



SATI PRESENTATION:

SEASON OVERVIEW | PROJECTS | KEY UPDATES

Presented by: Mecia Petersen



2025

TABLE TALK

GRAPE

CONVERSATIONS

28.07
Groblersdal

30.07
Kakamas

01.08
Paarl

PRESENTED BY

SATI
SOUTH AFRICAN TABLE
GRAPE INDUSTRY

SASEV
SAWWV

TABLE TALK 2025
NAVIGATE & INNOVATE

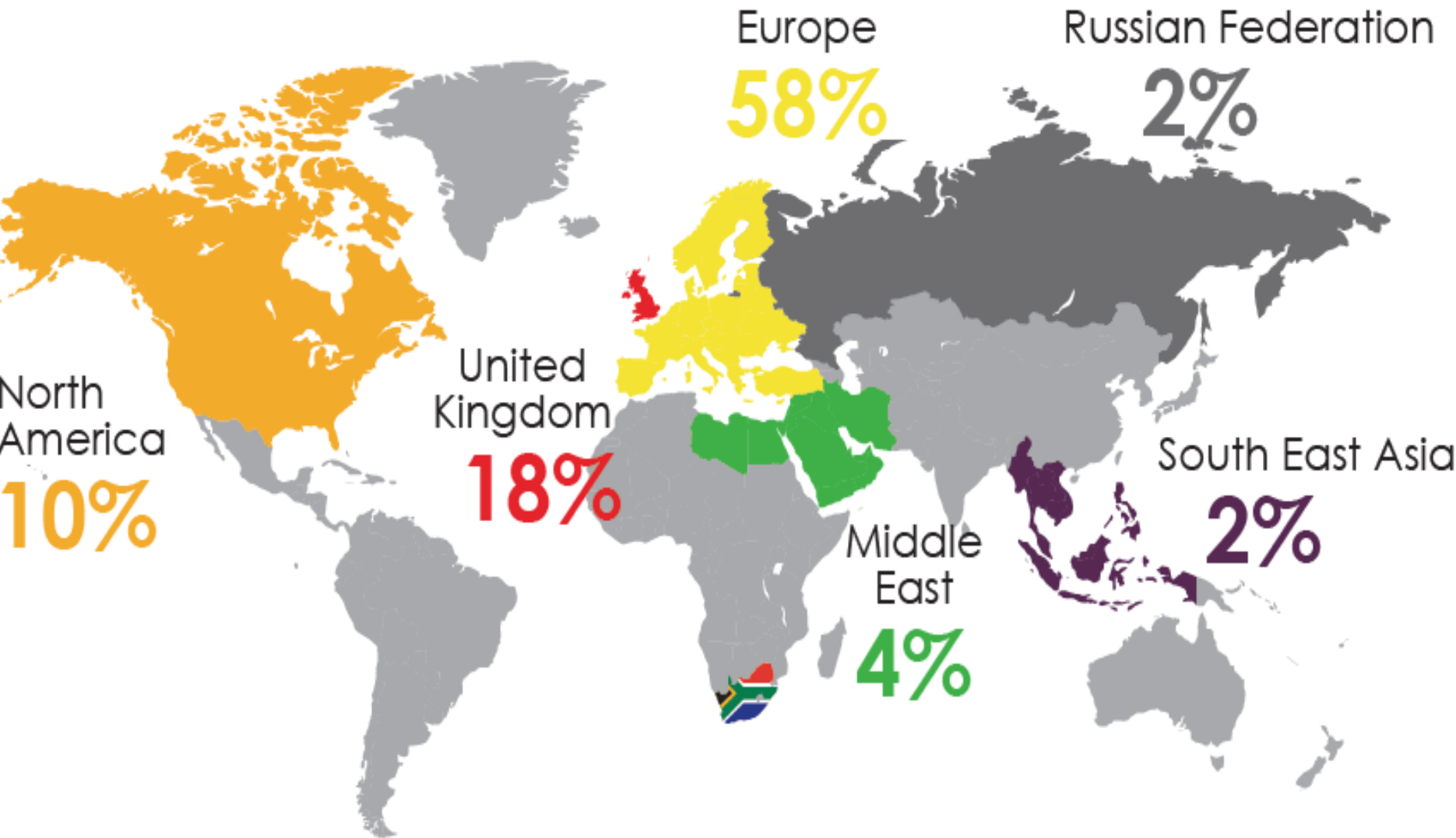
Creating a platform to explore topics impacting the table grape industry

SEASON OVERVIEW 2024/25

KEY EXPORT STATISTICS 2024/25 SEASON

MARKET SHARE & GROWTH BY DESTINATION

VS SEASON 2023-2024 (4.5 KG EQUIVALENT CARTONS)



45.1 mil	↑ +6%	VS 23-24
14.4 mil	↓ -1%	VS 23-24
7.5 mil	↑ +29%	VS 23-24
3.3 mil	↑ +26%	VS 23-24
1.7 mil	↓ -32%	VS 23-24
1.5 mil	↓ -2%	VS 23-24



78 172 935

Cartons Exported
COMPARED TO
74 149 581 LAST SEASON
(4.5 kg equivalent)



