SATI

SOUTH AFRICAN TABLE
GRAPE INDUSTRY

SATI/FPEF JOINT GRAPE MARKETING FORUM

PREPARED FOR: **JMF WRAP-UP 2025**

PRESENTED BY: J Ferreira | April 2025

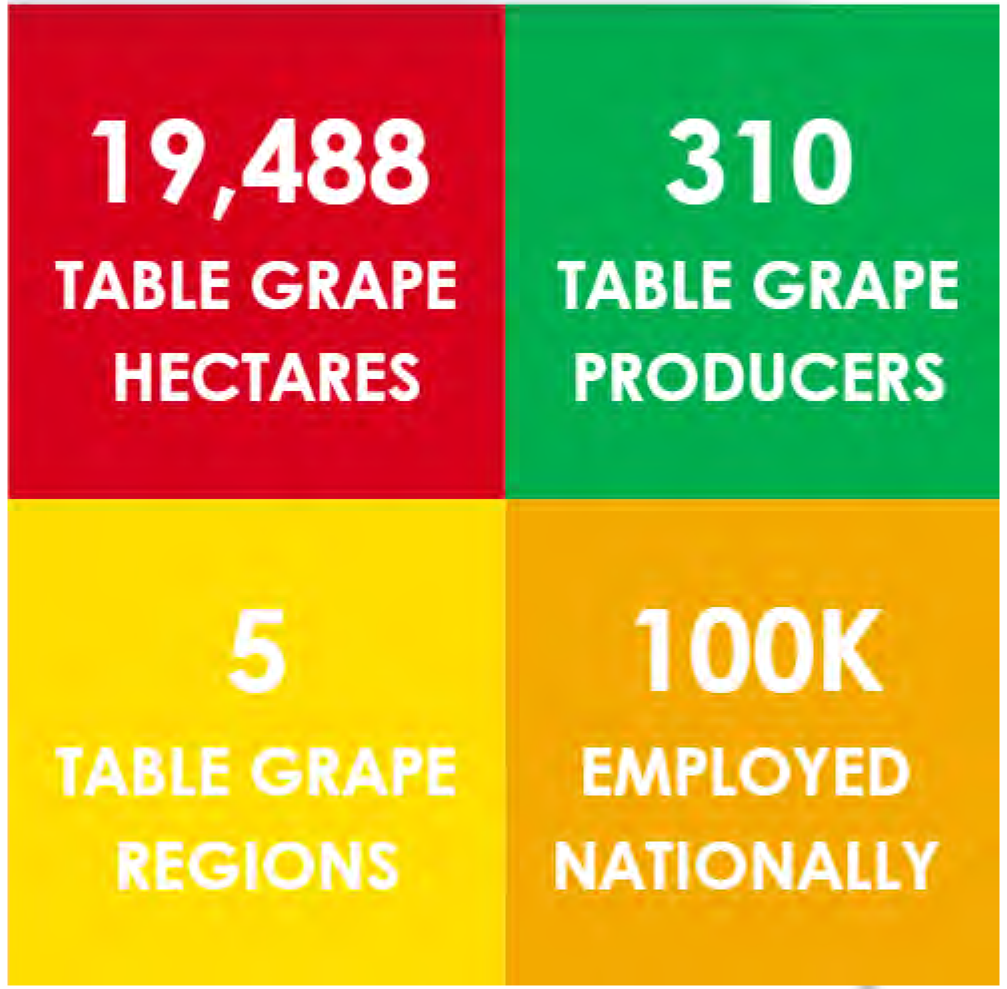
HIGH LEVEL STATISTICS

NATIONAL LEVEL

78.9 MILLION CARTONS INSPECTED FOR EXPORT

IN THE 2024/2025 SEASON

(4.5 kg equivalent)



