



SATI

SOUTH AFRICAN TABLE
GRAPE INDUSTRY

**CREATING A PROGRESSIVE,
EQUITABLE AND SUSTAINABLE
TABLE GRAPE INDUSTRY**



**STATISTICS BOOKLET
2013 / 2014**



TERM	DESCRIPTION
Intake	Produce inspected and passed for Export
Export	Produce that has left South African territory
Variety	Cultivar
PPECB	Perishable Products Export Control Board
FOB	Free On Board
PUC	Production Unit Code
R/HA	South African Rand per Hectare

2013/2014 EDITION

This edition depicts the 2013/2014 season (most recent harvest) and is released in the year of harvest (one year earlier than previously). To avoid a gap in statistics, this edition includes some information of the 2012/2013 harvest.

DISCLAIMER

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SEASON OVERVIEW 2013 / 2014

The total intake volume presented for inspection and passed for export during the 2013/2014 season was 50,548 million equivalent 4.5 kg cartons of which 50,311 million equivalent 4.5 kg cartons were exported. The intakes decreased by 9% compared to those of the 2012/2013 season. This could be attributed to rain and hail storms, which affected the product during the season. The only region to show any significant growth in intake volume was the Olifants river region.

The demand for seedless varieties continues to increase, with black seedless varieties showing the biggest increase (147 %) over the past five years. The demand for red seeded varieties showed an increase in Africa, the Far East (83% increase) and Russia (80% increase). The demand for seeded varieties however, continues to decline.

UK AND EUROPE

The UK and Europe continue to be the main export destinations, accounting for 79% of total exports for South African table grape producers. However, the market has not shown any significant increase in demand over the past five years. The UK saw the greatest decrease in wholesale prices, (13%, when compared to the 2012/2013 average). The Netherlands continued to have the lowest average seasonal price, even though prices were 6% higher than those of the previous season. The UK's retail prices for all table grape varieties decreased. Black grapes saw the greatest decrease (8%) while mixed varieties showed the smallest decrease (2%), on average.

FAR EAST AND MIDDLE EAST

The Far East imported 5,096 million equivalent 4.5kg cartons during the 2013/2014 season. This constitutes an increase of 55% over the past five years. Black seedless grapes showed the greatest increase of 479%, while red seeded grapes increased by 100% over the same period. On the other hand, exports to the Middle East showed a slight decline in volumes (2,711 during the 2009/10 season to 2,584 during the 2013/14 season).

RUSSIA

The demand for South African table grapes continues to grow in the Russian market and has shown a 53% growth rate over the past 5 years. However Russia accounts for 3% of the total market only. The reason for this is that the largest volumes of table grapes in Russia are sold between September and the first part of January, while the South African production volumes begin to pick up in January. The demand for table grapes declines as soon as spring sets in. According to official Russian statistical data, the volumes of imported table grapes in Russia decreased in the first half of the 2013/2014 season. From July to December 2013 Russia imported 237 thousand tons of table grapes from all over the world. This amounts to 17% less than in the same period in 2012. A 10% decrease in volumes imported from Turkey accounts for the bulk of this reduction.

AFRICA

The table grape market in Africa has seen growth of 113% over the past 5 years. There is a very positive outlook on the demand for South African table grapes in Africa as the continent is becoming more politically stable and economies are growing. Angola, Ghana, Nigeria and Senegal are the biggest importers of South African table grapes. Although this market is very small (less than 1% of South African exports) there is a lot of potential for growth.



PRODUCTION OVERVIEW 2013/2014**NORTHERN PROVINCES REGION**

Harvesting in the Northern Provinces started in Week 43. By the 4th week of the season producers had completed packing most of the early season varieties. Due to normal summer-rainfall conditions, mid and late season varieties were packed at a slower rate. The quality of all varieties remained excellent during the season.

ORANGE RIVER

Heavy frost in early September caused major damage to early and early-mid season varieties. The damage was not limited to destroyed bunches, but remaining bunches were smaller with smaller berry sizes which led to a significant drop in volumes for the first half of the season. The volumes recovered somewhat towards the end of the season due to a higher than anticipated Thompson Seedless crop that was harvested. Despite the adverse weather conditions the quality of produce was very good.

OLIFANTS RIVER

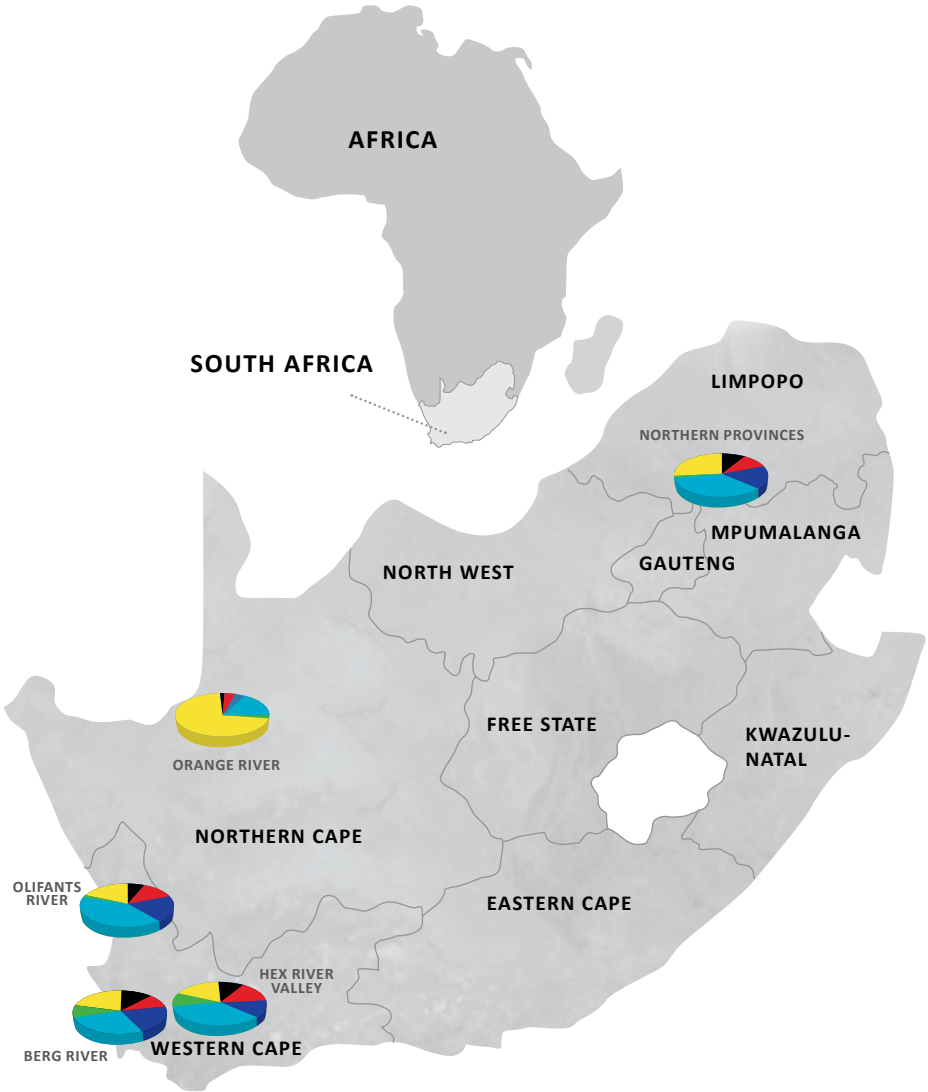
Rainy conditions in the first week of January briefly disrupted the harvest season. The Olifants River region, which has seen significant growth in plantings and yields since 2009/10 once again delivered a record crop and upheld its reputation for being the only Western Cape region that is rarely affected by unseasonal weather conditions.

BERG RIVER

The Berg River region experienced persistent rain early in Week 1 of the harvest period which reduced volumes of the early-season crop to a fraction of its potential of expected volumes. Fortunately the mid and late season varieties were not really affected by this and the season slowly recovered to the point that it ended quite positively for most producers.

HEX RIVER VALLEY

Hail caused major visual damage to young grape bunches in the lower Hex Valley in December 2013. This was followed by continuous rain in the first half of Week 1 over the entire region, leading to significant crop losses for all producers on early varieties. The mid and late season period was however characterised by good weather conditions, leading to a recovery in volumes and quality and ultimately yielding a good harvest.



