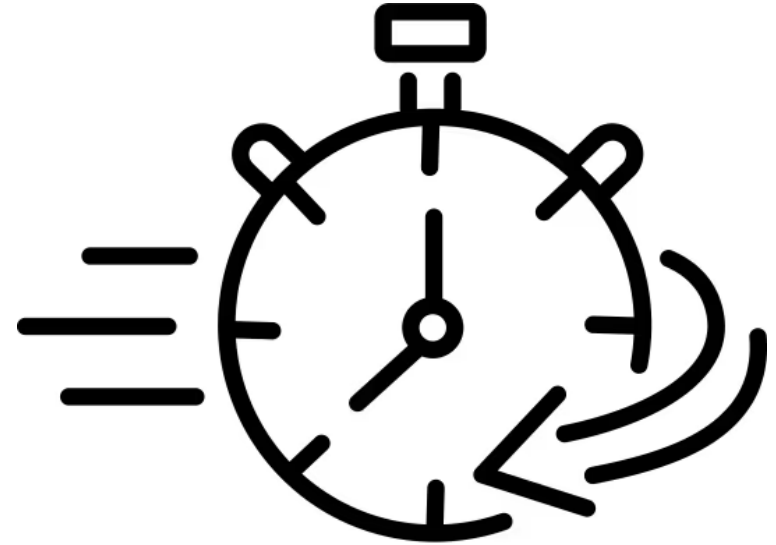
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Growing Fruit IQ



Maintaining Access

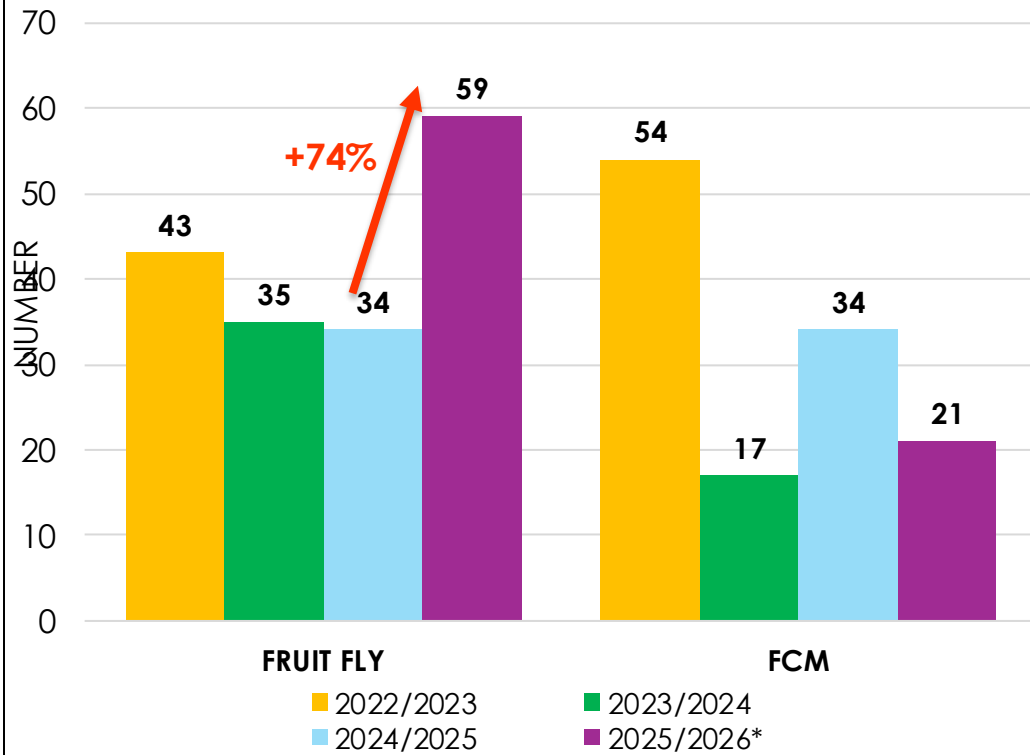
- Audits at different levels: Are we complying?
- RMS, Interception management
- Rapid response



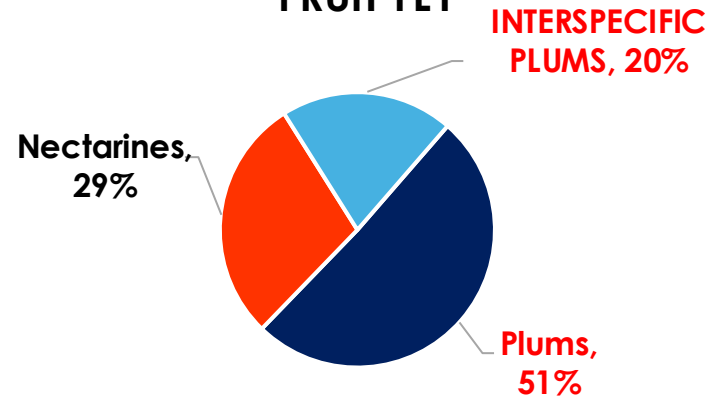
Quick Response

PPECB Interceptions/Rejections & Monitoring

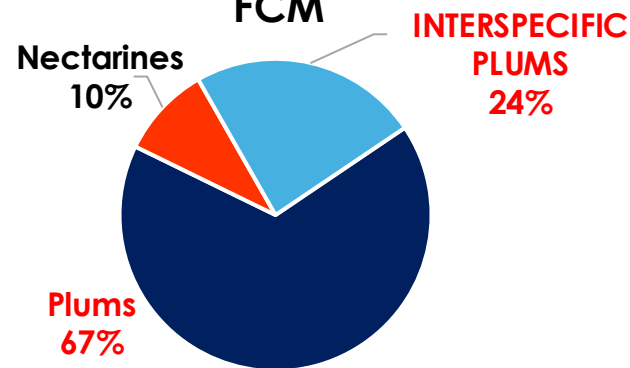
INTERCEPTIONS - FULL SEASON



FRUIT FLY



FCM



Key Constraints in the Process

- Long timelines
- Capacity limits (one/both sides)
- Increasingly stringent SPS requirements globally
- Logistics, practical, commercial, compliance challenges



Success Factors

- Industry-government alignment & relationship
- Scientific data, research, capacity
- Proactive strategy
- Government-Government interaction, relationship
- Compliance culture



Future Outlook

- Rising SPS, tariff & non-tariff barriers
- Pressure on use of remedies/agro-chemicals
- Climate driven pest risk concerns
- Traceability demands



Closing

- Market access determines **growth**
- Collaboration & **compliance** is critical

*Market access will become (is!) a **competitive differentiator***

*Countries that move **faster** will **win market share***

Good progress lately



Closing

- Market access is a **system**, not an event
- It requires **years of investment**
- **Compliance** determines sustainability
- **Collaboration** is non-negotiable



The future growth of South Africa's fruit industry will be determined not by what we can grow — but by where we can sell.

GRO: Gain, Retain, Optimise

THANK YOU