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NAMIBIAN AGRONOMIC BOARD

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AGRONOMY AND HORTICULTURE MARKET DEVELOPMENT DIVISION

RESEARCH AND POLICY DEVELOPMENT SUBDIVISION

AN OVERVIEW OF THE STATUS QUO OF FRUITS PRODUCTION IN NAMIBIA

ABSTRACT

Although Namibia is a net exporter of fruits, this is mainly due to the high production of table grapes that are targeted for export markets. Namibia has a very small market share in the fruits domestic market which is a mere 4% (732 tons) versus an import share of 97% (20,282 tons) (NAB, 2019). Based on these alarming figures, the NAB commissioned a study using a survey approach to investigate the status quo of fruit production in Namibia. The study's main aim was to quantify the current status of fruit production, storage, value addition, and marketing in Namibia. The study consulted 62 fruit producers, 27 fruit traders, and 17 nurseries sampled from countrywide. The study revealed that over 660,000 various fruit trees are planted over an area of 1,168 ha and an average size of 5,536 ha is available with a potential to grow an estimated 1,1 million fruit trees. Furthermore, about 41,000 fruit tree seedlings are imported into the country per year. Local fruit traders are indicated to be sourcing about 680 tons of their fruits from local suppliers per year in comparison to over 18,000 tons imported. The study also revealed that the majority of fruit producers source their fruit tree seedlings from uncertified nurseries, hence planting uncertified fruit trees. There is very minimal value addition on fruits in Namibia and a few of those doing value addition process lemons, mangoes, grapes, and olives. Therefore, at a high level, this study recommends that all interested parties (stakeholders) should invest in capacity building for farmers in fruit production and marketing; the MAWLR to implement the Seed and Seed Varieties Act 23 of 2018 to safeguard breeders and farmers; and fruit value chain development should be a Chapter in the 5-year Crop Value Chain Strategy that is being developed by the NAB, to have targeted interventions that will stimulate fruit production, processing, and marketing in Namibia.

Keywords: Fruits & fruit trees, seedlings, value addition

1. INTRODUCTION

Namibia's fruit production is very small of which only 4% (732 tons) was locally produced compared to 97% (20,282 tons) imported in 2019 (NAB, 2019). According to ITC (2020), the majority of Namibia's fruits, which is about 97%\, were imported from South Africa. Globally, China has been the fastest-growing import market for fruits and nuts for the last three years whilst Namibia is ranked number 23 (ITC, 2020). However, in Africa, Nigeria and Senegal are the only African countries appearing in the top 10 world fast-growing import markets of fruits and nuts.

A total value of N$194 million of the top ten fruits was traded in Namibia over the last four years, of which only N$7,7 million (about 4%) is a value from local trade. Most fruits consumed in Namibia such as apples, pears, and bananas are seldom produced in Namibia. Amongst others, oranges and grapes were the most supplied fruits from local producers on average over the last three years. Except for grapes (28 483 tons) and slightly mangoes (81 tons), the export of fruits is not much advanced in Namibia (NAB, 2018/2019).

As a result of the few statistics above, the NAB commissioned a study, using a survey approach, to investigate the status quo of fruit production in Namibia in terms of producers/farmers, traders, and nursery owners as to what is the extent of fruit production and trade in Namibia. This article highlights the main findings of this study based on the statistics collected from a sample size of 62 fruit producers, 27 fruit traders, and 17 nurseries as well as some in-house NAB statistics and other international data sources (i.e. ITC Trade map, FAOSTAT, etc.). Given the over 90% imports of fruits in Namibia, the statistics provided in this study can enable policymakers to make informed decisions on how best to stimulate the growth of Namibia's fruit production industry.