- BLACK SEEDED GRAPES ● BLACK SEEDLESS GRAPES ● RED SEEDED GRAPES
- RED SEEDLESS GRAPES ● WHITE SEEDED GRAPES ● WHITE SEEDLESS GRAPES

PRODUCTION REGIONS

REGION NAME	INSPECTION AREA	2013 / 2014	2012 / 2013
NORTHERN PROVINCES	Brits	44 849	85 096
	Bethlehem	14 639	
	Cape Town	10 485	13 726
	Groblersdal / Marble Hall	3 027 735	3 158 952
	Naboomspruit / Nylstroom	230 010	253 969
	Potgietersrus (Mokopane)	511 903	403 272
	Vaal Triangle	243 978	240 633
NORTHERN PROVINCES TOTAL		4 083 599	4 155 648
ORANGE RIVER	Augrabies	3 670 591	4 180 990
	Blouputs	1 485 798	1 489 870
	Cape Town	14 657	42 017
	Elgin	360	
	Friersdale	274 116	250 422
	Groblershoop	45 077	105 732
	Kakamas	3 765 203	3 614 651
	Kanoneiland	1 877 706	2 116 752
	Lower Orange River	3 466 216	3 555 954
	Upington	519 237	682 270
Vaal Triangle		724	
ORANGE RIVER TOTAL		15 118 961	16 039 382
OLIFANTS RIVER	Cape Town	20 810	26 647
	Clanwilliam	661 449	580 473
	Trawal	1 969 114	1 725 858
	Vaal Triangle	105	
	Vredendal	469 683	392 859
OLIFANTS RIVER TOTAL		3 121 056	2 725 942
BERG RIVER	Cape Town	73 222	44 597
	Ceres		38 288
	Paarl	4 274 790	4 350 575
	Piketberg	3 840 224	4 379 594
	Riebeeck Kasteel	1 050 602	1 134 727
	Saron	2 126 994	2 722 465
	Tulbagh	13 170	
	Vaal Triangle		1 922
BERG RIVER TOTAL		11 379 002	12 672 168
HEX RIVER VALLEY	Cape Town	120 970	50 309
	De Doorns	310 788	165 820
	Ladismith	28 756	11 994
	Montagu	93 958	44 222
	Robertson	286 400	311 179
	Vaal Triangle		485
	Worcester	16 005 324	17 702 716
HEX RIVER VALLEY TOTAL		16 846 196	18 286 725
GRAND TOTAL		50 548 814	53 879 865

Source: SATI and PPECB 2012/2013 & 2013/2014

REGIONAL CALENDARS

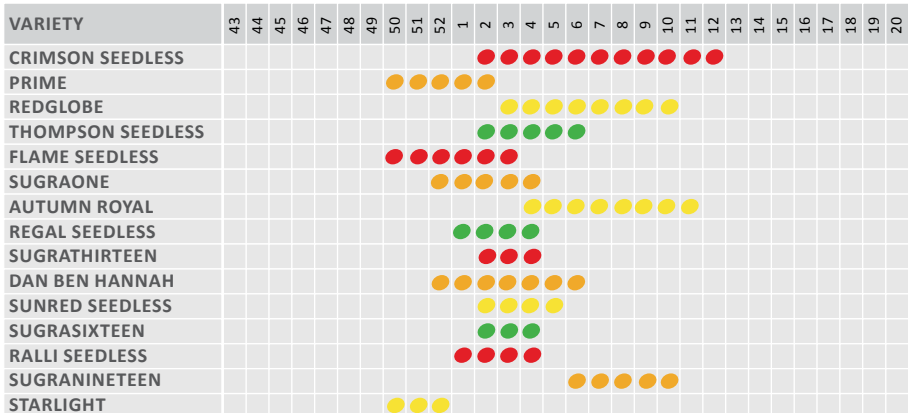
NORTHERN PROVINCES



ORANGE RIVER



OLIFANTS RIVER





BERG RIVER

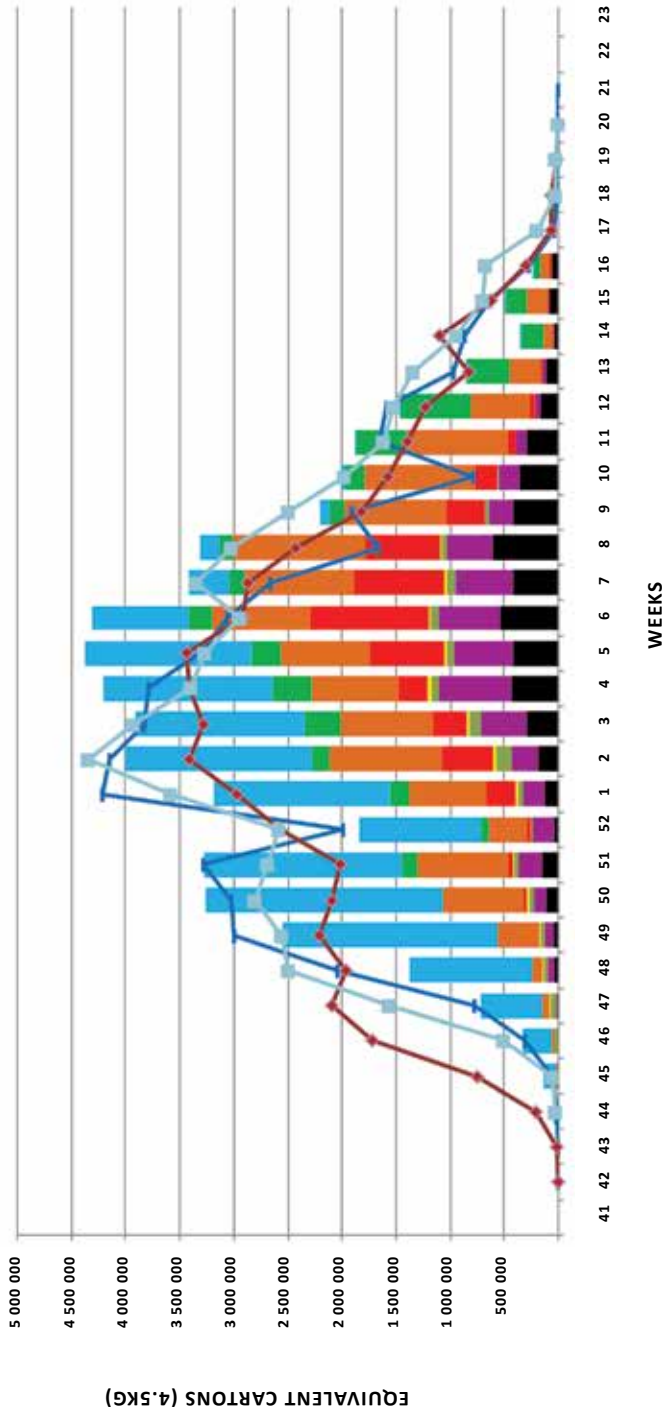
VARIETY	43	44	45	46	47	48	49	50	51	52	1	2	3	4	5	6	7	8	9	10	11	12	13	14	15	16	17	18	19	20	
CRIMSON SEEDLESS																															
PRIME																															
REDGLOBE																															
THOMPSON SEEDLESS																															
FLAME SEEDLESS																															
SUGRAONE																															
DAUPHINE																															
AUTUMN ROYAL																															
REGAL SEEDLESS																															
SUGRATHIRTEEN																															
DAN BEN HANNAH																															
VICTORIA																															
LA ROCHELLE																															
SUNRED SEEDLESS																															
BARLINKA																															
SUGRASIXTEEN																															
RALLI SEEDLESS																															
SUGRANINETEEN																															
ALPHONSE LAVALLÉE																															
STARLIGHT																															

HEX RIVER VALLEY

VARIETY	43	44	45	46	47	48	49	50	51	52	1	2	3	4	5	6	7	8	9	10	11	12	13	14	15	16	17	18	19	20	
CRIMSON SEEDLESS																															
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2012 / 2013 INTAKE GRAPH

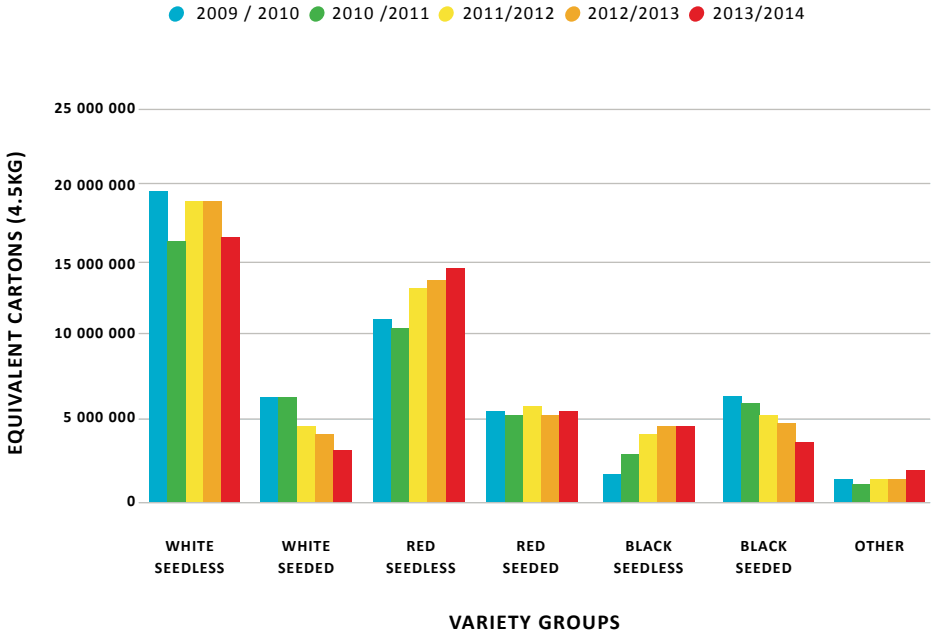
- BLACK SEEDED ● BLACK SEEDED ● EXPERIMENTAL ● MIXED GRAPES ● RED SEEDED
- RED SEEDED ● WHITE SEEDED ● WHITE SEEDED ● 2009 / 2010 ● 2010 / 2011 ● 2011 / 2012



