



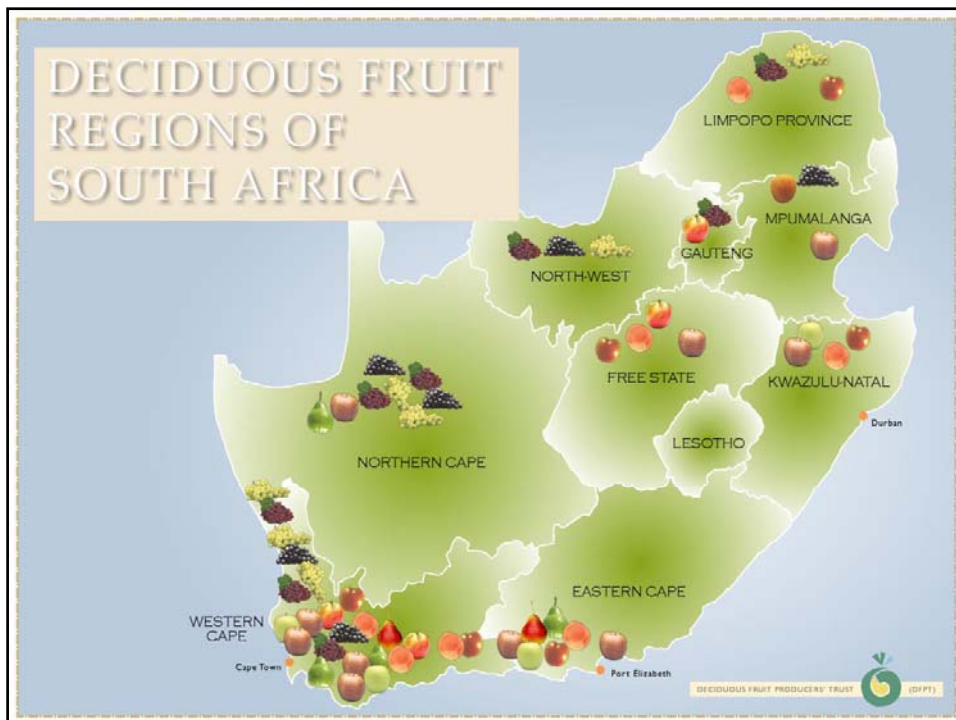
South African Prune Overview

IPA, California

May 2012

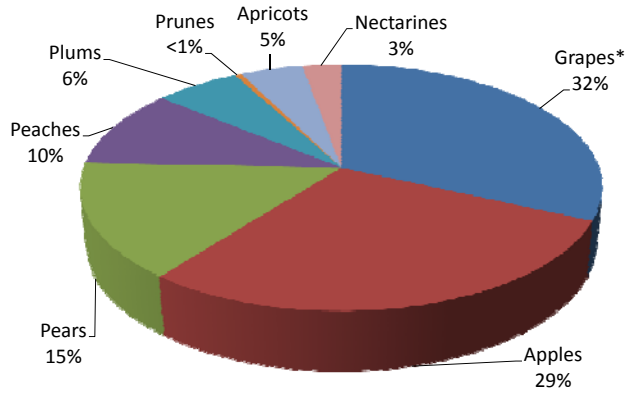
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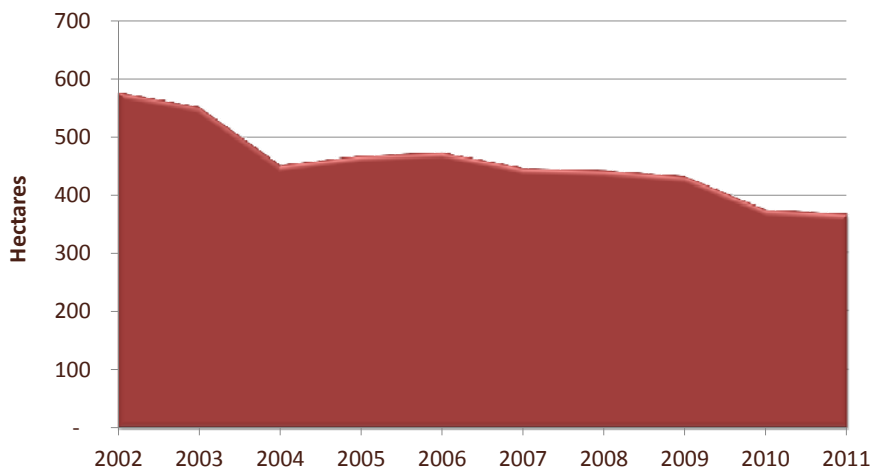


