



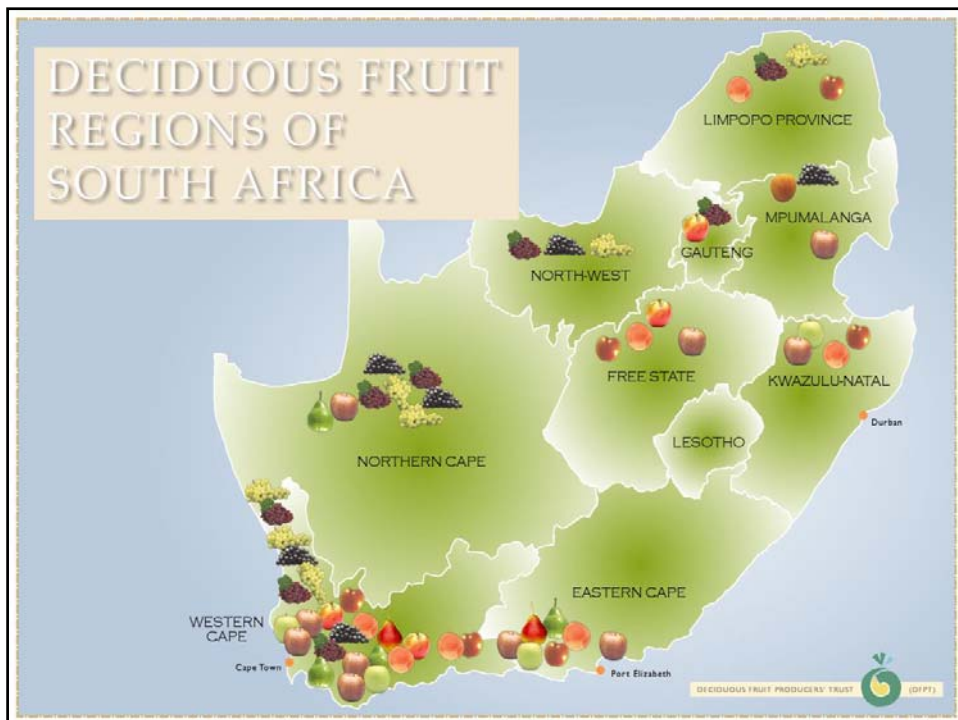
South African Prune Overview

IPA, Australia

October 2013

Dappie Smit
General Manager: Dried Fruit Technical Services
+27 (0)82 781 2192

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DECIDUOUS FRUIT REGIONS OF SOUTH AFRICA

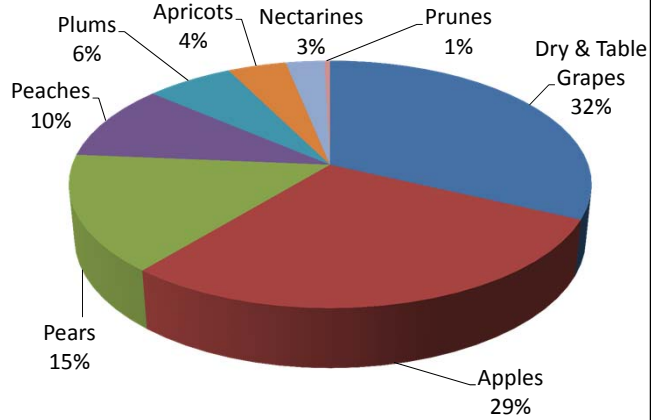
LIMPOPO PROVINCE
MPUMALANGA
GAUTENG
NORTH-WEST
FREE STATE
KWAZULU-NATAL
NORTHERN CAPE
LESOTHO
WESTERN CAPE
EASTERN CAPE