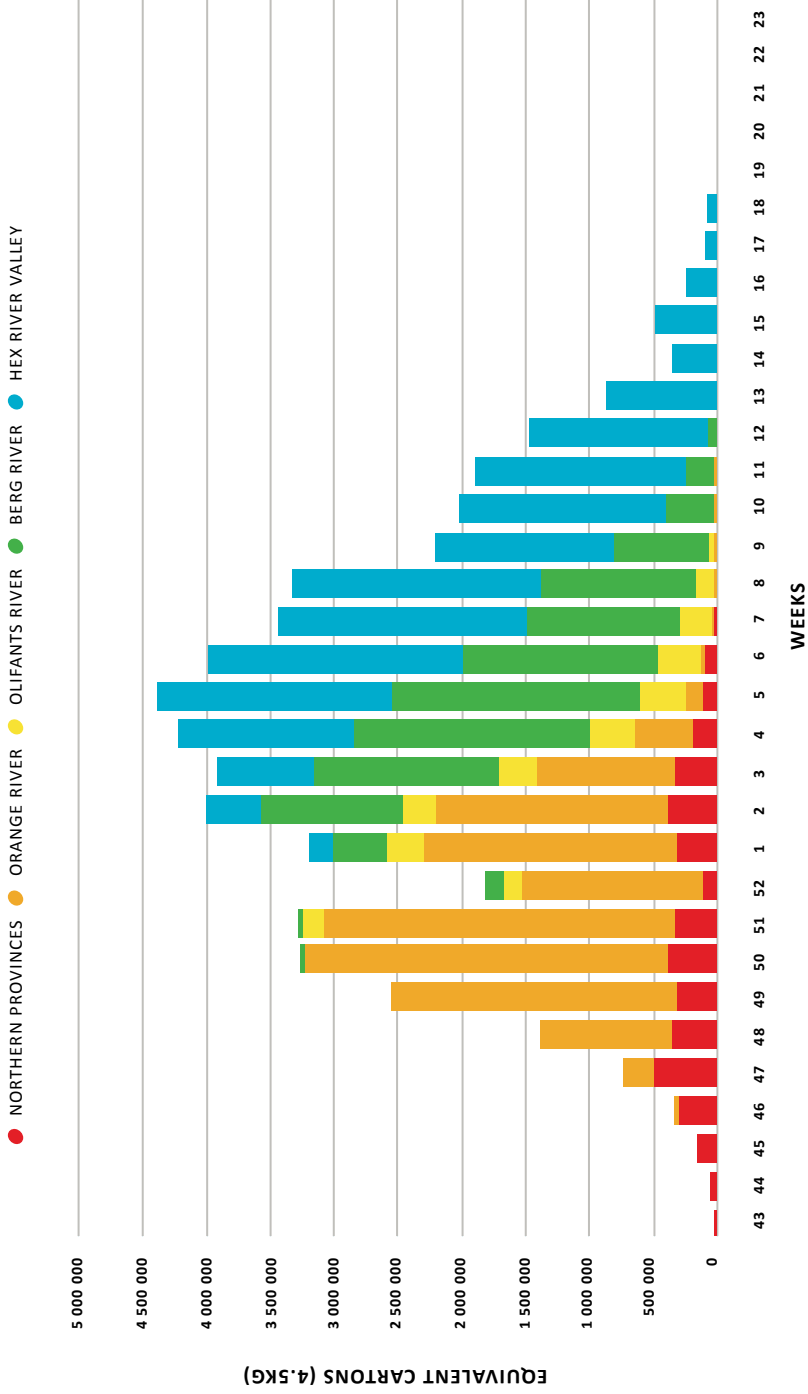
REGIONS NAMES		2013/14	2012/13	2011/12	2010/11	2009/10
NORTHERN PROVINCES	Black Seeded Grapes	400 312	472 838	646 917	640 337	663 999
	Black Seedless Grapes	314 088	274 797	238 465	178 297	127 400
	Experimental Grapes	182 823	188 086	85 328	32 333	1 995
	Mixed Grapes	73 010	45 737	78 380	23 934	52 992
	Red Seeded Grapes	592 959	706 962	817 795	751 874	908 313
	Red Seedless Grapes	1 426 018	1 368 965	1 256 251	991 028	1 487 312
	White Seeded Grapes	13 163	10 595	14 751	4 936	38 962
	White Seedless Grapes	1 081 226	1 087 668	1 116 288	954 958	1 109 104
	NORTHERN PROVINCES TOTAL	4 083 599	4 155 648	4 254 175	3 577 697	4 390 078
ORANGE RIVER	Black Seeded Grapes	63 643	116 474	188 562	216 658	269 346
	Black Seedless Grapes	993 865	839 377	909 243	518 130	421 048
	Experimental Grapes	181 296	79 334	66 044	23 138	2 683
	Mixed Grapes	90 057	58 221	290 479	350 551	450 831
	Red Seeded Grapes	546 424	639 170	517 354	704 931	694 692
	Red Seedless Grapes	2 136 649	2 284 954	2 470 507	2 063 164	1 776 276
	White Seeded Grapes	453 647	430 423	544 762	469 838	550 970
	White Seedless Grapes	10 653 380	11 591 429	11 838 237	9 595 762	12 600 088
	ORANGE RIVER TOTAL	15 118 961	16 039 382	16 825 188	13 942 172	16 765 935
OLIFANTS RIVER	Black Seeded Grapes	186 442	180 194	145 210	142 360	153 942
	Black Seedless Grapes	448 460	463 503	283 037	173 484	95 484
	Experimental Grapes	65 508	43 689	11 063	256	0
	Mixed Grapes	127	15 422	26 454	6 997	10 018
	Red Seeded Grapes	648 129	440 012	389 978	346 292	373 660
	Red Seedless Grapes	1 202 854	976 330	915 506	631 364	585 734
	White Seeded Grapes	18 209	20 172	17 790	29 890	39 090
	White Seedless Grapes	551 327	586 619	482 608	447 724	629 963
	OLIFANTS RIVER TOTAL	3 121 056	2 725 942	2 271 646	1 778 367	1 887 890
BERG RIVER	Black Seeded Grapes	1 321 869	1 713 307	1 698 809	1 869 541	1 743 613
	Black Seedless Grapes	1 079 942	1 218 214	1 132 545	773 906	479 439
	Experimental Grapes	567 624	420 177	257 197	122 416	56 497
	Mixed Grapes	34 471	94 975	196 568	104 950	117 083
	Red Seeded Grapes	2 190 763	2 032 653	2 226 854	2 015 826	2 103 651
	Red Seedless Grapes	2 806 528	2 566 851	2 654 143	2 336 950	2 398 771
	White Seeded Grapes	1 083 086	1 347 977	1 508 228	1 623 690	1 626 712
	White Seedless Grapes	2 294 719	3 278 015	3 199 994	3 075 612	3 046 904
	BERG RIVER TOTAL	11 379 002	12 672 168	12 874 338	11 922 891	11 572 671
HEX RIVER VALLEY	Black Seeded Grapes	1 712 921	2 425 283	2 631 146	3 193 895	3 672 015
	Black Seedless Grapes	1 990 439	2 114 045	1 839 644	1 505 067	832 901
	Experimental Grapes	335 795	190 821	134 271	71 992	9 730
	Mixed Grapes	77 474	90 821	146 271	91 299	300 081
	Red Seeded Grapes	1 735 531	1 763 371	2 035 883	1 846 059	1 862 153
	Red Seedless Grapes	7 131 282	6 624 292	6 243 523	4 874 856	5 323 457
	White Seeded Grapes	1 868 045	2 560 199	3 095 160	4 372 166	4 376 793
	White Seedless Grapes	1 994 709	2 517 893	2 306 150	2 268 796	2 260 280
	HEX RIVER VALLEY TOTAL	16 846 196	18 286 725	18 432 048	18 224 130	18 637 409
GRAND TOTAL	50 548 814	53 879 865	54 657 395	49 445 257	53 253 983	

FIVE YEAR VARIETY GROUP GROWTH

VARIETY GROUPS	2009/10	2010/11	2011/12	2012/13	2013/14	5 YEAR GROWTH
White Seedless	19 646 338	16 342 852	18 943 277	18 875 499	16 575 361	-16%
White Seeded	6 632 528	6 500 520	5 180 691	4 410 595	3 436 150	-48%
Red Seedless	11 571 551	10 897 362	13 539 930	13 951 449	14 703 331	27%
Red Seeded	5 942 468	5 664 982	5 987 864	5 519 309	5 713 806	-4%
Black Seedless	1 956 272	3 148 884	4 402 934	4 932 839	4 826 794	147%
Black Seeded	6 502 915	6 062 791	5 310 644	4 938 159	3 685 187	-43%
Other	1 001 911	827 866	1 292 055	1 252 015	1 608 185	38%
Grand Total	53 253 983	49 445 257	54 657 395	53 879 865	50 548 814	