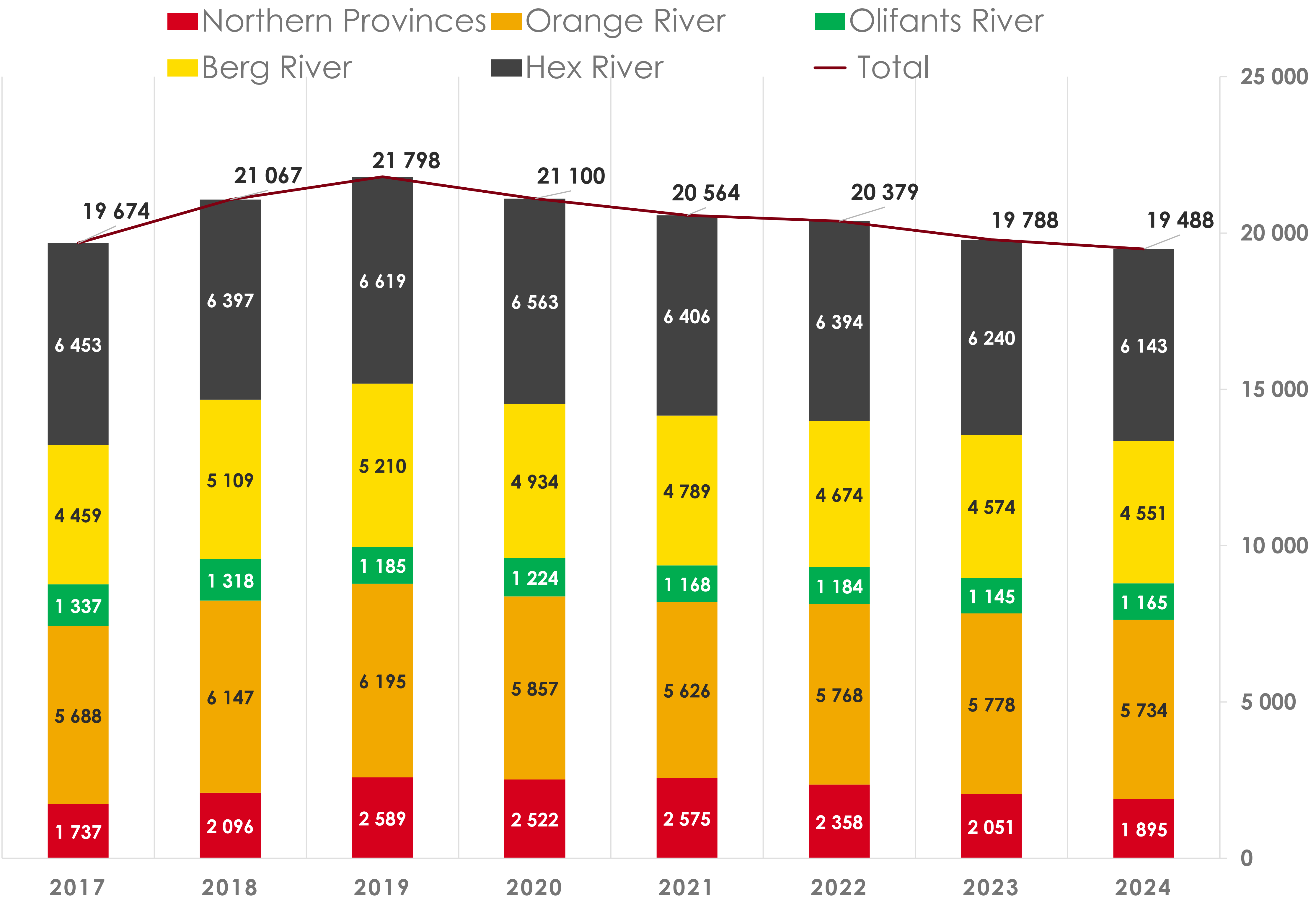
19,488
TABLE GRAPE HECTARES

310
TABLE GRAPE PRODUCERS

5
TABLE GRAPE REGIONS

100K
EMPLOYED NATIONALLY

SA TABLE GRAPE HECTARES PLANTED

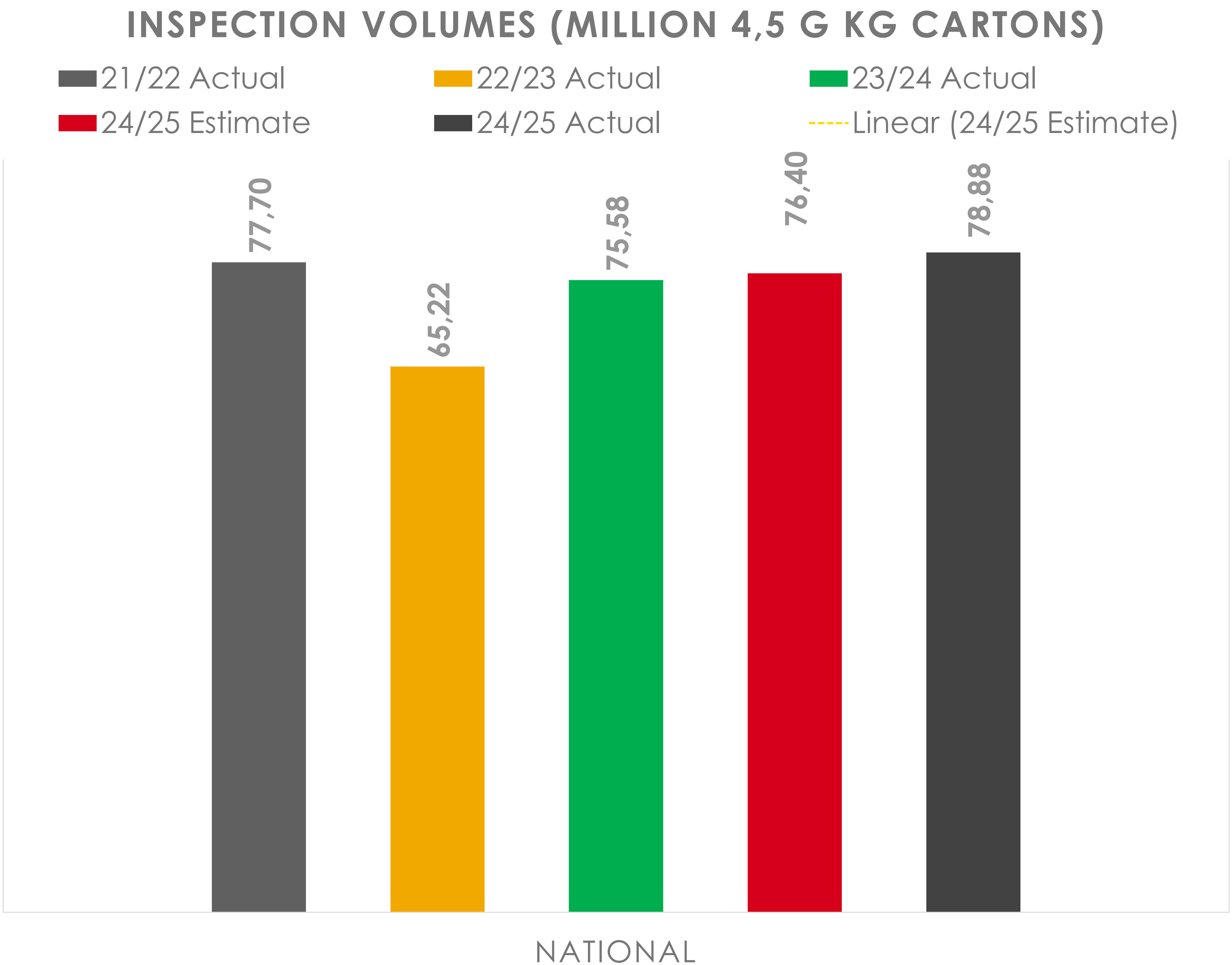


2024 Vine Census

- National hectares: -300 hectares (-2%) Y-O-Y
- Downward trend since peak 2019

Northern Provinces	- 156 ha	(-7%)
Hex River	-97 ha	(-2%)
Orange River	-44ha	(-1%)
Berg River	- 23 ha	(0%)
Olifants River	+20 ha	(+2%)

