Table Grape Information Day

Southern hemisphere view on volume trends

Jacques Ferreira / SASEV Roadshow / August 2022

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Agronometrics in Charts: Peru ascending as the world's leading grape exporter

March 29 , 2022 FreshFruitPortal.com

Peruvian table grape exports rose by 17 percent in 2021-22 season

June 14 , 2022

FreshFruitPortal.com

Peru shipped 584% more table grapes in April than in the same month of the previous campaign

Fresh Plaza

42% of the grapes that Peru exported during this campaign were seedless white

14 Jun 2022 Fresh Plaza

Peruvian table grape exports to rise by at least 8% in 2022-23

May 2022 FreshFruitPortal.com

This Chilean table grape season was "one of the worst" - Uvanova

EUROFRUIT

Chilean table grapes bounce back

By Maura Maxwell | 19 November 2021

Climate Change Victim: Chile Faces Its Worst Drought in History

Chile plans to ration water to citizens as 12-year long drought leaves the country without enough water

by Elizabeth Partsch — April 19, 2022 in Climate Change, Environment

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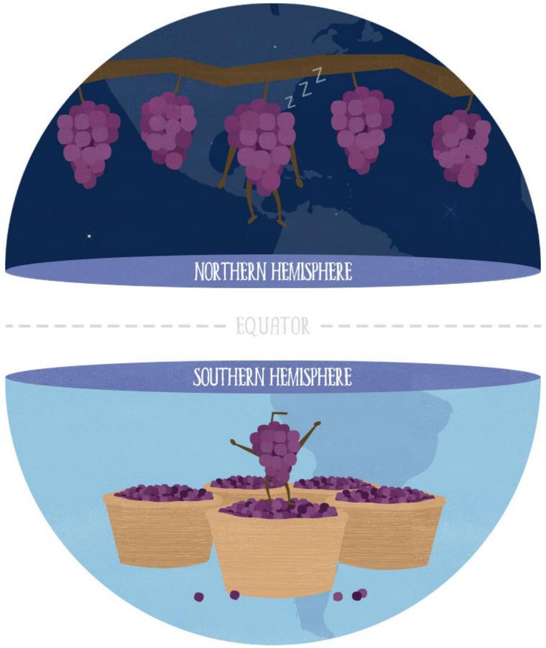
Southern Hemisphere table grapes achieve new export record

FROM **FRESH FRUIT PORTAL** | 26 JULY 2022



- Global Exports 2021 : 4,8 million tons (calendar year)
- Seasonal record 21/22 : 4,3 million tons

- Southern Hemisphere ?

- In the 2021-22 season, S-H countries achieved a new export record of **1.5 million** tons, an increase of **0.3 million tons in a decade**.

- 31% of global supplies from S-H.

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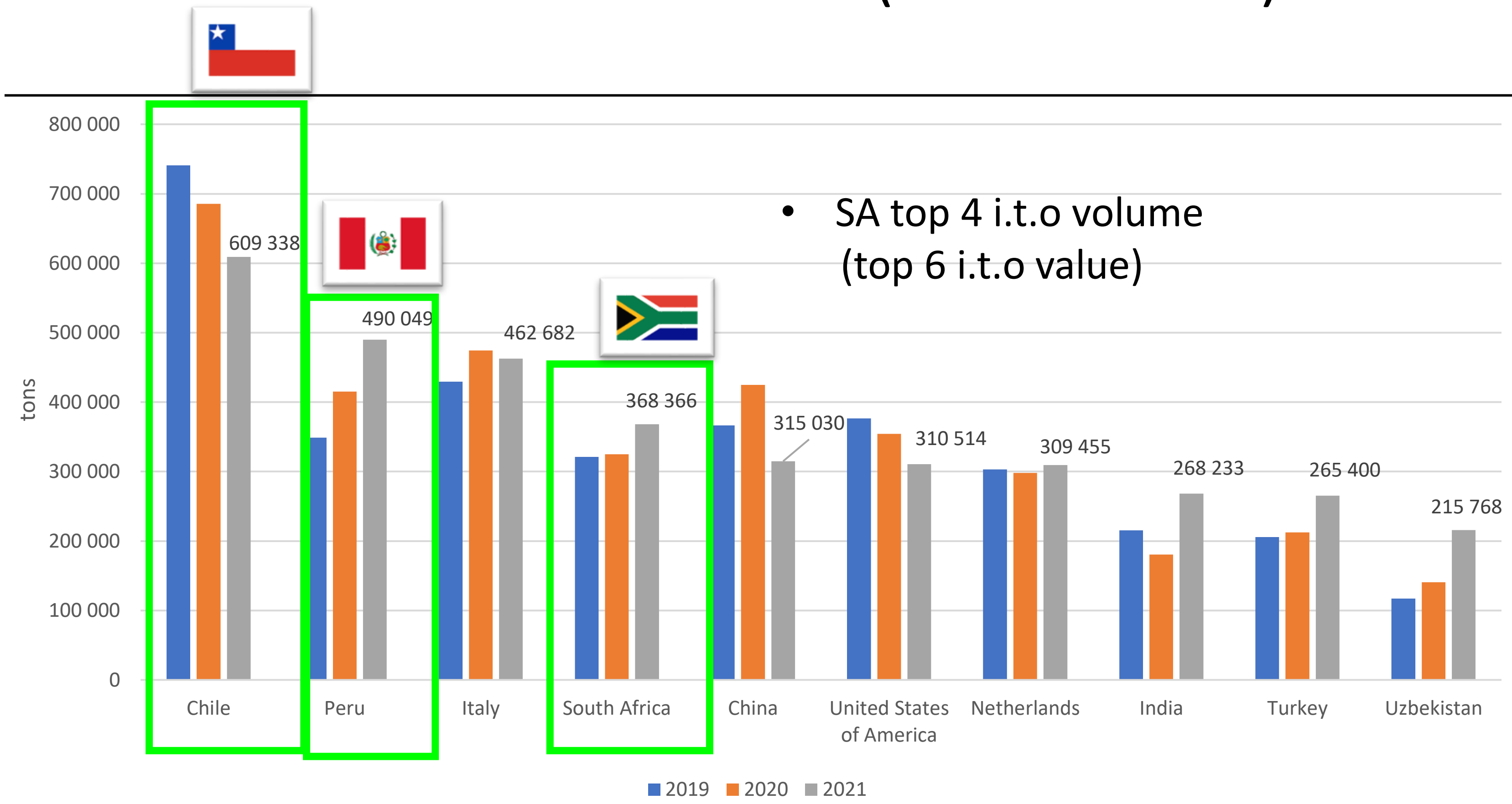
GLOBAL TABLE GRAPE EXPORTS MARKET SHARE (PER VOLUME)



- SA top 4 i.t.o volume (top 6 i.t.o value)

- Global yearly exports 4,8 million tons
- Chile 13 %
- Peru 10 %
- SA 7%

Source: Trademap ITC (values per calendar year not season)

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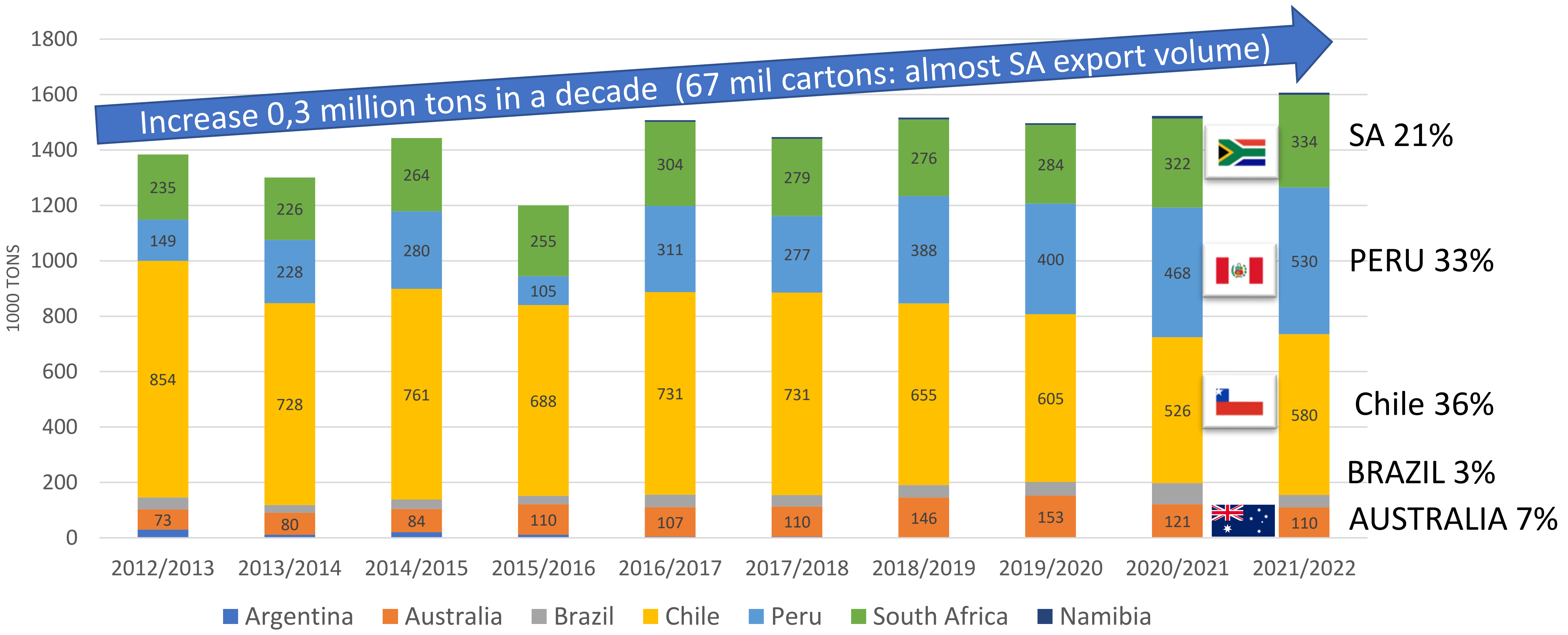
SOUTHERN HEMISPHERE EXPORTS



