



Pome Fruit Industry Overview

Prognosfruit | August 2017

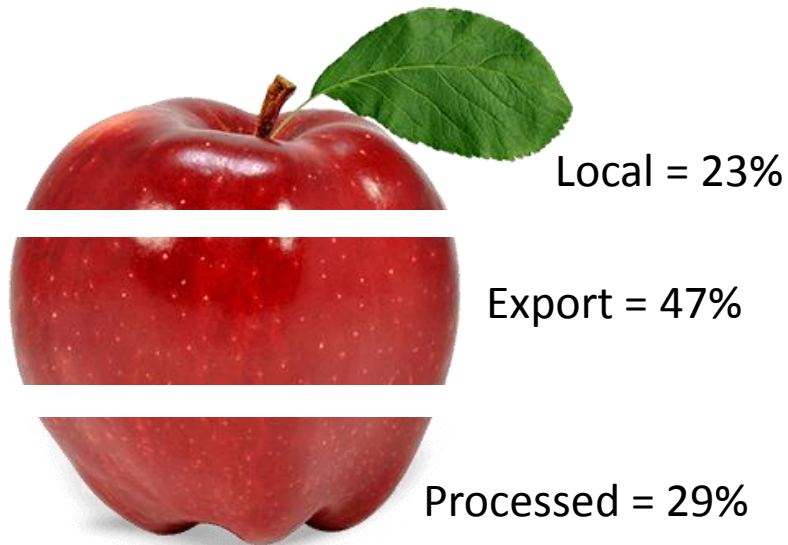
Nic Dicey

Chairman: SA Apple & Pear Producers' Association