Total Area planted / fruit kind

Fruit	Hectares
Grapes*	24 309
Apples	21 920
Pears	11 561
Peaches	7 941
Plums	4 708
Prunes	366
Apricots	3 462
Nectarines	2 158
TOTAL	76 425

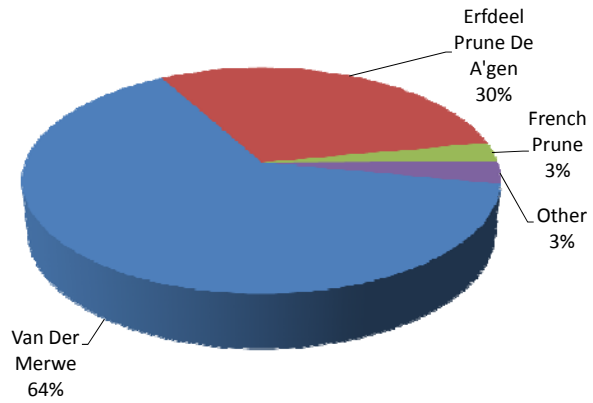


Prunes: Area Planted (ha)

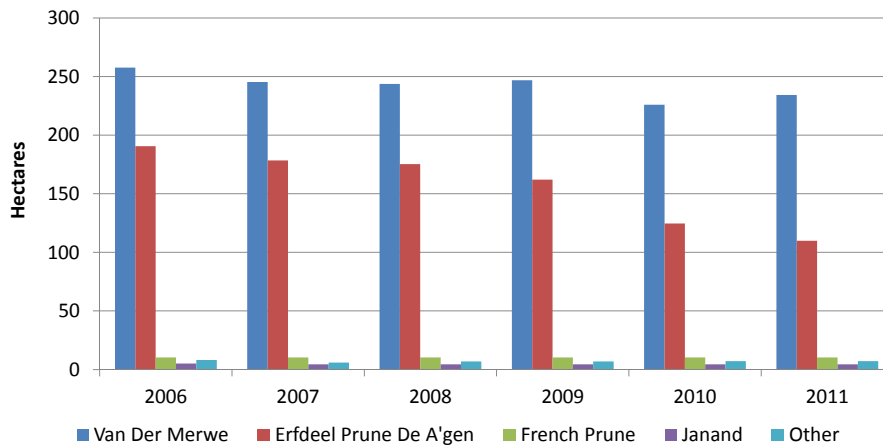


Area planted per cultivar

Cultivar	Hectares
Van Der Merwe	234
Erfdeel Prune De A'gen	110
French Prune	10
Other	12
TOTAL	366



