

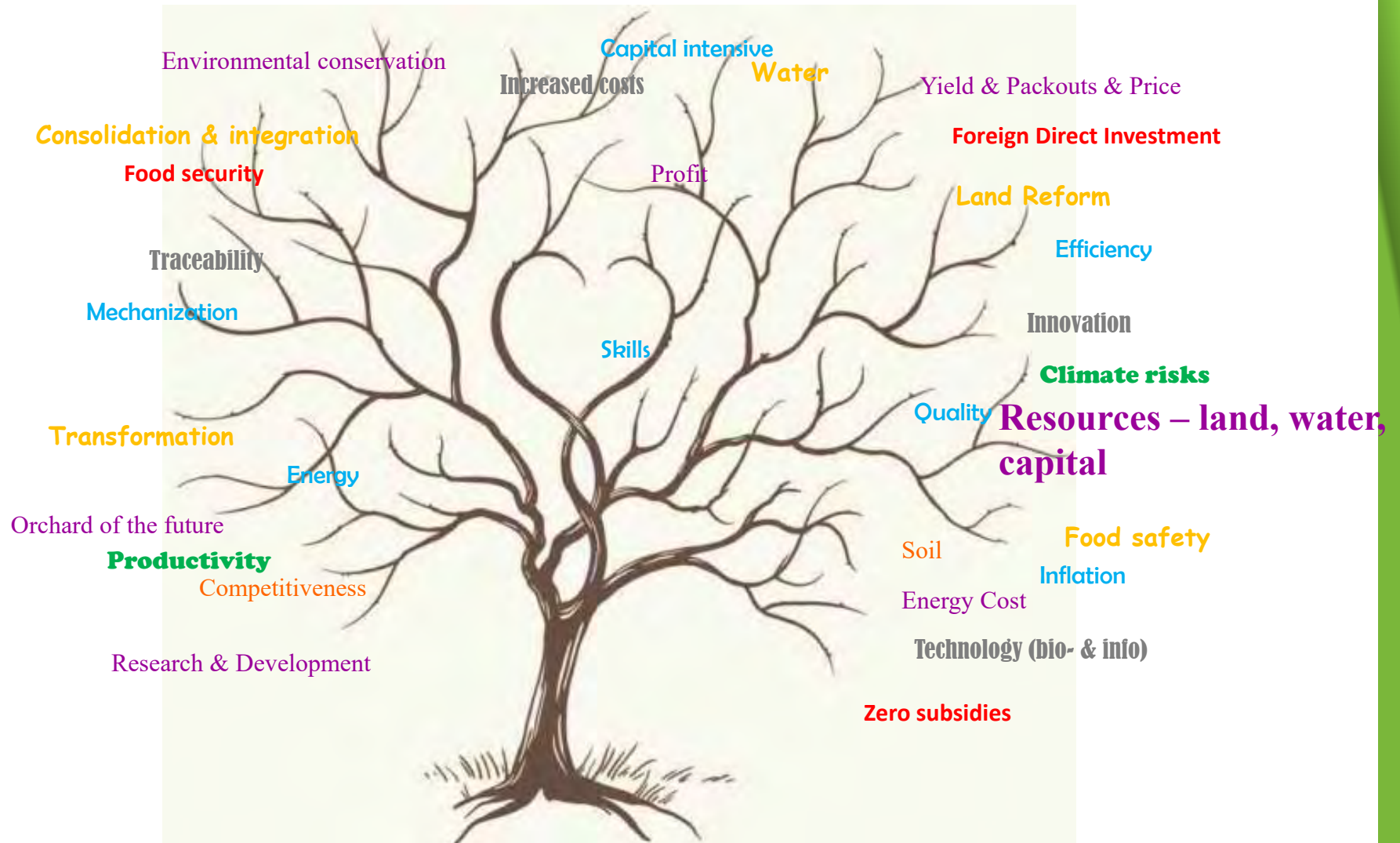
South African Prune Industry Overview

France | 2018

Dappie Smit



Agri business environment





**CEO - Dr Konanani Liphadzi
Trade/International relations –
Dr Mono Mashaba**



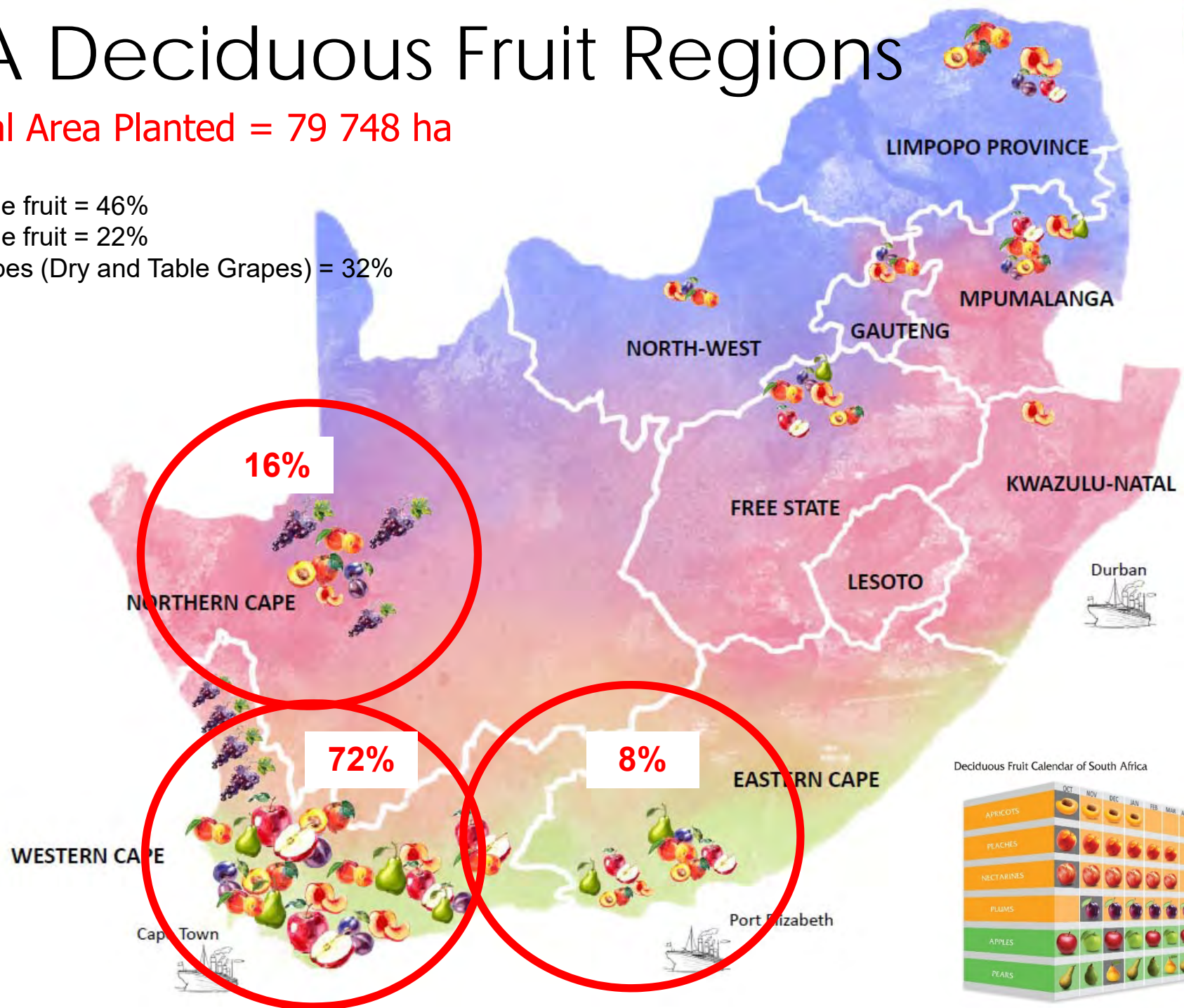
Government relations, Market access,
policy & legislation, logistics &
infrastructure, SIZA - Ethical trade
(Environment, FS & GAP to follow),
AgriHub, SA Fruit Journal,
Social Compact/FIVCRT

