



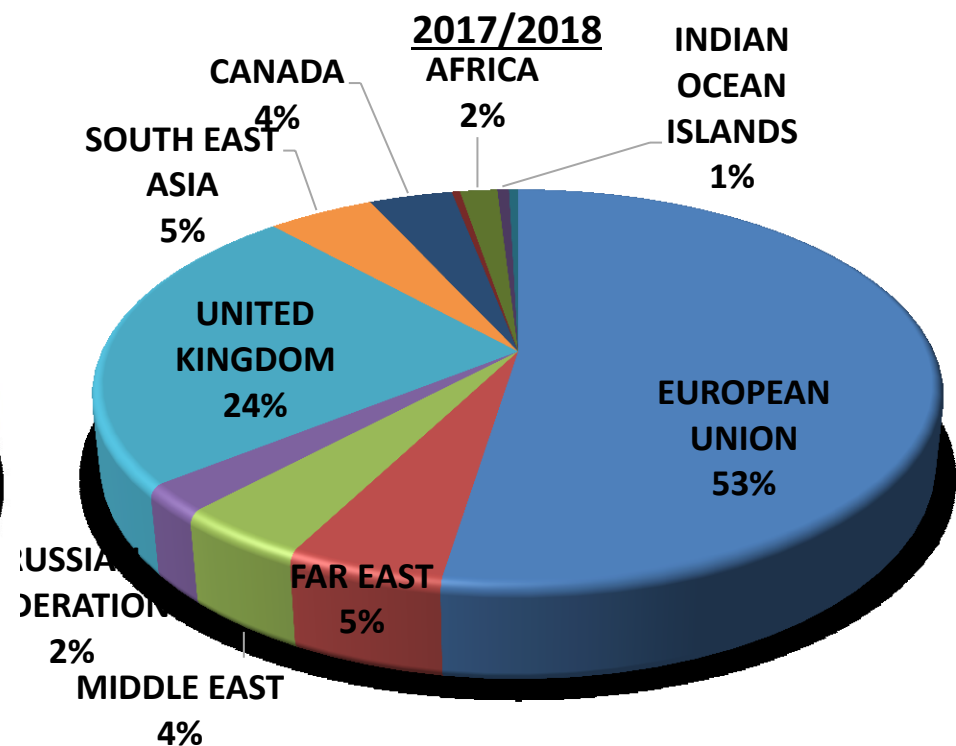
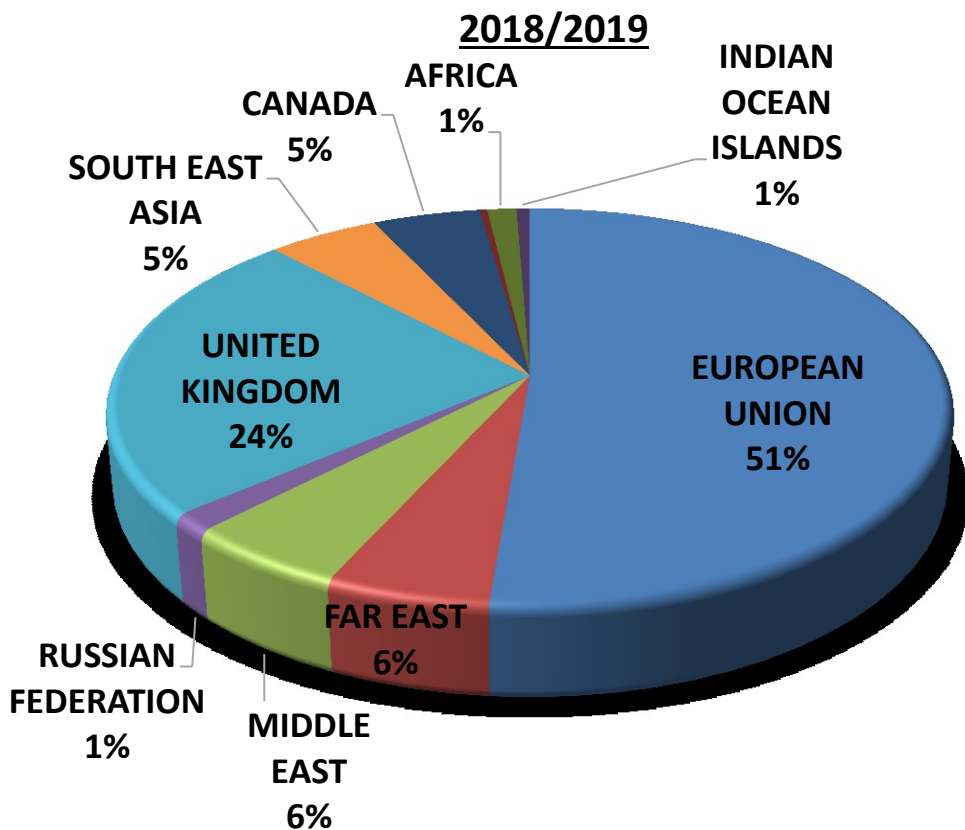
SA TABLE GRAPES MARKET DEVELOPMENT IN CHINA
SATI 南非鲜食葡萄协会