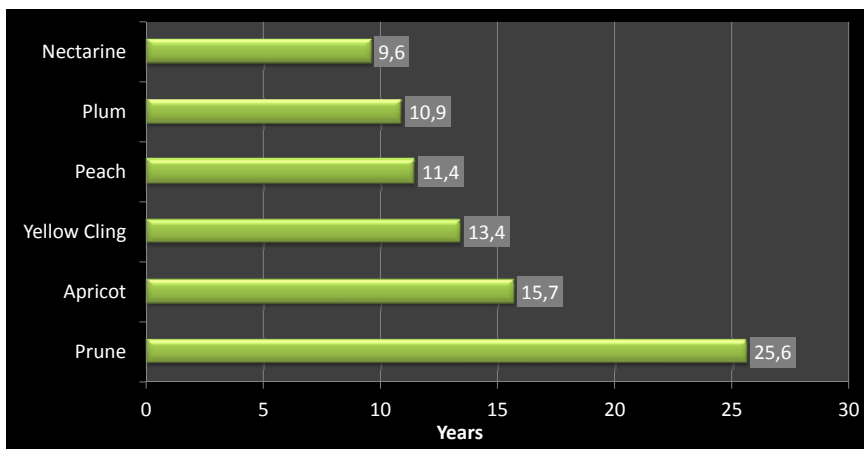
Cultivar trends



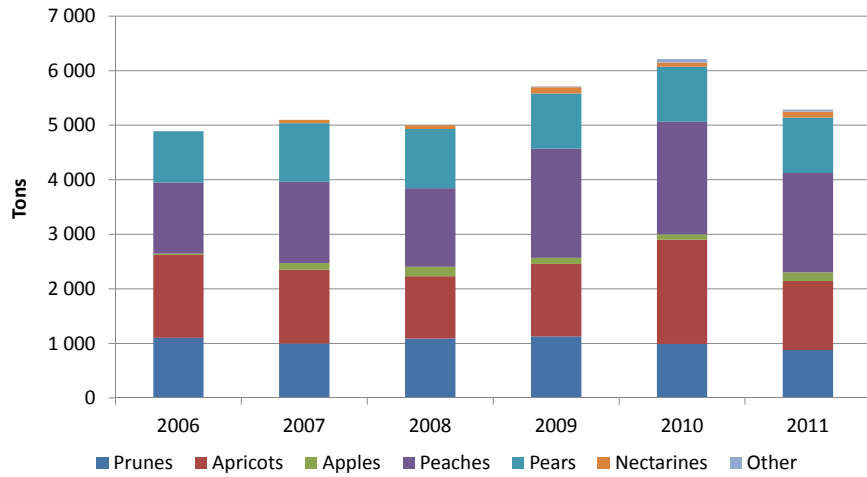
Average prune orchard age

Cultivar	0 - 3 years	4 - 10 years	11 - 15 years	16 - 25 years	25+ years
Van Der Merwe	24	41	29	29	112
Erfdeel Prune De A'gen	3	4	1	7	95
French Prune	0	0	0	0	10
Janand	0	0	3	0	1
Other	0	1	5	1	0
TOTAL	27	46	37	37	219
% OF TOTAL AREA (HA)	7%	12%	10%	10%	59%

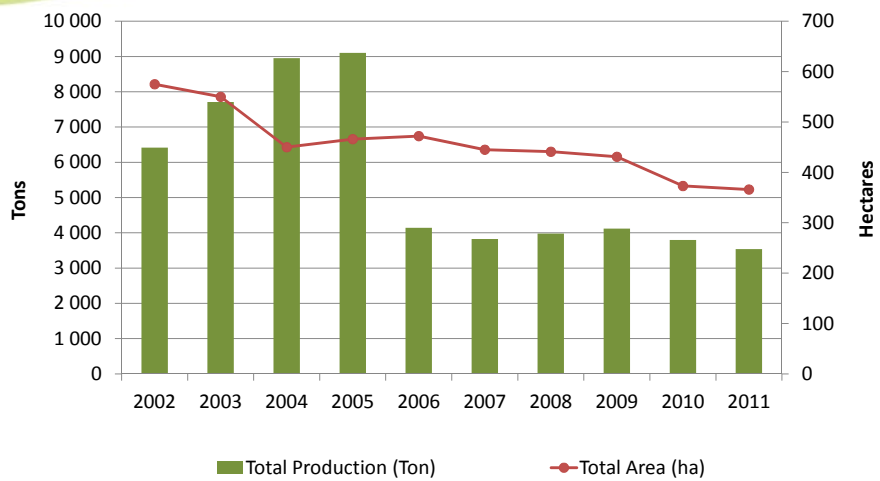
Average orchard age (deciduous fruit)