SA Deciduous Fruit Regions



Total Area Planted = 79 748 ha

- Pome fruit = 46%
- Stone fruit = 22%
- Grapes (Dry and Table Grapes) = 32%



Deciduous Fruit Calendar of South Africa

	OCT	NOV	DEC	JAN	FEB	MAR	APRIL	MAY	JUNE	JULY	AUG	SEPT
APRICOTS												
PEACHES												
NECTARINES												
PLUMS												
APPLES												
PEARS												

Legend: ■ START OF SEASON

Production structure

Consolidation of units (70:25) principle



2002: 1 646

Avg fruit enterprise =
34 ha

2016 Grower Groupings:

9%	> 100 ha
14%	50 – 100 ha
35%	15 – 50 ha
44%	< 15 ha - 7% ha

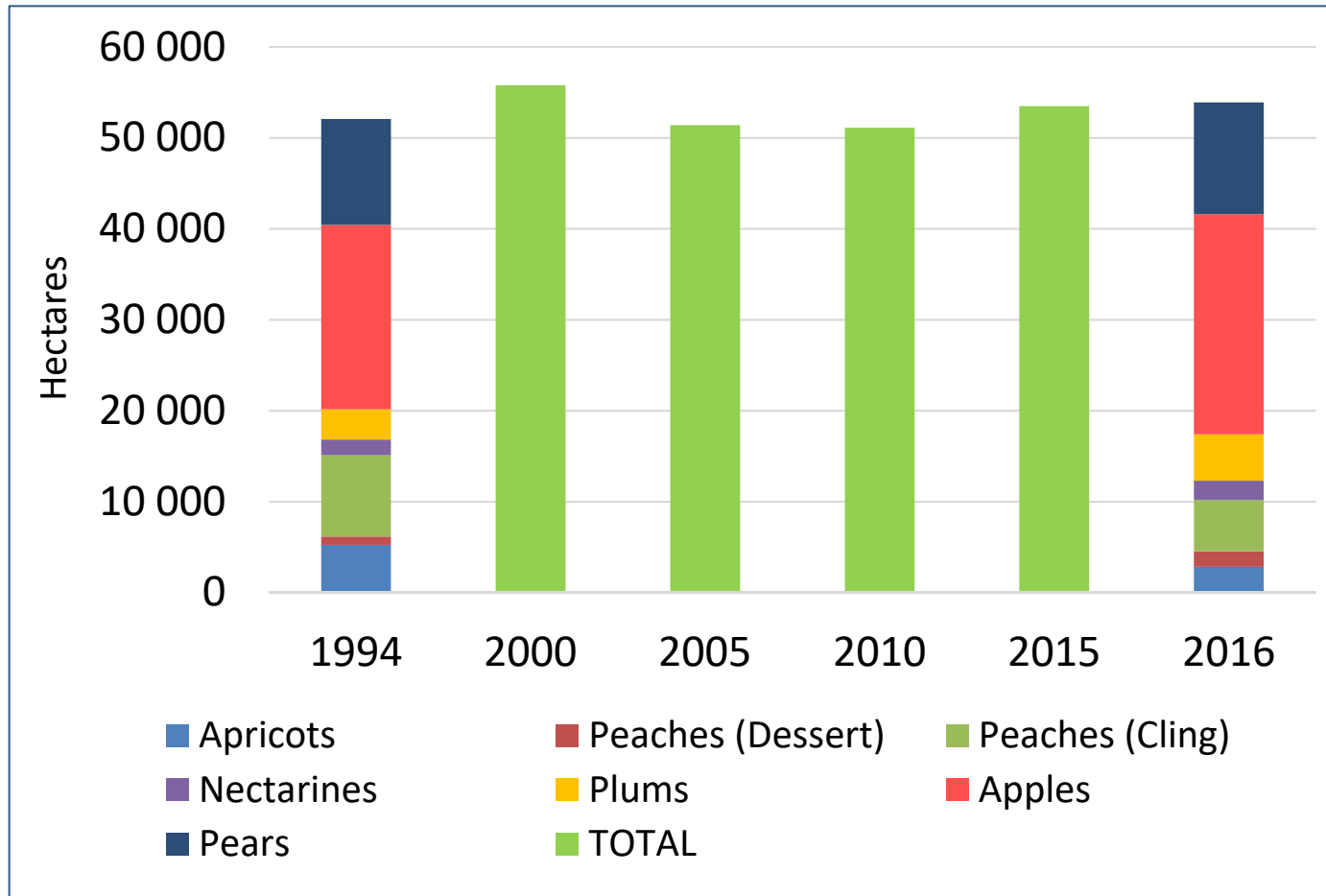


2016: 1 210

Avg fruit enterprise =
45 ha



Evolution of production



of cultivars:

- 148 to 550
- Stone fruit x4 (440)
- Pome fruit x 3 (110)

of trees/ha:

- Stone fruit +25% more trees/ha
- Pome fruit +58% more trees/ha

Production/ha:

efficiency per ha increased with 25 %
– 35% per ha

Industry Perspective Stone Fruit



Local = 5%

Export = 8%
(R78 million) p.a.

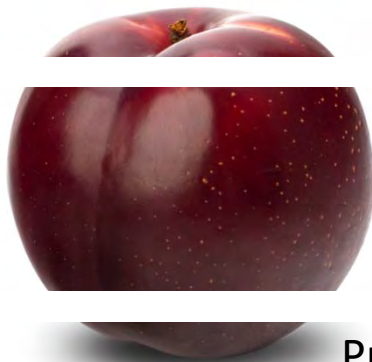
Processed = 70%

Dried = 16%



Fresh		
	<u>Nectarines</u>	<u>Dessert Peaches</u>
Export	55%	48%
Local	44%	52%

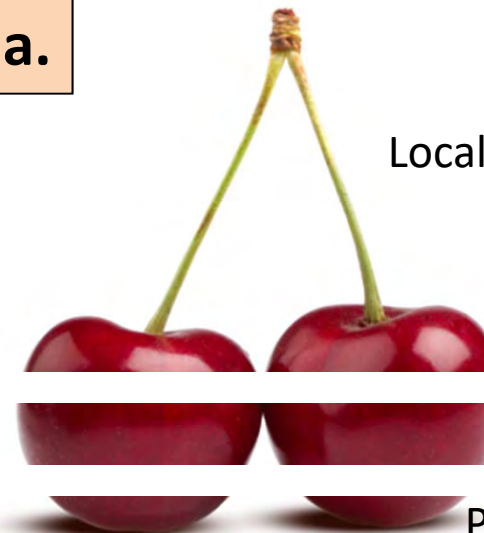
328 391 Tons
41% Fresh
R2,9 billion p.a.



Local = 24%

Export = 73%
(R1,09 billion) p.a.

Processed = 3%



Local = 42%

Export = 50%
(R13 million) p.a.