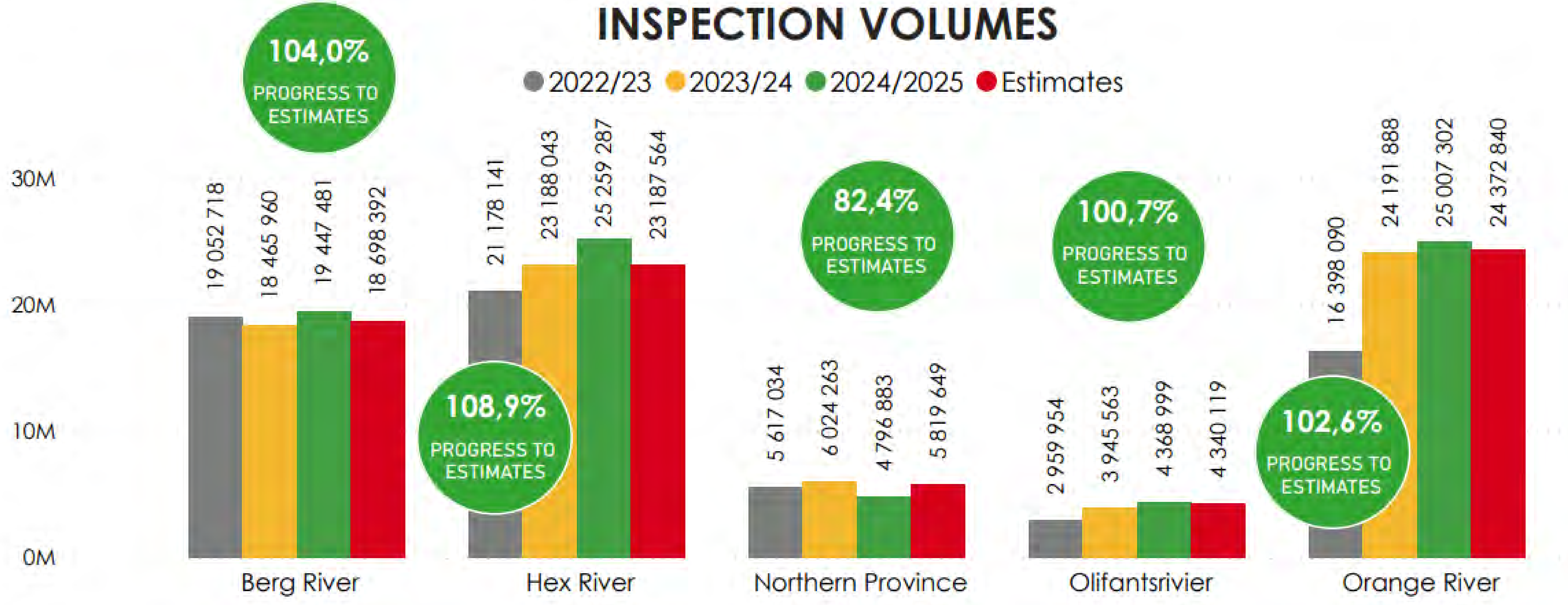
2024/25 INSPECTION VOLUME VS ESTIMATE



- **2024/25 Estimate**
  - 76.4 ± 3% (74.1 to 78.7)
  - 3.4 million (1.4%) more than 23/24
- **Actual Volume Inspected**
  - 1.1 million (1.5%) more than 21/22
  - 3.3 million (3.3%) more than 23/24

REGIONAL INSPECTIONS VS ESTIMATES

INSPECTION VOLUMES

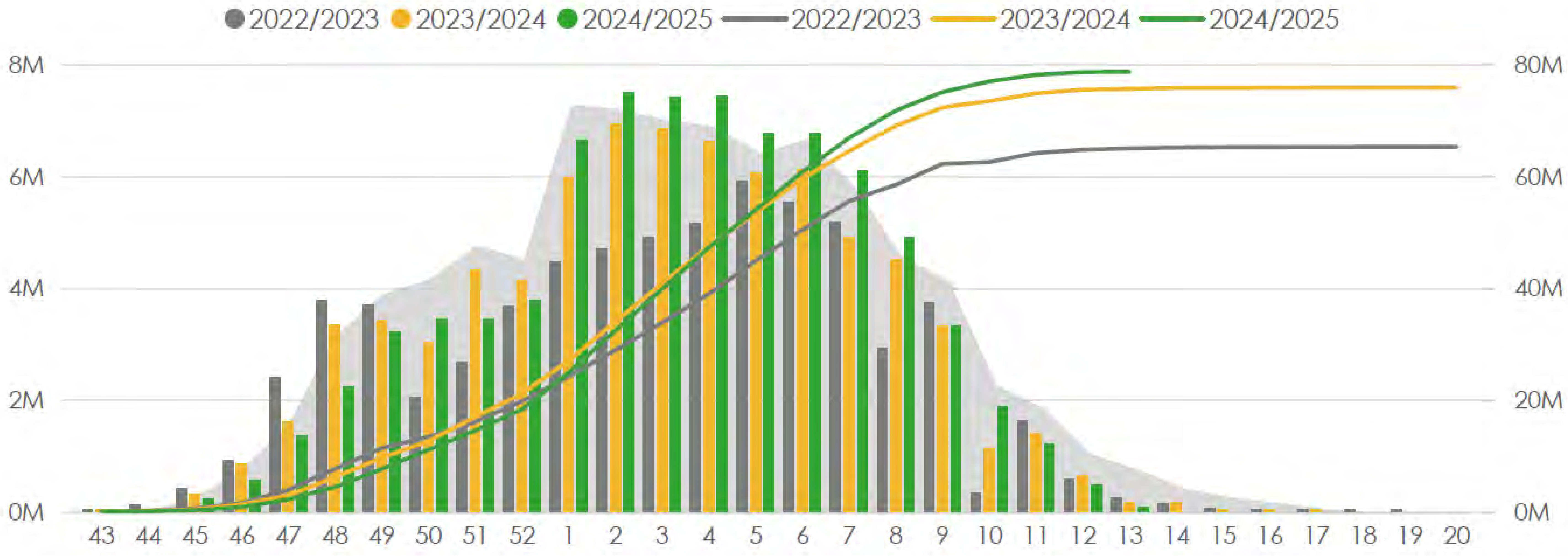


NATIONAL VIEW

INSPECTIONS - 2013/2014 to 2024/2025 (4.5kg Equivalents)