Overview

- ❑ SA Table Grapes Market Share
- ❑ The SA Realities
- ❑ The Strategic Imperative & Objective
- ❑ Why China?
- ❑ The SATI commitment
- ❑ Partnerships & Support
- ❑ China Focus Group
- ❑ Planning for China

MARKET SHARE

2018/2019 vs 2017/2018



Europe & UK = 75%

Realities

- ❑ SA soon up to 70+ million cartons industry
- ❑ Southern Hemisphere competition growing
 - International trade disruptions (Trump)
 - Increasing volumes to saturated EU and UK
- ❑ SA's over-exposure to EU & UK = 77%
- ❑ New markets an uncertain and tedious process

The Strategic Imperative & Objective

- ❑ Diversify markets – outside of the EU & UK
- ❑ Export +10 million cartons to China within 5 years
 - Profitably and sustainably
 - SA needs to become significant in China
 - Additional 7 750 Jobs and R1,3 billion foreign earnings
- ❑ Strategically important to all Growers & Exporters
 - Including those not active in target market

Why China?

□ An enormous market

- Economy, middle class & consumption growing
- Imports almost 2 x SA crop annually (incl. Hong Kong)

□ SA has market access

- Shipment Protocol manageable
- Tariff digestible, i.e. 13%
- South Africa & Africa a strategic partner; e.g. BRICS

Why China?

Figure 1: Fresh Fruit Import Value (billion USD)