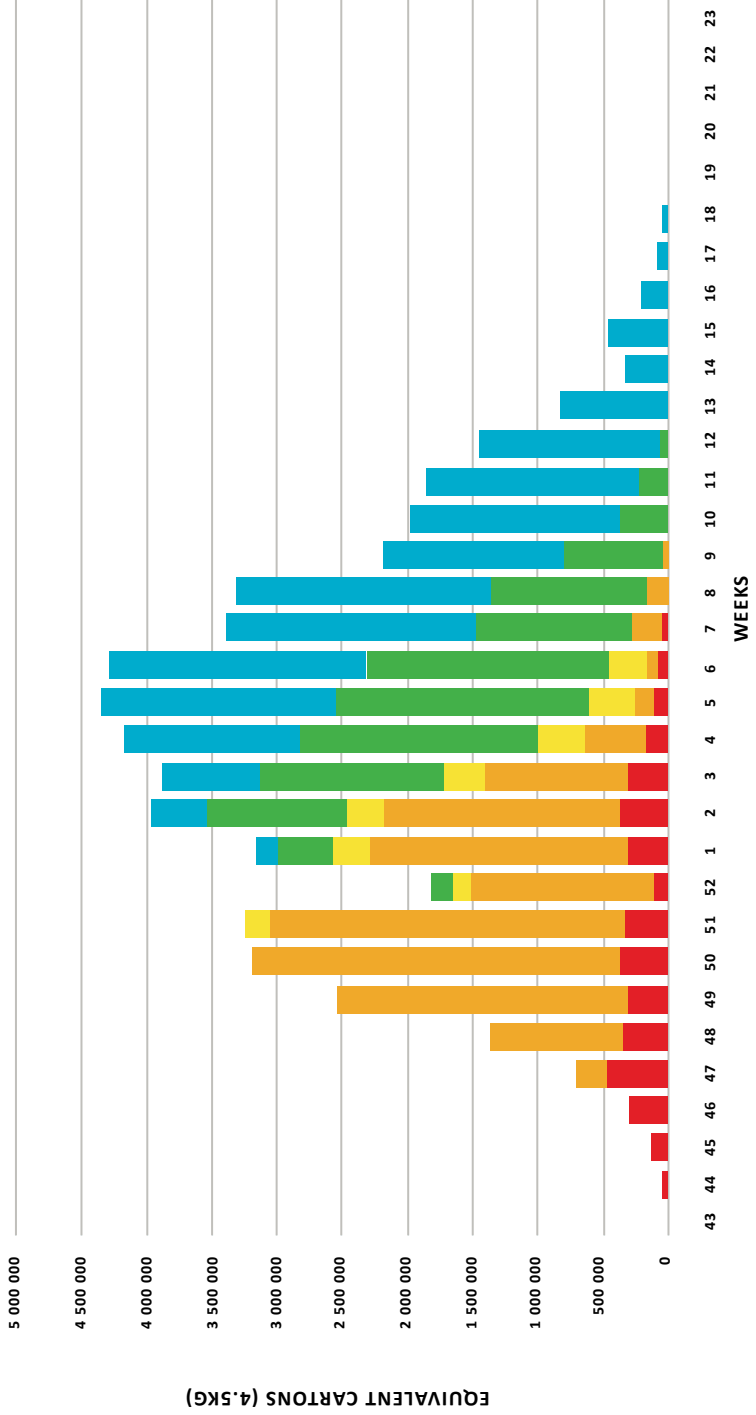


2012 / 2013 REGIONAL WEEKLY INTAKE

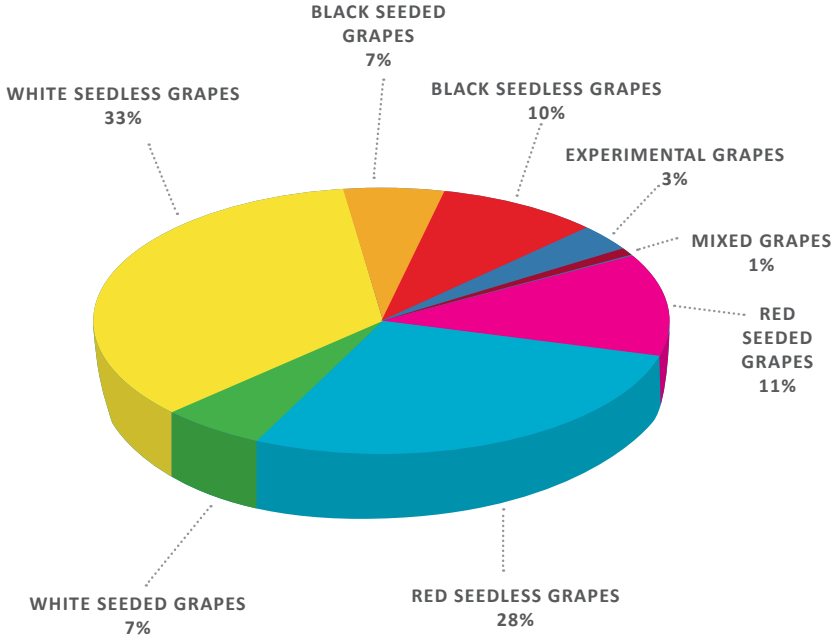


2013 / 2014 REGIONAL WEEKLY INTAKE

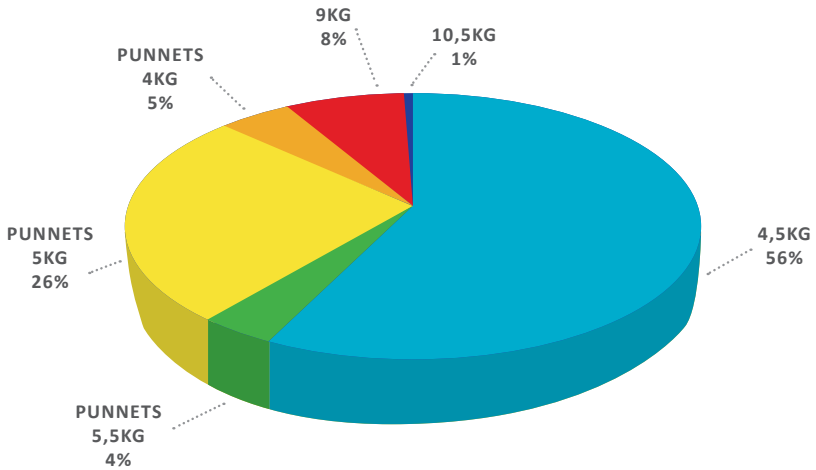
- NORTHERN PROVINCES
- ORANGE RIVER
- OLIFANTS RIVER
- BERG RIVER
- HEX RIVER VALLEY