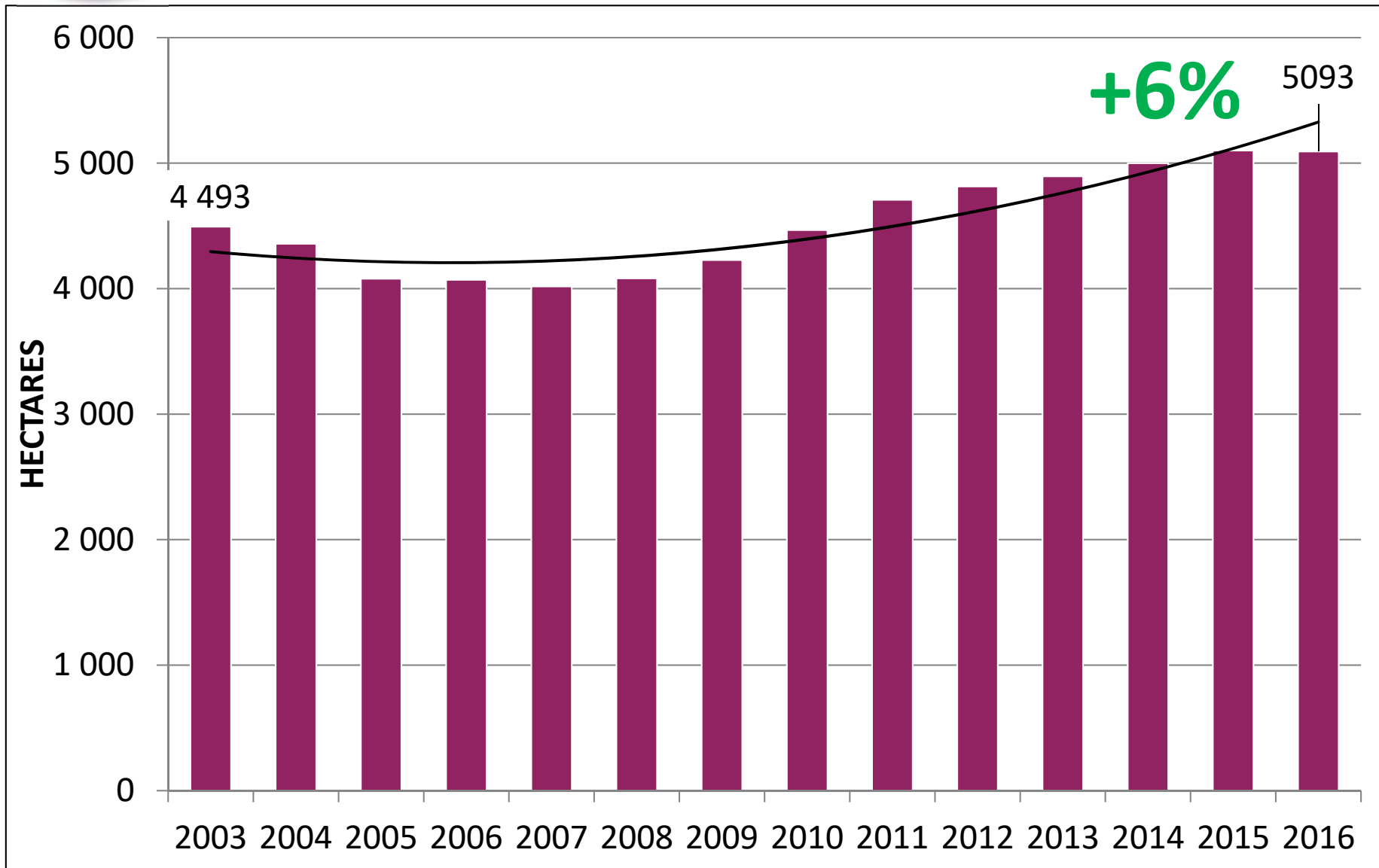
Processed = 7%



Treefruit	2010	2011	2012	2013	2014	2015	2016	2017
Prune	990	878	1 142	811	950	602	1 050	1 100
Apricots	1 912	1 265	1 745	1 659	1 449	1 782	1 325	1 430
Apples	99	159	111	296	316	275	20	217
Peaches	2 063	1 823	1 493	1 780	1 384	2 366	2 560	2 251
Pears	1 009	1 013	1 234	1 506	1 485	1 695	1 660	3 801
Nectarines	75	112	126	133	106	129	133	149
Other	66	36	0	70	31	58	31	36
Total Tons	6 214	5 286	5 851	6 255	5 721	6 907	6 779	8 984