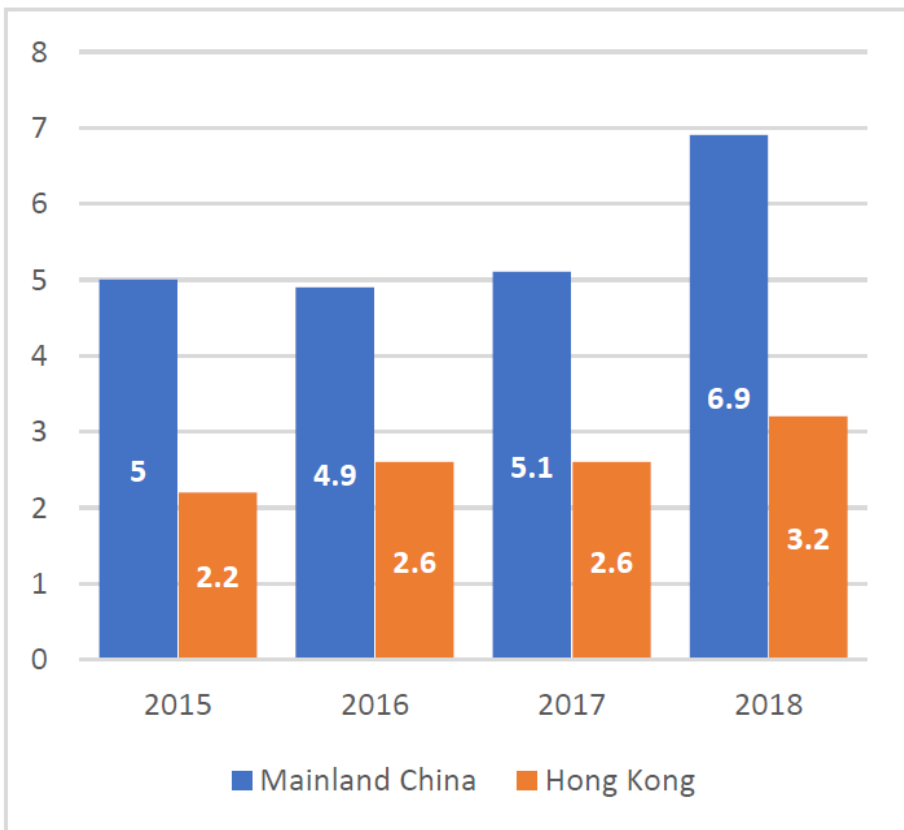
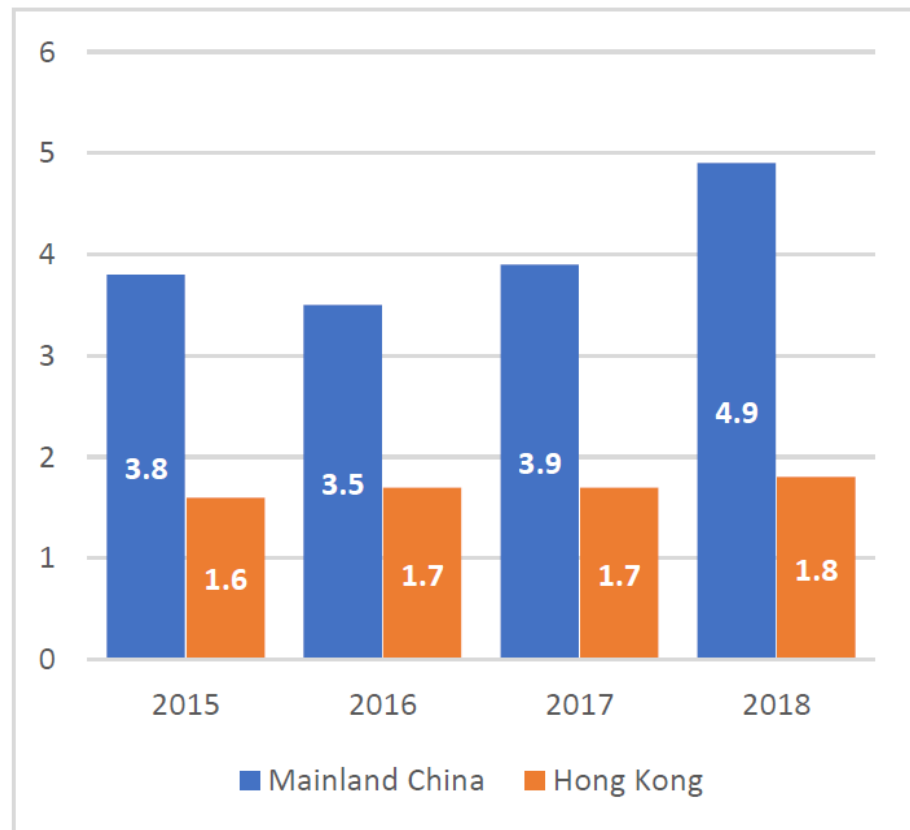