Industry perspective

POME FRUIT



902 129 tons



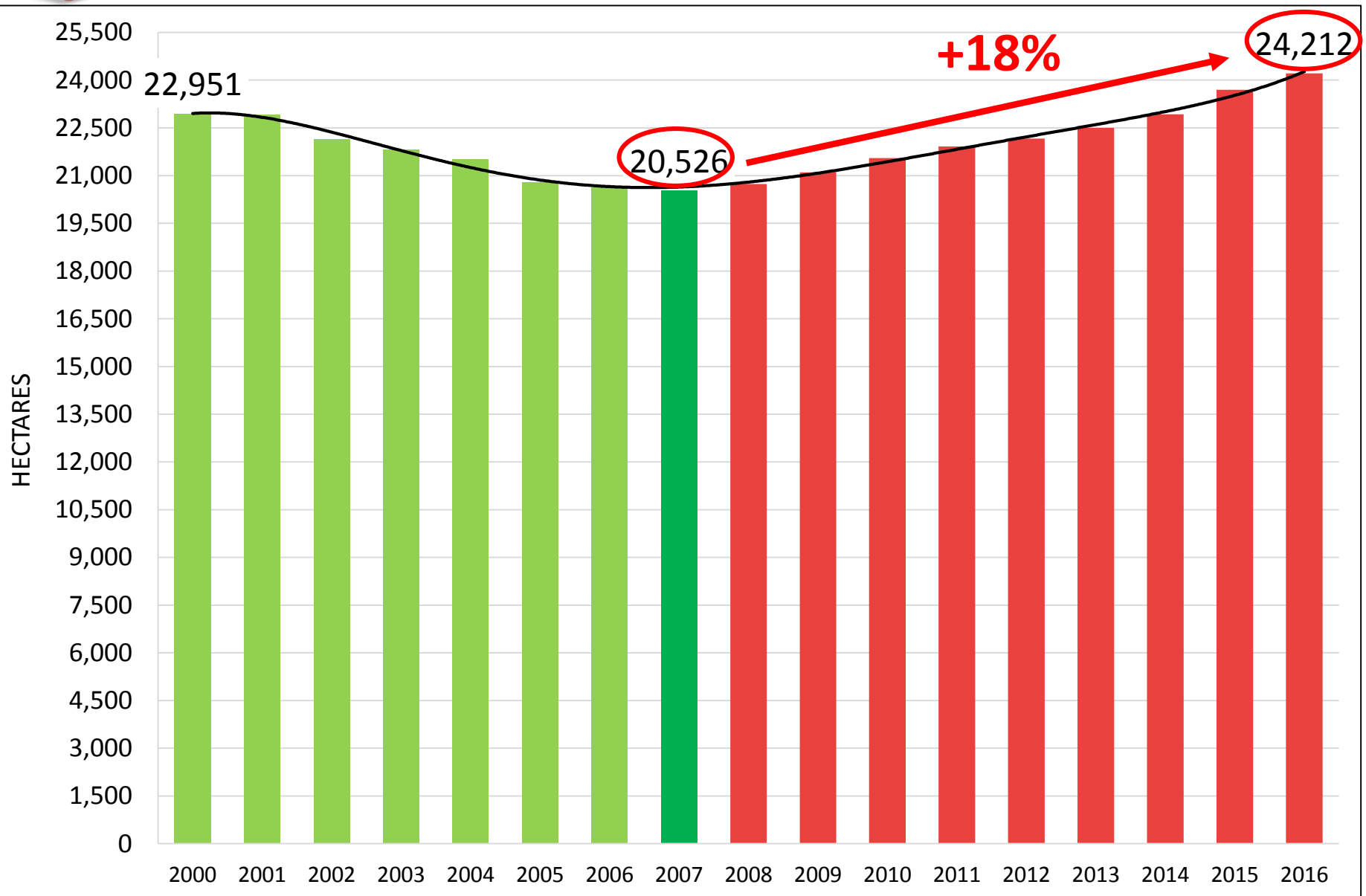
431 535 tons



APPLES

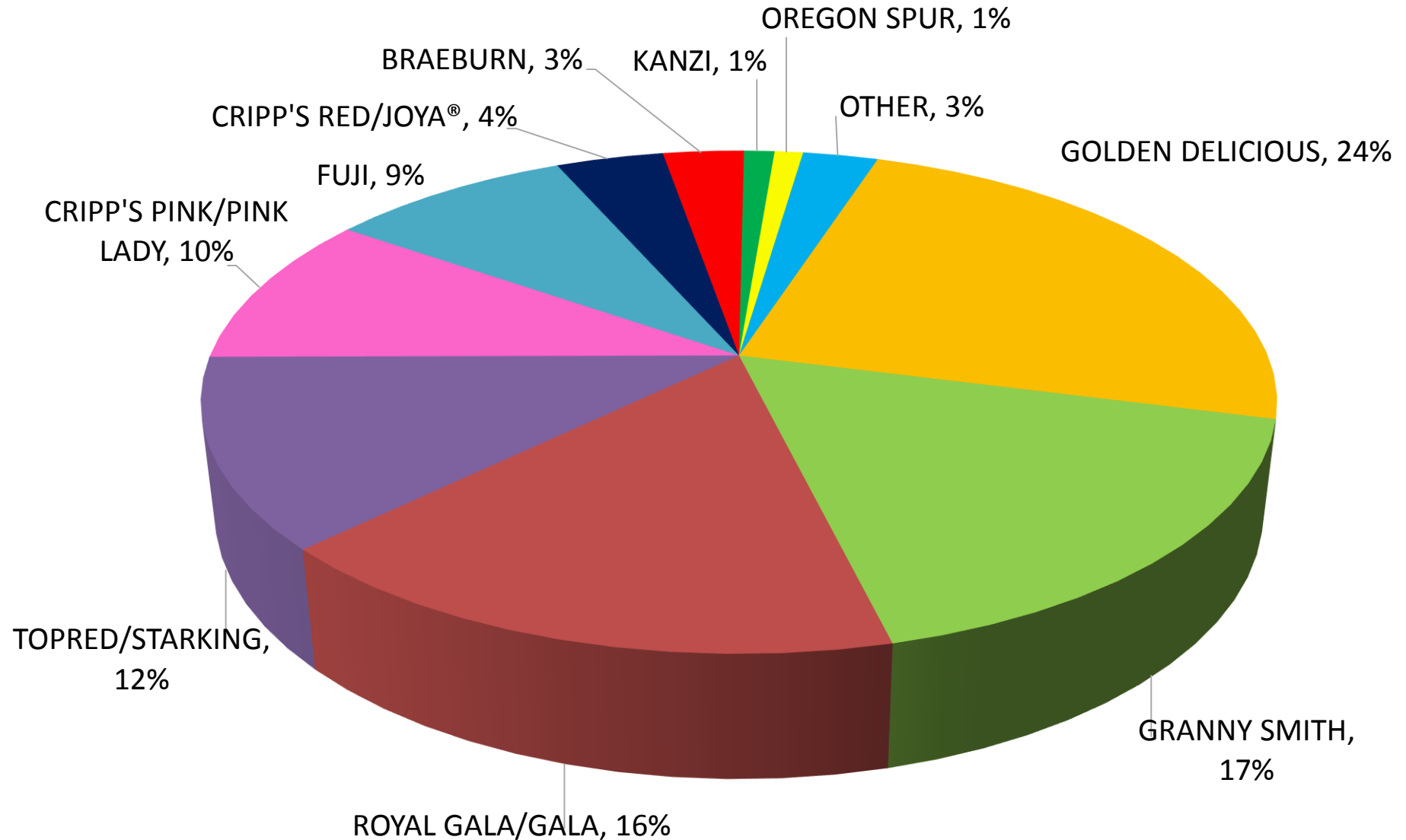


SA Apple Hectare Trend