Cape Town
Durban
Port Elizabeth

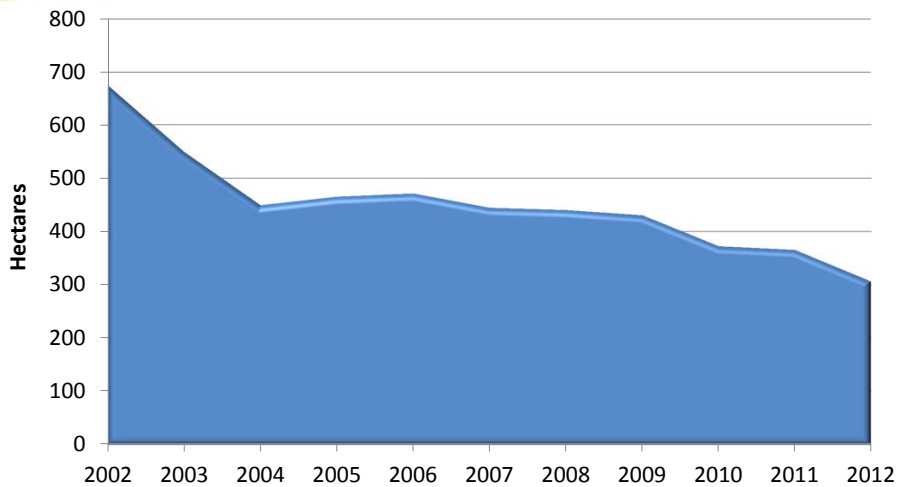
DECIDUOUS FRUIT PRODUCERS TRUST (DFFT)

Total Area planted / fruit kind

Fruit Kind	Hectares
Dry & Table Grapes	24,422
Apples	22,166
Pears	11,700
Peaches	7,576
Plums	4,814
Apricots	3,230
Nectarines	2,140
Prunes	307
Grand Total	76,355

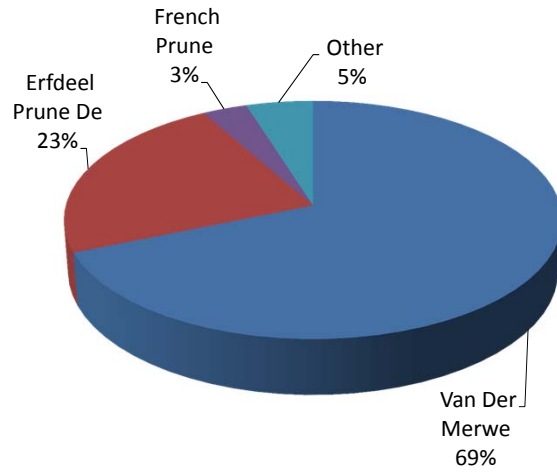


Prunes: Area Planted (ha)

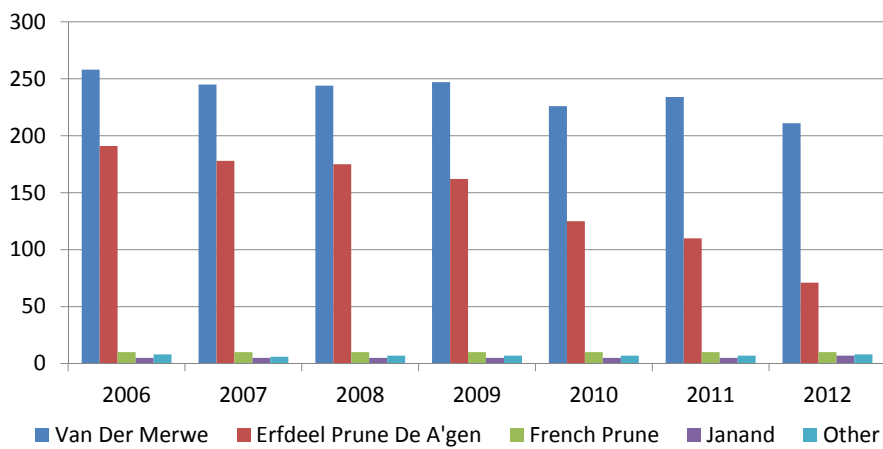


Area planted per cultivar

Cultivar	Hectares
Van Der Merwe	211
Erfdeel Prune De A'gen	71
French Prune	10
Other	15
TOTAL	307



