

SA TAFELDRUIF INDUSTRIE NUUSBRIEF 8: 20/01/2010

2009/2010 Season review

Table 1: Weekly intakes from all production regions up to week 1

Region Names	2009/2010	2008/2009	2008/2009
	<i>Accumulative up to Week 1 including Week 53</i>	<i>Accumulative up to Week 1</i>	<i>Accumulative up to Week 2</i>
All regions	21 539 534	14 603 086	17 944 007
Berg River	1 690 806	303 100	922 862
Hex River	768 311	16 187	285 909
Northern Province	3 353 377	2 659 774	2 949 148
Olifants River	908 084	422 923	665 006
Orange River	14 656 154	11 165 719	13 083 618

Table 1 above provides an intake comparison of the current season against the 2008/2009 season. The current season includes a week 53 while the 2008/2009 season did not. The above table seeks to compare week 1 of the current season against week 1 and 2 of the 2008/2009 season in order to determine the effect of the extra week (week 53) the current season have on seasonal data.

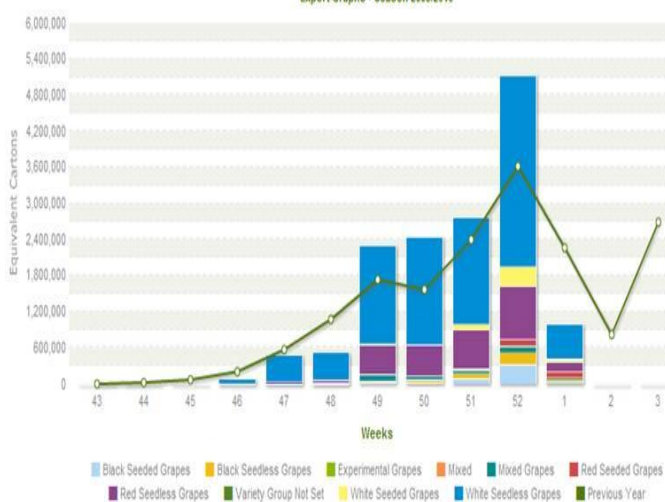
Overall industry volumes up to week 1 show a large increase as compared to the 2008/2009 season. Total inspected volumes are 47% higher than week 1 of 2008/2009 season. However the percentage declines to 20% when compared to week 2 of 2008/2009 season. Factors that may have stimulated volume growth include (i) less rain and hail damage in the early regions (ii) better quality and more yield per hectare (iii) large number of vines entering their full bearing capacity.

The Orange River has had a good season to date with white seedless varieties producing outstanding quality grapes. White seedless varieties contribute more than 76% of the region's total crop. At the end of week 1 in the current season, intake volumes for white seedless were 1.16 million cartons higher than week 2 of 2008/2009 season. However, the difference increased to 2.63 million cartons when compared to week 1 of 2008/2009 season.

The NTA has packed more than 88% of their total crop and has already passed the total crop harvested from this region in the 2008/2009 season. Black and Red seedless varieties showed a strong growth, as both increased by 66% and 23% respectively as compared to 2008/2009 season. The region's late cultivars (i.e. Crimson and Red Globe) are expected to boost the total volumes to over 3.5 million cartons in 2009/2010 season.

Olifants River started at a higher pace in comparison to the 2008/2009 season. The harvest of red seedless cultivars has been relatively good both in terms of quality and quantity. Flame is currently 61% higher than the previous season. White seedless cultivars are also looking positive and large volumes of Thompson and Sugraone are expected in the coming weeks. The region's current intake volumes are 115% higher in comparison to week 1 of 2008/2009 season. However the percentage declines to 37% when compared to week 2 of 2008/2009 season.

Export Graphs - Season 2009/2010



Note:

Week 52 includes volumes shipped in week 53. Low export volumes displayed in week 1 are the results of vessel delays, therefore large shipping volumes are expected.

The shipped volumes indicated on the above graph are subject to change without notice

Intakes Week 1: Accumulative Totals

Region Name	2009/2010	2008/2009	% Diff
All	21 539 534	14 602 376	48%
BTA	1 690 806	922 862	83%
NTA	3 352 377	2 659 054	26%
OTA	908 084	422 923	115%
ORPA	14 656 154	11 165 719	31%
HTA	768 311	16 187	4646%

Exports Week 1: Accumulative Totals

Market	2009/2010	2008/2009	% Diff
All	14 744 730	13 523 333	9%
UK	5 056 245	4 947 909	2%
N-EU	7 886 554	7 239 619	9%
Middle East	497 692	219 523	127%
Far East	720 449	673 280	7%

Note: In addition to the sea freight volumes represented by the table above, a total of 500 thousand cartons has been airfreight to all markets. 64% of these volumes were transported by air to UK, 20% to continental EU and 14% to Middle East.