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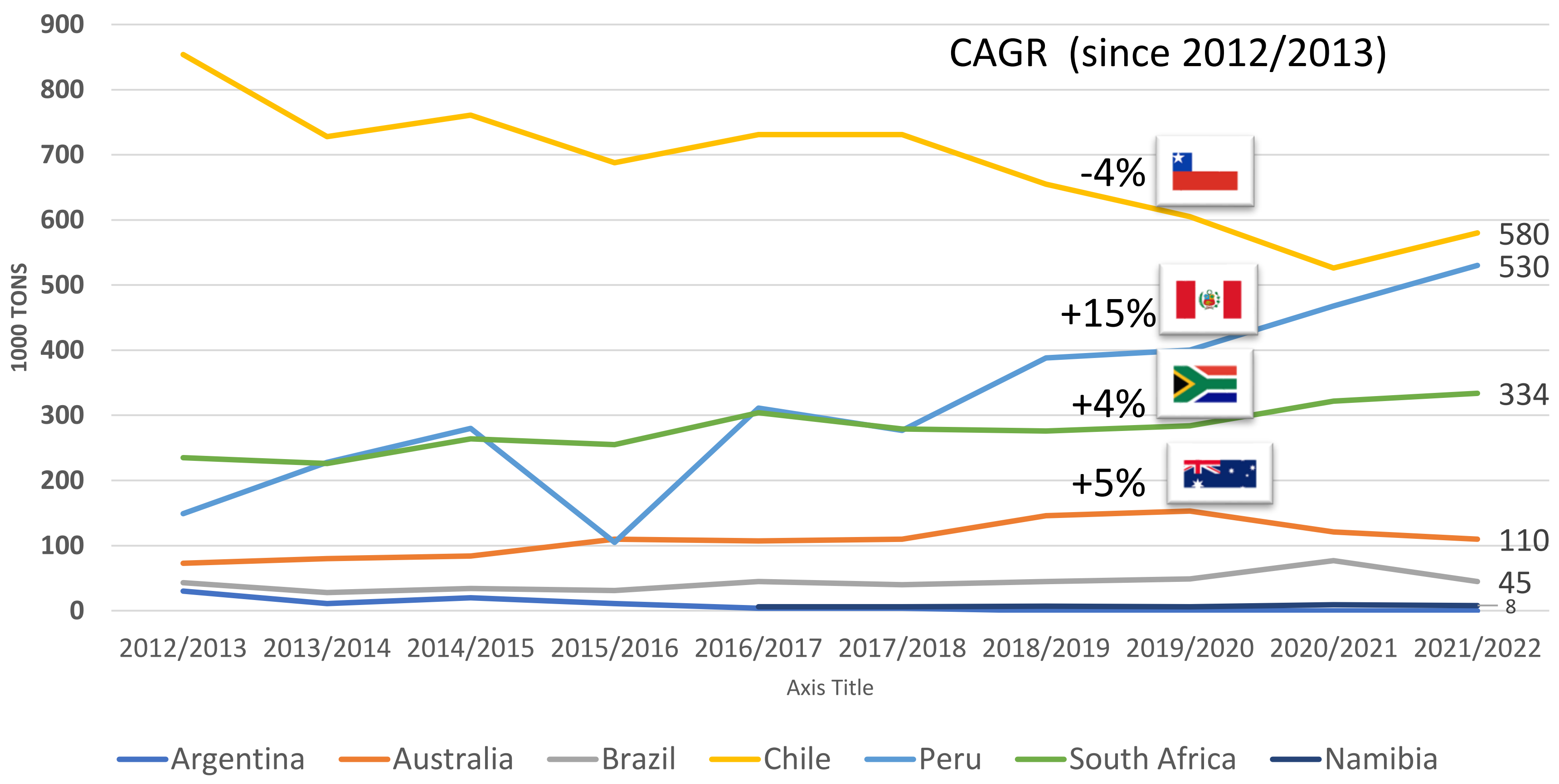
INDIVIDUAL SOUTHERN HEMISPHERE EXPORTS



- Chile continue to lead, despite challenges e.g. drought
- Peru showed the biggest growth
- SA & Aus. steady growth

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CHILE GROWING AREAS

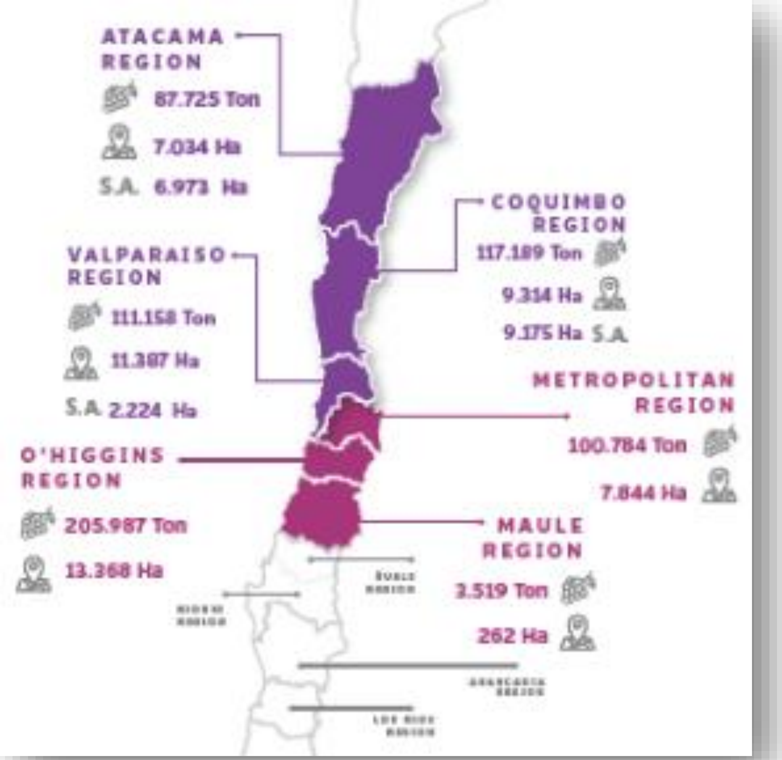

Table 1: Table Grape Planted Area by Region in MY2019/20 (hectares)

Region	Planted Area (hectares)	Share (%)
Arica y Parinacota	2	0.0%
Atacama	6,836	15.0%
Coquimbo	8,159	17.9%
Valparaíso	9,970	21.9%
Metropolitana	6,848	15.1%
O'Higgins	13,435	29.5%
Maule	241	0.5%
Total	45,489	100.0%

Source: Chilean Ministry of Agriculture, ODEPA

- 47 800 hectare (2018/2019)
- 2 300 hectare in 2019/2020 (-4,8%)
- 85% of vineyards are <5 hectares

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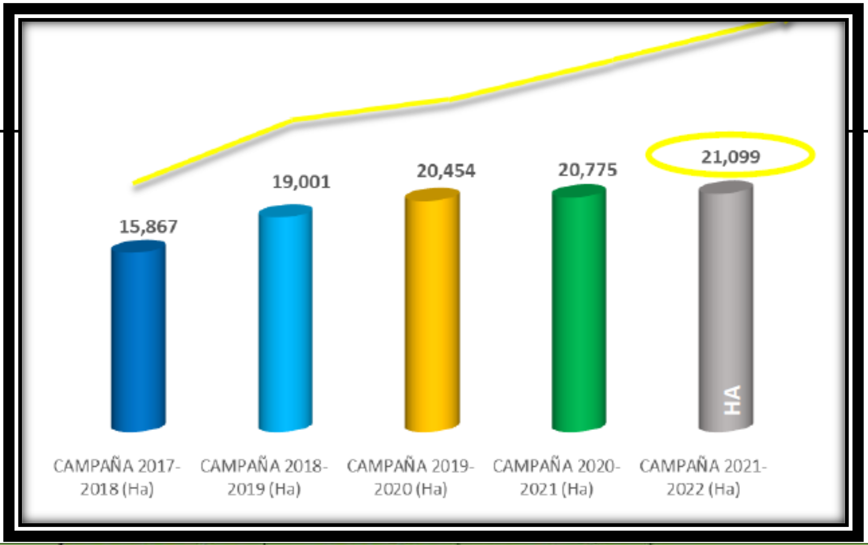
PERU GROWING AREAS



21,099 HA

VS 2020 2021: ↑ +2%

VS 2019 2020: ↑ +3%

REGION	CAMPAÑA 2017-2018 (Ha)	CAMPAÑA 2018-2019 (Ha)	CAMPAÑA 2019-2020 (Ha)	CAMPAÑA 2020-2021 (Ha)	CAMPAÑA 2021-2022 (Ha)	VARIACIÓN 18/19 vs 21/22	VARIACIÓN 19/20 vs 21/22	VARIACIÓN 20/21 vs 21/22
ICA	7,928	8,779	9,421	9,820	10,117	15%	7%	3%
PIURA	5,457	6,569	7,245	7,535	7,555	15%	4%	0.3%
LAMBAYEQUE	1,245	1,682	1,795	1,541	1,540	-8%	-14%	-0.1%
LA LIBERTAD	623	1,128	1,087	1,173	1,221	8%	12%	4%
AREQUIPA	401	540	586	487	440	-19%	-25%	-10%
ANCASH	186	277	282	201	144	-48%	-49%	-28%
LIMA	15	7	34	18	72	977%	113%	293%
MOQUEGUA	12	18	5		11	-42%	111%	-
TOTAL	15,867	19,001	20,454	20,775	21,099	11%	3%	2%

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PERU TOP PLANTED CULTIVARS

AREAS CAMPAÑA 2021 2022

21,099 HA

GRUPO VARIETAL

			VS 2020 2021
1	WHITE SEEDLESS	45%	↑ +21%
2	RED SEEDLESS	29%	↓ -5%
3	RED GLOBE	21%	↓ -18%
4	BLACK SEEDLESS	5%	↓ -11%

Las uvas White Seedless incrementaron en un 21%. Los otros grupos decrecieron en 5%,18% y 11% respectivamente.