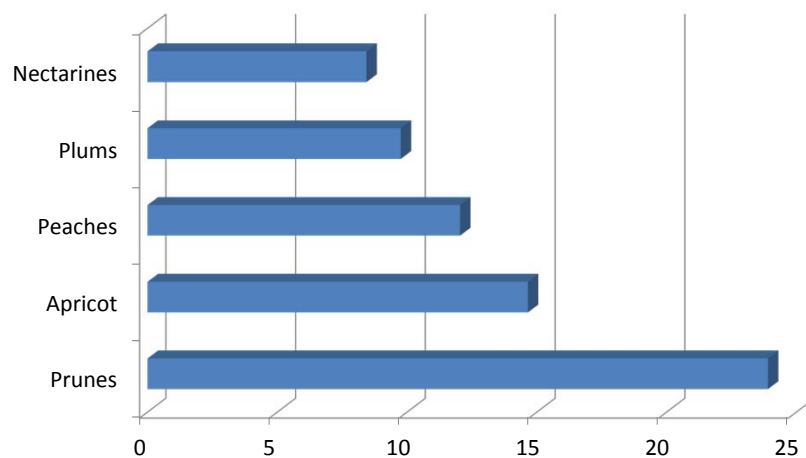
Cultivar trends

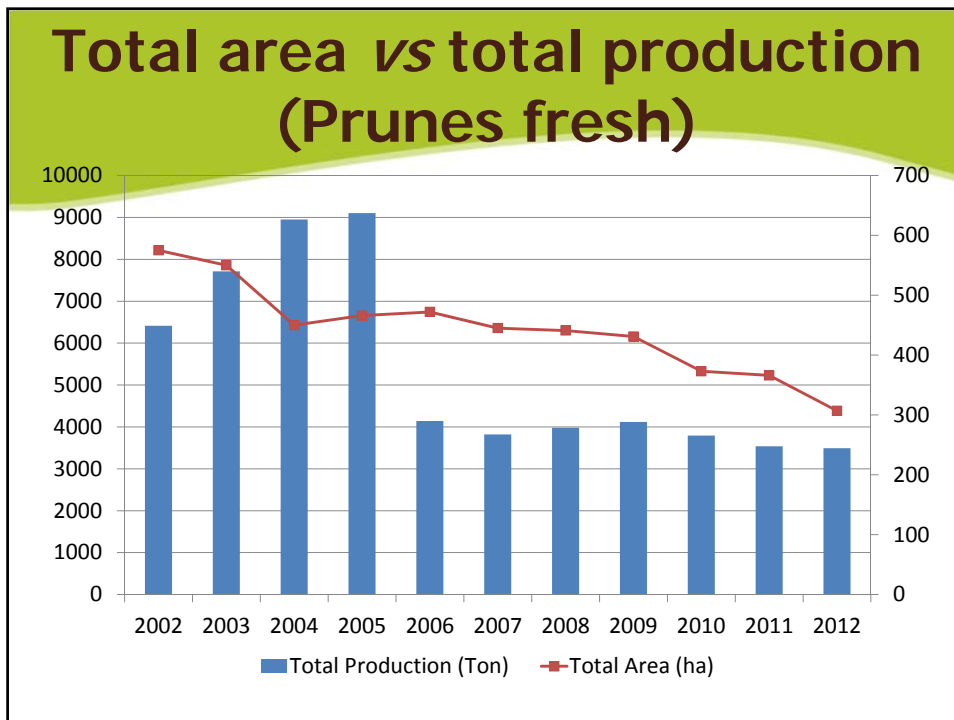
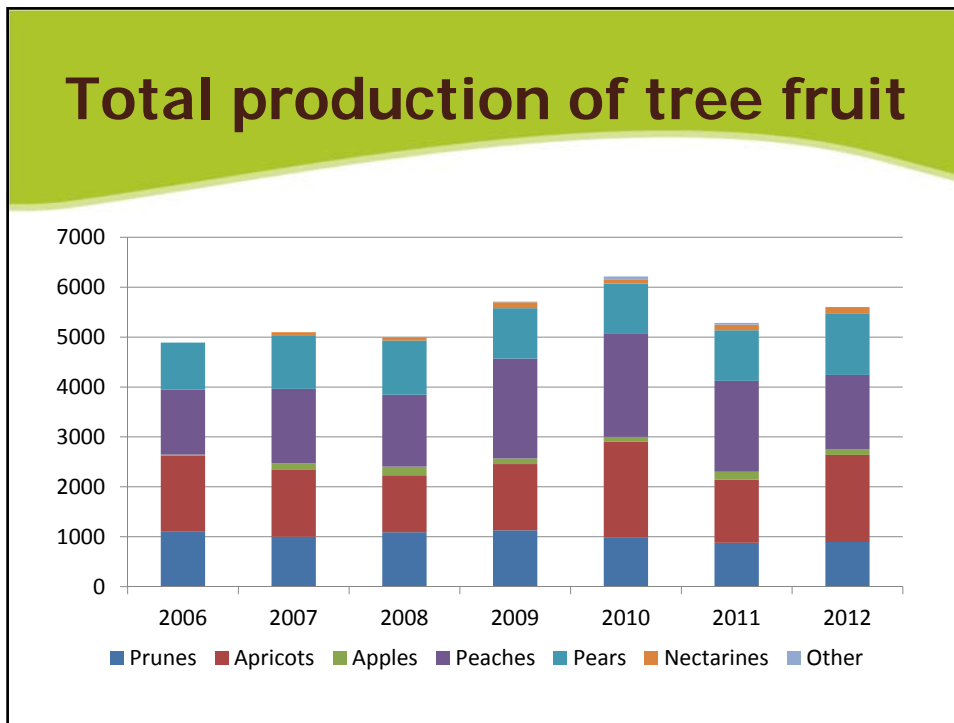