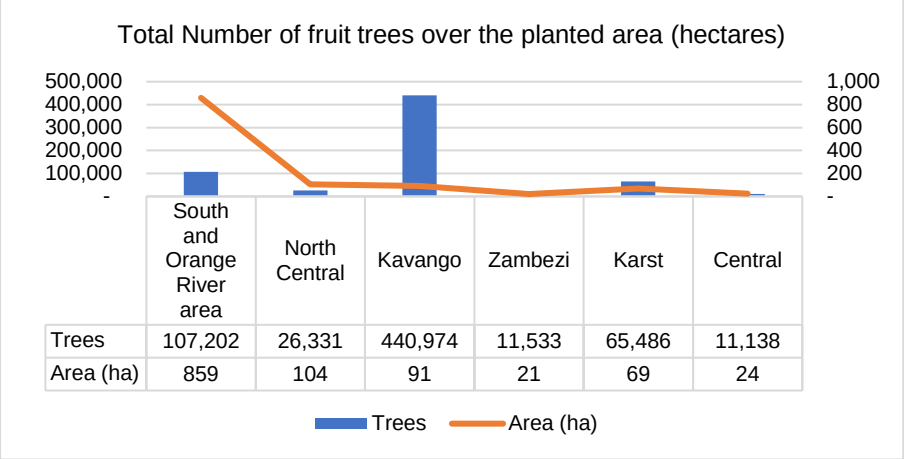
2. METHODS

Primary data was collected through a survey (face-to-face interviews) using a structured questionnaire, with both structured and unstructured questions. The interviewed respondents were from all production zones namely, North Central, Kavango, Zambezi, Karst, Central, South, and Orange River production zones. Additional or secondary information from previous studies, reports, and online data from other relevant institutions was also reviewed and utilised to support the primary data collected through the survey. The study had a population size of 264 potential respondents and 106 respondents from producers, traders, and nurseries were interviewed. The data were analysed using Microsoft Word and Excel to present the descriptive data.

3. RESULTS AND DISCUSSIONS

4.1. Production analysis

From the sampled respondents, a total area of 6,704 hectares was identified as available for fruit production in Namibia. However, only 17% (1,168 hectares) of this land is currently under cultivation as of 2021. A total of 662,014 trees are being cultivated/planted over this area, with blueberries, grapes, and oranges topping the list in terms of the number of trees/shrubs/vines.



Average yield of fruits:

4,252.84 tons/season

Figure 1: Total number of trees over a planted area (hectares). NB: Statistics based on 67 sampled producers

These planted trees give an average yield of about 4,252.84 tons per season/harvest. According to the respondents sampled and interviewed, the largest proportion of this harvest is from lemons at 35%, followed by mangoes at 14% respectively.

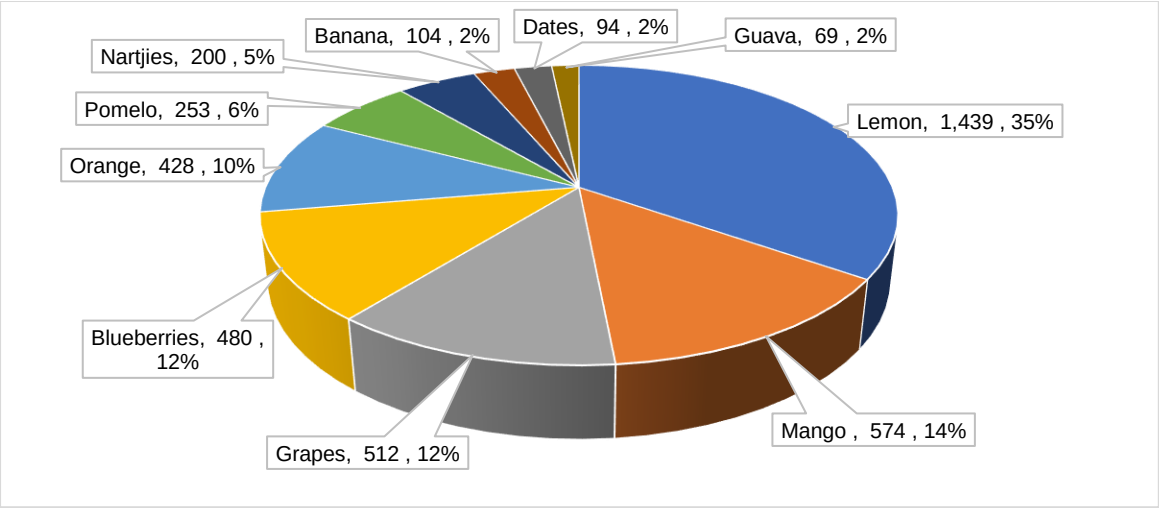


Figure 2: Average yields (tons) of fruits produced in Namibia (top 10). NB: Based on 67 sampled producers