VARIEDADES - TOP 8

			VS 2020 2021
1	RED GLOBE	21%	↓ -18%
2	IFG Ten (067-105) (SWEET GLOBE)	18%	↑ +24%
3	SUGRATHIRTYFIVE (AUTUMN CRISP)	8%	↑ +115%
4	CRIMSON SEEDLESS	6%	↓ -33%
5	SHEEGENE 20 (ALLISON)	6%	↑ +26%
6	SUGRAONE (SUPERIOR SEEDLESS)	5%	↓ -18%
7	SWEET CELEBRATION	5%	↑ +0.4%
8	SHEEGENE 2 (TIMPSON)	4%	↑ +28%

Provid
Asociación de Productores de Uva de mesa del Perú

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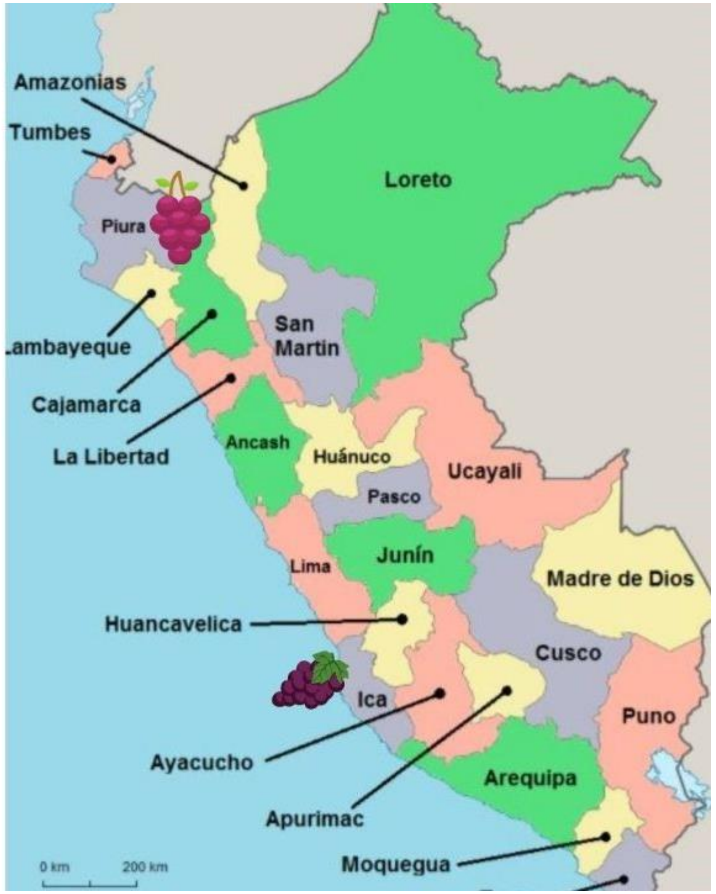
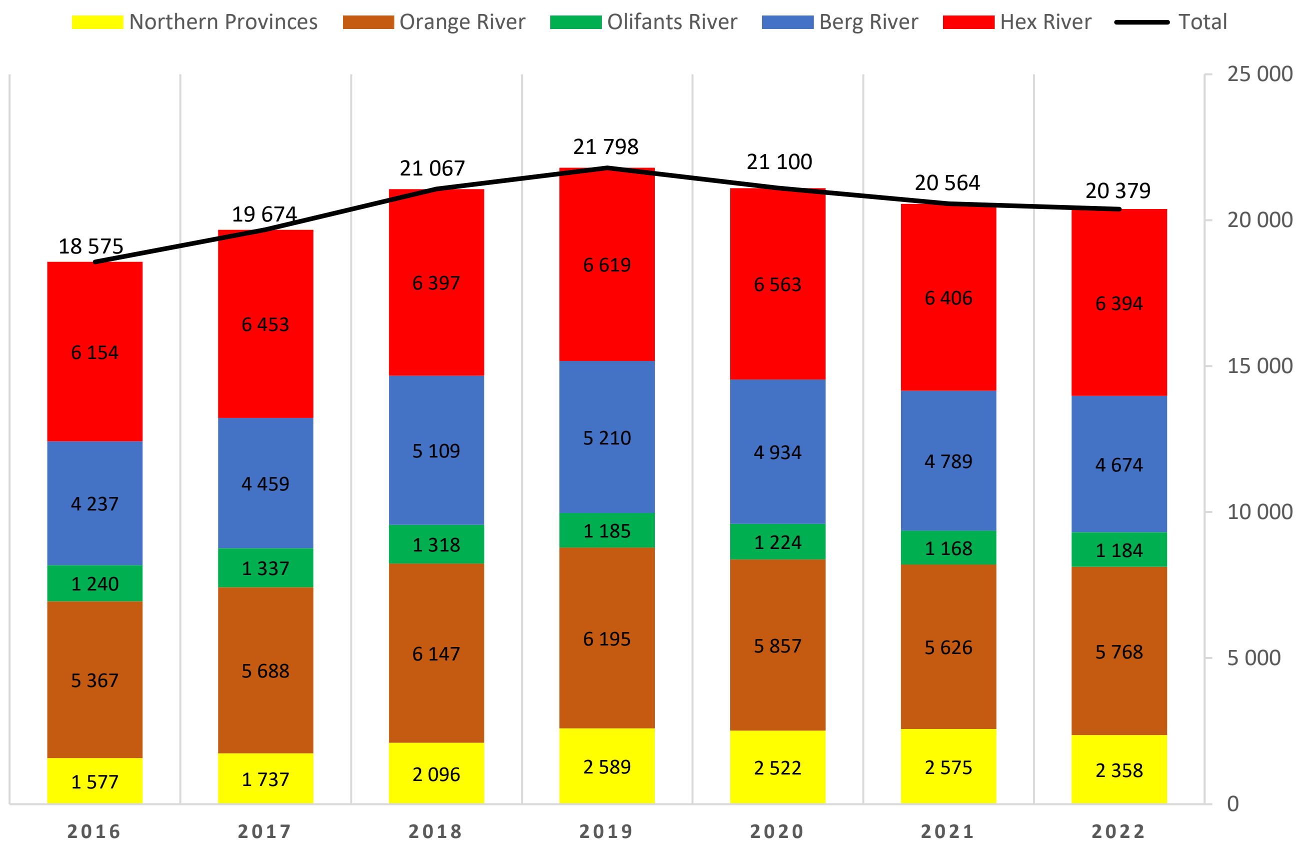
PERU GROWING AREAS



- Favorable weather conditions
    - Dry Coast
    - Over 12 hours sunlight a day
    - High-Tech Irrigation systems

- Table grapes now the largest agricultural export : 15%
- Exceeded Blueberries (14%) and Avo's (13%)
- On course to become S-H & Global export leader

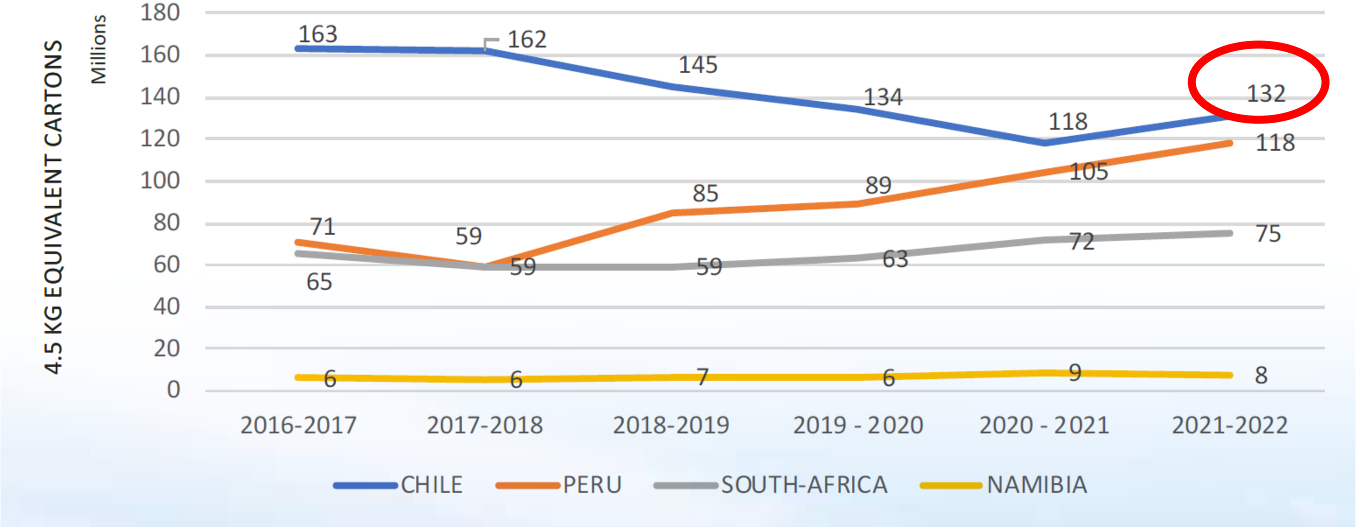
SA table grape vine census



Latest vine census shows:

- National hectares ⇩ 185 hectares (1%) Y-O-Y
- Downward trend since peak 2019
  - Orange River ⇧ 140
  - Northern Provinces ⇩ 220
  - Berg River ⇩ 110

CHILEAN TRENDS



- 2021/22: higher supplies boosted higher exports 594 000 tons (132 mil cartons)

- Bounced back 2021/22 - Grow 12% Y-O-Y
- Mainly driven by new varieties

- Water scarcity became a long-term challenge,
- Unusually hot summers
- Decrease in planting areas in North

- 2020/2021: damaging rains in the main growing regions (Metropolitana, O'Higgens & Valparaiso)

- Logistical crisis

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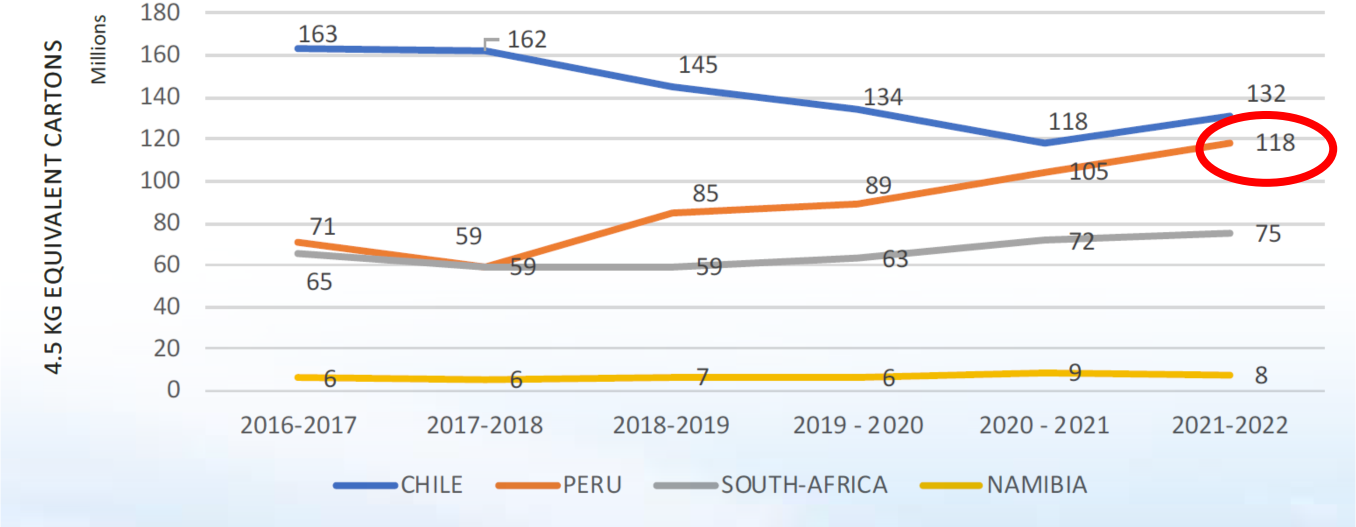
PERUVIAN TRENDS



- Peru

- Exports doubled in last 4 years !
- Same volume as Chile previous season.

- 2021/22: higher supplies increased exports 4th year in a row - 531 000 tons (118 mil cartons)

- Favorable growing conditions & new plantings continuing to come into production.

- Expected to rise another 8% to 573 000 tons (127 million 4,5 kg cartons) 2022/23

- Replacement of traditional varieties with more productive proprietary varieties

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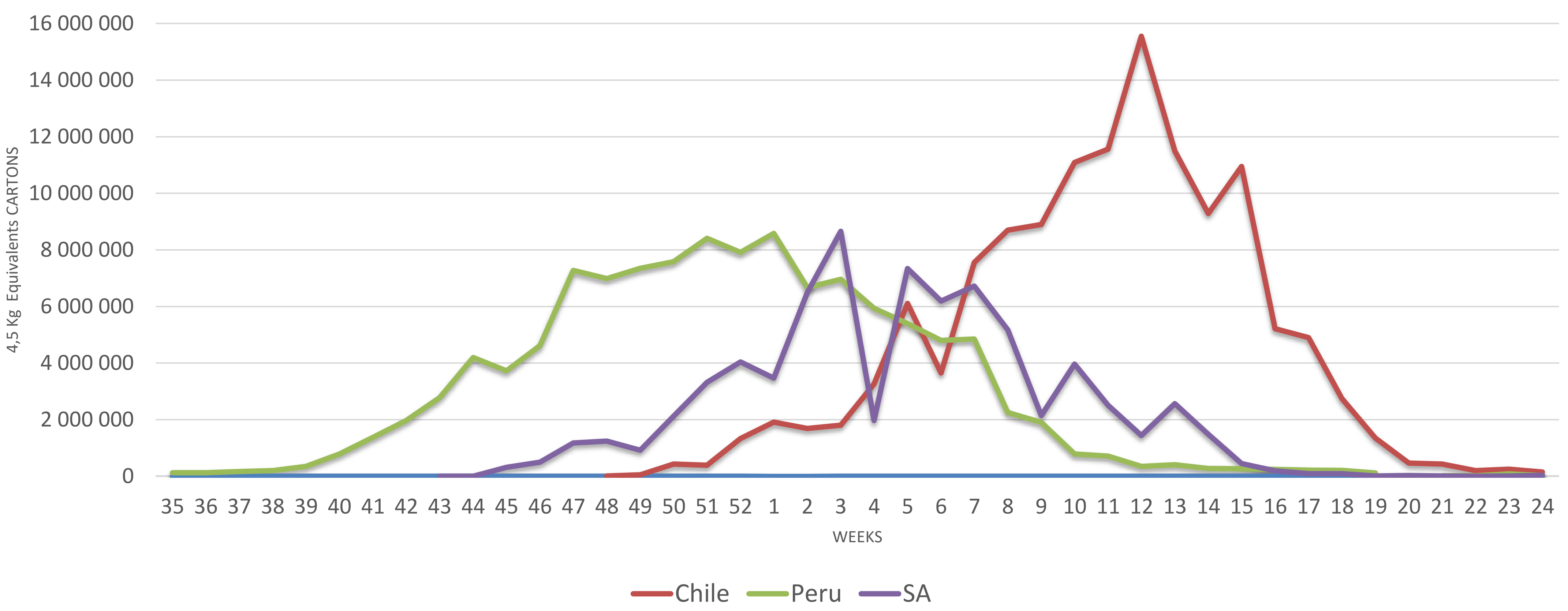
WEEKLY EXPORT VOLUMES : CHILE, PERU & SA 2021/22



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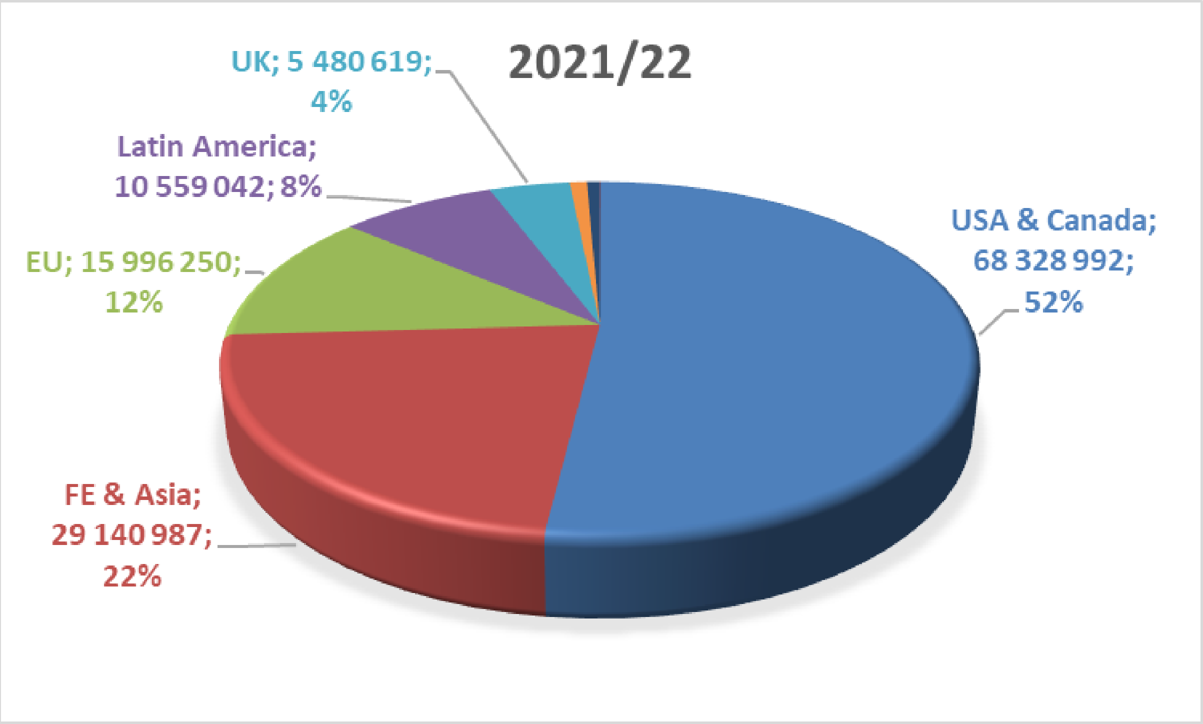
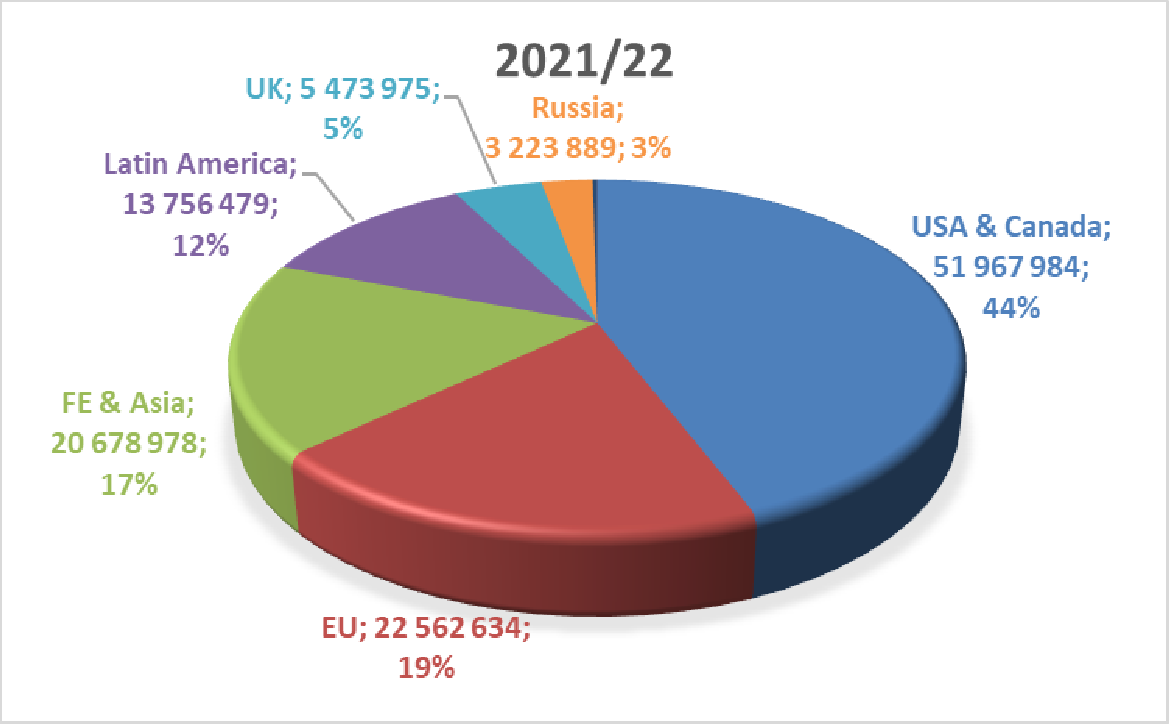
EXPORT MARKETS