351 778

Tons Exported
COMPARED TO
333 673 LAST SEASON



21 715

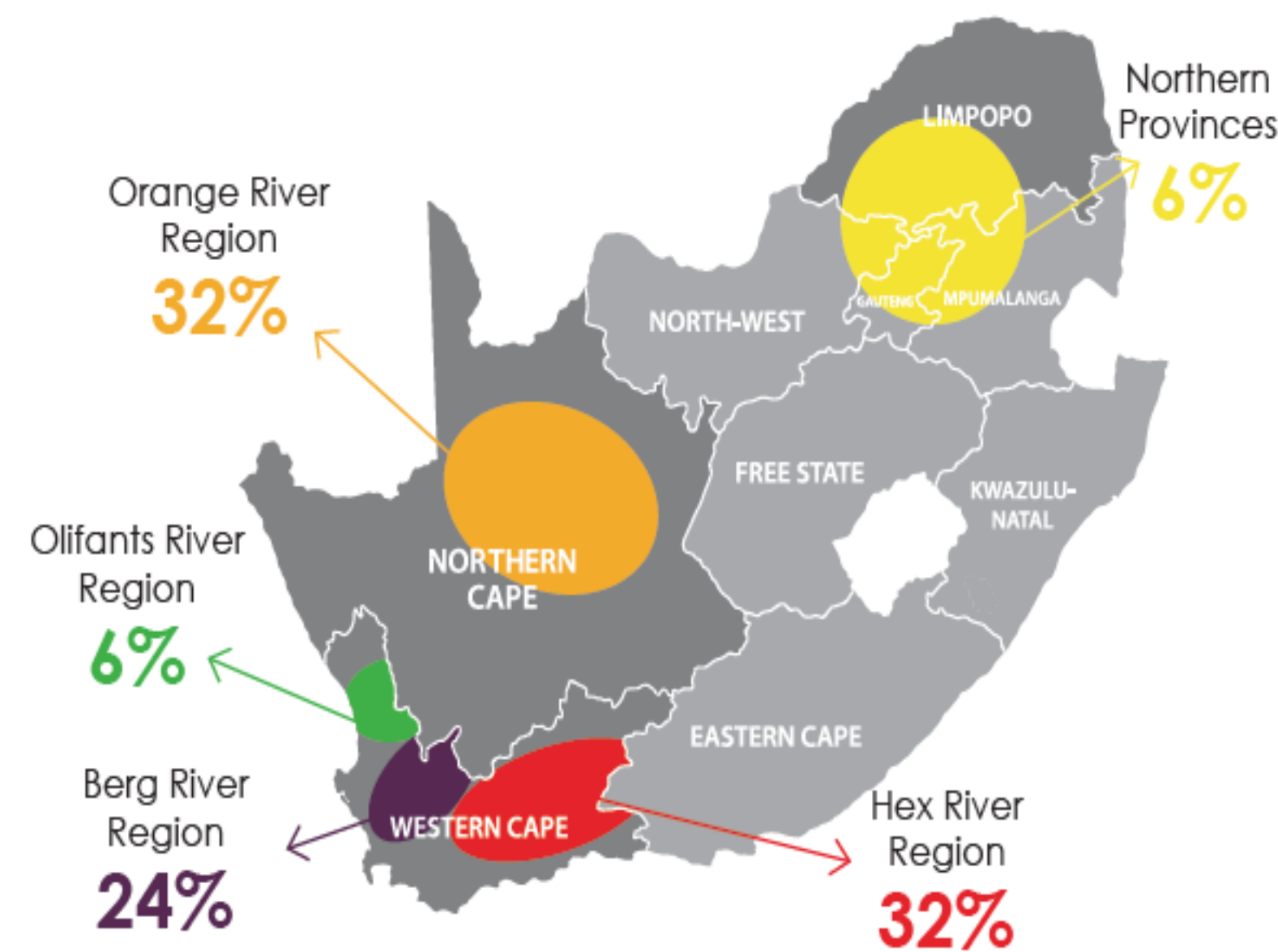
Containers Exported
COMPARED TO
20 597 LAST SEASON