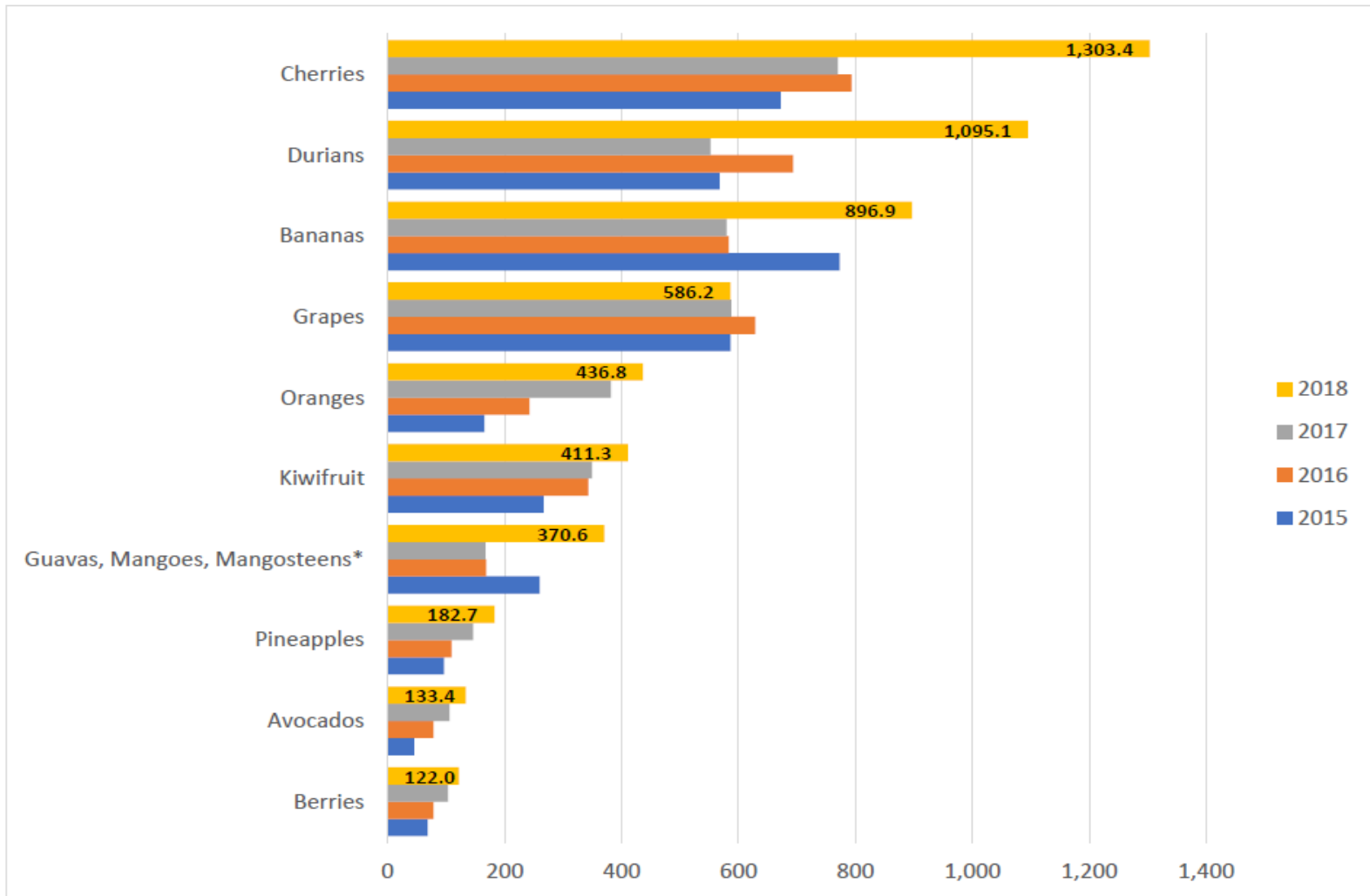