2013/2014 INTAKE AND VARIETY GROUP SPLIT

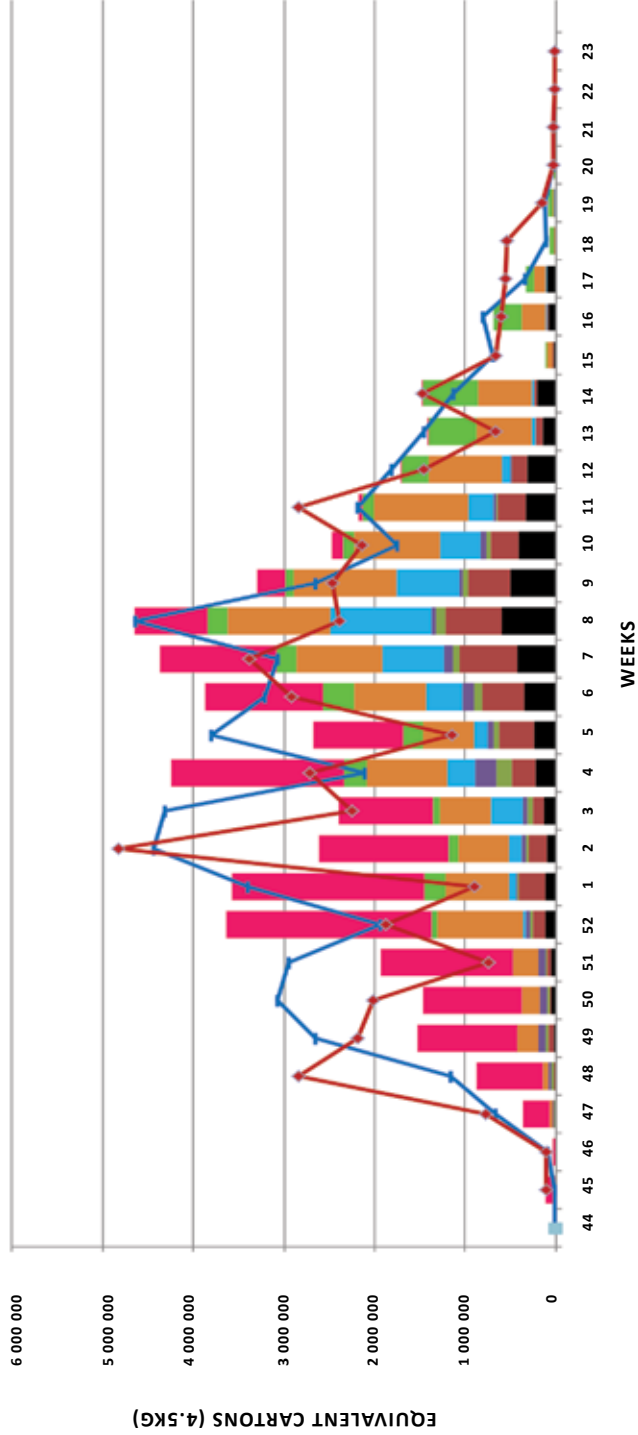


2013/2014 TOTAL INTAKE BY CARTON MASS

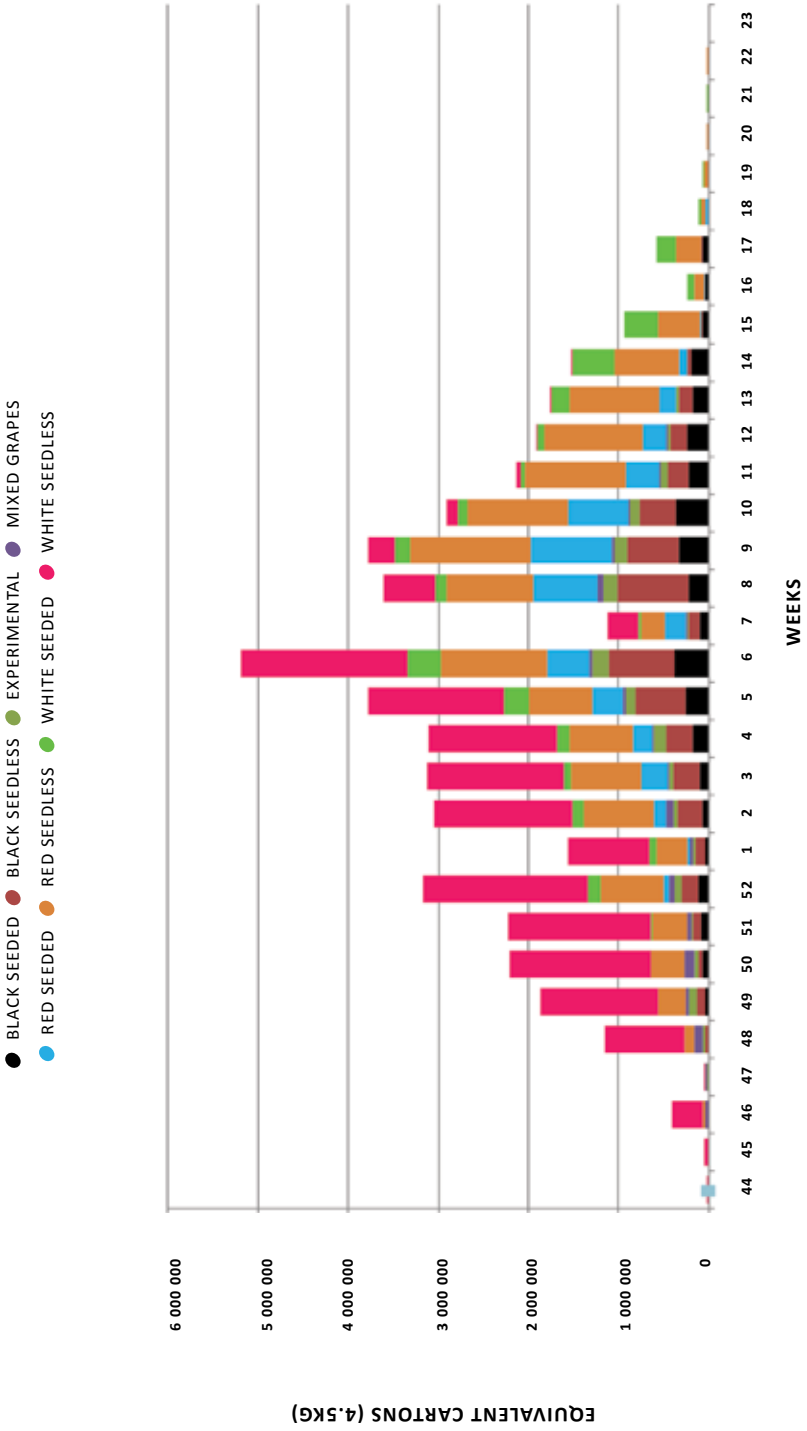


2012 / 2013 EXPORT GRAPH

- BLACK SEEDED ● BLACK SEEDED ● EXPERIMENTAL ● MIXED GRAPES ● RED SEEDED
- RED SEEDED ● RED SEEDED ● WHITE SEEDED ● WHITE SEEDED ● 2010 / 2011 ● 2011 / 2012



2013 / 2014 EXPORT GRAPH



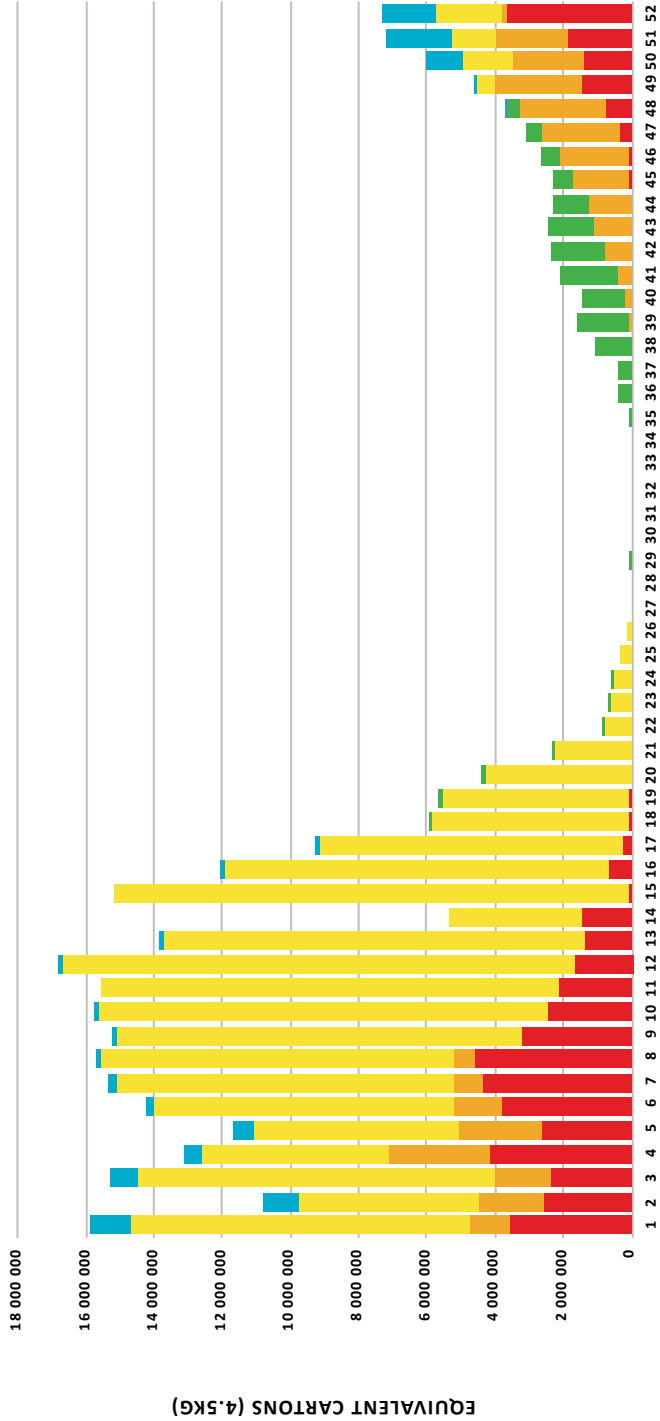
FIVE YEAR EXPORT MARKET SPLIT

MARKET	VARIETY GROUP	2013/14	2012/13	2011/12	2010/11	2009/10
AFRICA	Black Seeded Grapes	6 404	19 832	11 840	14 240	5 440
	Black Seedless Grapes	3 938	10 693	8 160	160	2 720
	Experimental Grapes	28 862	29 440	13 440	2 240	1 600
	Mixed Grapes	3 778	3 040	0	3 680	1 280
	Red Seeded Grapes	373 446	328 248	257 659	178 400	160 480
	Red Seedless Grapes	145 998	178 999	136 667	81 280	58 080
	White Seeded Grapes	7 503	7 328	4 420	5 920	3 680
	White Seedless Grapes	18 282	32 486	20 960	19 840	42 560
AFRICA TOTAL		588 211	610 066	453 146	305 760	275 840
EUROPE	Black Seeded Grapes	2 367 564	3 211 259	3 538 052	4 101 728	3 843 680
	Black Seedless Grapes	1 950 157	1 669 577	1 397 955	809 120	559 520
	Experimental Grapes	774 509	580 396	346 720	81 600	39 040
	Mixed Grapes	410 363	662 948	543 200	531 040	549 120
	Red Seeded Grapes	1 945 944	2 268 037	2 069 262	2 280 320	2 358 080
	Red Seedless Grapes	7 017 449	5 844 963	6 034 380	4 719 520	4 809 760
	White Seeded Grapes	2 719 352	3 384 286	4 044 960	4 666 592	4 664 640
	White Seedless Grapes	11 332 570	11 339 471	11 782 428	9 826 720	12 594 468
EUROPE TOTAL		28 517 908	28 960 937	29 756 957	27 016 640	29 418 308
FAR EAST	Black Seeded Grapes	114 131	234 144	435 840	306 080	349 280
	Black Seedless Grapes	1 358 749	1 682 752	1 623 520	780 320	234 560
	Experimental Grapes	147 036	79 830	113 824	26 080	1 280
	Mixed Grapes	46 590	184 952	28 640	103 840	85 600
	Red Seeded Grapes	1 069 215	810 182	1 266 560	900 800	584 320
	Red Seedless Grapes	1 689 008	2 061 806	2 555 936	1 291 040	1 032 480
	White Seeded Grapes	3 423	7 360	44 640	53 920	34 400
	White Seedless Grapes	668 407	1 079 310	1 436 320	1 091 520	962 560
FAR EAST TOTAL		5 096 559	6 140 336	7 505 280	4 553 600	3 284 480
INDIAN	Black Seeded Grapes	33 000	23 777	26 240	37 120	38 600
OCEAN	Black Seedless Grapes	22 752	32 540	26 400	20 480	8 320
ISLANDS	Experimental Grapes	3 789	800	1 600	0	0
	Mixed Grapes	1 630	6 942	2 720	5 120	1 920
	Red Seeded Grapes	98 102	80 436	75 680	96 640	76 480
	Red Seedless Grapes	126 547	97 715	117 600	70 080	81 600
	White Seeded Grapes	18 270	14 240	12 320	14 720	13 600
	White Seedless Grapes	36 548	63 111	36 480	35 360	86 560
INDIAN OCEAN ISLANDS TOTAL		340 638	319 561	299 040	279 520	307 080