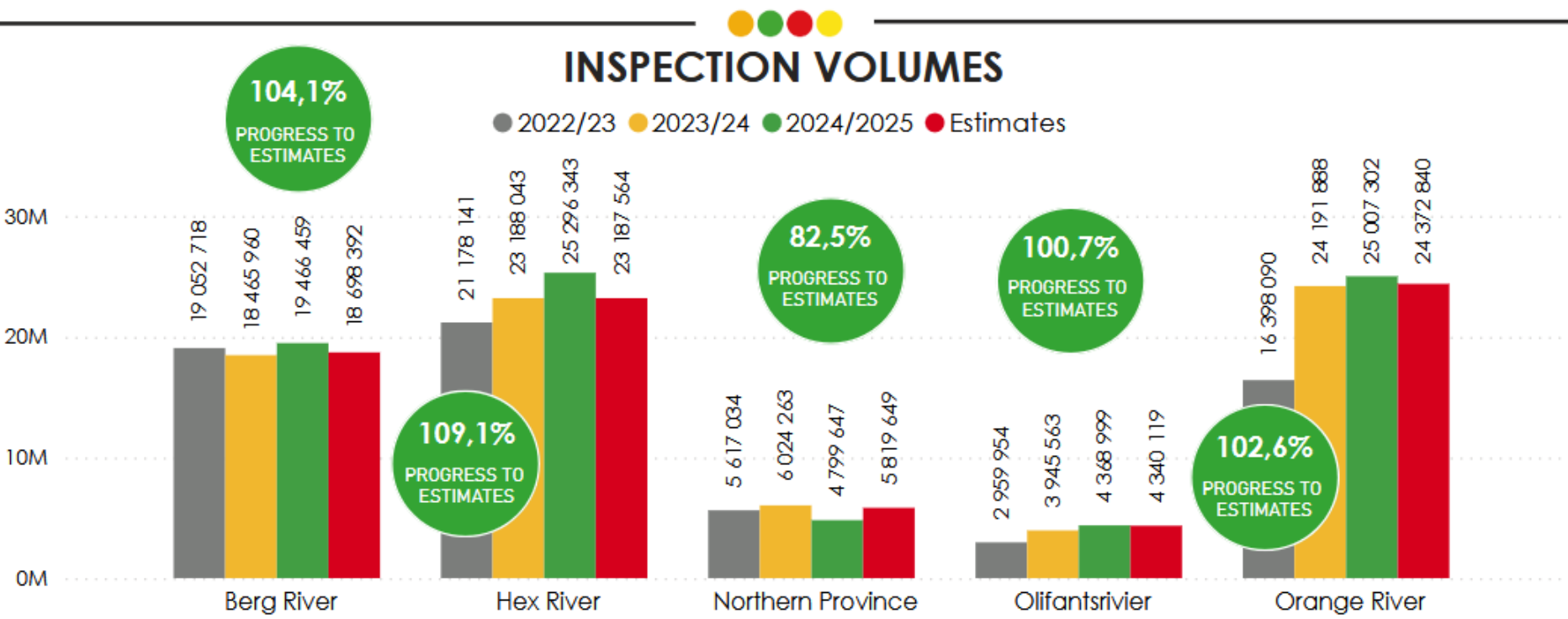
SEASON OVERVIEW 2024/25

PRODUCTION BY REGION

PRODUCTION BY REGION



INSPECTION VOLUMES



Berg River
19.4 mil cartons

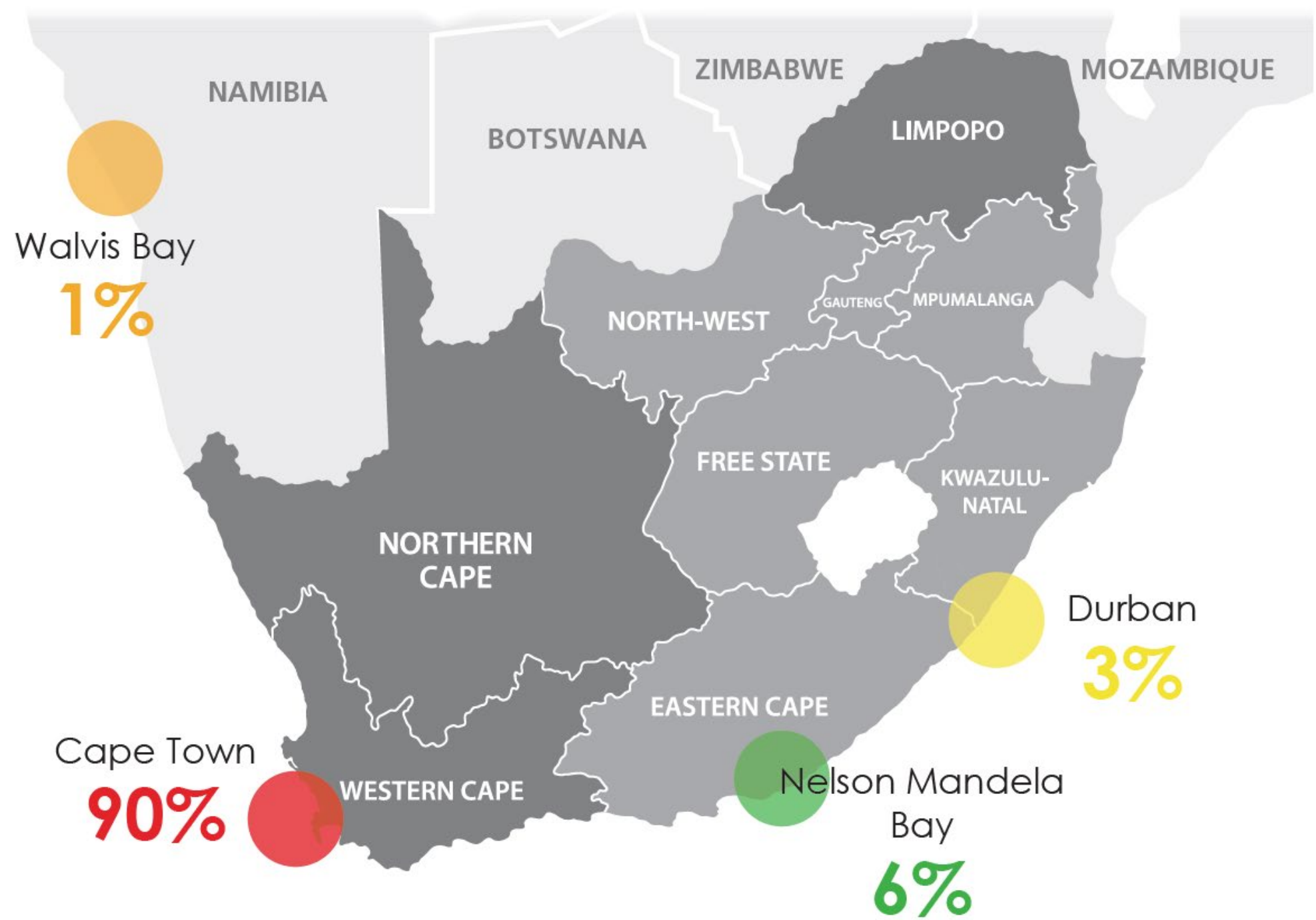
Hex River
25 mil cartons

Northern
4.8 mil cartons

Olifants
4.4 mil cartons

Orange
25 mil cartons

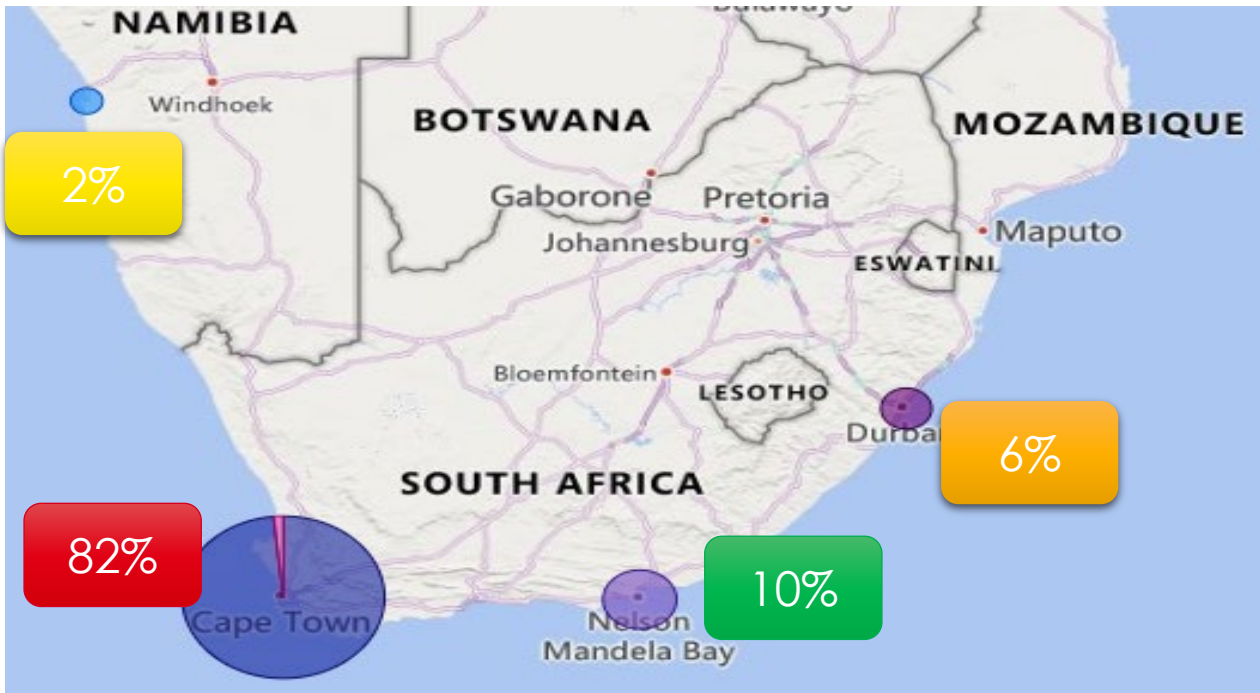
PORT UTILISATION 2024/2025



CT Terminal	2024	2025
MPT & CTCT	73%	83%
Conv @ FPT	10%	7%
Walvis Bay	0%	1%
PE & Coega	10%	6%
Durban	7%	3%

Risk Mitigation Strategy Driver – Impact of no Walvis and PE

23/ 24 Baseline



Port	Port Utilisation
ZACTCT	70%
ZAFPT	10%
ZACTMPT	2%
ZADUR	6%
ZAPLZ/ ZBA	10%
NAWVB	2%