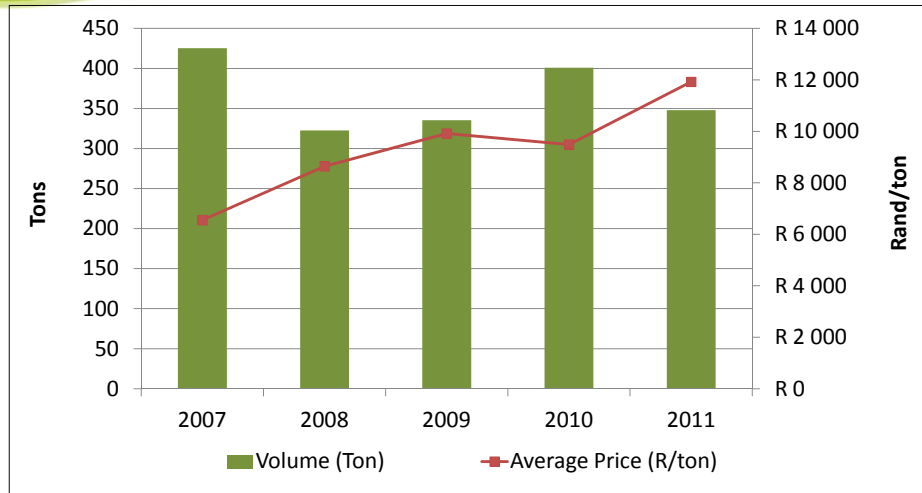
Total production of tree fruit



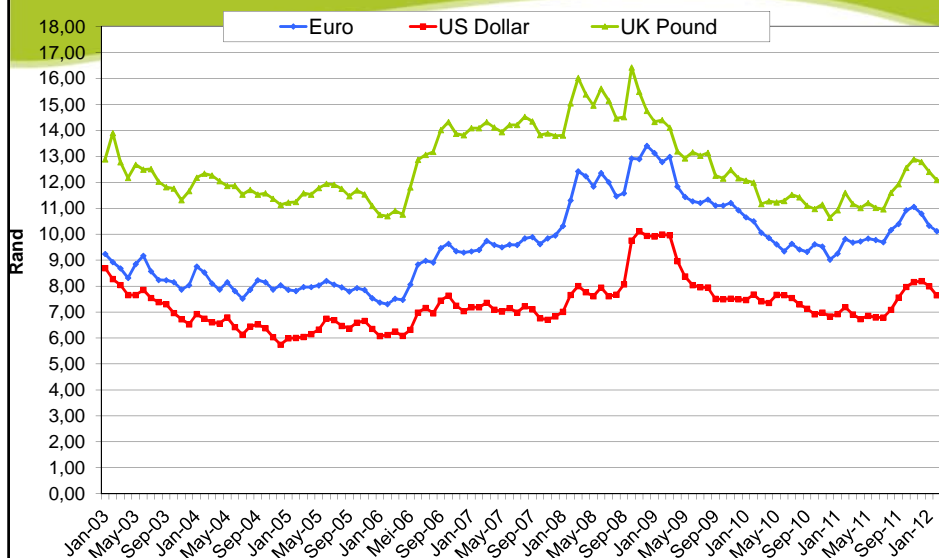
Total area vs total production (Prunes fresh)