STREEKS TERUGVOER

NTA

Oes aktiwiteite in die streek is besig om af te neem na mate die laaste Crimson Seedless en Red Globe gepak word. Beide kultivars het meestal verwagtinge oortref in terme van die goeie kwaliteit (suiker inhoud en kleur). Enkele berigte van Regal Seedless wat verbruining in die mark getoon het is ontvang. Prime wat vroeg gepak was en verbruining in die VK mark getoon het, was uiteindelik teen goeie pryse in die EU Kontinent markte verkoop. Daar is aanduidings dat groot volumes Red Globe vanuit Peru druk op die pryse van Suid Afrikaanse Red Globe in die EU Kontinent markte plaas. In die geheel is daar 'n gevoel onder produsente dat die laaste deel van die oesseisoen die beste was in die laaste 3 jaar.

ORPA

Thompson Seedless word steeds verpak terwyl hier en daar ook nuwe, lae volume kultivars (bv. Sugrasixteen) verpak word. Reën het verlede week voorgekom in die streek en het daartoe gelei het dat sommige produsente nie die laaste Thompson Seedless kon oes nie, of uiteindelik minder van die kultivar sal oes as wat aanvanklik geskat is. Die volume reën was egter wisselvallig en die laer Thompson Seedless volumes is dus geïsoleerde gevalle en nie wydverspreid deur die streek nie. Daar word steeds verwag dat oesbedrywigheede teen die einde van week 6 gestaak sal word.

OTPV

Crimson Seedless en Thompson Seedless is byna klaar verpak. Autumn Royal en Waltham Cross word ook nog verpak. Die gehalte is steeds baie goed. Individuele produsente berig dat hul oes volumes op Crimson Seedless effens laer is as wat verwag was.

BTPV

Dit wil voorkom of die donsskimmel probleme al minder begin raak soos verpakking van die mid-seisoen kultivars op dreef kom. Thompson Seedless, Regal Seedless en Victoria van goeie gehalte word tans verpak. Tot dusver was die pakseisoen relatief droog wat beteken dat interne kwaliteit goed is terwyl die trosse relatief gesond bly (vry van bederf). Sommige produsente het al aangedui dat hul oesvolumes gemiddeld tot onder gemiddeld is / gaan wees as gevolg van ligter tros massas.

HTA

Flame Seedless is so te sê klaar verpak. Korrel barsies (in die wingerd) het veroorsaak dat sommige produsente 10% tot 15% minder Flame verpak het as wat hul oesskattings was. Daar word ook tans Victoria, Regal Seedless, Sunred Seedless, Ralli Seedless en Thompson Seedless verpak. Daar word verwag dat Red Globe, Autumn Royal en Ebony Star in die komende twee weke verpak sal word. 'n Interessante opmerking uit die streek is dat dit voorkom of Alphonse Lavalée hierdie seisoen stadig en/of laat verkleur. Geen verklaring vir hierdie oënskynlike abnormaliteit kon nog gevind word nie.

Transformasie-Nuwe aansoekforms, en n nuwe program beskikbaar Preferred cultivars, preferred country

“Preferred cultivars, preferred country” is n nuwe SATI program waar aansoek gedoen kan word vir finansiële ondersteuning om nuwe kultivars aan te plant. Die program is deel van SATI se visie, “Preferred country of origin”. Besigheidseenhede wat betrokke is by bemagtiging word aangemoedig om vroegtydig aansoek te doen.

Training and mentorship support

The packing season is drawing to a close in some regions. Revised application forms for support under training and mentorship as well as the new program; “Preferred cultivars, preferred country” will be available on the SATI website next week. Please contact the office for printed copies or for further information and explanations of eligibility and processes if needed.

Beroepsklassifikasie studie vir beursuitruiking

Agri-Expert, wat betrokke is by die studie om behoeftes te bepaal vir beurse en opleiding, sal in Februarie 2010 hulle verslag afhandel. Beurse sal daarvolgens uigereik word. Indien daar belangstelling is vir beurse vir die 2010 jaar, word aplikante versoek om voor Februarie n afspraak te maak met **SATI se transformasiebestuurder**.

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Consumer Educational Campaign

UK Launch – Dorchester Hotel, 14th January 2010

The official launch of the UK consumer educational campaign took place on the 14th January 2010 at the Dorchester Hotel in London where invited guests (retailers, wholesalers, buyers and the media) were treated to some true SA hospitality, wine and great food. The main objectives and outcomes of the campaign were highlighted together with acknowledgement to the exporters who voluntary contributed to the campaign. Below is the campaign mascot with SA's fruit industry representatives.



L-R: Ronald Ramabulana, (NAMC); Rhomona Gounden, (SATI); Elaine Alexander (SATI); Justin Chadwick (CGA); Stuart Symington (FPEF); Anton Rabe (Hortgro SA); Stefan Conradie (Hortgro SA)

To date various stores have commenced instore tastings. Information booklets have been inserted into various punnets with mixed varieties. SATI visited tastings at Asda, Morrisons and Sainsbury's. It was good to see many interested consumers sampling SA produce. A bonus this month was a 2 page editorial in “Hello” magazine.



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