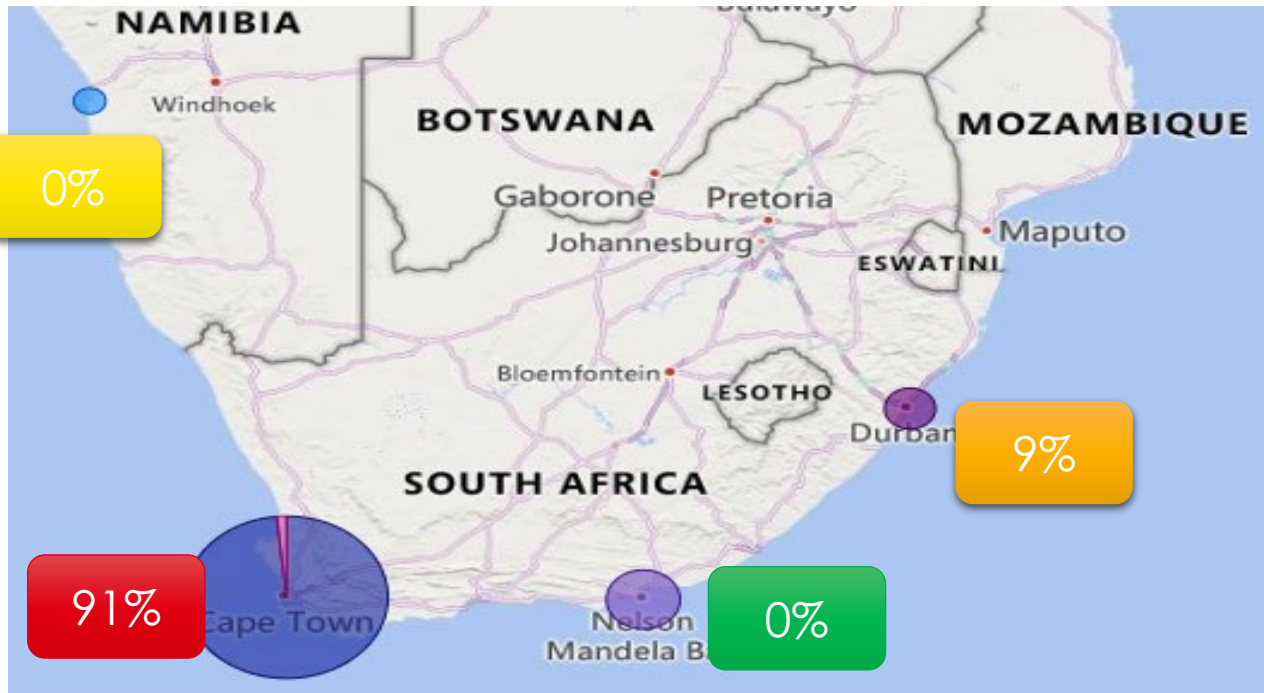
17M

Max inventory

97%

% of inspections exported

No PE/NAWVB



Port	Port Utilisation
ZACTCT	86%
ZAFPT	2%
ZACTMPT	3%
ZADUR	9%
ZAPLZ/ ZBA	0%
NAWVB	0%

22M

Max inventory

96%

% of inspections exported

Evaluate 23/24 season baseline vs a model with no capacity at Walvis or PE

Inventory spike at 22m cartons, this is 30% higher than the max seen in 23/24

Profit margin per container is reduced by 3%.

Est minimum loss of R123m in profit based on none exported product.

Note: The “No PE/NAWVB” is still an optimisation model, this means this is BEST case in this scenario, in reality this would most likely be worse

TRANSNET PROGRES UPDATE

2023/24 SEASON TO 2026/27 SEASON PLANS

2023/24	2024/25	2025/26	2026/27
 47 Replacement trailers received Sept 2023 - Done	 9 RTG's delivery - March 2025 - Done	 9 RTG's – second batch - 11 Aug 2025 – revised date - June	 Phase 2 B Expansion Project
 7 x Second hand RTGs Acquisition - 10 December 2023 delivery - Done	 2 x Replacement new Reach Stackers 10 April 2024 - Done	 STS Midlife refurbishment continued	 STS Replacement – Project approved
 Leasing of ECH x 1 – One ECH delivered, second one on route – April 2024 - Done		 10 RTG's – second batch - 20 Nov 2025 – revised date -Sept 2025	
 Acquisition of RTG Engines x 7 – 31 Oct 2023 - Done Leasing of forklifts x 3 31 Dec		 8 x Forklifts acquisition December 2025	
 OEM appointment for STS cranes technical support 1 Nov 2023 - Done		 2 x Replacement Empty Handlers December 2025	
 STS and RTG long term Spares contract 1 July 2023 - Done		 STS Midlife refurbishment starts June 2025	
 Long term OEM partnership in place December 2023 - Done		 4 x Additional new Straddles – December 2025	
 Placed order for 27 x new RTGS 6 December 2023 - Done			

TRANSNET

OPERATIONAL PROGRESS CTCT



Reefer champion appointed



Windbound strategy comms



Improved stack management
(24 hr notice)