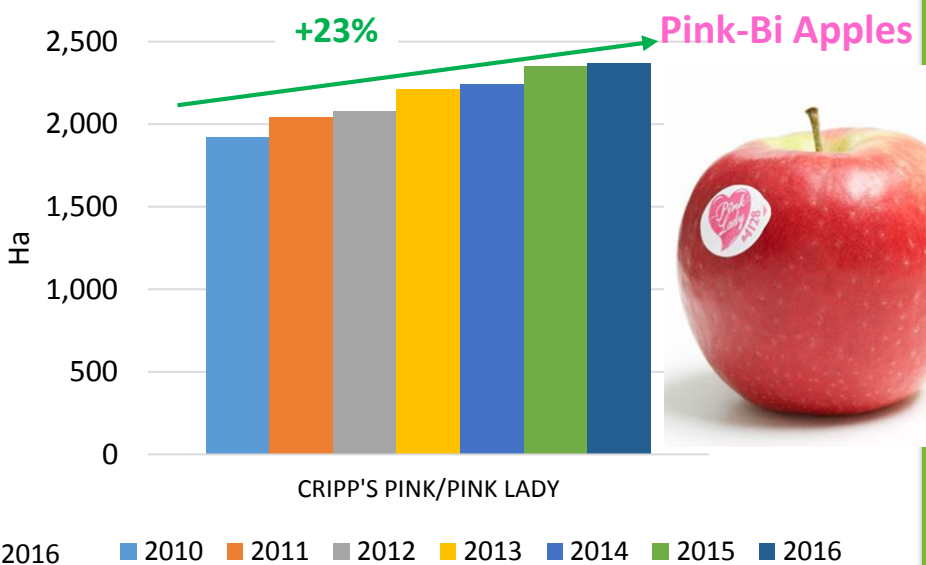
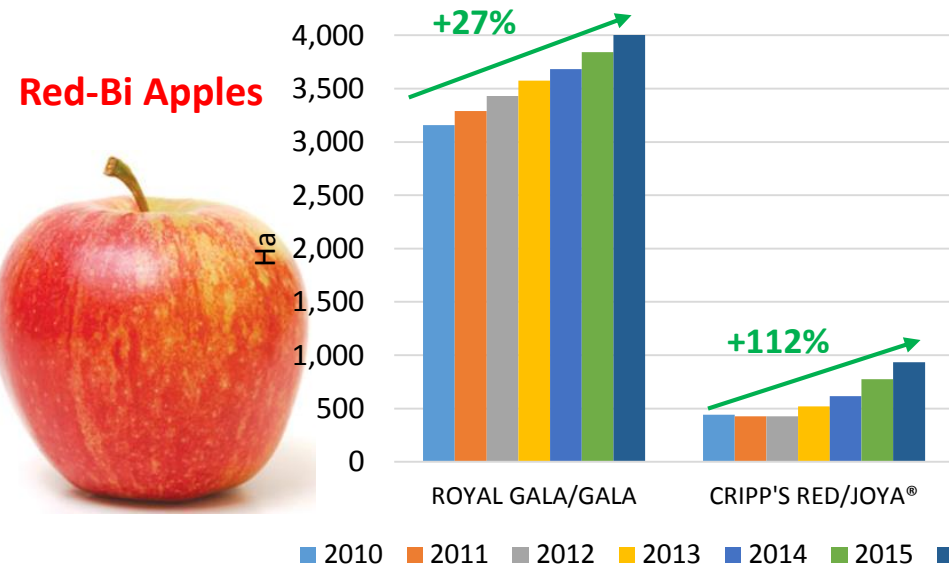
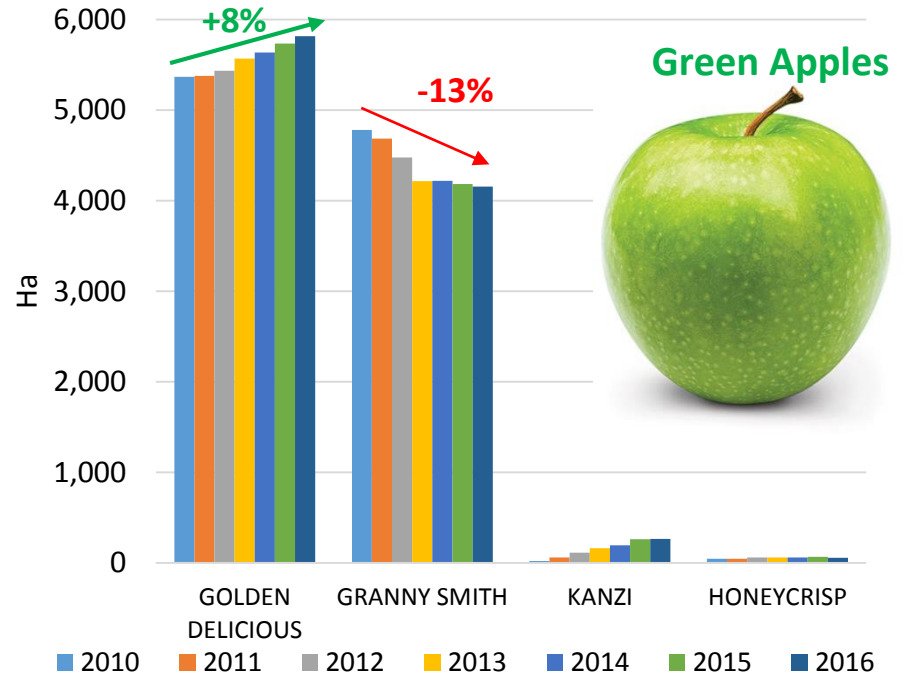
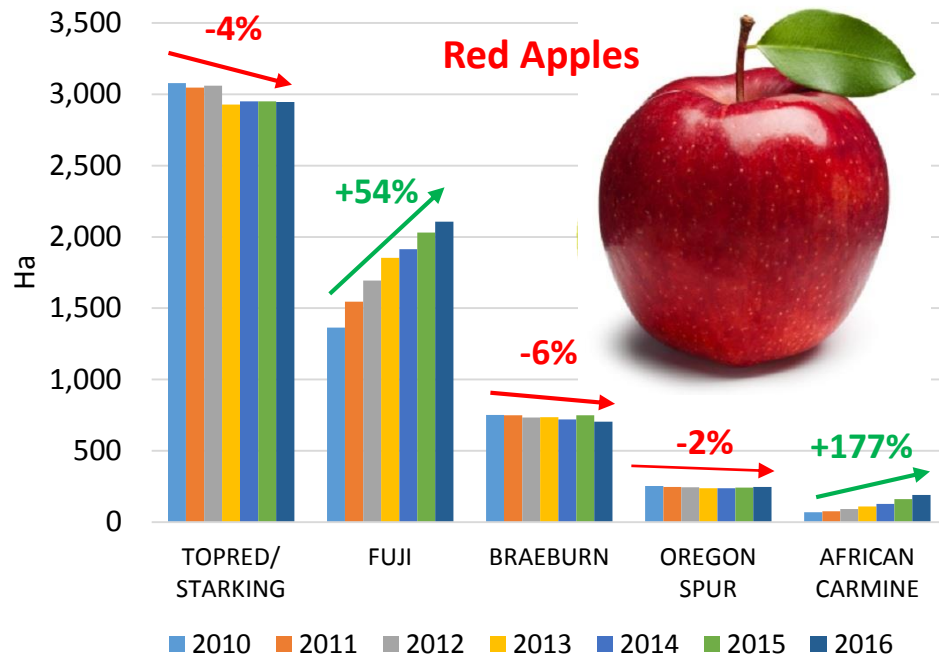