Plum Hectare Trend



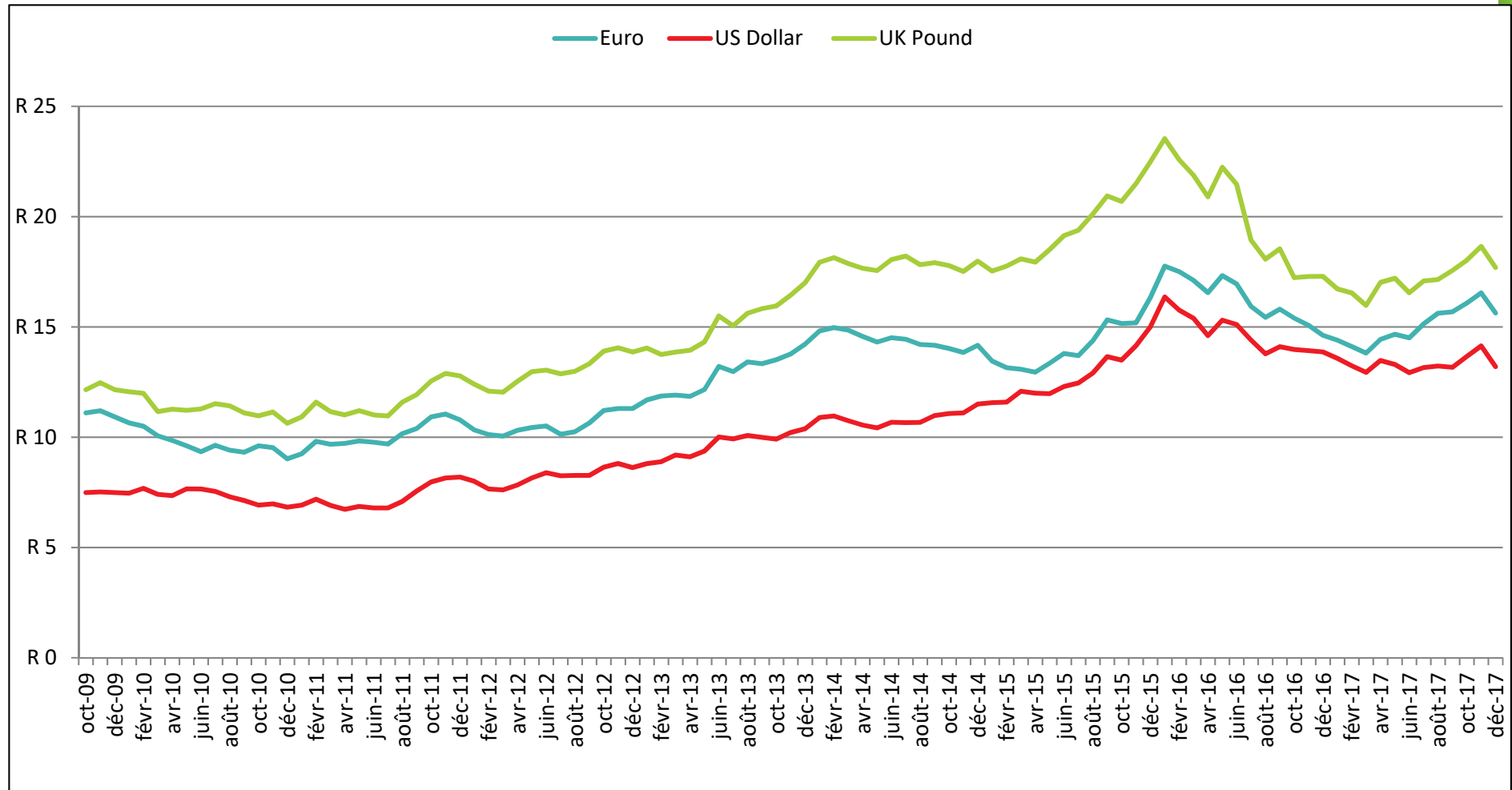


NFI over time

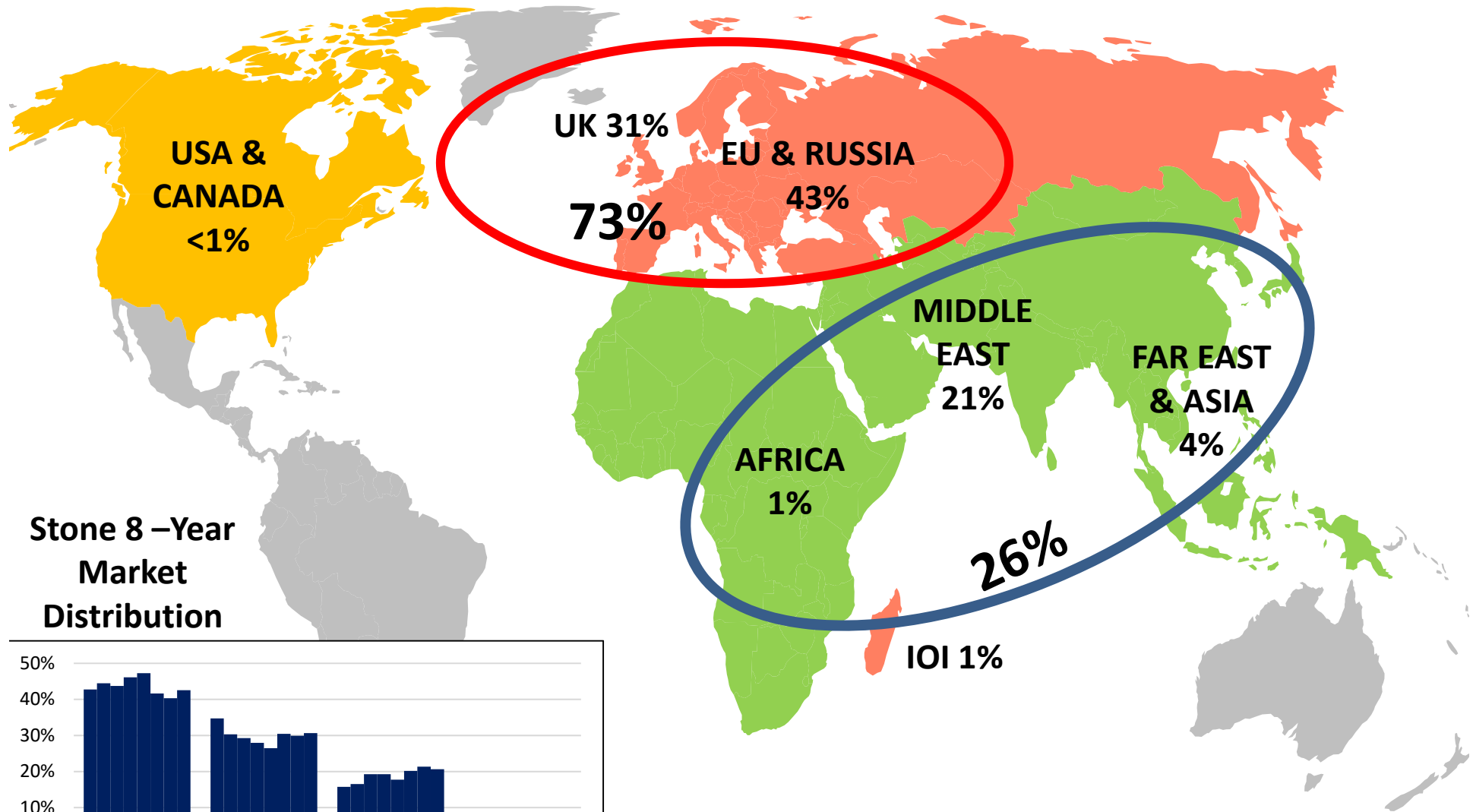
JAAR	APPLES	PEARS	APRICOTS	N&P	PLUMS
2004	-4 333	-6 241			-1 196
2005	17 344	6 709	-22 336	-15 202	-11 848
2006	39 137	28 201	-15 583	16 800	6 257
2007	61 360	49 915	-12 538	26 243	21 144
2008	25 143	28 625	-5 608	18 527	45 219
2009	12 057	6 396	-489	-3 850	20 852
2010	32 835	11 304	6 921	5 691	8 645
2012	51 260	34 849	-5 805	5 654	1 737
2013	102 212	75 984	-9 238	24 188	19 083
2014	64 297	61 699	24 378	59 034	63 601
2015	55 539	70 827	-8 466	22 054	24 987
2016	26 725	103 169	-8 953	79 869	77 833
2017			22 918	45 113	28 712
2018	?	?	?	?	?