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CHILE EXPORT MARKET GROWTH

Market	2019/20	2020/21	2021/22	2019/20	2020/21	2021/22	diff '22 vs '20
USA & Canada	64 655 883	59 777 691	68 328 992	48%	51%	52%	3 673 109
FE & Asia	35 921 826	30 334 446	29 140 987	27%	26%	22%	-6 780 839
EU	12 955 309	11 193 663	15 996 250	10%	9%	12%	3 040 941
Latin America	9 520 821	8 185 108	10 559 042	7%	7%	8%	1 038 221
UK	6 139 387	4 215 548	5 480 619	5%	4%	4%	-658 768
Middle East	2 383 098	1 318 224	1 171 706	2%	1%	1%	-1 211 392
Russia	2 476 774	3 140 311	839 716	2%	3%	1%	-1 637 058
Africa	91 381	107 420	41 328	0%	0%	0%	-50 053
Grand Total	134 144 479	118 272 410	131 558 640	100%	100%	100%	-2 585 839

(4,5 Kg Equivalent Cartons)

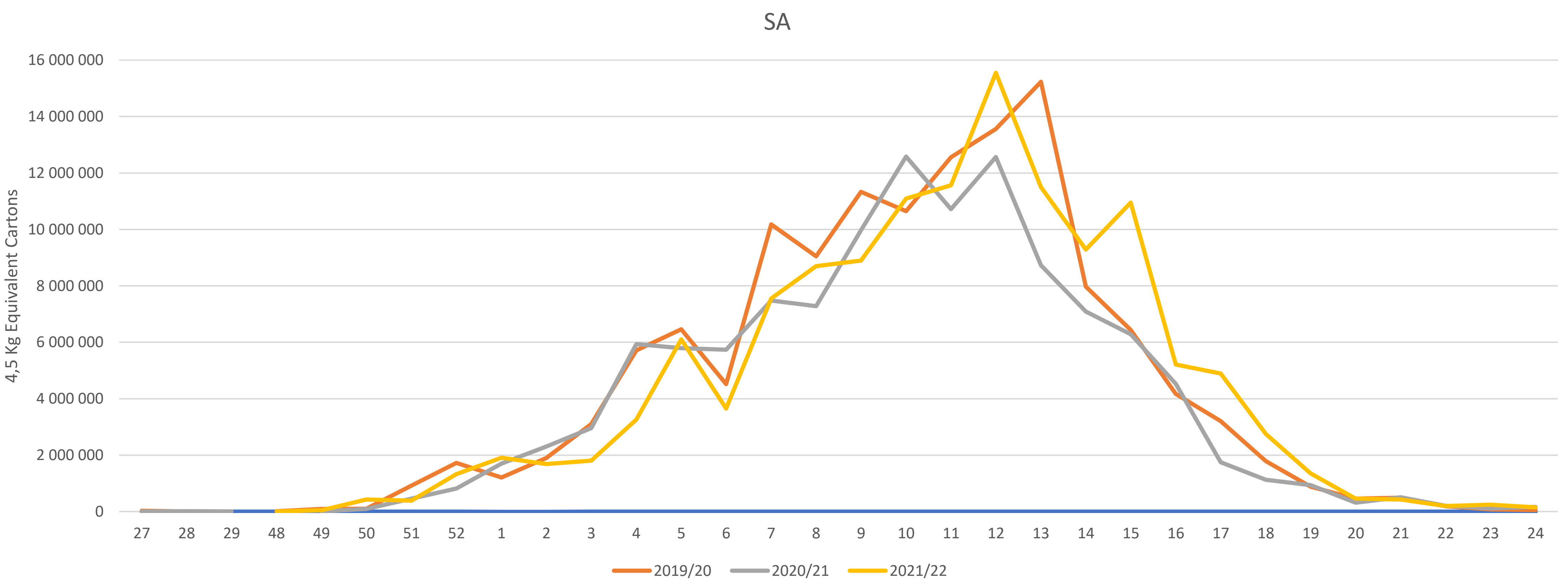
PERU EXPORT MARKET GROWTH

- Market proportions constant
- Volumes increase all markets

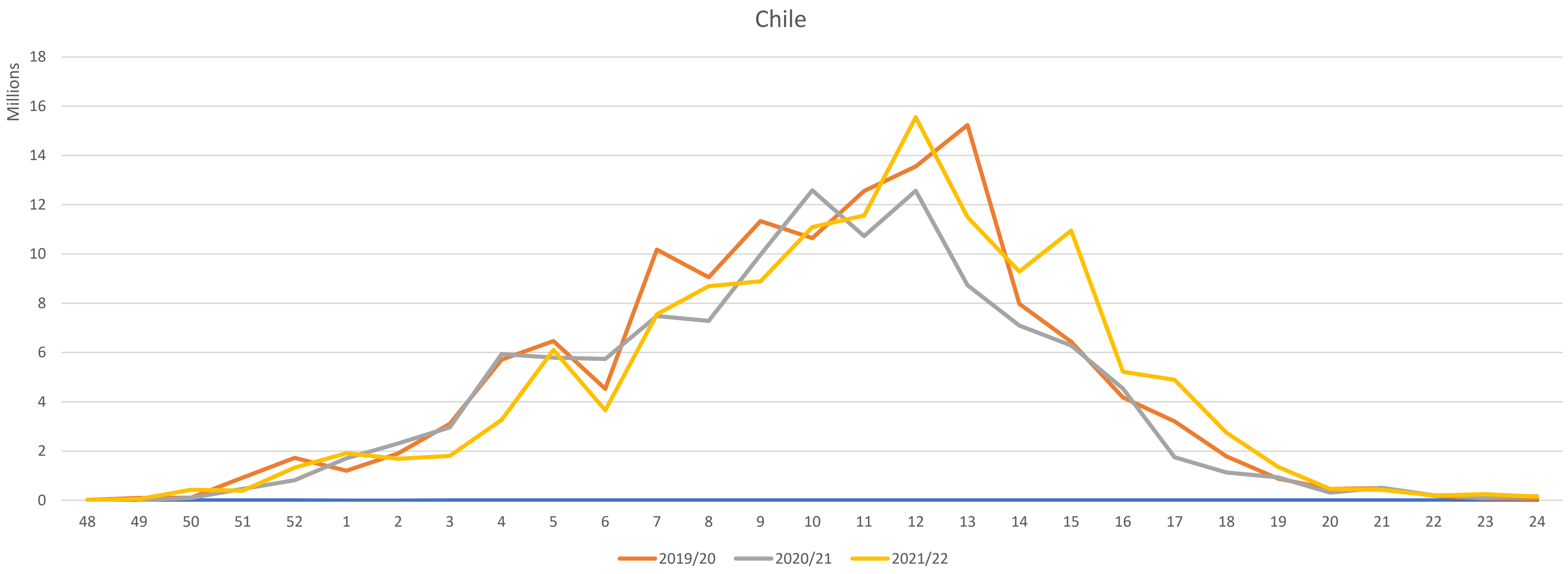
Market	2019/20	2020/21	2021/22	2019/20	2020/21	2021/22	diff '22 vs '20
USA & Canada	38 589 191	46 193 692	51 967 984	44%	45%	44%	13 378 792
EU	17 090 429	22 403 077	22 562 634	19%	22%	19%	5 472 205
FE & Asia	16 418 294	16 433 736	20 678 978	19%	16%	18%	4 260 684
Latin America	9 401 634	10 327 245	13 756 479	11%	10%	12%	4 354 846
UK	4 145 352	4 482 352	5 473 975	5%	4%	5%	1 328 623
Russia	2 009 829	2 953 569	3 223 889	2%	3%	3%	1 214 060
Middle East	621 244	600 401	263 165	1%	1%	0%	-358 079
Africa	61 149	84 765	16 619	0%	0%	0%	-44 531
Grand Total	88 337 122	103 478 837	117 943 723	100%	100%	100%	29 606 601