MARKET	VARIETY GROUP	2013/14	2012/13	2011/12	2010/11	2009/10
MIDDLE EAST	Black Seeded Grapes	418 463	495 299	530 880	484 000	509 120
EAST	Black Seedless Grapes	52 754	43 805	47 360	21 120	38 880
	Experimental Grapes	42 385	5 436	9 600	11 360	0
	Mixed Grapes	28 466	54 214	26 080	18 720	27 840
	Red Seeded Grapes	1 196 894	1 000 917	1 187 040	986 880	1 122 720
	Red Seedless Grapes	182 236	182 797	186 240	141 920	120 960
	White Seeded Grapes	28 688	80 101	47 200	85 440	128 480
	White Seedless Grapes	634 924	873 519	906 880	774 880	762 880
	MIDDLE EAST TOTAL		2 584 810	2 736 088	2 941 280	2 524 320
RUSSIAN FEDERATION	Black Seeded Grapes	305 101	320 502	201 920	206 880	113 440
	Black Seedless Grapes	48 932	71 434	34 400	14 080	11 840
	Experimental Grapes	16 657	6 400	0	0	0
	Mixed Grapes	10 758	17 508	3 200	0	15 040
	Red Seeded Grapes	155 540	256 930	122 720	34 080	86 240
	Red Seedless Grapes	129 056	136 317	70 400	74 240	97 280
	White Seeded Grapes	301 909	400 698	390 400	201 920	272 000
	White Seedless Grapes	343 868	248 277	253 280	146 240	261 920
RUSSIAN FEDERATION TOTAL		1 311 821	1 458 066	1 076 320	677 440	857 760
UNITED KINGDOM	Black Seeded Grapes	46 863	39 967	89 600	124 000	78 720
	Black Seedless Grapes	1 407 040	1 124 656	896 800	625 280	294 720
	Experimental Grapes	378 948	165 834	81 040	28 280	2 880
	Mixed Grapes	158 897	179 646	219 520	310 400	186 880
	Red Seeded Grapes	166 645	83 676	124 800	104 800	200 160
	Red Seedless Grapes	5 500 404	4 774 972	4 487 520	3 705 280	4 082 720
	White Seeded Grapes	16 626	33 443	66 880	40 880	148 480
	White Seedless Grapes	3 841 580	4 673 658	4 888 240	4 281 644	6 379 109
UNITED KINGDOM TOTAL		11 517 003	11 075 852	10 854 400	9 220 564	11 373 669
USA & CANADA	Black Seeded Grapes	9 780	29 096	6 400	3 200	3 200
	Black Seedless Grapes	67 812	57 271	1 600	0	0
	Experimental Grapes	3 260	590	480	0	0
	Mixed Grapes	4 075	19 423	2 880	0	4 640
	Red Seeded Grapes	805	20 800	8 320	25 600	11 680
	Red Seedless Grapes	52 816	103 848	40 320	68 320	114 560
	White Seeded Grapes	163	0	320	6 400	0
	White Seedless Grapes	215 647	111 496	114 400	96 640	74 240
USA & CANADA TOTAL		354 358	342 524	174 720	200 160	208 320
GRAND TOTAL		50 311 308	51 643 430	53 061 143	44 778 004	48 436 337

2012 / 2013 SOUTHERN HEMISPHERE EXPORTS

● ARGENTINA ● CHILE ● BRAZIL ● PERU ● SOUTH AFRICA

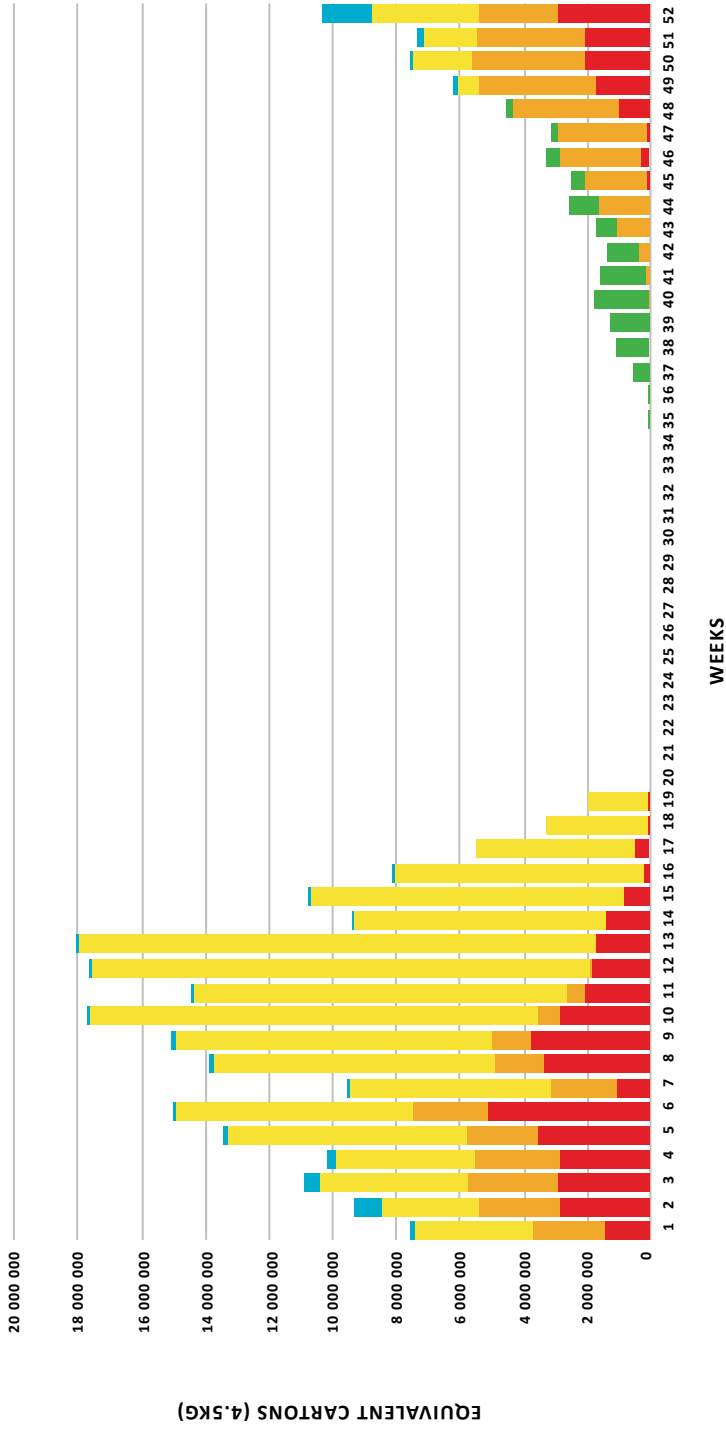


WEEKS

Source: CIF Business Intelligence

2013 / 2014 SOUTHERN HEMISPHERE EXPORTS

● ARGENTINA ● BRAZIL ● CHILE ● PERU ● SOUTH AFRICA



Source: CIF Business intelligence



VARIETY GROWTH BETWEEN 2009/2010 - 2013/2014

VARIETY	2009/10	2010/11	2011/12	2012/13	2013/14
Crimson Seedless	5 670 091	5 268 117	6 970 402	7 361 120	8 948 985
Prime	5 606 237	4 941 871	5 978 674	7 002 497	5 670 998
Redglobe	5 833 876	5 268 117	5 822 236	5 460 665	5 512 613
Thompson Seedless	6 485 554	4 835 917	5 574 936	5 041 147	4 845 413
Flame Seedless	3 876 405	3 625 341	4 342 968	4 119 986	3 357 505
Sugraone	4 845 794	3 707 154	4 303 973	3 638 921	3 137 593
Dauphine	3 837 649	3 824 930	2 752 330	2 239 814	2 280 983
Autumn Royal	644 141	1 522 236	2 029 571	2 224 380	1 718 446
Regal Seedless	2 462 699	2 436 698	2 368 490	2 194 129	1 661 152
Sugrathirteen	1 016 599	1 154 093	1 675 007	1 730 628	1 576 922
Dan ben Hannah	1 233 876	1 143 768	1 211 439	1 346 249	1 078 567
Victoria	1 614 847	1 598 596	1 490 762	1 340 745	1 059 720
La Rochelle	1 629 452	1 584 380	1 387 415	1 249 008	902 970
Sunred Seedless	1 512 608	1 388 741	1 096 570	1 042 419	928 196
Barlinka	1 630 325	1 173 510	930 055	858 826	878 026
Sugrasixteen	251 249	364 107	495 456	744 719	740 841
Ralli Seedless	478 901	466 760	689 504	714 737	629 625
Sugranineteen	40 102	155 807	432 185	691 087	621 134
Alphonse Lavallée	795 094	908 452	664 544	566 107	401 490
Starlight	19 004	104 316	319 846	525 622	369 368
Other	3 763 480	3 972 346	4 121 032	3 787 059	4 228 267
Total	53 247 983	49 445 257	54 657 395	53 879 865	50 548 814

TOP 20 VARIETIES

South Africa has a wide range of splendid table grape varieties, which are harvested from October to April to bring the full flavour of the crop to local and international consumers over a period of seven months. The supply basket is made up of White, Black and Red, Seeded and Seedless varieties.