In terms of nurseries, the interviewed 17 nurseries are operating over an area with a size of 3.94 ha, however, only a space of 0.46 is under usage currently. Over 41,000 fruit tree seedlings are imported into Namibia whilst about 40,000 fruit tree seedlings are locally grown.

From the trader's perspective, the study revealed that local fruit traders import about 6,355.43 tons of fruits and also purchase 433.38 tons of fruits from local producers.

During the 2018/2019 financial year, Namibia imported over 8,300 tons of apples, 5,084 tonnes of bananas, 3,347 tonnes of oranges, 1,114 tonnes of pears, and, 998 tonnes of grapes. In terms of value, the country imported fruits worth about N$210 million in 2017/2018 and N$209 million in 2018/2019 (NAB, 2022).

Table 1: Top 5 fruit imports in Namibia during the 2018/2019 financial year (NAB, 2022)

Fruit type	Tonnage	Proportion %
Apples	8,327	44%
Banana	5,084	27%
Oranges	3,347	18%
Pears	1,114	6%
Grapes	998	5%
Total	**18,870**	**100%**

The country also exported a significant amount of fruits worth over N$600 million in both years (2017/18 & 2018/19), however over 85% of these exports were grapes alone, and the remaining 15% of exports were dates, blueberries, and a few mangoes.

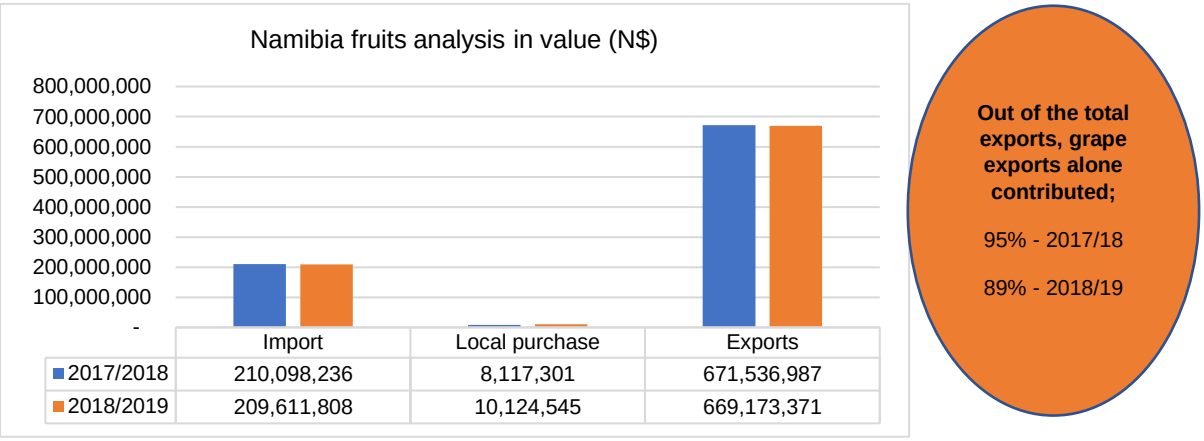


Figure 3: Namibia fruits analysis for the 2017/2018 and 2018/2019 financial year (NAB, 2022)

4.2. Regulatory compliance and industry protection

In terms of plant and food safety, the majority of the interviewed respondents (producers) indicated that they do not source their fruit tree seedlings from accredited nurseries and the majority of these producers are from the regions with communal set-ups (Zambezi, North Central, and Kavango). Furthermore, the study revealed that 72% of producers do not implement any food safety systems at their place of fruit production. On the other hand, the majority of these producers also wish for the government's protection to boost local fruit production.