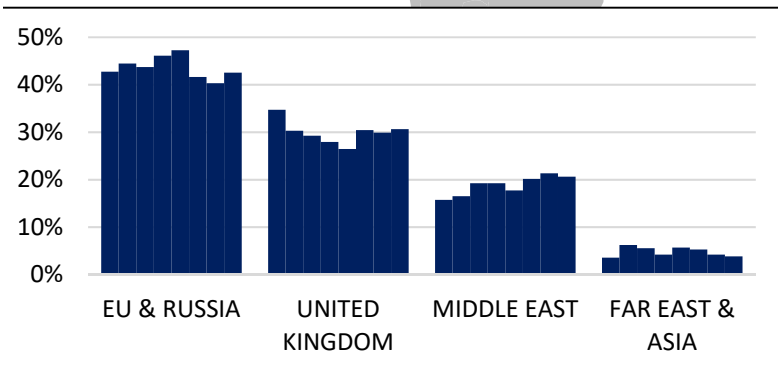
LONGTERM EXCHANGE RATE

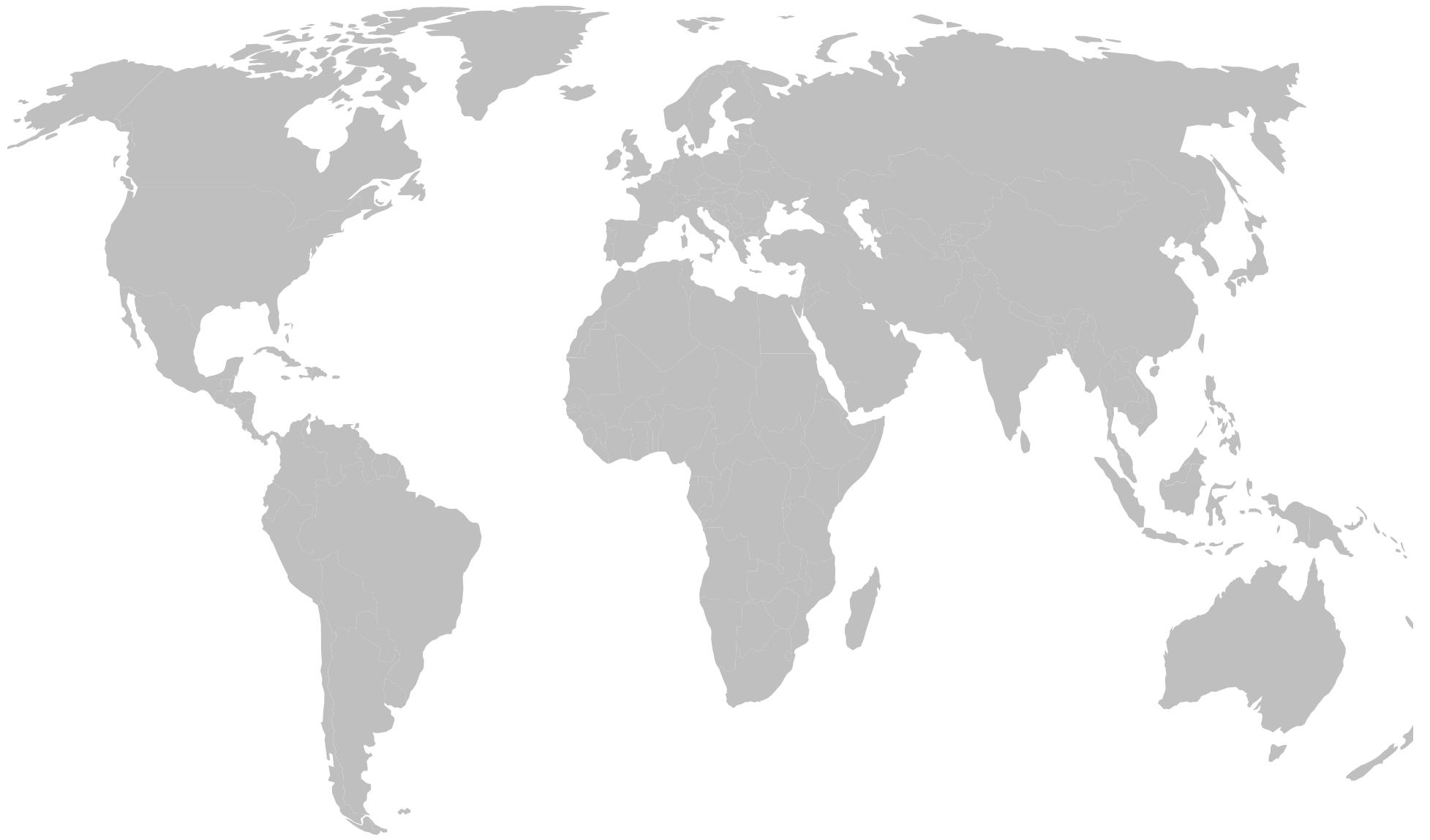


Stone Market Split 2016/2017

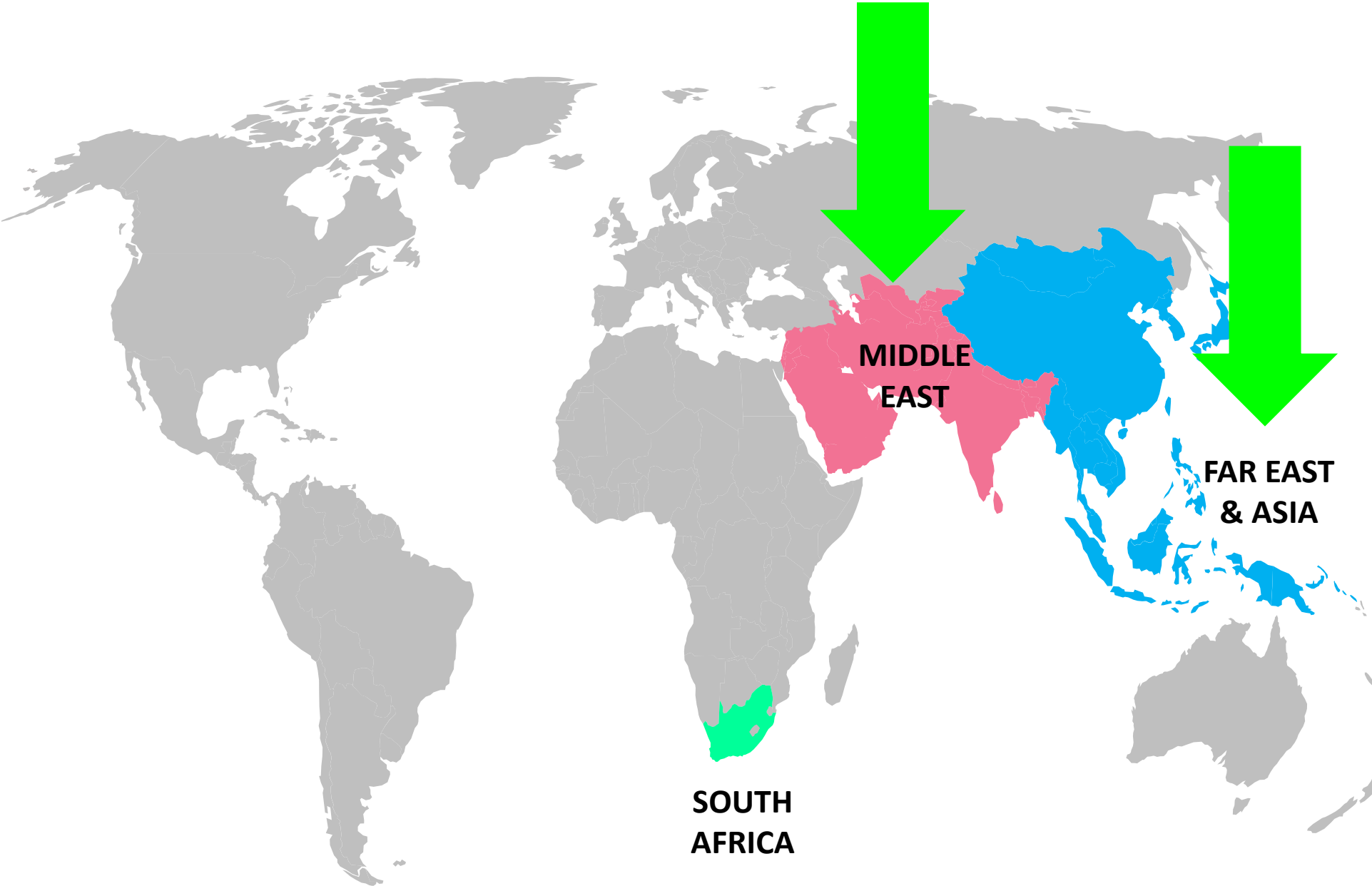