Year	Northern Provinces	Orange River	Olifants River	Berg River	Hex River	Total National
2013/2014	4 083 599	15 118 961	3 121 056	11 379 002	16 846 196	50 548 814
2014/2015	4 510 726	17 686 726	3 788 287	13 062 449	20 331 091	59 379 279
2015/2016	4 730 931	18 642 606	3 157 059	12 599 726	18 849 217	57 979 539
2016/2017	5 537 784	20 532 515	3 968 073	15 426 175	22 110 612	67 575 160
2017/2018	6 828 762	19 015 641	2 802 436	13 052 616	20 365 295	62 064 749
2018/2019	7 120 755	19 207 361	2 366 503	13 788 759	18 649 830	61 133 209
2019/2020	6 100 383	19 859 013	3 319 516	16 274 501	20 596 570	66 149 984
2020/2021	**7 881 591**	18 508 777	**4 443 619**	**20 061 729**	23 997 667	74 893 384
2021/2022	7 438 123	22 315 878	3 569 414	19 151 150	25 258 170	77 732 736
2022/2023	5 617 730	16 398 090	3 044 430	18 968 977	21 187 915	65 218 198
2023/2024	6 026 435	24 191 888	3 945 563	*18 472 103*	*23 209 774*	*75 845 673*
2024/2025	*4 796 761*	***25 007 302***	*4 368 999*	*19 447 481*	***25 259 287***	***78 879 952***
CAGR 10YR	**0.7%**	**3.9%**	**1.6%**	**4.5%**	**2.4%**	**3.2%**
CAGR 3YR	**-13.6%**	**3.9%**	**7.0%**	**0.5%**	**0.0%**	**0.4%**