(4,5 Kg Equivalent Cartons)

WEEKLY GROWTH PER COUNTRY



WEEKLY GROWTH PER COUNTRY



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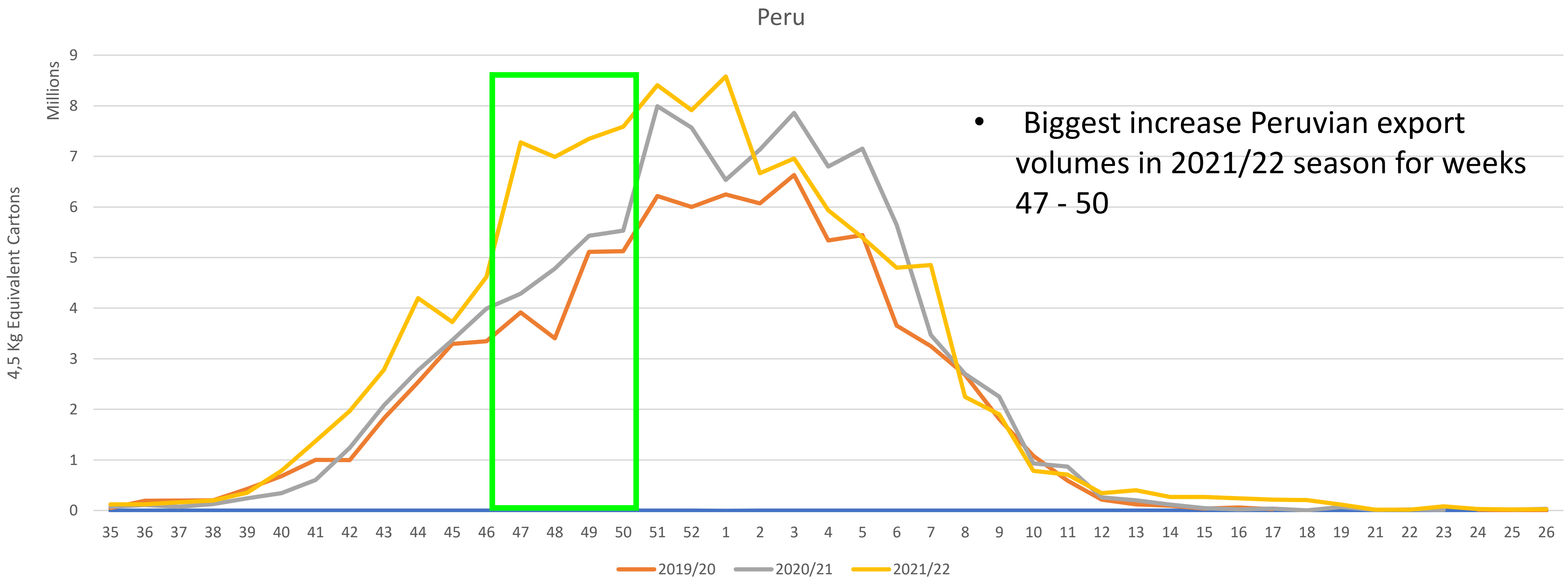
WEEKLY GROWTH PER COUNTRY



- Biggest increase Peruvian export volumes in 2021/22 season for weeks 47 - 50

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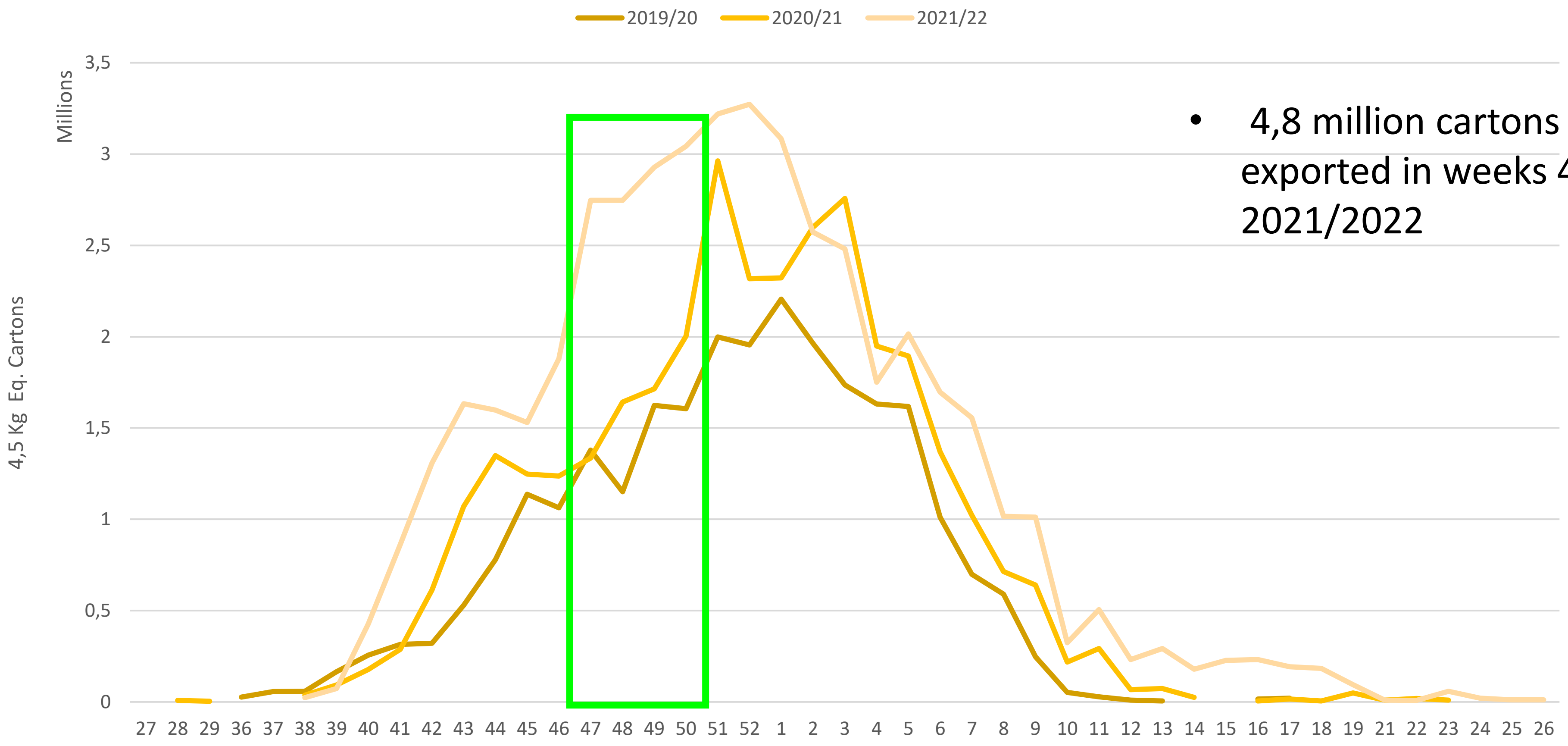
PERU WHITE SEEDLESS



- 4,8 million cartons more white seedless exported in weeks 47 to 50 of 2021/2022

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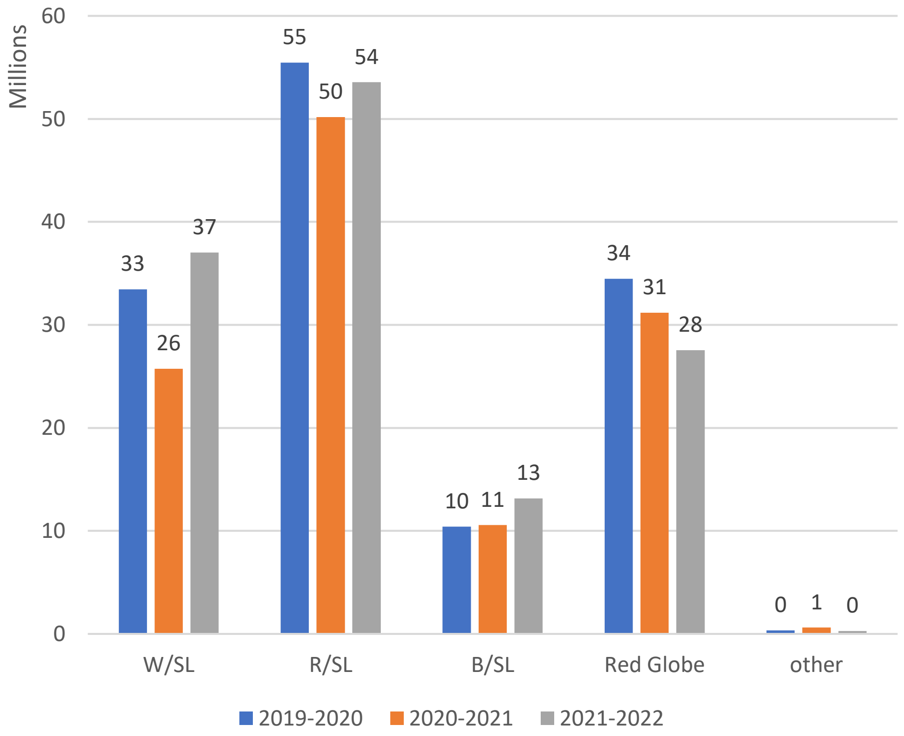
VARIETY GROUP TRENDS