Major Apple Cultivar Distribution 2016





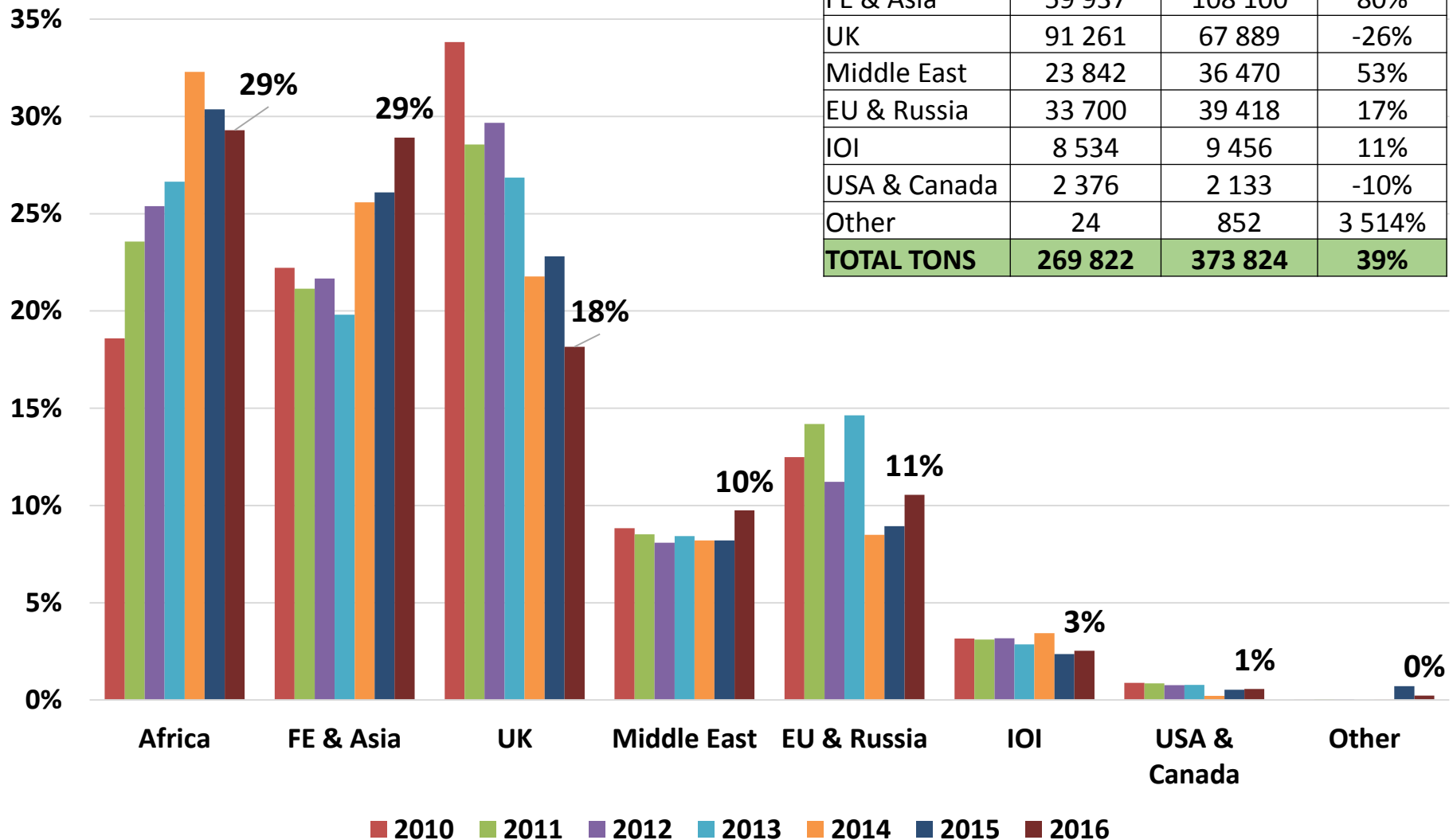
SA Apple Cultivar Trend





Apple exports per market

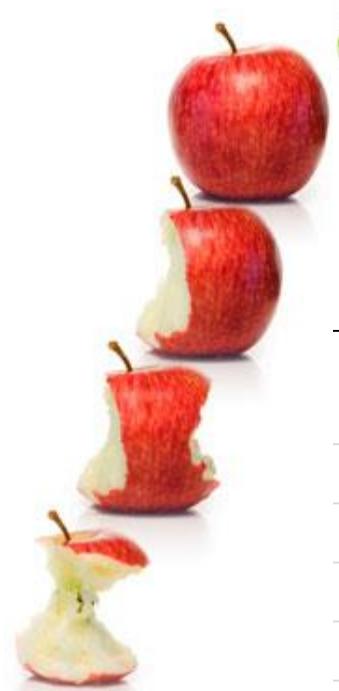
7yr comparison





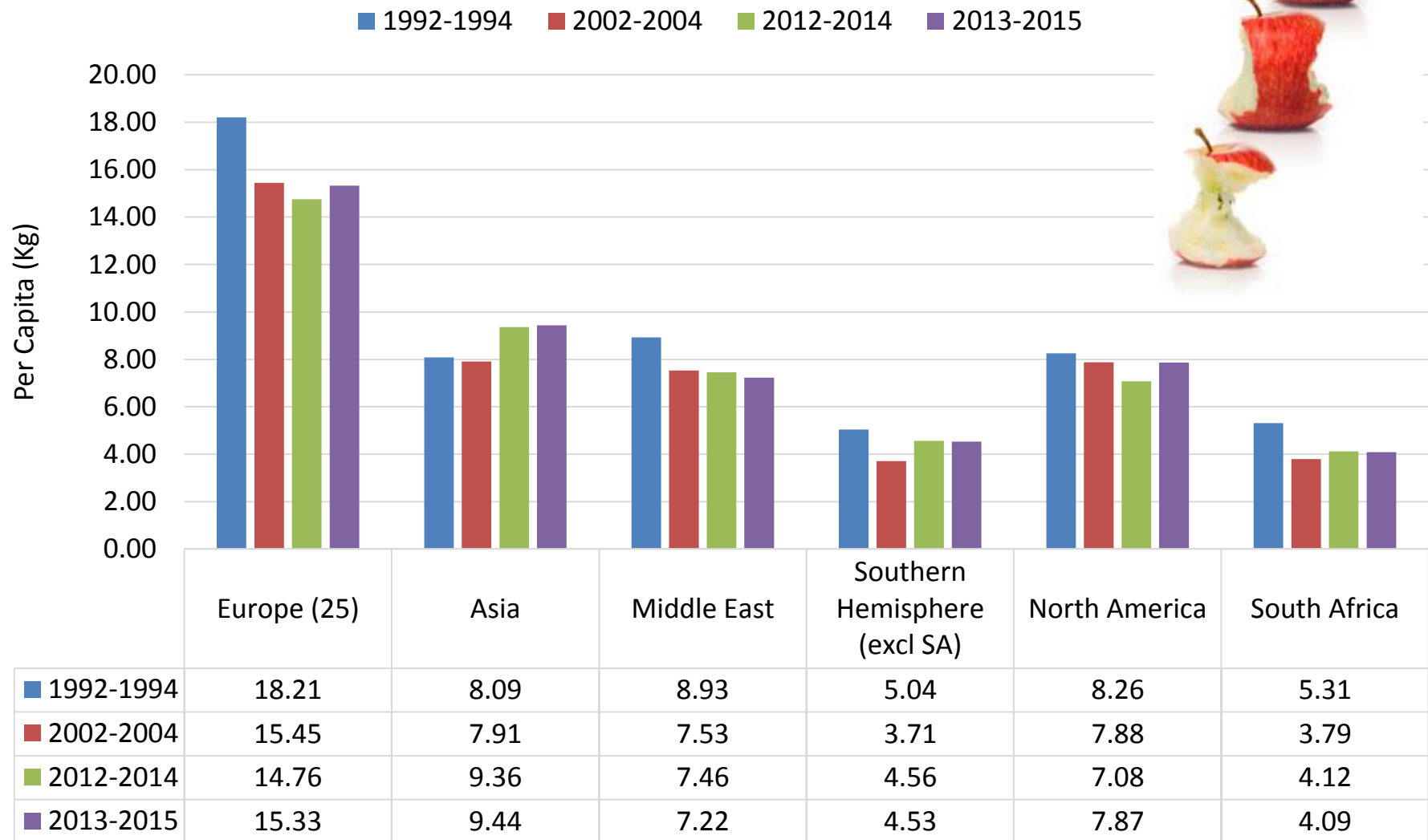
Apple Export Estimate (tons)