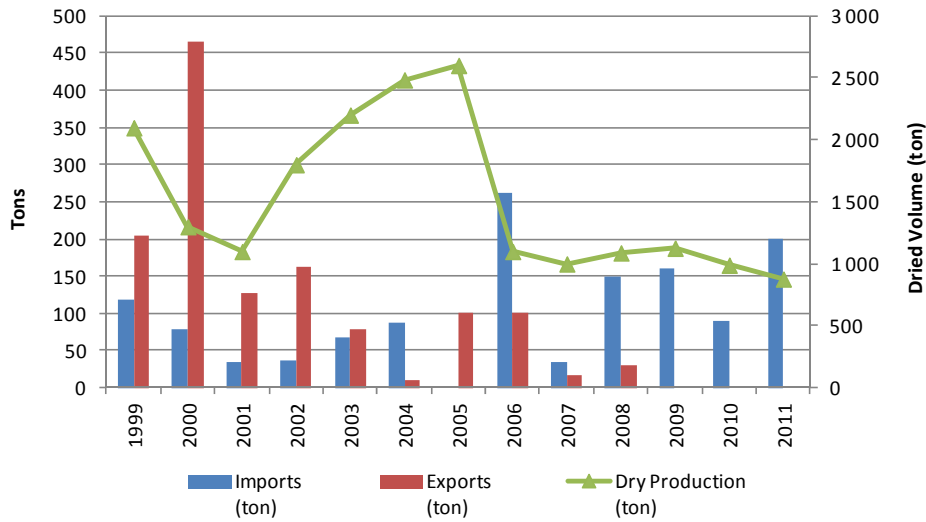
Fresh local market sales



Exchange rate movements

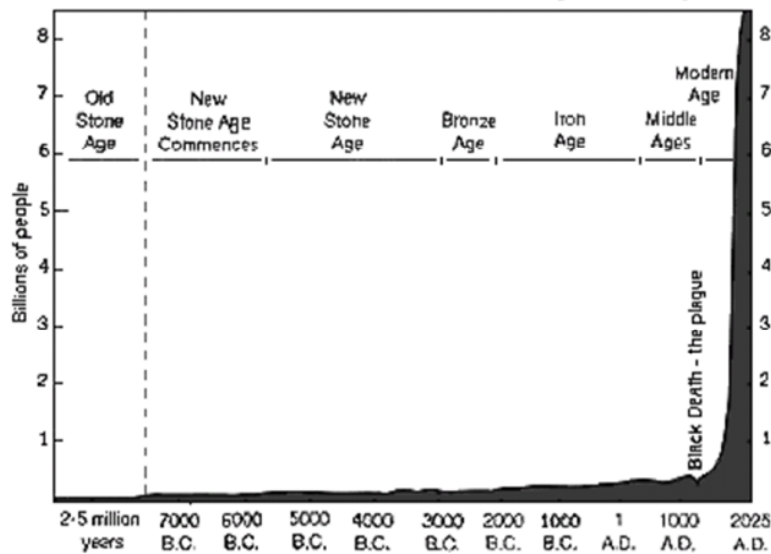


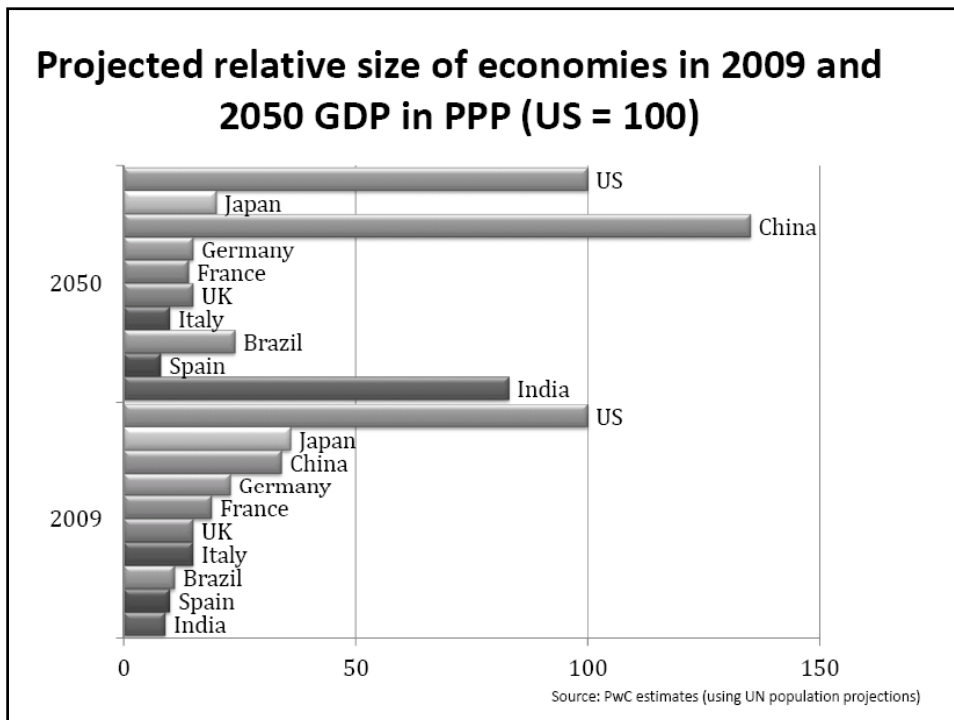
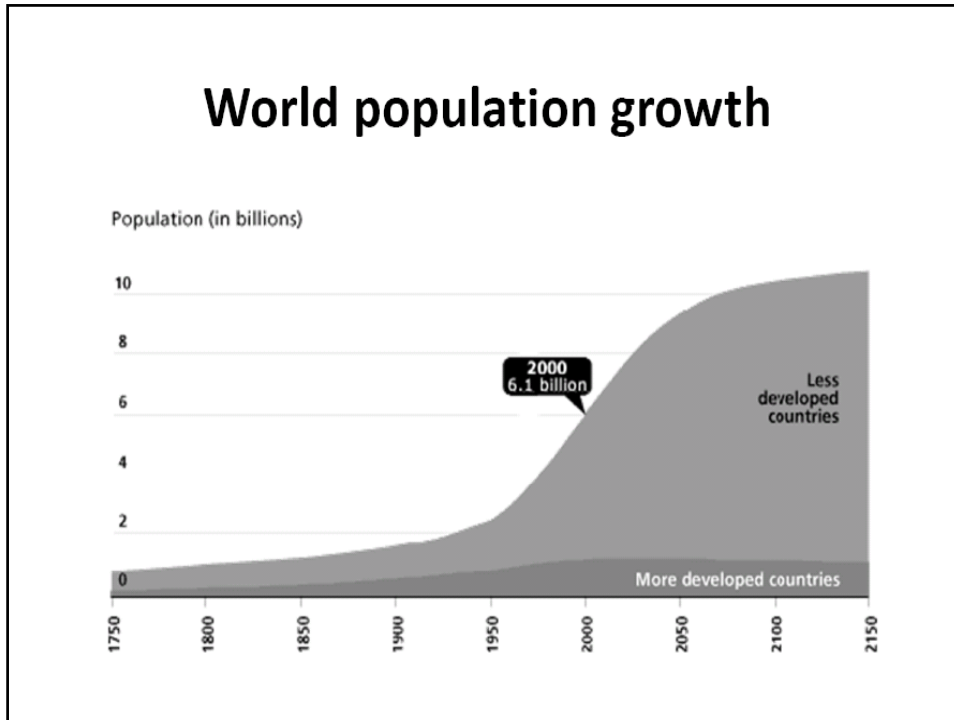
SA Import and export balance (Prunes)