4.3. Market information

The study revealed that a variety of fruits sold in formal markets (including export markets) attracts fairly high prices compared to those sold in the informal market. Furthermore, about 70% of the producers interviewed are not doing any value addition to their fruits, and a few are doing juice and jam processing, pressing for oil, and drying.

Table 8: Type of value addition on fruits done in Namibia (Survey data, 2022)

Fruit type	Form of value addition	End/finished product	Production zone
Lemon	Processing	Juice	North Central; South and Orange River
Grapes	Drying and processing	Raisins and jam	South and Orange River
Olives	Oil pressing	Oil	Central
Mango	Processing	Juice and jam	North Central

4.4. Challenges and Opportunities:

Several challenges affect the development of the fruit production industry in Namibia. However, there are also opportunities that are available to turn the whole picture around and improve the country's fruit industry.

Challenges	Opportunities
➢ High costs of production inputs such as fertilizers, labour, water, and equipment. ➢ Lack of viable seeds/seedlings (no established standard nurseries). ➢ Lack of proper knowledge or expertise in fruit production. ➢ High post-harvest losses due to lack of preservation and proper storage opportunities. ➢ Weather damage due to heavy rain and sometimes heat.	➢ Water and land are largely available especially along the rivers in the Kavango, Orange River, and Zambezi production zones which can be taken advantage of to produce crops on a commercial and large-scale basis. ➢ Communities have a high interest in farming and fruit production is one of the fully untapped farming operations. ➢ High opportunities to invest in establishing nurseries that will be producing high-quality planting materials for commercial fruit production given the high trees and fruits import in Namibia.

➢ Pests and diseases i.e. fruit flies, birds, powdery mildew, etc.	➢ There are high investment opportunities in value addition, cold storage, and fruit processing. Investments in these areas also open up doors for increased fruit production. ➢ Availing of government support in terms of extension services, mentorship, market protection, and financing can be a catalyst for fruit production development in Namibia. ➢ There are high opportunities for exploring export markets, especially for fruits such as mangoes that are currently experiencing high post-harvest losses.

4. CONCLUSION AND RECOMMENDATIONS

The study, based on the sampled respondents, quantified the average size of land under fruits production (1,168 ha), whereby a total of over 660,000 trees are grown with a potential to increase to over 1 million fruit trees on the 5,536 ha identified as available for fruits production. In terms of the yield of fruits produced locally, Namibia records the highest yields in lemons (1,438.99 tons), grapes (511.55 tons), and mangoes (574.18 tons), although these yields are averages based on the interviewed respondents. A total of 17 nurseries are operating over an area with a size of 3.94 ha, however, only 0.46 ha is under utilisation currently. Over 41,000 fruit tree seedlings are imported into Namibia whilst about 40,000 fruit tree seedlings are locally grown annually. From the trader's perspective, the study revealed that local fruit traders import an average of 6,355.43 tons of fruits in comparison to 433.38 tons purchased from local fruit producers.

Therefore, to stimulate local fruit production, processing, and marketing, we recommend the following, specific interventions:

a) All interested parties (stakeholders) to invest in capacity building for farmers in fruit production and marketing.
b) Agri-input suppliers to establish nurseries to supply high quality, certified and affordable tropical and subtropical fruit tree seedlings that are free from pests and diseases.
c) The Ministry of Agriculture, Water and Land Reform (MAWLR) to implement the Seed and Seed Varieties Act 23 of 2018 to safeguard breeders and farmers.
d) The NAB to establish a database of fruit producers in Namibia and closely monitor local production.
e) The NAB and other parties should promote investment in fruit production and value addition.

f) The NAB to organise the fruit industry in the country for them to speak with one voice to influence decision-making and policies.
g) The NAB to establish the fruit development scheme strategy to holistically facilitate the development of the value chain.
h) The MAWLR to strictly enforce regulatory measures to ensure that fruit tree seedlings that are imported into the country come from disease and pest-free nurseries.
i) The introduction of a tailor-made and affordable financial product by financial institutions, given that fruit production takes a long time before the first harvest is realised.
j) The NAB to conduct field research trials to identify fruit varieties that can adapt well to the Namibian climatic and soil conditions.

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