VARIETY	VARIETY GROUP	DESCRIPTION
Crimson Seedless	Red Seedless	Attractive pink elongated berries, crispy excellent flavour.
Prime	White Seedless	The earliest South African variety, seedless, good berry size, crisp new season taste.
Redglobe	Red Seeded	Large berries, deep, wine red colour, fleshy, melting and sweet flavour.
Thompson Seedless	White Seedless	White, elongated berries, good bunches, fleshy, melting taste, outstanding quality and appearance
Flame Seedless	Red Seedless	Red, attractive in colour, firm, pleasant taste, crispy eating experience.
Sugraone	White Seedless	White, seedless, large berries, good shelf life, slight muscat flavour when mature.
Dauphine	White Seeded	Late seeded white grape, attractive bunches and berries, excellent late maturing flavour.
Autumn Royal	Black Seedless	Large, elongated purple-black berries with a crunchy skin, firm texture and a pleasant, distinctive flavour.
Regal Seedless	White Seedless	Early mid-season white, seedless, large crisp berries, good shelf life.
Sugrathirteen	Black Seedless	Early mid-season, large berry, black seedless variety. Excellent taste and flavour.
Dan ben Hannah	Black Seeded	Large oval berries. Also known as Black Emperor in the Far East. Mid-season variety with very good taste.
Victoria	White Seeded	The earliest white seeded variety available from South Africa. Large berries, good shelf life, crisp berries.
La Rochelle	Black Seeded	A noble black seeded grape, crunchy berries, full of flavour, a unique eating experience.
Sunred Seedless	Red Seedless	Mid-season, round berries, deep maroon colour, crispy, firm and crunchy.
Barlinka	Black Seeded	A late season black seeded grape, good eating quality, late vintage flavour.
Sugrasixteen	Black Seedless	This black seedless variety has berries with a unique, fruity, muscat-type flavour, juicy, moderately firm flesh and tough skin.
Ralli Seedless	Red Seedless	The berries are crisp and firm, short to long elliptic and seedless with a thick, slightly tough skin, and firm crisp flesh with a neutral flavour.
Sugranineteen	Red Seedless	This distinct grape variety is characterized by late ripening berries that are crisp, juicy, and elliptical in shape.
Alphonse Lavallée	Black Seeded	“Big Black”, the prince of black grapes, large berries and outstanding eating experience.
Starlight	Red Seedless	Starlight is a mutation of Prime. It is a large berry red seedless variety that ripens early season.

2014 ANNUAL VINE CENSUS

AREA PLANTED (HA) AND NUMBER OF VINES PER CULTIVAR						
CULTIVAR	NO OF VINES	TOTAL HECTARES	AGE 0-3	AGE 4-9	AGE 10-15	AGE 16+
Crimson Seedless	5 253 929	2982	922	994	1011	56
Prime	2 851 628	1578	146	530	881	23
Redglobe	2 095 871	1135	61	303	211	560
Thompson Seedless	2 227 518	1381	99	185	379	719
Flame Seedless	2 489 039	1351	84	495	563	208
Sugraone	2 022 452	1207	254	268	391	293
Dauphine	961 206	459	2	85	83	290
Autumn Royal	1 740 533	883	248	612	16	8
Regal Seedless	835 173	441	6	16	356	64
Sugrathirteen	948 670	534	113	322	67	32
Dan Ben Hannah	435 039	241	5	71	40	125
Victoria	347 350	180	3	20	116	41
La Rochelle	449 448	203	1	33	15	154
Sunred Seedless	421 197	243	7	7	48	182
Barlinka	442 178	201	0	4	79	117
Sugrasixteen	305 894	182	49	123	4	5
Ralli Seedless	477 968	264	61	155	47	0
Sugranineteen	559 854	310	199	104	4	3
Alphonse Lavallée	215 017	84	1	1	3	79
Starlight	490 429	245	113	123	9	0
Other Varieties	4 011 303	2125	953	666	246	260
TOTAL	29 581 696	16 229	3324	5116	4569	3220
% SPLIT BY AGE TIER		100%	20%	32%	28%	20%

Source: SATI Annual Vine Census 2014

REGIONAL CENSUS INFORMATION

AREA (HA) AND VINES UNDER TABLE GRAPE PRODUCTION

REGION NAME	2013 / 2014	
	HA	VINES
Northern Provinces	1205	1 940 999
Orange River	4896	8 149 056
Olifants River	1192	2 169 406
Berg River	3706	6 389 117
Hex River Valley	5185	10 933 118
Total	16 229	29 581 696

TOTAL TABLE GRAPE PRODUCERS

REGION NAME	2013 / 2014
Northern Provinces	51
Orange River	65
Olifants River	22
Berg River	86
Hex River Valley	102
Total	326

TOTAL NUMBER OF FARM LABOURERS

REGION NAME	2013 / 2014	
	SEASONAL	PERMANENT
Northern Provinces	3008	722
Orange River	12 971	1274
Olifants River	3736	880
Berg River	13 215	2474
Hex River Valley	7527	3995
Total	40 457	9345

Source: SATI Annual Vine Census 2014



***PRODUCTION COSTS FOR TABLE GRAPES R/HA**

DIRECT PRODUCTION COST	2013	2012	2011
Fertiliser & Organic Material	R 6 099	R 6 034	R 5 791
Pest and Weed Control	R 10 630	R 10 930	R 10 431
Supervision, Permanent, Seasonal & Contract Labour	R 96 242	R 91 932	R 83 733
Fuel, Oil, Repairs, Parts & Maintenance	R 17 628	R 17 828	R 14 475
Licences & Insurance	R 1 411	R 1 723	R 1 546
Hired Transport	R 566	R 629	R 262
Electricity	R 7 465	R 6 491	R 5 560
Water	R 1 167	R 1 008	R 871
Land -, Property -, Municipal Taxes, Administration and Miscellaneous	R 3 906	R 3 622	R 3 798
TOTAL CASH EXPENDITURE	R 145 114	R 140 197	R 126 467
DEPRECIATION	R 22 596	R 21 539	R 20 410
TOTAL EXPENDITURE	R 167 710	R 161 736	R 146 877

**These values are averages derived from specific inputs from all table grape producing regions. It is important to note that each individual production unit's cost structure (direct and indirect) will be unique and vary in relation to its proximity to the required resources and the size of the operation.*

Source: Various Table Grape Producers 2014

SOCIAL ACCOUNTABILITY

SATI aims to create an equitable Table Grape Industry. In order to achieve this, we develop and manage support programmes for existing and potential producers who hail from Historically Disadvantaged (HD) backgrounds. Furthermore, SATI plays a producer advocacy role, by engaging key stakeholders and providing information to people who are interested in acquiring land or businesses for Broad Based Black Economic Empowerment (B-BBEE).

According to SATI's annual survey of enterprises which embark on B-BBEE, the HD stake in table grape vineyards appears to have increased from 8% in 2009 to around 12% in 2014. Over the past three years, the collective value of table grapes sold by enterprises reporting their B-BBEE ownership figures to SATI has increased from around R 15 million in 2010/11 to over R 19 million in 2012/2013 for the HD component.

PARAMETER	TOTAL
Total number of 4.5 kg equivalent cartons sold by emerging growers as per producer survey.	340 986
Total number of 4.5 kg equivalent cartons sold by Black Equity Businesses (HD Owned Component only) as per producer survey.	2 079 279
Total farm-gate revenue of both forms of ownership as per producer survey.	R 207 754 326
Number of 100% black owned farms.	15
Total number of black people who own a share in a partly black owned farm.	557
Total number of partly owned farms and enterprises.	14

Source: SATI Annual Vine Census 2014

TABLE GRAPES SOLD BY ALL SA FRESH PRODUCE MARKETS
SEPTEMBER 2012 - JULY 2013

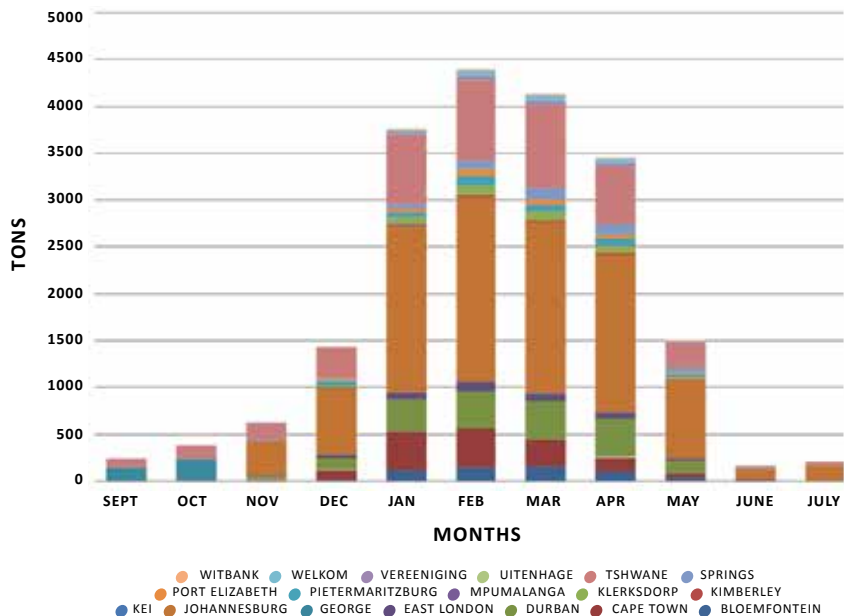
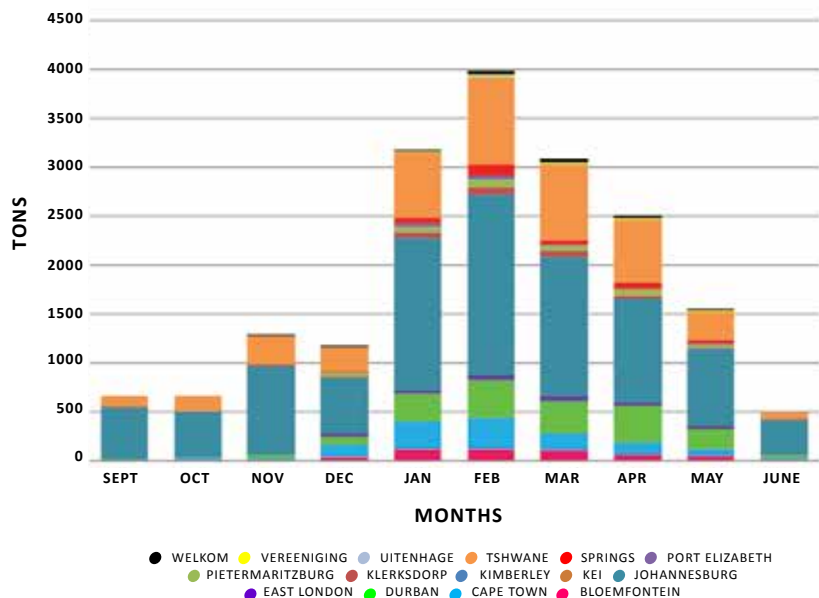