WEEKLY INSPECTIONS 2024/25



SOUTH AFRICA – EXPORTS 2024/2025

33.4 mil

WHITE SEEDLESS

↑ **+10%** VS 23-24

33.3 mil

RED SEEDLESS

↑ **+3%** VS 23-24

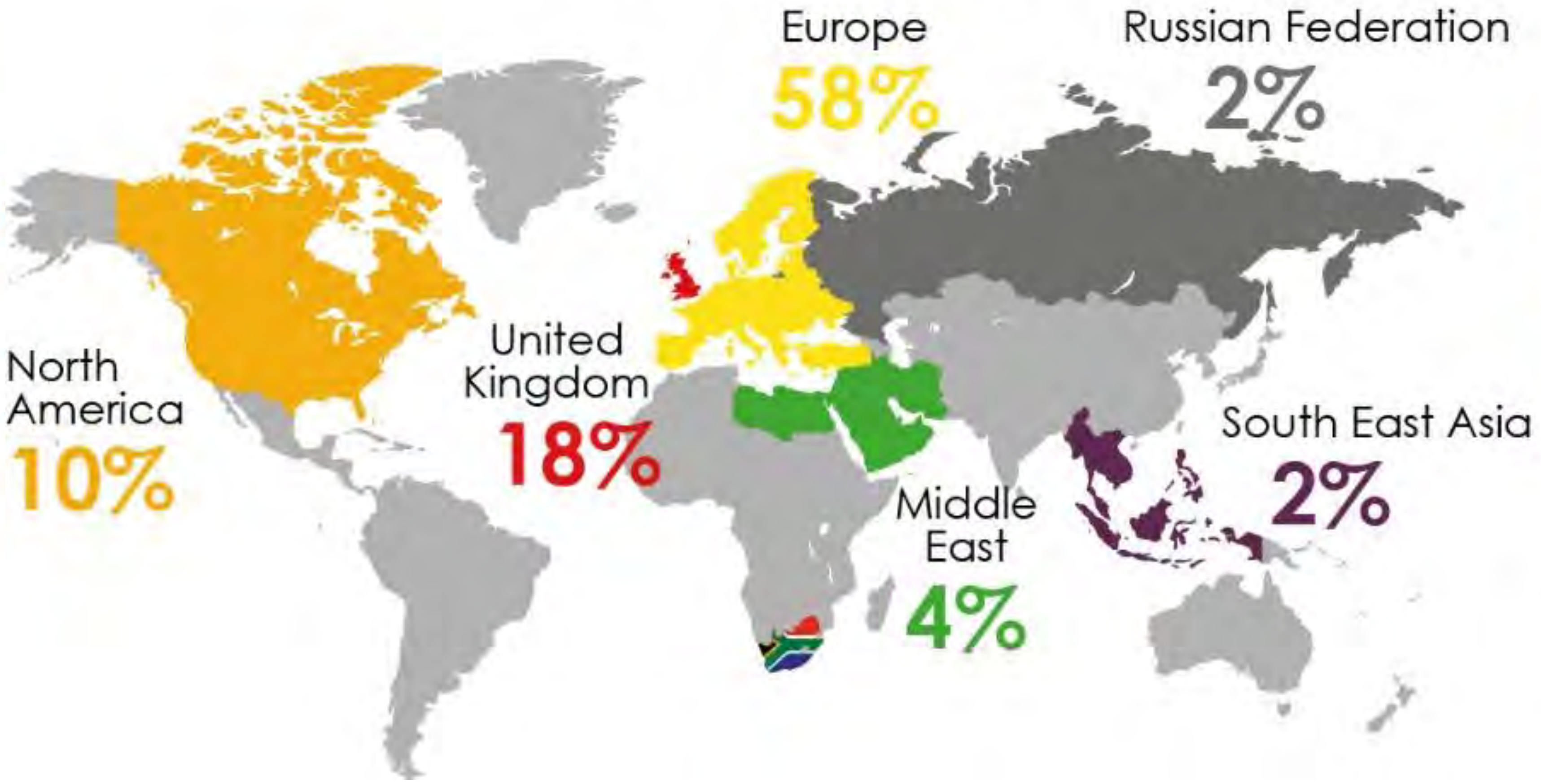
9 mil

BLACK SEEDLESS

↓ **-4%** VS 23-24

MARKET SHARE & GROWTH BY DESTINATION

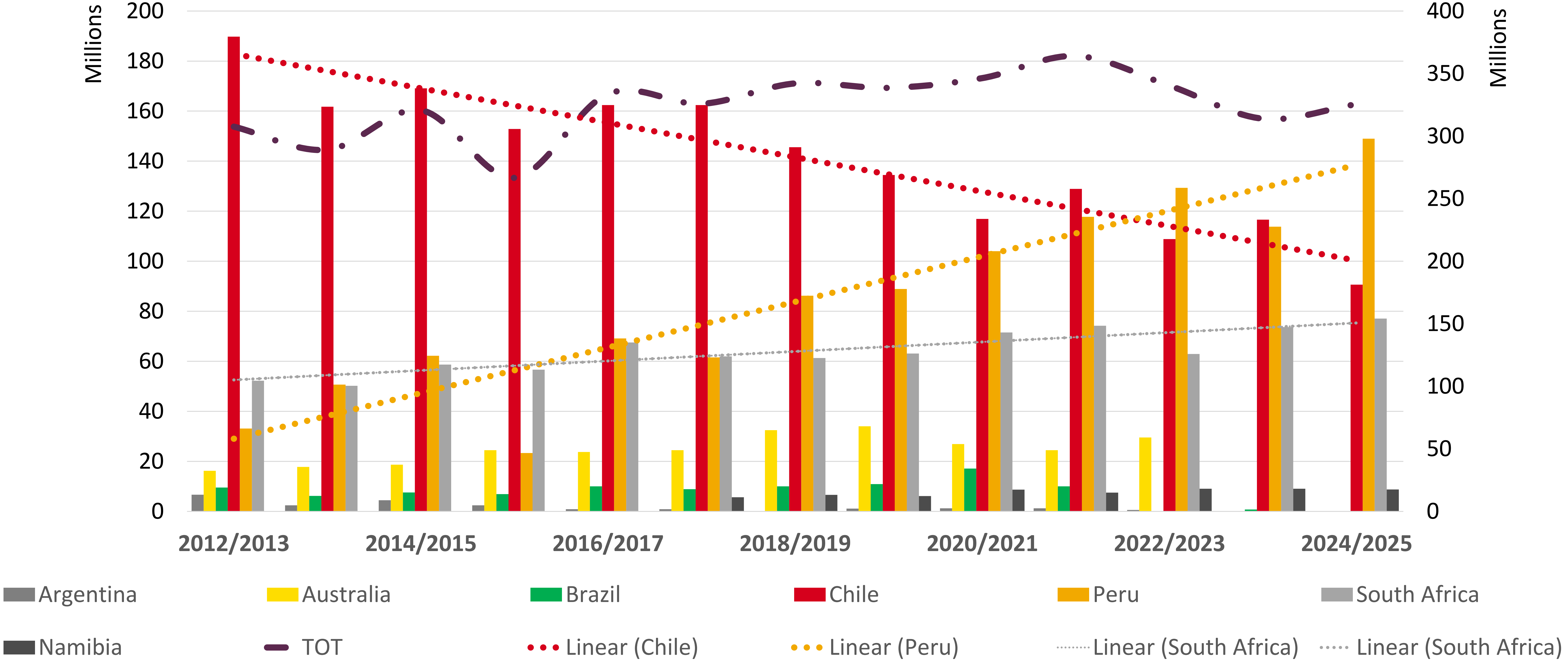
VS SEASON 2023-2024 (4.5 KG EQUIVALENT CARTONS)