Variety	2014	2015	2016	2 yr Average	2017 Estimate	2016 vs 2017	
GOLDEN DELICIOUS	98 779	104 287	107 741	106 014	96 091	-11 650	-11%
ROYAL GALA/GALA	67 184	93 552	89 413	91 482	93 068	3 656	4%
GRANNY SMITH	62 829	72 159	78 761	75 460	63 185	-15 576	-20%
CRIPPS PINK	20 137	24 958	22 753	23 855	26 024	3 271	14%
PINK LADY ®	21 165	27 853	28 612	28 232	20 424	-8 188	-29%
FUJI	21 088	29 217	35 649	32 433	30 042	-5 607	-16%
TOPRED/STARKING	24 164	28 392	28 421	28 407	25 914	-2 507	-9%
BRAEBURN	13 025	16 914	17 190	17 052	16 505	-685	-4%
CRIPP'S RED	9 414	13 023	12 486	12 755	12 559	73	1%
JOYA ®	477	150	539	344	1 033	494	92%
OTHER	834	2 789	4 227	3 508	4 904	677	16%
Grand Total	339 096	413 292	425 791	419 541	389 749	-36 041	-8%



Apple per capita consumption trends (kg)

Source: Adapted from World Apple Review

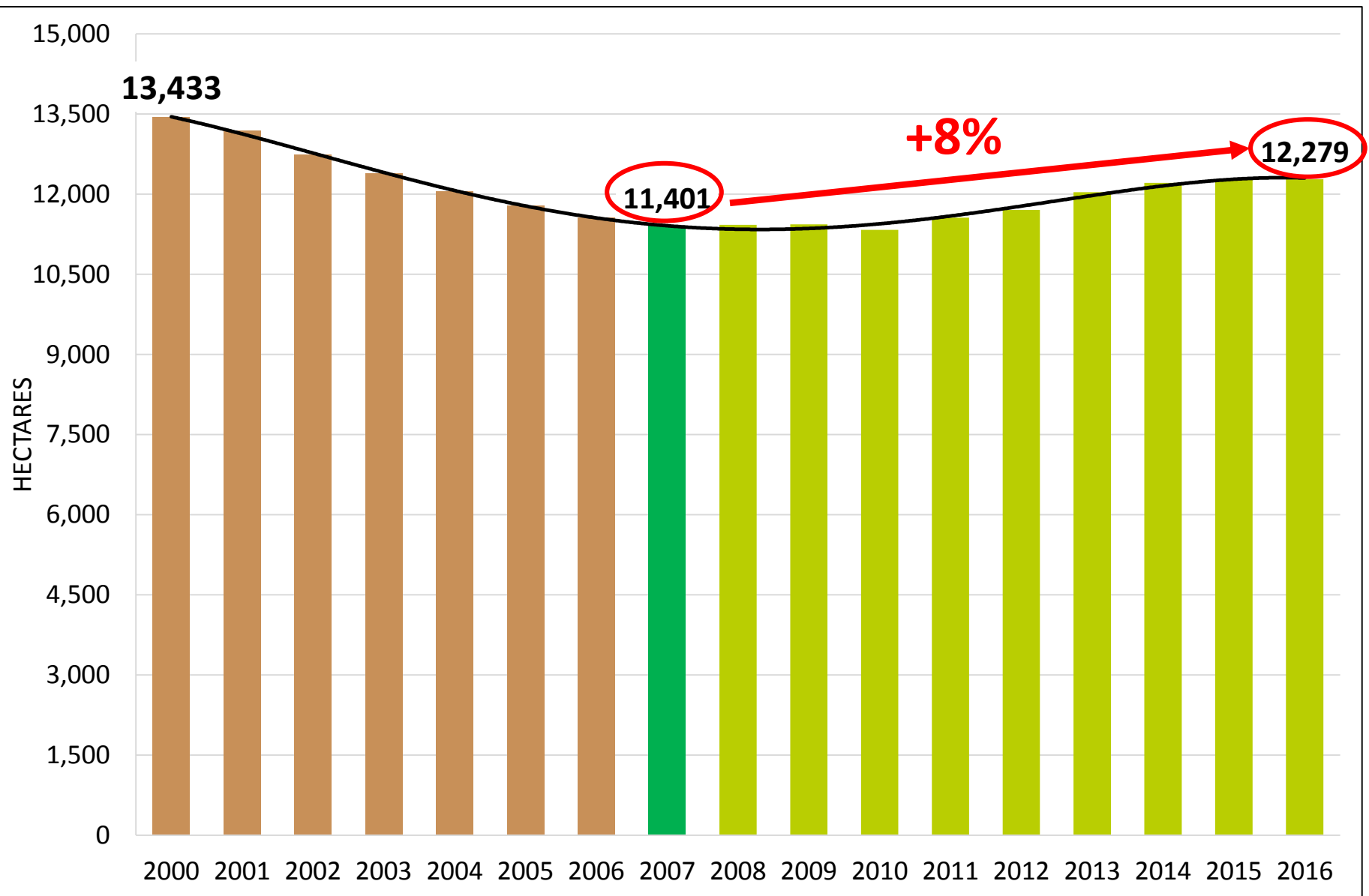




PEARS

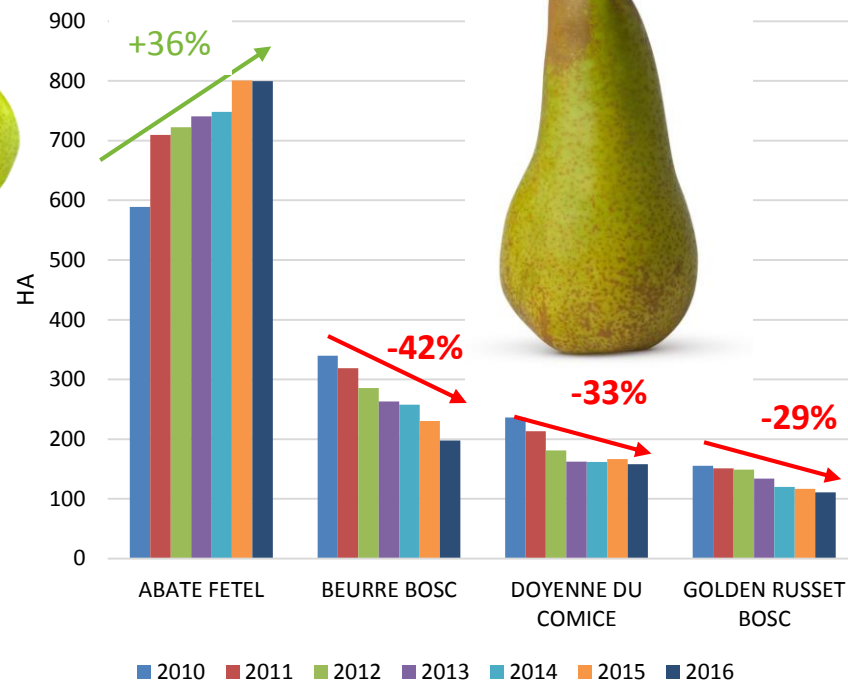
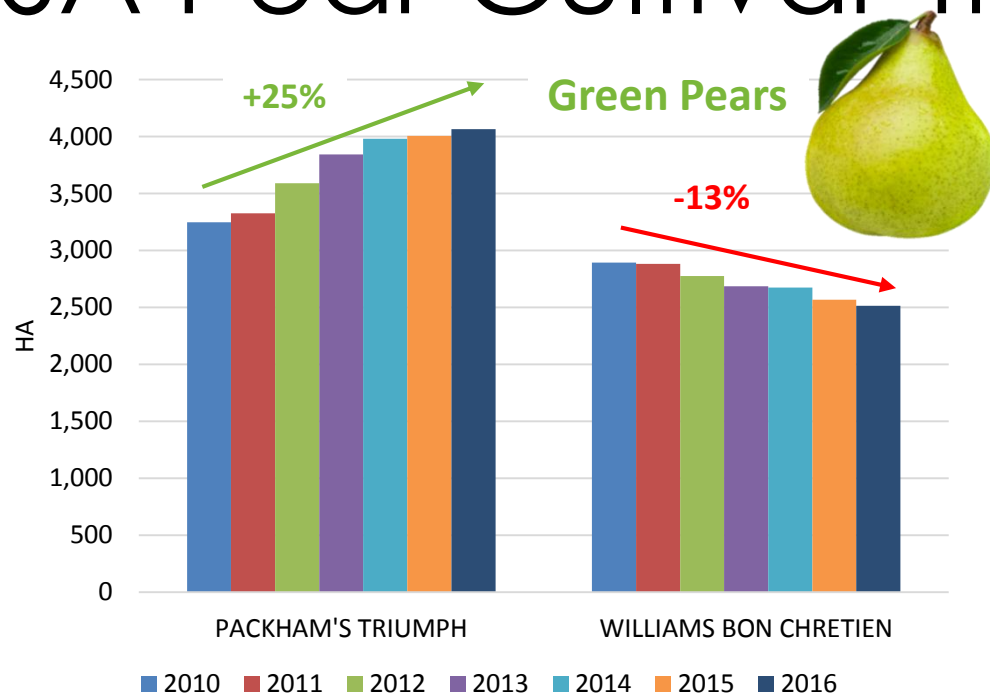