Figure 2: Fresh Fruit Import Volume (million tons)



Why China?

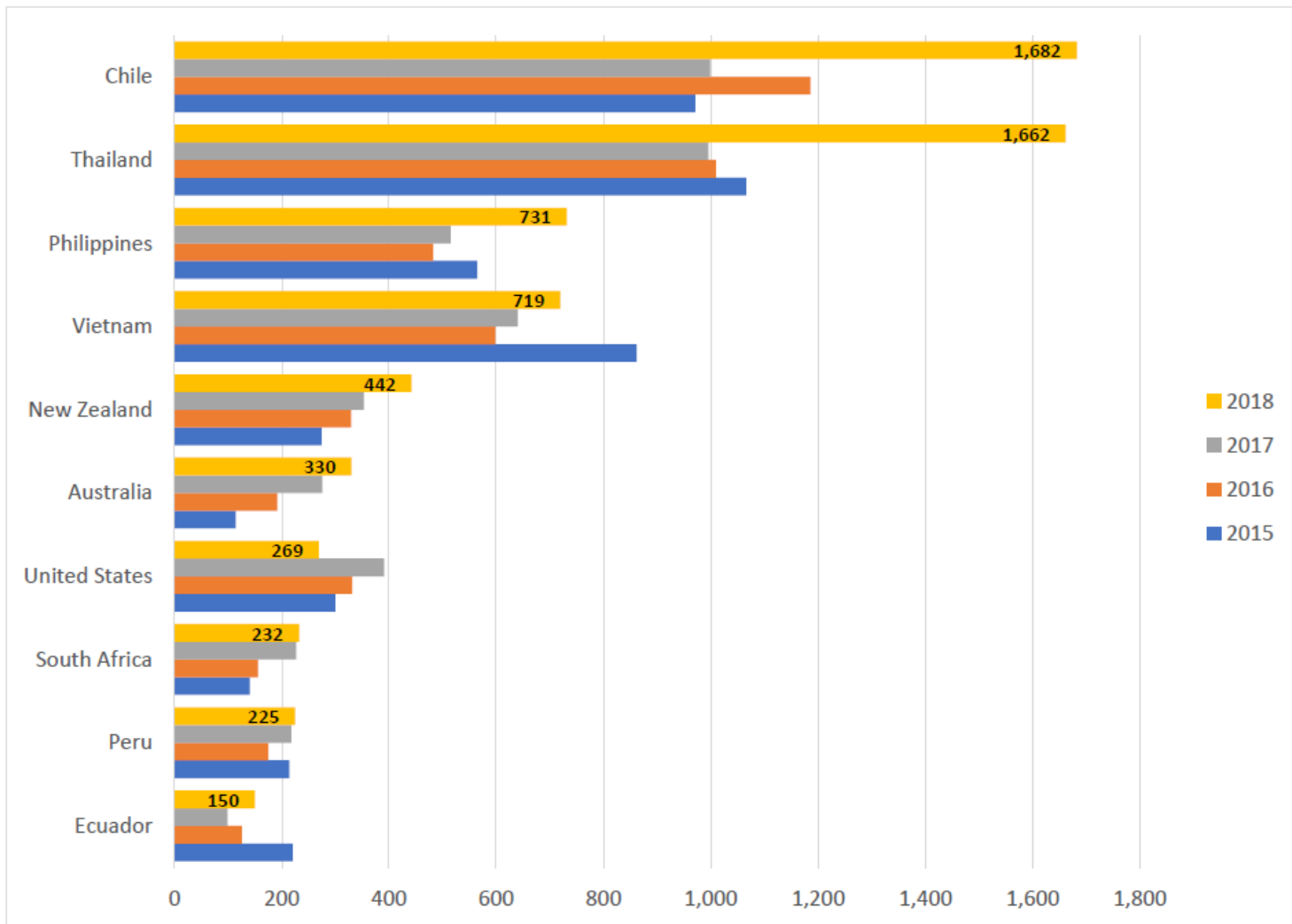
Figure 3: Mainland China Top 10 Imported Fruits (million USD)