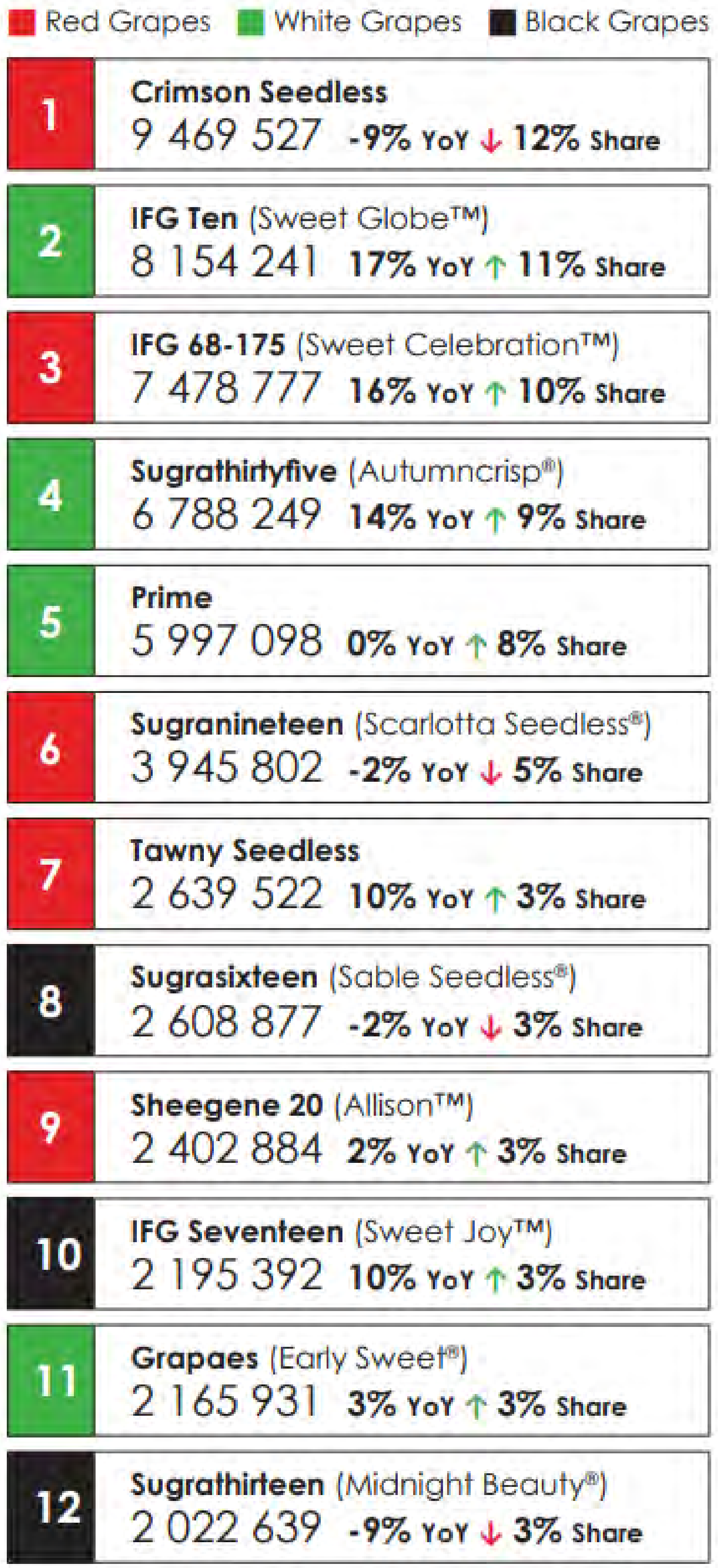
44.8 mil	↑ **+5%**	VS 23-24
14.3 mil	↓ **-2%**	VS 23-24
7.5 mil	↑ **+28%**	VS 23-24
3.2 mil	↑ **+24%**	VS 23-24
1.7 mil	↓ **-33%**	VS 23-24
1.4 mil	↓ **-2%**	VS 23-24

SOUTHERN HEMISPHERE

VOLUMES (4.5kg Eq) – 2012/13 to 2023/24



SA EXPORTS TOP CULTIVARS 2024/25



🟥 Red Grapes 🟩 White Grapes ⬛ Black Grapes

🟥 1	**Crimson Seedless**	9 469 527	-9% YoY ↓	12% Share
🟩 2	**IFG Ten** (Sweet Globe™)	8 154 241	17% YoY ↑	11% Share
🟥 3	**IFG 68-175** (Sweet Celebration™)	7 478 777	16% YoY ↑	10% Share
🟩 4	**Sugrathirtyfive** (Autumncrisp®)	6 788 249	14% YoY ↑	9% Share
🟩 5	**Prime**	5 997 098	0% YoY ↑	8% Share
🟥 6	**Sugranineteen** (Scarlotta Seedless®)	3 945 802	-2% YoY ↓	5% Share
🟥 7	**Tawny Seedless**	2 639 522	10% YoY ↑	3% Share
⬛ 8	**Sugrasixteen** (Sable Seedless®)	2 608 877	-2% YoY ↓	3% Share
🟥 9	**Sheegene 20** (Allison™)	2 402 884	2% YoY ↑	3% Share
⬛ 10	**IFG Seventeen** (Sweet Joy™)	2 195 392	10% YoY ↑	3% Share
🟩 11	**Grapaes** (Early Sweet®)	2 165 931	3% YoY ↑	3% Share
⬛ 12	**Sugrathirteen** (Midnight Beauty®)	2 022 639	-9% YoY ↓	3% Share