SA Pear Hectare Trend

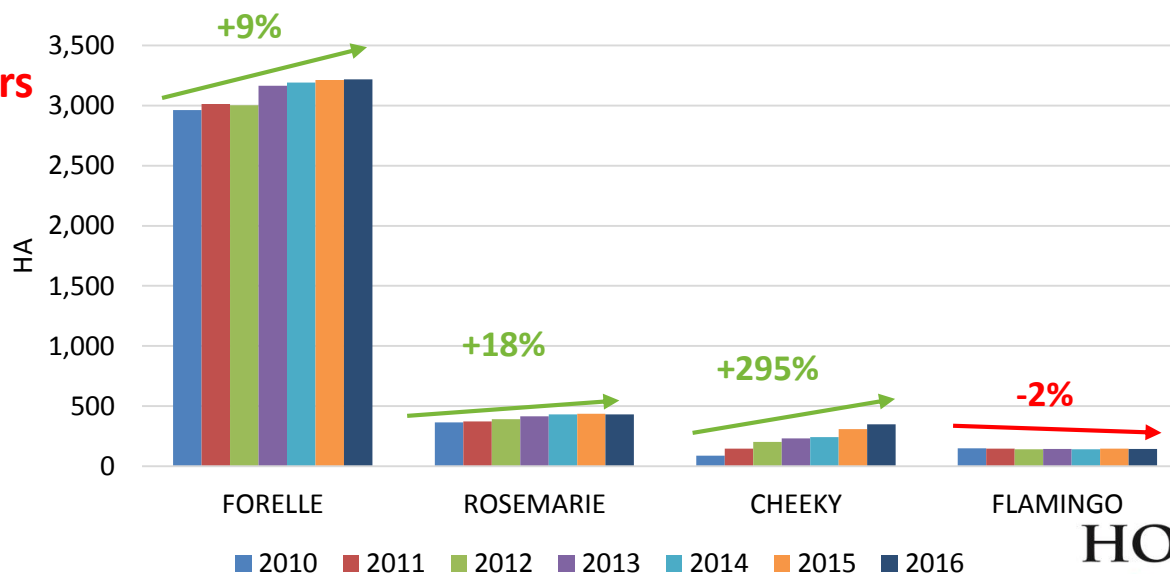


SA Pear Cultivar Trend

Brown Pears

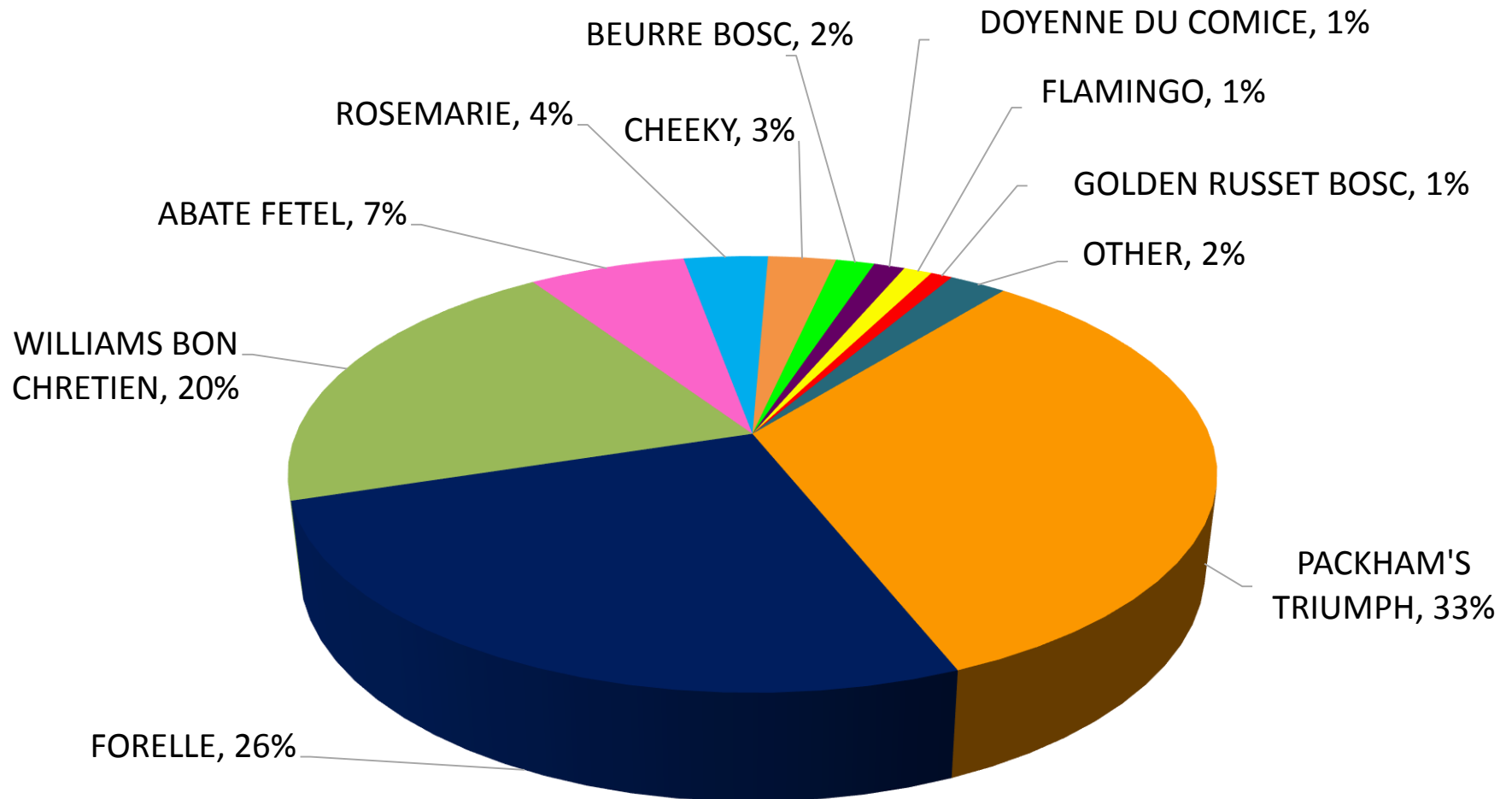


Blush Pears