World population growth

World Population Growth Through History





Economic growth in emerging markets will remain buoyant

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

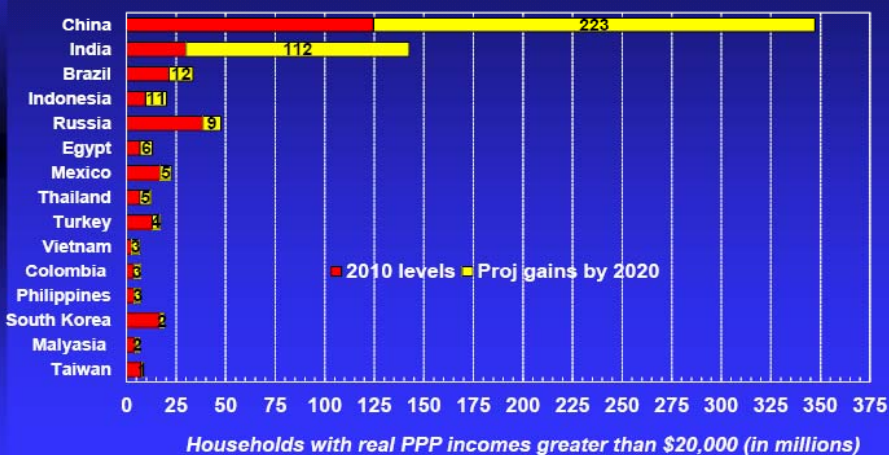
Source: Chief Economist: USDA

- 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.

“Middle Class” in Developing Countries Could Reach 730 Million Households By 2020, Up 104% From 2010 Levels

20% of households in these countries are middle class. By 2020, this could increase to 36% and the impact on food consumption will be large

Developing countries with fastest growing “middle class”



Source: M, Dwyer (USDA Chief Economist)

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?



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