Other cultivars that showed growth includes:

- ARRA 15 / ARRA SWEETIES™ +20% YoY / about 1.8 million cartons
- ARRA 29 / ARRA PASSION FIRE™ +55% YoY / about 1.2 million cartons

THEMES OF GUEST SPEAKERS

- Early season started off with strong markets in EU & UK
    - Peruvian Influence
- Ongoing economic pressures and reduced disposable income globally
- Importance of thorough post-cooling grape inspections before loading
    - Product alignment with client/market

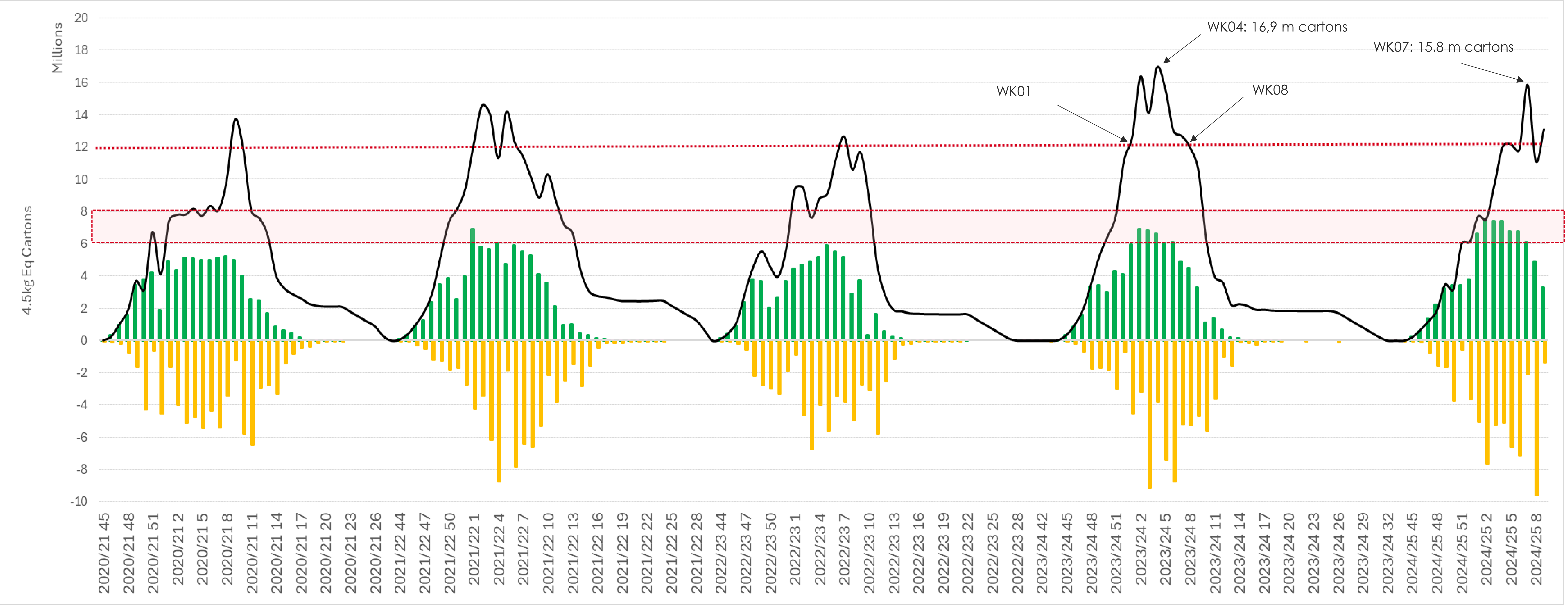
- New disruptors in the East – China exports growing, becoming a net exporter
- USA market changes (70% WS,25% RS, 5% BS) / (SA Gap filler) – (PRE TRUMP TARRIFFFS!!

- Utilising Walvis Bay Port: Pro's & Con's

- Cultivar sensitivity - to ensure that our top cultivars are performing
  - especially in the EU markets

STOCK BUILD-UP PER WEEK PER SEASON

DIFFERENCE BETWEEN INSPECTED AND EXPORTED 2021-2025



PRESCRIPTIVE LOGISTICS MODEL

WHY DID WE EMBARK ON THIS PROJECT?

- **Pro-active response** to logistical challenges experienced
- **Identify & Quantify** the impact of port efficiencies at the Port of CT
- To **reduce stock levels** during the peak weeks of our export season
- Propose **alternate export options**, considering ports if Walvis Bay, Port Elizabeth, Durban & Conventional vessel
  - **Quantify the cost differential** of each against CT

- Insights from model to guide industry decision in the interest of optimising cost and time to market.

- PHASE 1 & 2

- Focus on 2026 – Phase3?

THANK YOU

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