White seedless

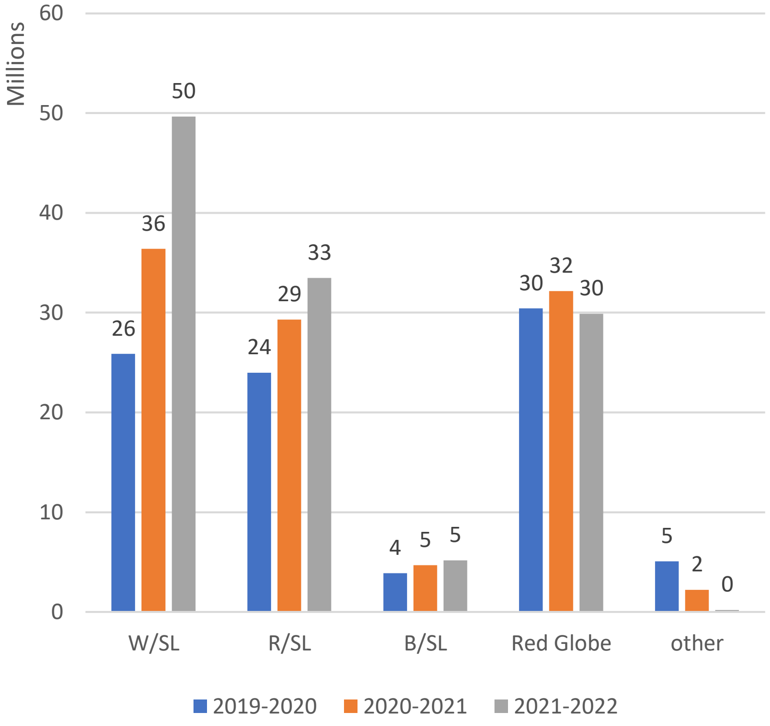
-Chile +3,6m (+11%)

-Peru +23,8m (+92%)

(over 2 years)

Red Globe

-Chile -6m (-18%)



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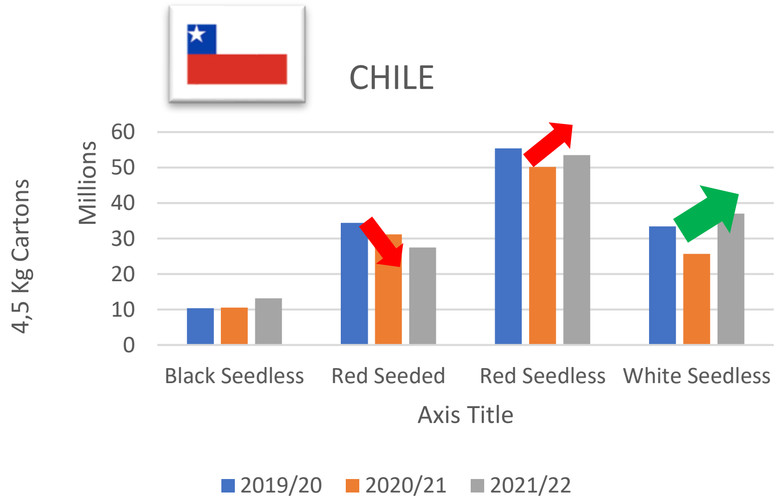
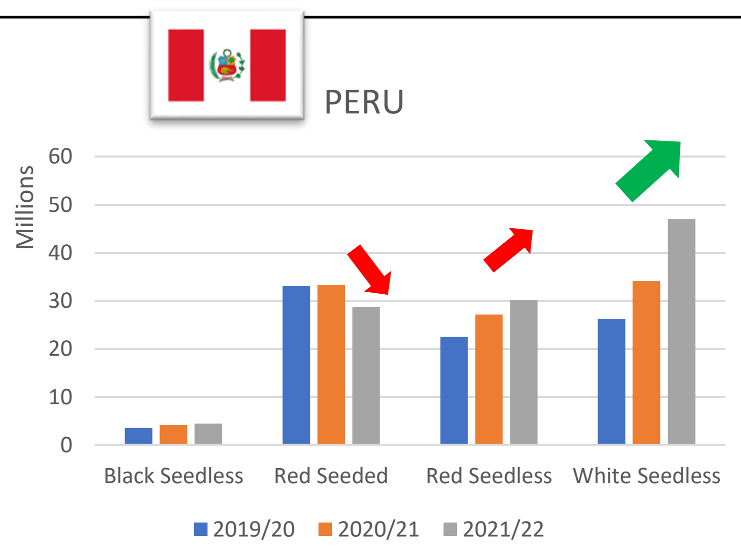
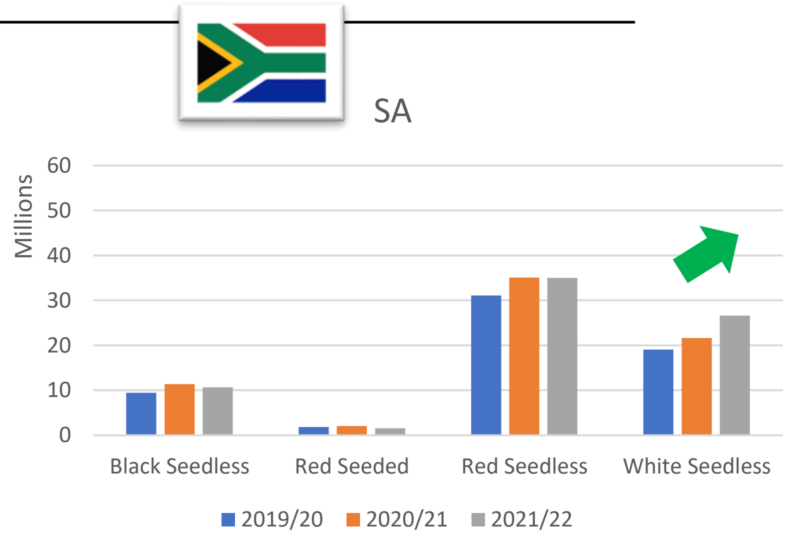
VARIETY GROUP TRENDS







- Increase white seedless Chile, Peru & SA
- Decrease in red-seeded (Red Globe) Chile & Peru
- Increase in Red Seedless Peru

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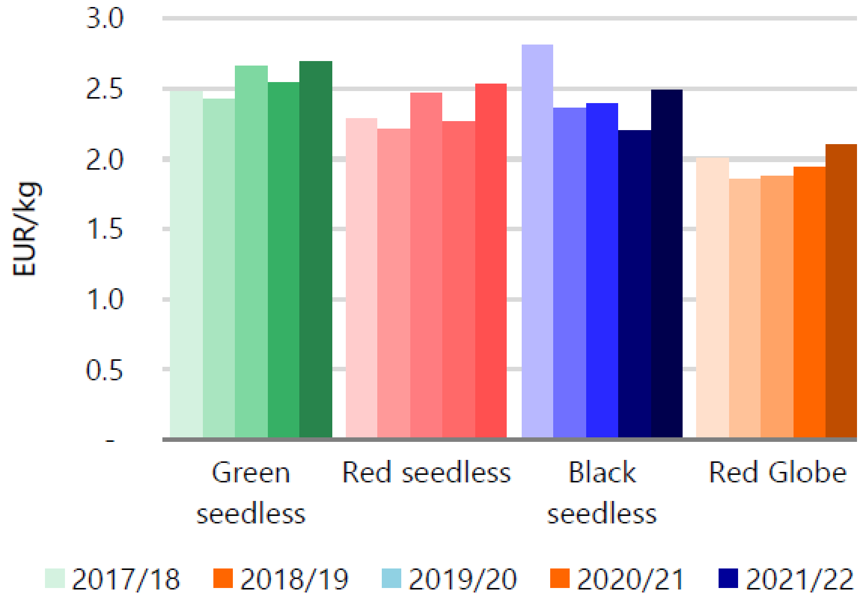
VARIETY GROUP TRENDS

Figure 12: Average table grape wholesale prices in Rotterdam by variety, 2017/18-2021/22*



*Note: Prices for all varieties from Chile, Peru, Brazil, India, and South Africa

Source: Rabobank 2022

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CHILEAN CULTIVAR EXPORT SHIFTS

CULTIVAR	2021/22	Y-O-Y Vol Diff	2-YR	Y-O-Y	% of Tot
RED GLOBE	26 679 166	-4 496 007	-11%	-14%	20%
CRIMSON SEEDLESS	18 293 666	-1 263 742	-16%	-6%	14%
THOMPSON SEEDLESS	16 767 590	4 969 016	-7%	42%	13%
SHEEGENE 13 (TIMCO™)	9 025 004	1 898 003	8%	27%	7%
SHEEGENE 20 (ALLISON™)	6 255 414	884 048	30%	16%	5%
IFG 68-175 (SWEET CELEBRATION®)	5 591 689	-513 011	15%	-8%	4%
ARRA 15 - ARRA Sweeties™	4 814 726	1 218 528	27%	34%	4%
SUGRAONE(SUPERIOR SEEDLESS®)	3 757 281	481 725	-9%	15%	3%
AUTUMN ROYAL	3 031 544	-719 467	-12%	-19%	2%
IFG SIXTEEN (SWEET FAVORS®)	2 803 259	1 700 739	106%	154%	2%
SHEEGENE 2 (TIMPSON®)	2 751 835	988 424	50%	56%	2%
IFG TEN (SWEET GLOBE®)	2 141 098	438 188	146%	26%	2%
FLAME SEEDLESS	2 089 116	-364 181	-21%	-15%	2%
ARRA 29 PASSION FIRE™	2 073 163	952 980	50%	85%	2%
SUGRASIXTEEN (SABLE SEEDLESS®)	2 042 072	1 027 724	41%	101%	2%
Other	23 442 020	6 083 264	19%	35%	18%
Grand Total	131 558 640	13 286 230	-1%	11%	100%