Stone 8 –Year Market Distribution

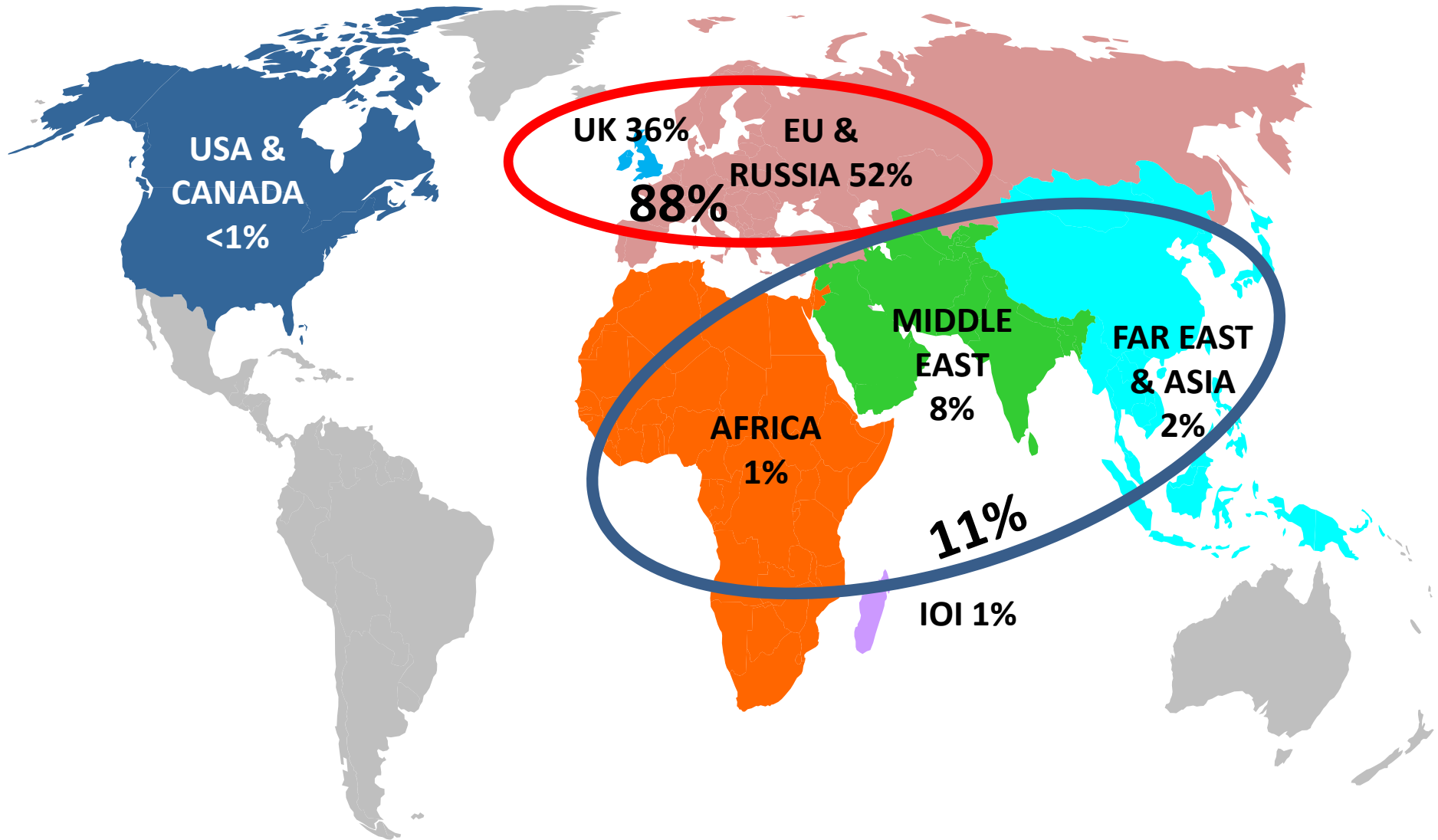




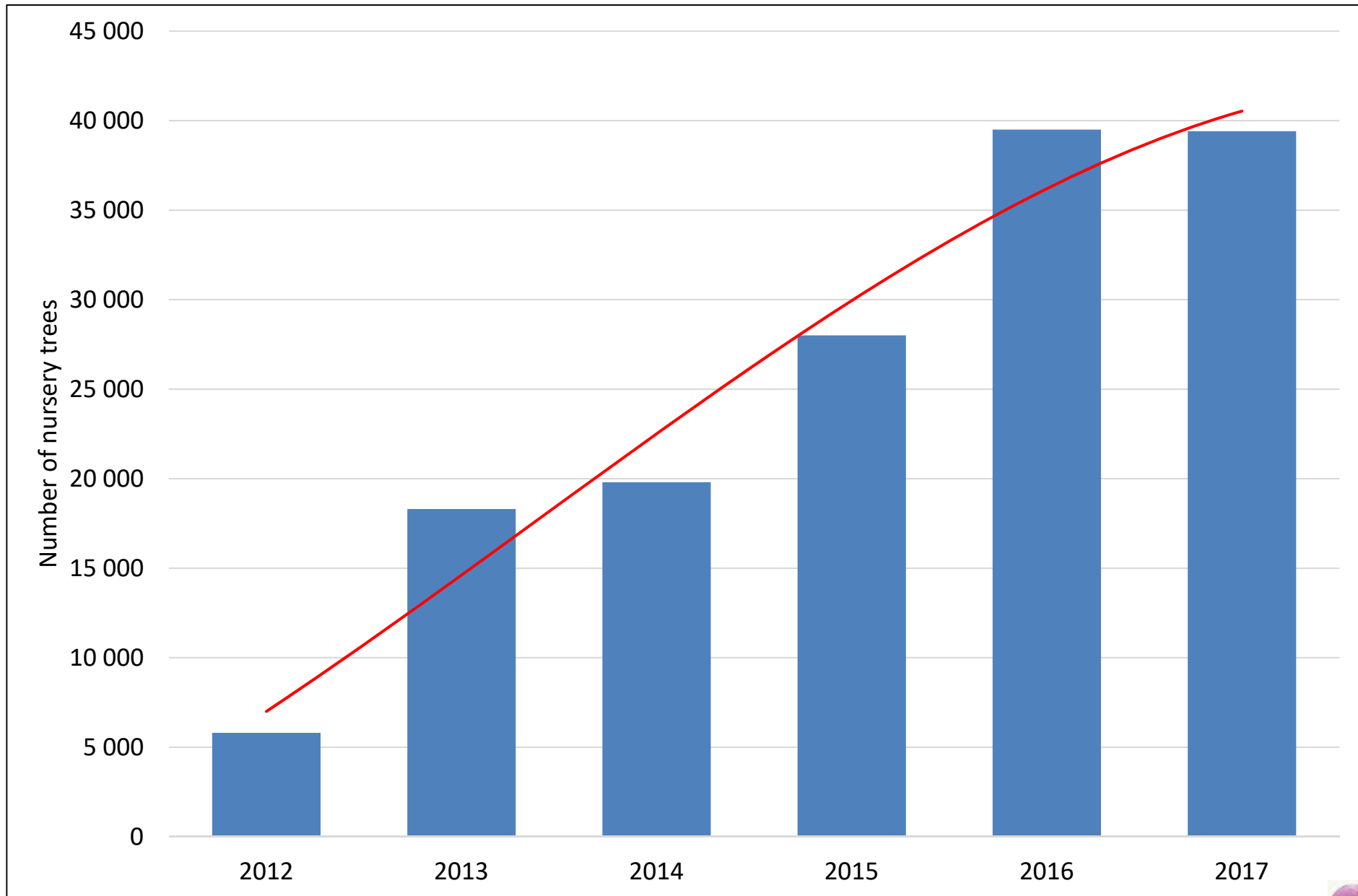
POSSIBLE FUTURE GROWTH