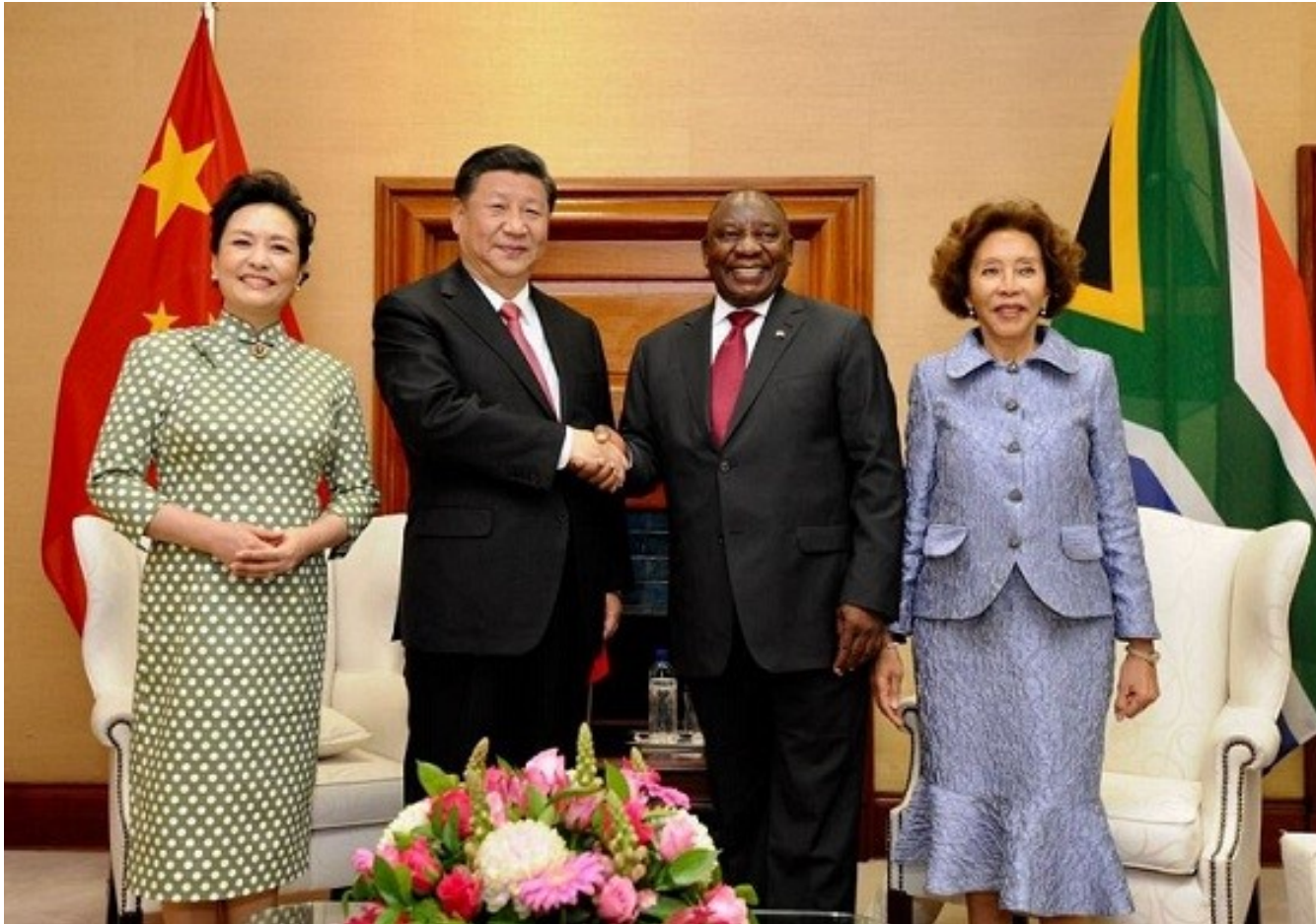
* Mangoes account for most of this category

Why China?

Figure 4: Mainland China Fresh Fruit Imports (million USD)



Why China?



SATI Commitment

- ❑ Support a Generic SA Table Grapes Campaign
 - Sustain for 4 Years
 - Partner with Exporters (FPEF) and Other Stakeholders
 - R2 million per annum
 - Pursue co-funding and partnerships
- ❑ SATI provides the generic platform
 - Exporters to support commercially
- ❑ Fund and execute a technical shipment project

Partnerships & Support

□ Growers (SATI) & Exporters (FPEF)

- Completion of Technical Shipment Project
- Established a joint China Focus Group
- In-market activities

□ The Department of Trade & Industry

- SA Embassy in China
- National pavilions
- Consulted with other SA companies active in China

China Focus Group

□ Technical work group

- Draft specifications for “project China”
- Procurement of grapes for the Market Development programme
- Co-ordination of specifications through the season
- Focus on a few cultivars “with legs”
- Perhaps 3 cultivars e.g. Crimson
- Services of a viticulturist consultant will be employed to assist

China Focus Group

□ Growers (SATI) & Exporters (FPEF)

- Develop a branding toolkit
- Develop China Quality spec

Planning for China

- ❑ After Asia Fruit Logistica (4-6) in September (8-11)
- ❑ Meetings and visits to:
 - ❑ 2 Wholesale Markets
 - ❑ Retailers (at least 2, also meet some at FL)
- ❑ **Inform China concept & obtain their support requirements & expectations and timelines**
- ❑ *Feedback to Technical Work Group & Focus Group*