(4,5 Kg Equivalent Cartons)

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PERUVIAN CULTIVAR EXPORT SHIFTS

CULTIVAR	2021/22	Y-O-Y Vol Diff	2-YR	Y-O-Y	% of Tot
RED GLOBE	28 698 596	-4 595 878	-7%	-14%	24%
IFG TEN (SWEET GLOBE®)	19 984 925	5 809 133	52%	41%	17%
SHEEGENE 20 (ALLISON™)	7 429 515	2 282 445	103%	44%	6%
SUGRATHIRTYFIVE (AUTUMNCRISP®)	7 128 902	4 288 334	339%	151%	6%
IFG 68-175 (SWEET CELEBRATION®)	5 530 586	229 249	22%	4%	5%
CRIMSON SEEDLESS	5 465 329	-2 010 965	-10%	-27%	5%
SHEEGENE 2 (TIMPSON®)	4 675 695	1 567 562	43%	50%	4%
IFG NINE (JACK SALUTE(TM))	4 543 051	1 376 797	33%	43%	4%
SUGRAONE(SUPERIOR SEEDLESS®)	3 883 998	-546 091	-18%	-12%	3%
SHEEGENE 21 (IVORY™)	3 444 144	862 404	95%	33%	3%
SHEEGENE 13 (TIMCO™)	2 846 929	1 274 536	73%	81%	2%
other	24 312 053	3 927 361	18%	19%	21%
Grand Total	117 943 723	14 464 886	17%	14%	100%

- White Seedless
- Red Seedless:

Crimson being replaced with Allison

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SA CULTIVAR EXPORT SHIFTS

CULTIVAR	2021/2022	YoY Change	CAGR (4yr)
Crimson Seedless	11 845 827	-5%	-2%
Prime	6 066 367	4%	-1%
IFG Ten (Sweet Globe®)	4 588 767	59%	117%
IFG 68-175 (Sweet Celebration®)	4 257 674	43%	39%
Sugranineteen (Scarlotta Seedless®)	4 156 300	-10%	10%
Sugrathirtyfive (Autumncrisp®)	3 798 733	28%	89%
Tawny Seedless	3 198 091	-22%	7%
Thompson Seedless	3 043 491	20%	-7%
Sugrathirteen (Midnight Beauty®)	2 683 825	-11%	4%
Grapaes (Early Sweet®)	2 348 313	-1%	22%
Sugrasixteen (Sable Seedless®)	2 281 634	-6%	18%
Sheegene 20 (Allison™)	2 219 215	2%	18%
IFG Seventeen (Sweet Joy™)	2 151 019	16%	128%
Sugraone (Superior Seedless®)	1 692 039	-7%	-18%
Starlight	1 584 183	-2%	1%
Arrafifteen (Arra Sweeties™)	1 551 027	2%	40%
Redglobe	1 438 501	-26%	-11%
Sugrathirtyfour (Adora Seedless®)	1 084 083	-20%	12%
Flame Seedless	1 033 493	-32%	-22%
Ralli Seedless	987 974	-3%	2%
Other	12 599 934	19%	4%
GRAND TOTAL	**74 610 490**	4%	6%

- Two white seedless cultivars shows biggest growth
    - Sweet Globe & Autumn Crisp
- Sweet Celebration
- Sweet Joy

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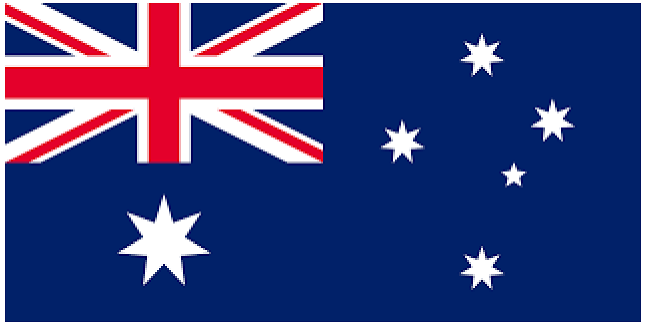
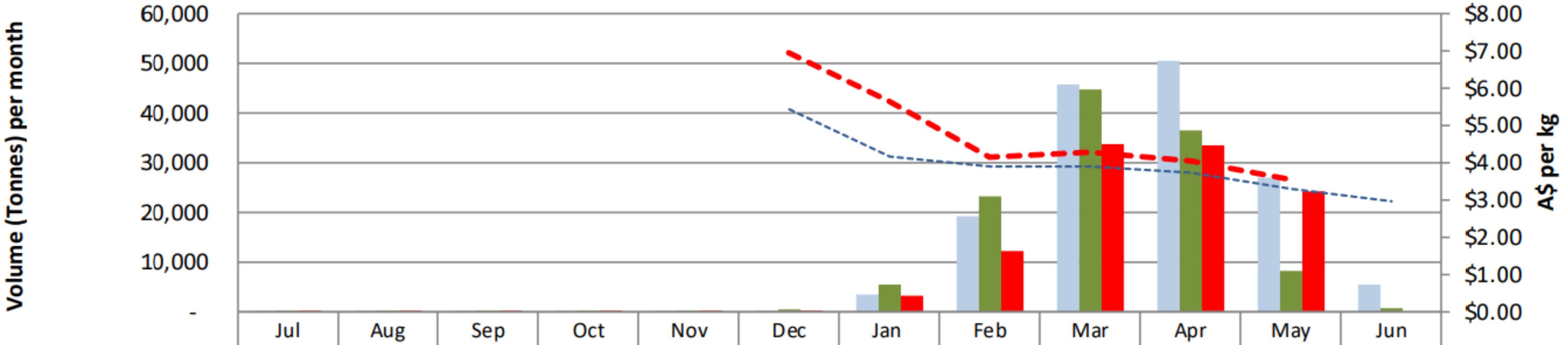


ATGA
Australian
Table Grape
Association Inc.

AUSTRALIAN EXPORT SEASON



	Jul	Aug	Sep	Oct	Nov	Dec	Jan	Feb	Mar	Apr	May	Jun
2019/20 Export	122	12	15	22	78	93	3,529	19,301	45,737	50,486	27,109	5,676
2020/21 Export	404	16	103	4	56	507	5,484	23,420	44,903	36,602	8,325	901
2021/22 Export	121	91	107	25	7	91	3,271	12,257	33,762	33,479	24,326	-
A$ per kg 20/21						$5.44	$4.17	$3.90	$3.90	$3.73	$3.30	$2.99
A$ per kg 21/22						$6.94	$5.64	$4.17	$4.28	$4.06	$3.54	

ATGA
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- EXPORT SEASON WEEKS 2 to 21

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AUSTRALIAN EXPORT MARKETS

	July to May			
Market	**2020/21**	**Chg LY**	***Share***	MAT
	Tonnes	%	%	Tonnes
China	26,801	-38%	*24.9%*	26,801
Indonesia	19,089	16%	*17.8%*	19,158
Vietnam	13,509	94%	*12.6%*	13,580
Japan	8,700	-8%	*8.1%*	8,751
Philippines	8,208	-3%	*7.6%*	8,208
Thailand	7,827	24%	*7.3%*	7,827
Korea, South	4,123	-6%	*3.8%*	4,123
New Zealand	3,742	24%	*3.5%*	3,966
Hong Kong	3,709	-67%	*3.4%*	4,075
Singapore	3,354	67%	*3.1%*	3,354
Malaysia	2,652	35%	*2.5%*	2,652
Taiwan	1,902	38%	*1.8%*	1,902
United Arab Emirates	1,594	-17%	*1.5%*	1,598
Bangladesh	643	69%	*0.6%*	643
Qatar	296	-4%	*0.3%*	330
Fiji	251	-20%	*0.2%*	293
New Caledonia	246	41%	*0.2%*	277
India	217		*0.2%*	217
all other	*675*		*0.6%*	683
Total Tonnes	**107,537**	**-10%**	*100.0%*	*108,437*

Source: ABS via IHS Global Trade Atlas; Fresh Intelligence analysis

- Big decrease in exports to China : - 38%
    - Inspections more strict at ports
    - Less cash buyers (COVID)
    - Delays in shipments
    - Challenges with Crimson Seedless e.g. colouring
    - Expected to be unstable for next few years

- Between July 2021 and April 2022, table grape exports to Vietnam increased by 98 percent compared with the same period in 2020-21

ATGA Australian Table Grape Association Inc.

SATI SOUTH AFRICAN TABLE GRAPE INDUSTRY

SUMMARY

- Supply of grapes from S-H is increasing – Increased competition.
- Medium-term expectations Peru & Chile?
- Supply of White Seedless cultivars in the biggest S-H countries are increasing
- ↑ Supply ↓ downward pressure on prices
- Effect of global inflation on demand for fruit/grapes
- With more proprietary varieties, with high royalty fees, being planted, sufficient evaluation to ensure varieties with integrity and sustainability is key.
- No more room for underperforming varieties.

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