TABLE GRAPES SOLD BY ALL SA FRESH PRODUCE MARKETS
SEPTEMBER 2013 - JUNE 2014



10 YEAR PRODUCTION TRENDS

SEASON	PRODUCTION GROWTH	TOTAL PRODUCTION (TON)	TOTAL EXPORTS (TON)	DOMESTIC MARKET (TON)	EXPORTS AS % OF PRODUCTION	DOMESTIC AS % OF PRODUCTION
2004/05	11%	237 633	210 823	26 810	89%	11%
2005/06	12%	267 169	230 896	36 273	86%	14%
2006/07	-2%	260 678	227 265	33 413	87%	13%
2007/08	-1%	258 773	224 123	34 650	87%	13%
2008/09	-1%	255 284	217 875	37 409	85%	15%
2009/10	7%	273 372	234 579	38 794	86%	14%
2010/11	10%	245 112	202 500	42 612	83%	17%
2011/12	17%	285 810	245 797	40 013	86%	14%
2012/13	-8%	261 883	234 463	27 420	89%	11%
2013/14	-4%	251 477	226 401	25 076	90%	10%
10 Year Average		259 719	225 472	34 247	87%	13%

Source: OABS 2004/2005; and SATI, NDA & various Retailers 2005/6 - 2009/10, NAMC 2010/11 - 2013/14

GLOBAL IMPORTERS OF TABLE GRAPES

IMPORTERS	TRADE INDICATORS									
	EXPORTED VALUE 2013 (USD THOUSAND)	SHARE IN SOUTH AFRICA'S EXPORT (%)	EXPORTED QUANTITY 2013 (TONS)	UNIT VALUE (USD/TON)	EXPORTED GROWTH IN VALUE BETWEEN 2009-2013 (% P.A.)	EXPORTED QUANTITY BETWEEN 2009-2013 (% P.A.)	EXPORTED GROWTH IN VALUE BETWEEN 2012-2013 (% P.A.)	RANKING OF PARTNER COUNTRIES IN WORLD IMPORTS	SHARE OF PARTNER COUNTRIES IN WORLD IMPORTS (%)	TOTAL IMPORT GROWTH IN VALUE OF PARTNER COUNTRIES BETWEEN 2009-2013 (% P.A.)
World	441 475	100	283 239	1559	5	1	2	0	100	6
Netherlands *	194 200	44	129 647	1 498	5	4	5	2	11.2	6
United Kingdom	91 320	20.7	57 557	1 587	5	-1	9	4	8	4
Russian Federation	24 315	5.5	13 627	1 784	24	19	46	6	6	1
Hong Kong, China	16 285	3.7	7 260	2 243	14	2	-58	9	2.6	5
China	14 591	3.3	8 426	1 732	175	156	1 454	5	6.2	34
United Arab Emirates	13 975	3.2	9 007	1 552	8	6	-22	20	0.9	17
Malaysia	13 477	3.1	7 700	1 750	13	11	-14	38	0.4	26
Singapore	8 890	2	4 240	2 097	14	11	-9	28	0.7	11
Germany	7 457	1.7	7 149	1 043	-19	-16	0	3	8.3	4
Norway	7 276	1.6	4 287	1 697	13	4	-6	16	1.2	4
Saudi Arabia	5 086	1.2	3 535	1 439	11	12	-28	37	0.4	15
Canada	3 328	0.8	1 708	1 948	16	-1	91	7	5.3	4
Vietnam	2 989	0.7	1 759	1 699	40	39	122	17	1.1	22
Taipei, Chinese	2 612	0.6	1 514	1 725	-3	-7	-19	31	0.6	11
France	2 326	0.5	1 524	1 526	-3	-8	15	8	2.8	3
Botswana	2 237	0.5	3 401	658	0	0	0	106	0	17
Zimbabwe	1 826	0.4	1 760	1 038	56	60	-8	94	0	60
Philippines	1 606	0.4	743	2 162	88	67	21	47	0.2	4
Other Markets	27 678	6.1	18 390	1 505	8	15	50	0	44	29

* Re-distributed in Europe

Source: Trade Map, Product: 080610 Grapes Fresh

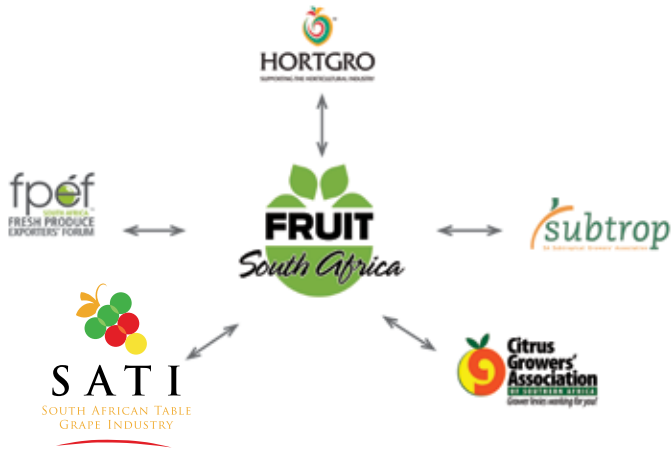
GLOBAL TABLE GRAPE EXPORTERS

UNIT: USD THOUSAND					
EXPORTERS	EXPORTED VALUE IN 2013	EXPORTED VALUE IN 2012	EXPORTED VALUE IN 2011	EXPORTED VALUE IN 2010	EXPORTED VALUE IN 2009
World	7 633 703	7 227 847	6 985 933	6 336 874	5 723 088
Chile	1 707 679	1 481 047	1 466 740	1 354 854	1 197 167
United States of America	1 084 478	974 928	908 418	831 124	758 950
Italy	823 994	766 399	806 840	750 269	619 399
Netherlands*	777 528	719 425	703 821	633 964	602 598
Peru	515 877	365 393	300 804	184 597	135 834
South Africa	441 475	431 156	427 233	420 413	358 492
Spain	316 164	271 669	315 626	259 564	226 710
China	268 811	262 135	162 273	104 943	85 850
India	193 526	131 287	77 680	102 493	68 329
Turkey	187 710	162 688	175 325	203 926	155 594
Egypt	183 355	224 306	210 060	202 052	225 377
Greece	173 090	122 458	145 112	132 554	142 494
Mexico	150 269	160 108	140 223	156 897	118 935
Australia	127 615	103 982	82 176	73 030	150 734
Brazil	102 995	121 891	135 783	136 626	110 574
Germany	86 219	73 823	86 499	65 779	66 222
Lithuania	60 024	58 893	47 149	38 770	31 739
Argentina	37 391	73 842	85 484	78 560	58 984
France	35 815	40 566	37 160	32 040	34 769
Namibia	33 860	35 737	32 205	34 350	57 907
Other Exporting Countries	325 828	646 114	639 322	540 069	516 430

* Includes volumes re-distributed in Europe

Source: Trade Map, Product: 080610 Grapes Fresh

STRUCTURE OF THE SOUTH AFRICAN FRUIT INDUSTRY



SATI

The South African Table Grape Industry (SATI) is the industry association of table grape producers in South Africa. SATI is dedicated to maintaining South Africa's position as the preferred country for taste around the world, as well as to ensure that the industry remains progressive, equitable and sustainable. SATI's leadership consists of elected regional representatives as the Board of Directors. This ensures that the board is fully mandated by a majority vote from South African table grape producers.

SATI'S FOUR KEY AREAS OF INTERVENTION

To Gain, Retain, Optimise through:

- **Market Access**
- **Research and Technical Transfer**
- **Information and Knowledge Management**
- **Transformation and Training**

SATI is funded by a grower levy. SATI is a co-founder and a key supporter of the Sustainability Initiative of South Africa (SIZA), an ethical trade programme led by Fruit South Africa.



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**“THE SUN, WITH ALL THOSE PLANETS REVOLVING AROUND IT
AND DEPENDING ON IT, CAN STILL RIPEN A BUNCH OF GRAPES
AS IF IT HAD NOTHING ELSE IN THE UNIVERSE TO DO”**

GALILEO GALILEI



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