Online presence

SATI简报 1月第1周

国际果蔬 1/24



2018/2019产季数据



地区	2018/2019产季预估产量		实际产量		
	低	高	2017/2018	2016/2017	2015/2016
北部省份	6,700,000	7,500,000	6,828,762	5,537,784	4,730,931
奥兰治河	18,500,000	20,500,000	19,015,641	20,532,515	18,642,606
奥勒芬兹河	3,500,000	4,100,000	2,802,136	3,968,073	3,157,059
伯格河	13,600,000	15,000,000	13,052,616	15,426,175	12,599,726
赫克河	20,900,000	23,000,000	20,365,295	22,110,612	18,849,217
总量	63,200,000	70,100,000	62,064,450	67,575,159	57,979,539

SATI 2018/2019产季第一次产量预估保持不变，预计在6320万~7010万箱（4.5kg/箱）之间。

区域概况

北部省份

这个地区产季较早，在产季结束前还有大约2至3周的包装时间，目前收获情况和提子品质良好，预计该地区产量将在预估范围内。最后收获黑提，以克里森（Crimson）和Scarletta收尾。

奥兰治河

这个地区的包装正在进行中，比预计晚了一到两周。种植者的总体看法是将达到预估产量，收获条件非常有利。种植者目前正在包装Thompson和Autumn Crisp。

奥勒芬兹河

虽然这个收获开始较晚，但包装现在正在进行中。一场非季节性降雨给收获的初始阶段带来了负面影响。早期迹象表明，该地区从严重干旱中恢复的速度比预期要慢。不过，该地区的预期仍然明显好于去年。种植者目前正在包装Tawny，火焰（Flame）和Prime。Krissy，Magenta和克里森（Crimson）将在大约两周后开始。

第1周产量（数据来源：南非官方易腐产品出口认证机构PPECB）

第1周 - 产量

单位：箱（4.5kg/箱）

产区	2018/2019	2017/2018	2016/2017	2015/2016
北部省份	5,513,907	5,596,451	4,315,504	3,934,887
奥兰治河	13,998,791	16,470,936	17,834,766	17,750,050
奥勒芬兹河	917,245	1,210,105	1,471,096	1,513,105
伯格河	1,285,477	1,598,944	2,378,630	3,078,018
赫克河	623,891	751,933	1,372,594	1,395,227
总量	22,339,311	25,628,369	27,372,590	27,671,287

第2周出口量（数据来源：AgriHub Data，截至2019年1月10日，星期四，上午8点）

第2周 - 出口

单位：箱（4.5kg/箱）

市场	2018/2019	2017/2018	2016/2017	2015/2016
欧盟	11,583,026	12,319,385	13,331,118	12,457,067
英国	4,492,082	5,467,542	6,311,329	5,774,294
中东	993,693	856,130	1,073,204	1,283,817
东南亚	828,857	939,467	861,288	1,103,077
中国（含香港）	684,187	865,017	1,601,731	979,112
俄罗斯	346,034	626,504	469,884	557,907
美国	60,172	102,309	45,681	26,187
加拿大	1,366,802	1,347,275	1,133,335	497,555
其他市场	202,695	310,129	308,324	339,875
总量	20,557,548	22,833,756	25,135,894	23,018,891


Online presence



SATI banner ads C1 (Chinese Website)



SATI Wechat banner ads



从南非桌山到您的餐桌

南非鲜食葡萄



以全球最高标准严格要求产自南非，无论您身处世界何处，都将品质上乘、口味优良的鲜食葡萄，从桌山脚下送至您的餐桌。

南非鲜食葡萄协会 (SATI) 为种植者赋能，致力协助葡萄种植商维护、发展和优化市场。SATI 代表种植商参与政府和行业关键举措讨论，在确保可持续发展的同时，从购买果园到开拓新市场为行业提供更多机遇。

南非是鲜食葡萄最新无核品种的领先供应国，每季从11月到次年5月供应。作为欧洲市场最主要的葡萄供应源之一，南非的果园和包装厂满足最严格的欧洲食品标准和安全要求。

享用葡萄，认准南非桌山！



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Thank You