Truck booking system –
Regulate slots & reduce
wasted slots



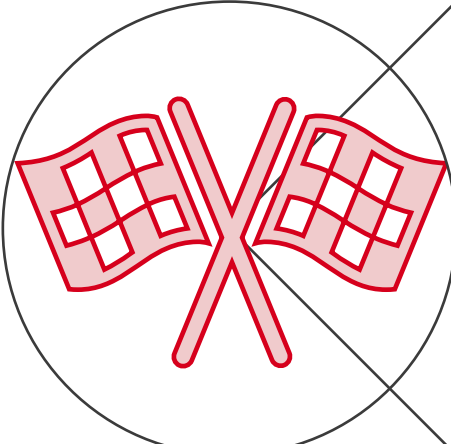
Truck booking
system – entry
without
appointments



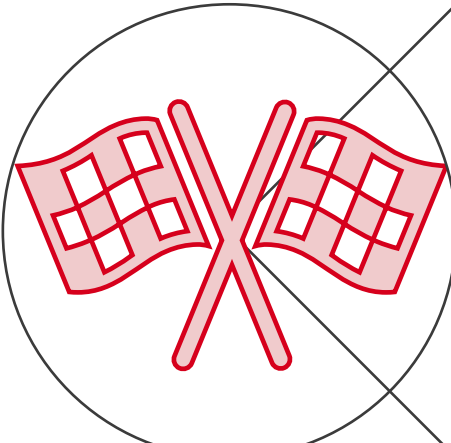
Digital tech
platform to
facilitate cargo
planning



Procure additional
equipment &
operators



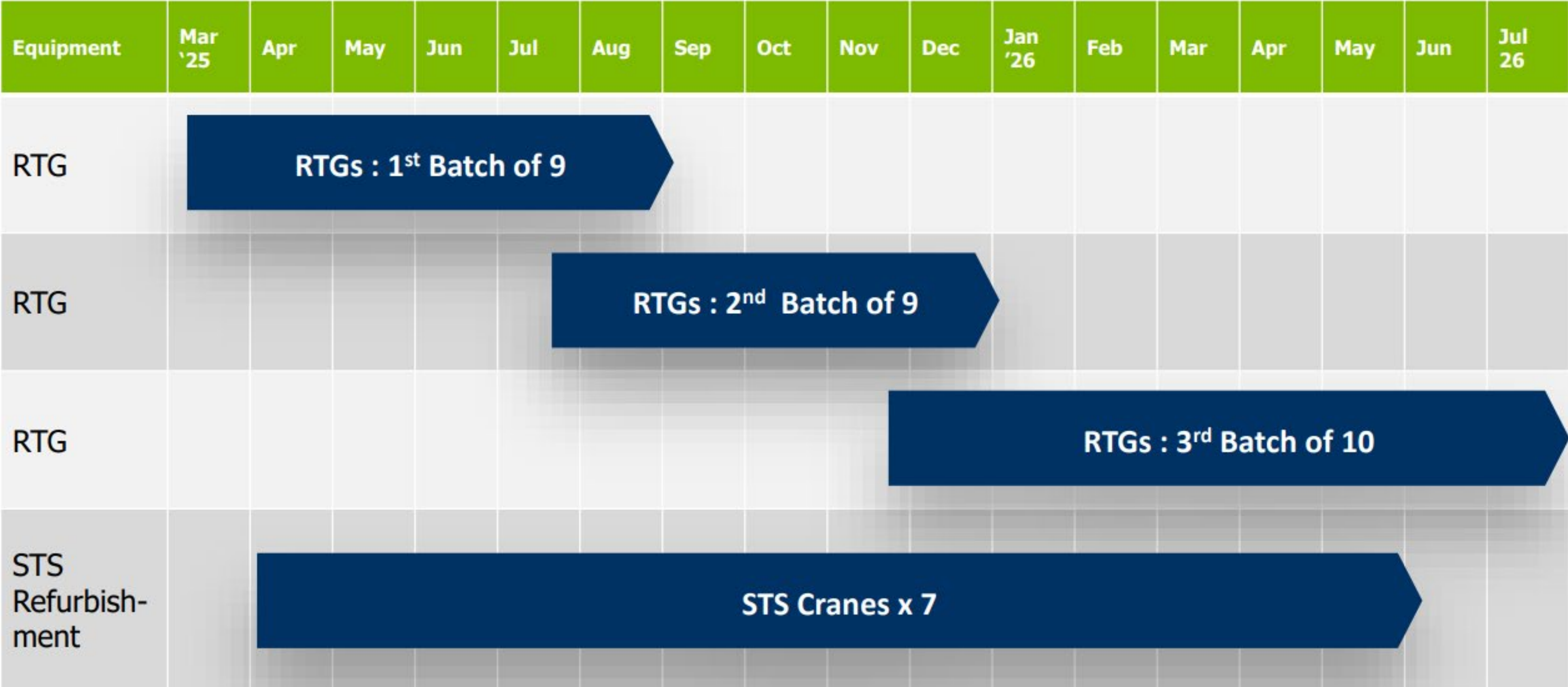
4th gang =
relief during
windbound
& holidays