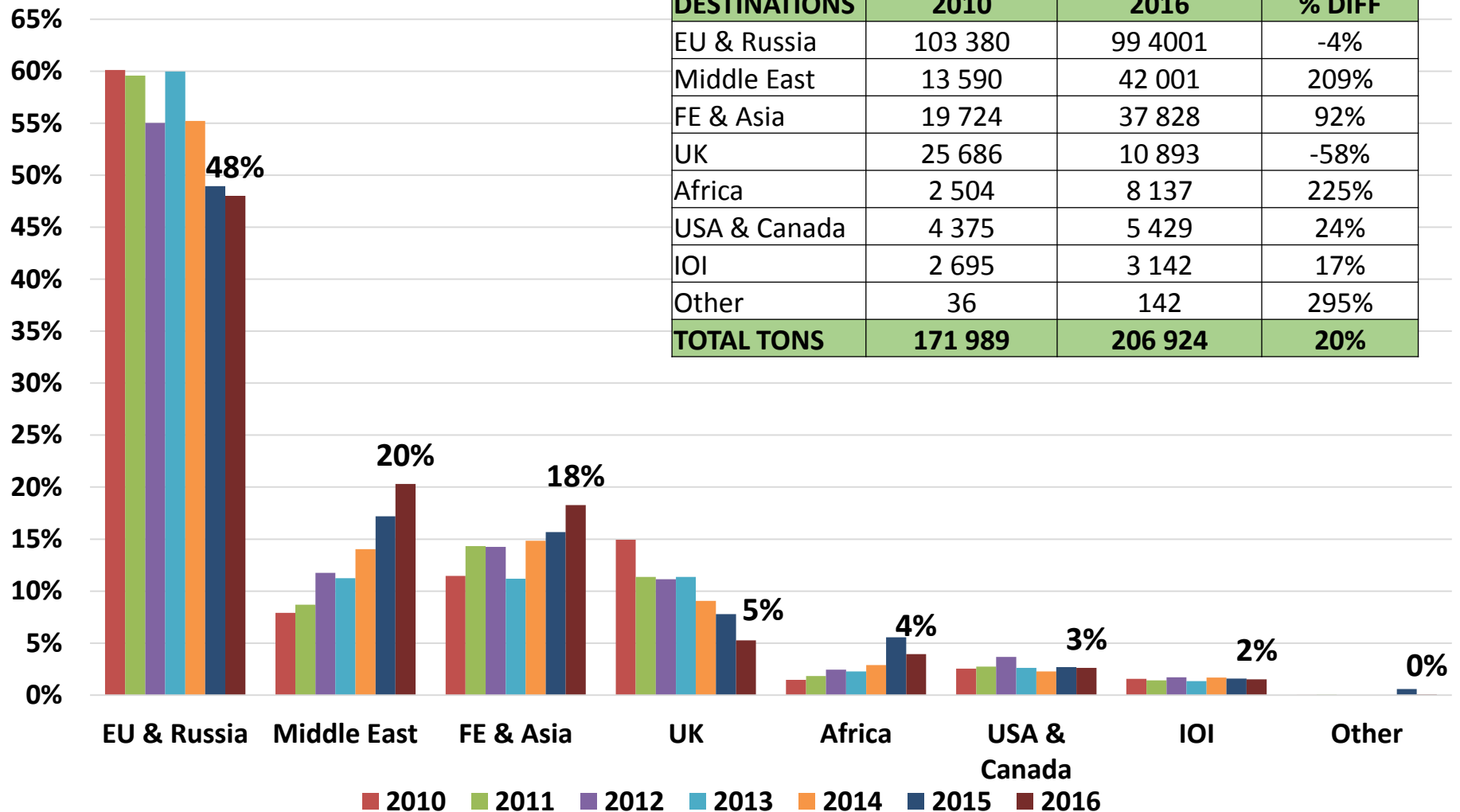
Major Pear Cultivar Distribution 2016





Pear exports per market

7yr comparison





Pear Export Estimate (tons)