Average prune orchard age

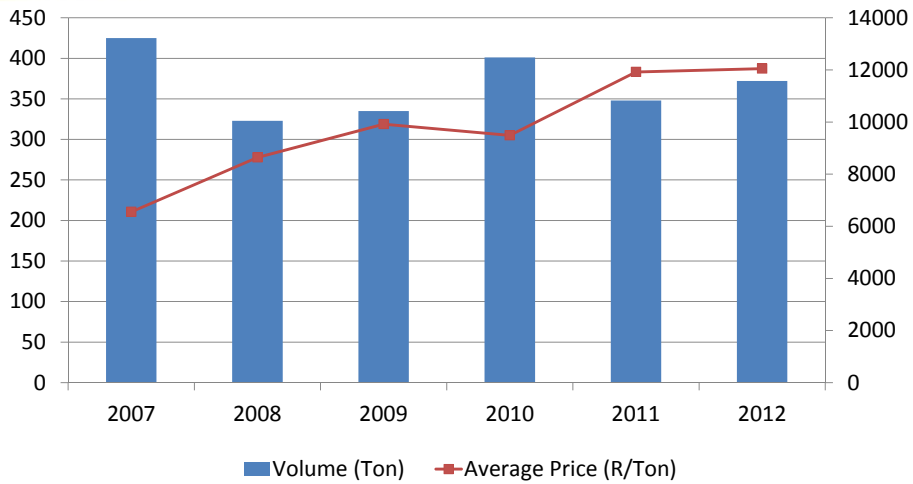
Cultivar	0 - 3 years	4 - 10 years	11 - 15 years	16 - 25 years	25+ years
Van Der Merwe	26	39	27	23	96
Erfdeel Prune De A'gen	3	3	1	3	61
French Prune	0	0	0	0	10
Janand	0	0	3	0	2
Other	2	1	6	1	0
TOTAL	31	43	37	27	169
% OF TOTAL AREA (HA)	10%	14%	12%	9%	55%

Average orchard age (deciduous fruit)