FIRST PSP
INITIATIVE
2x 500kVG
gensets

TRANSNET

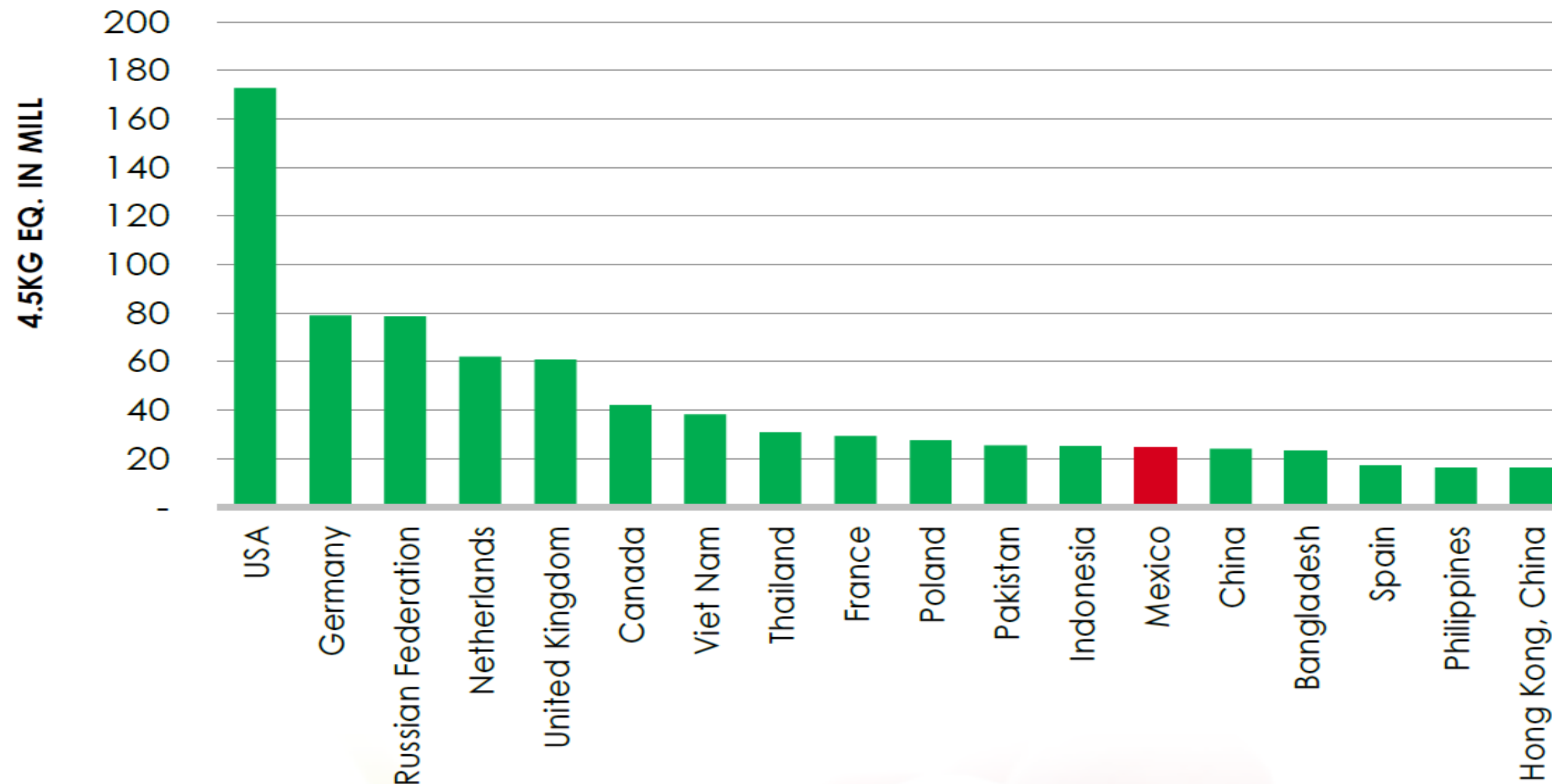
CTCT EQUIPMENT REPLACEMENT



MARKET ACCESS

SA SEASON = 80% in \$ terms

South Africa currently enjoys **access to 17 of the top 18 table grape importing markets** globally



MARKET ACCESS

ACCESS TO NEW MARKETS

- This season South Africa secured market access for **table grape exports to the Philippines**, and we look forward to the first consignments being shipped in the 2025/26 season.
- Officials from **the Republic of Korea visited South Africa in February** to conduct an on-site verification of the table grape industry. We hope the market process will be officially concluded by November and that at least one container be exported during 2025/26, as a symbolic opening of the market.

RESEARCH & TECHNICAL TRANSFER

RESEARCH THEMES & PROJECTS

Good progress has been made in the research portfolio in revising the process for identifying research and knowledge transfer needs and the roll out of projects.