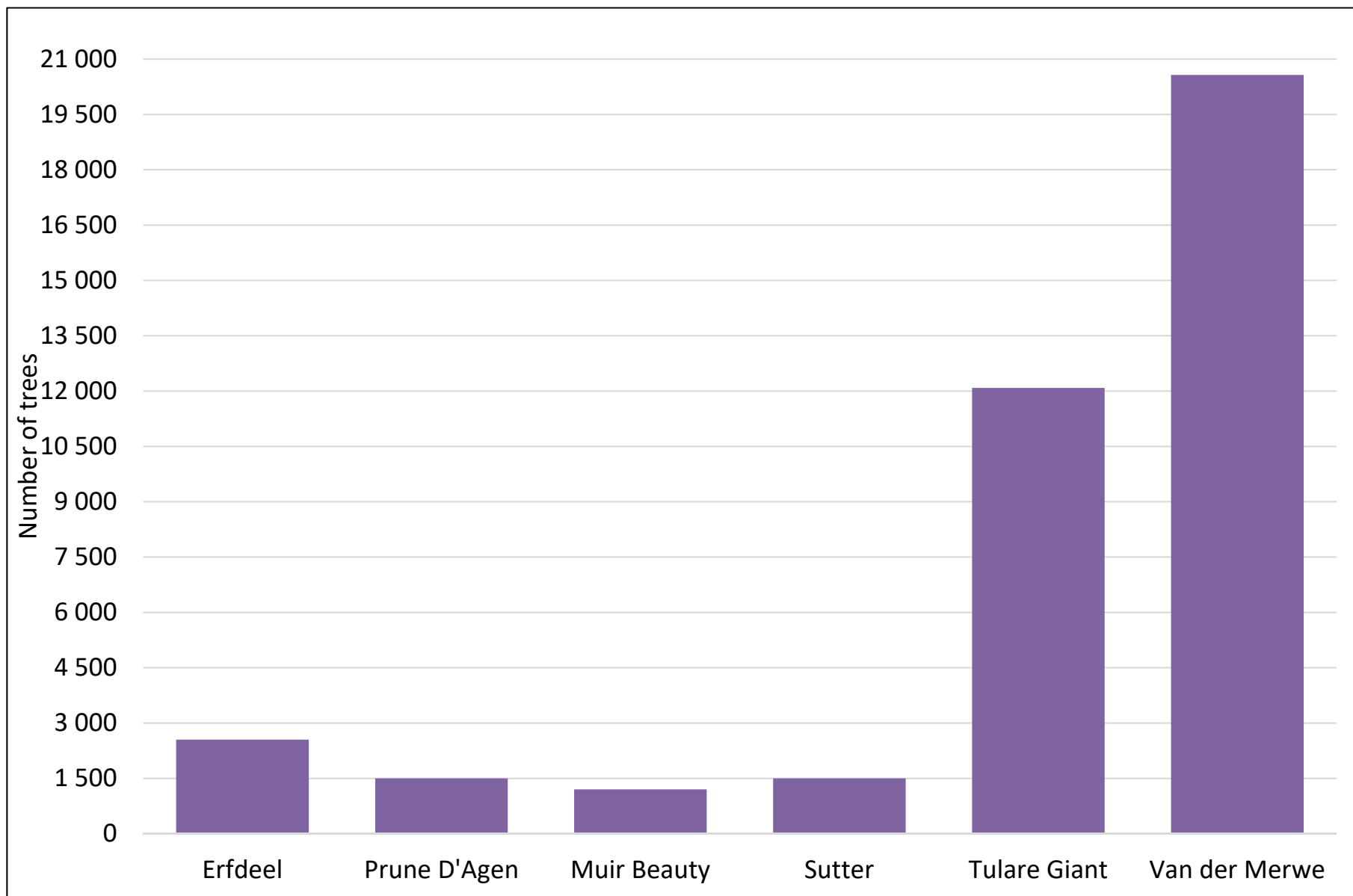
Stone Market Split 2005/2006



Number of Nursery Prune Trees Sold



2017 Number of Nursery Prune Trees Ordered





Prune Gross Value