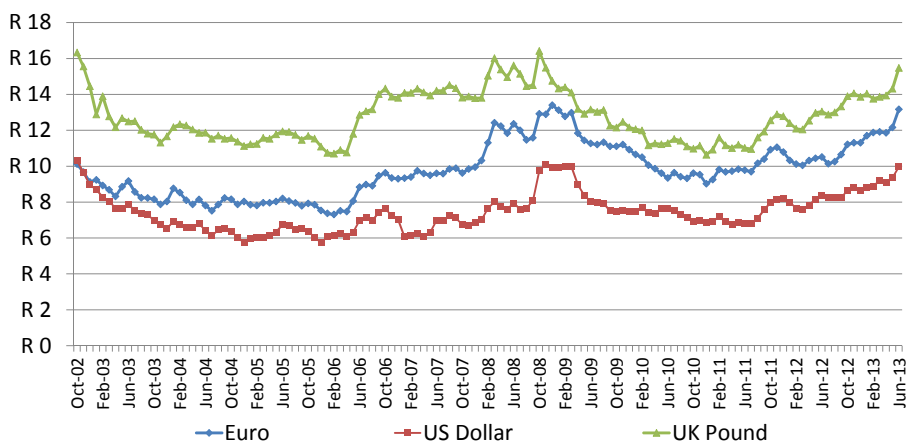


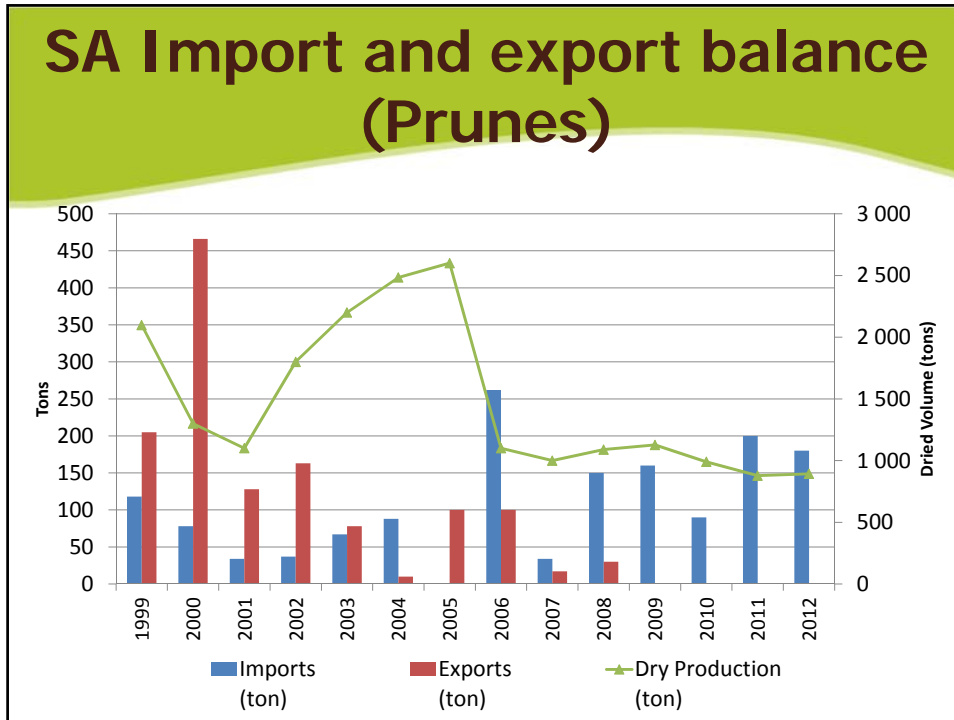


Fresh local market sales



Exchange rate trends





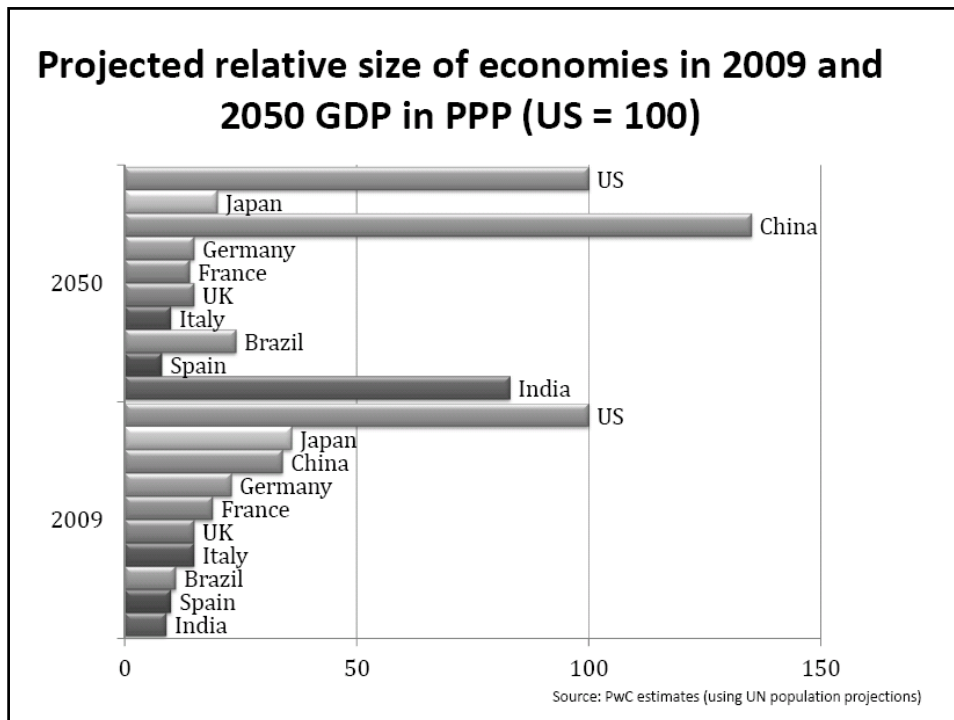
World Population Projections

World Population: Who's Going Up and Who's Going Down?

	2010	2030	2050
	- billion -		
World	6.9	8.2	9.0
Africa	1.0	1.5	2.0
Asia	4.1	4.8	5.1
Europe	0.7	0.7	0.7
LAC*	0.6	0.7	0.8
North America	0.3	0.4	0.5
Oceania	0.04	0.04	0.05

*Latin America & Caribbean
Source: UN (population scenario planning)

Imperial College
London

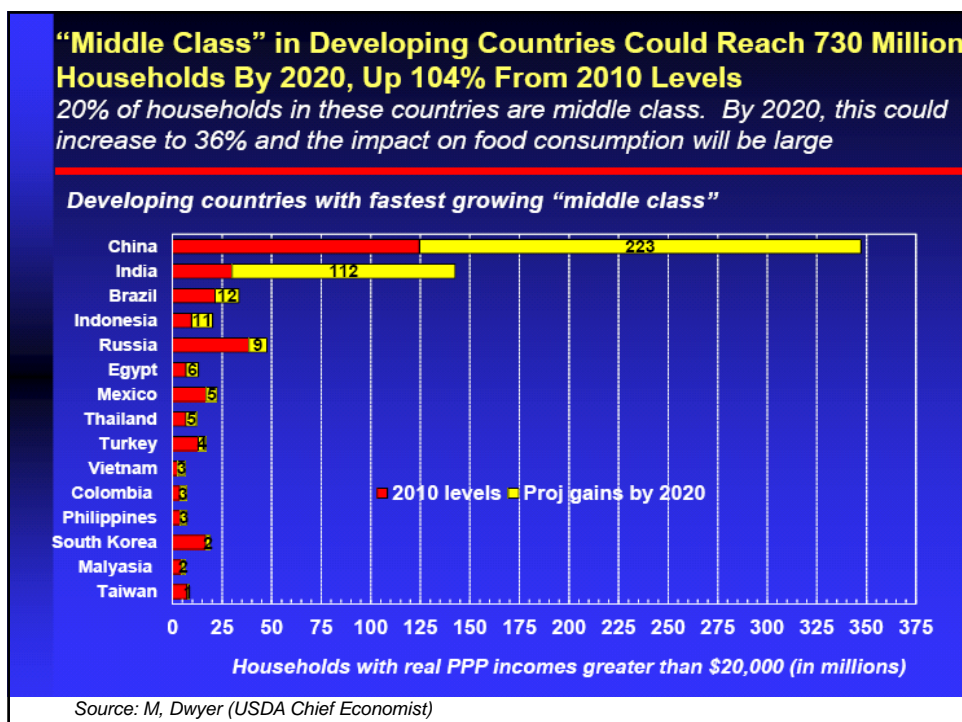


Economic growth in emerging markets will remain buoyant

“Expansion of the middle class is likely to double over the next decade”

Source: Chief Economist: USDA

- Global economy emerged from worst recession in decades in 2010. Developing countries performed better and growing faster than developed countries – likely to continue to 2020.
- Consumer incomes are rising and middle class households are expanding rapidly, especially in large emerging markets like China & India.
- Logarithmic growth in middle class expected through 2020 – 104% in developing countries vs 9% for developed countries.
- Impact on global food demand will be significant due to higher income elasticities for food in emerging markets.
- What could go wrong? A new global recession that sharply slows in emerging markets would reduce demand....and prices.



Challenges

- Introduce new areas of production
- Increase production but retain quality
- Manage competition – fresh
- Increase local consumption
- Seek low chilling cultivars
- Change in consumer preferences (pitted) / pitting capacity

THANK YOU / QUESTIONS?