Key projects in the pipeline:

- Overhead plastics & nets

Research topics currently under consideration for the 2025/26 budget are:

1. Integrated mealybug management
2. Multi-crop management of thrips
3. Bunch stem necrosis
4. Over shatter of table grapes

TRANSFORMATION

HIGH LEVEL UPDATE

KEY AGREEMENTS SIGNED

- SATI signed an **MOU with Landbank** for collaboration to support qualifying table grape farmers
- An **MOU was signed with the Western Cape Department of Agriculture** to renew our longstanding relationship and acknowledge the sharing of responsibilities to support black farmers in the province
- SATI signed a **service level agreement with the National Department of Land Reform and Rural Development**, resolving to provide targeted producer support to land reform beneficiaries in the table grape industry

TRANSFORMATION

HIGH LEVEL UPDATE CONTINUED

TRANSFORMATION WORKING GROUP

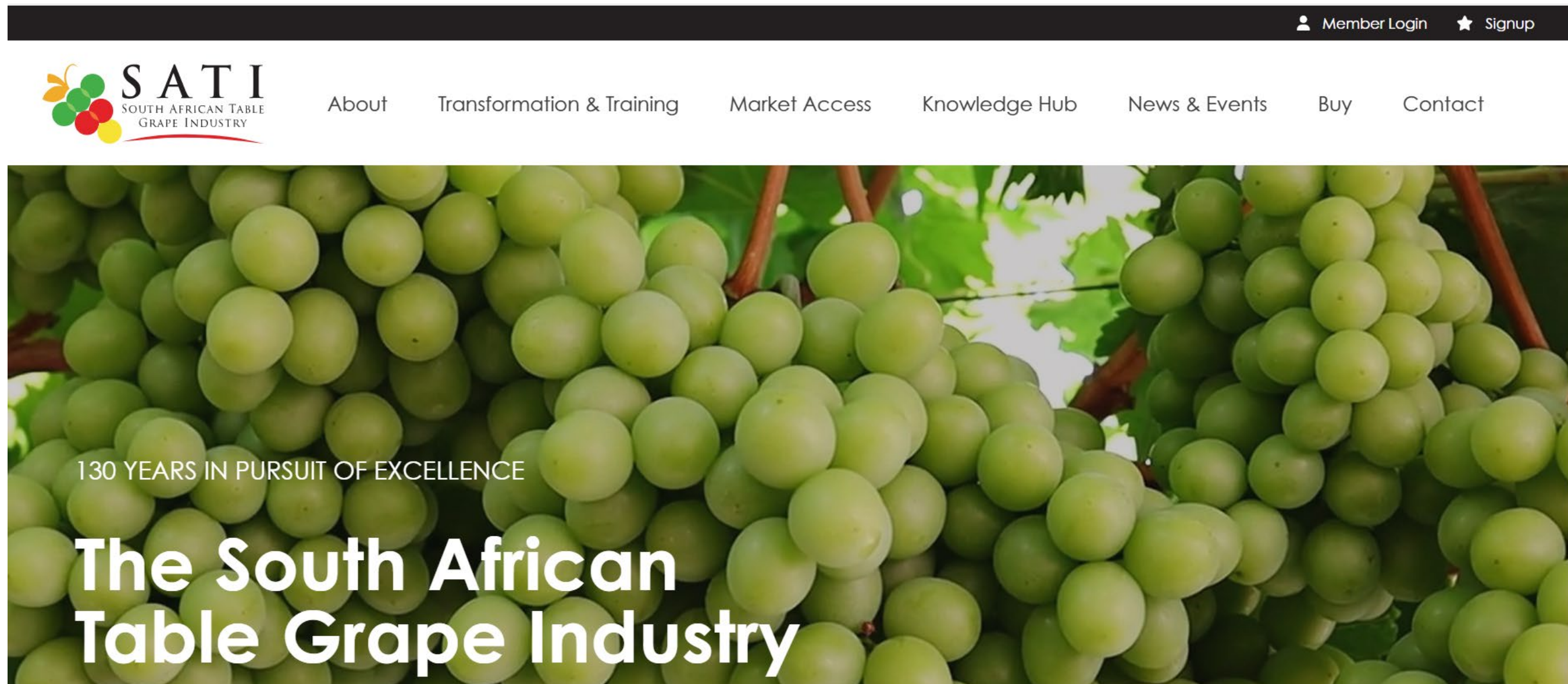
SATI recently established a transformation working group which will operate as a committee of the board.

Objectives:

- Provide a formal channel of communication between the SATI Board and the first-generation farmers
- Make recommendations and give support to the board relating to transformation matters

WEBSITE REFRESH

NEW SATI WEBSITE TO LAUNCH IN AUGUST



- SATI new website will launch by end-August
- The site will be faster and more user-friendly
- The subscriber functionality has been improved

GEO-POLITICAL ENVIRONMENT

KEY UPDATES & IMPACTING FACTORS

- **USA Tariffs**
 - Document signed by Minister Parks Tau
 - Brazil 50%
 - Chile & Peru 10%
- Possibility of trade agreement with **China**
- **Transnet**
- **Eskom**

A scenic view of a South African vineyard. In the foreground, rows of grapevines with lush green leaves are visible, some supported by wooden trellises. A dirt path leads through the vines towards the background. In the middle ground, a large, flat vineyard stretches across the landscape. In the far background, there are rolling hills and mountains under a bright, hazy sky. The overall atmosphere is warm and sunlit.

SOUTH AFRICA **QUALITY ON ROOT**