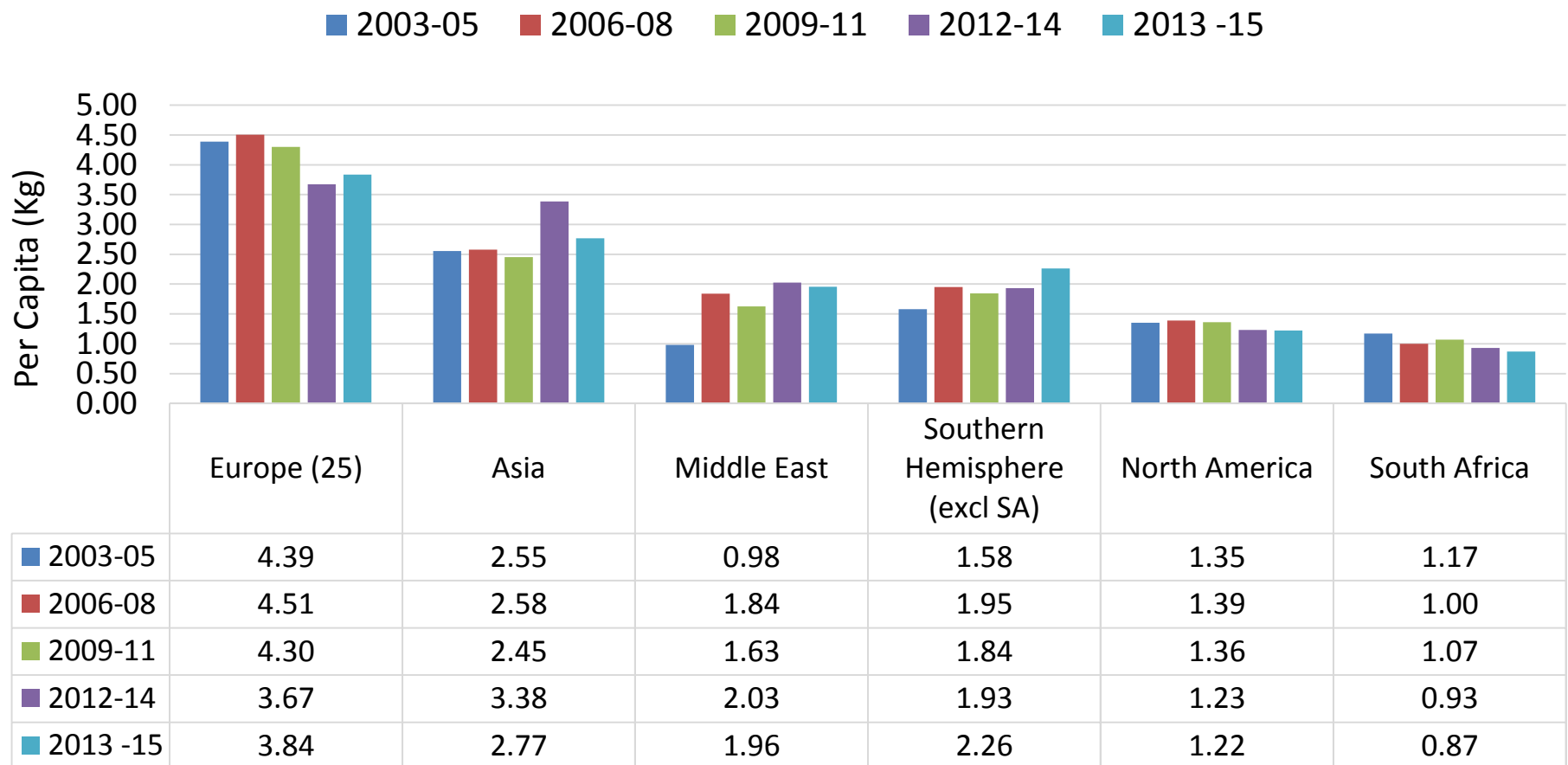
Variety	2014	2015	2016	2 yr Average	2017 Estimate	2016 vs 2017	
PACKHAM'S TRIUMPH	69 685	72 951	79 644	76 297	76 779	-2 866	-4%
FORELLE	40 886	44 759	46 390	45 575	46 492	102	0%
WILLIAMS BON CHRETIEN	33 013	22 552	29 050	25 801	27 506	-1 544	-5%
ABATE FETEL	17 577	14 612	19 052	16 832	16 433	-2 619	-14%
VERMONT BEAUTY	17 960	14 522	19 550	17 036	16 052	-3 498	-18%
SEMPRE	5 455	3 762	5 940	4 851	4 320	-1 620	-27%
ROSEMARIE	4 222	3 917	5 730	4 824	6 111	381	7%
BEURRE BOSC	4 055	3 433	3 974	3 704	2 452	-1 522	-38%
GOLDEN RUSSET BOSC	2 864	2 797	3 466	3 132	3 115	-351	-10%
CHEEKY	630	1 044	2 208	1 626	2 959	751	34%
DOYENNE DU COMICE	3 198	4 673	3 030	3 851	4 168	1 138	38%
FLAMINGO	1 288	1 093	1 759	1 426	1 576	-183	-10%
BON ROUGE	747	581	830	705	905	75	9%
BEURRE HARDY	1 014	800	782	791	544	-239	-31%
OTHER	520	514	787	650	804	18	2%
Grand Total	203 112	192 009	222 192	207 101	210 214	-11 978	-5%



Pear per capita consumption trends (kg)



Source: Adapted from World Pear Review



Impact of drought



1. Adapting production practises
 - Mulch is a must.
 - Irrigation scheduling (probes, satellites, etc.) critical.
 - Pruning/thinning practises to control crop load (fruit size & volume of fruit on tree)
 - Culling of marginal orchards
2. 3rd consecutive dry cycle – impacting all areas (some more severe) and knock-on impact of previous season.
3. Decline in demand for trees (nurseries)
4. Boreholes under pressure
5. Insufficient storage capacity and added pressure on existing infrastructure
6. Good chilling units – late start to winter
7. Uncertainty in quantifying the impact & magnitude of drought



Thank you

