

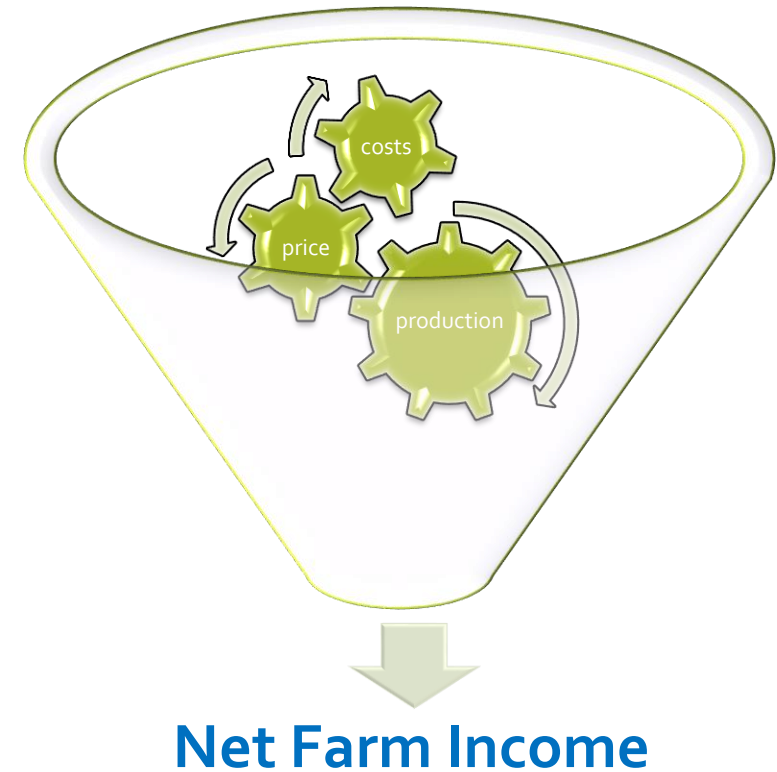




The principles of profitability in the blueberry industry



- Independent & confidential benchmarking
- Since 1997
- Report per farm unit
- Down to a variety level
- Over time  NFI  RISK



• PRODUCER SURVEYS

- Citrus : 28 000 + ha (Wcape, Ecape, Limpopo)
- Table-grapes : 12 600 ha (Nam,NCape,Limpopo,Bergriver, Olifant & Hexriver)
- Pomefruit : 12 200 ha (Ceres,EGVV)
- Stonefruit : 3 100 ha (Wcape)
- Raisin : 800 ha (Ncape)
- Blueberries : 1 700 ha (RSA)

• EXPORTER SURVEYS

- Stonefruit (80% of exported volume)
- Pomefruit (81% of exported volume)

BLUEBERRY BENCHMARKING

<u>season</u>	<u>ha</u>	<u># production units</u>
2018	314	7
2019	784	16
2020	1447	33
2021	1689	38
2022	****	**



Timeline

- **coordination of entries to participate** **May – June 2023**
- **processing and analysis of the information** **June – July 2023**
- **a comprehensive benchmark report** **first half of August 2023**
- **individual discussion of the report with producer**



Context from our previous results

- **Production per bearing ha**
-
-
-
-

Summary Per Cultivar (> 10bearing Ha)

Cultivar Info

- Income / Bearing Ha
- T/Ha
- % Export
- T/Ha Export
- R/kg Export
- % Export+Local 1
- T/Ha Export+Local 1
- R/kg (Export+Local 1)
- % UNSOUND
- R/kg Total Harvest

North vs South

- Select all
- NORTH
- SOUTH

Area

- KAAP
- Limpopo
- Noord
- SWD
- Ver Noord

#CULTIVAR	2019	2020	2021	Average
24			30.71	30.71
20	22.46	26.12	25.24	25.41
3			24.22	24.22
62			21.19	21.19
2			20.66	20.66
25	18.71	22.10	18.68	19.66
13	17.77	21.12	18.19	19.26
44	19.56	19.70	18.27	18.97
19	22.74	16.85	20.40	18.92
69	18.94	20.46	17.45	18.62
60	18.32	18.68	15.90	16.85
28	34.35	14.44	14.29	16.45
18	17.86	15.75	15.19	15.75
43	15.94	13.60	16.18	15.22
Total	15.06	15.91	16.93	16.27

Summary Per Cultivar (>10bearing Ha)

Cultivar Info

- Income / Bearing Ha
- T/Ha
- % Export
- T/Ha Export
- R/kg Export
- % Export+Local 1
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- R/kg (Export+Local 1)
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- R/kg Total Harvest

North vs South

- Select all
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Area

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- Ver Noord

#CULTIVAR	2019	2020	2021	Average
69	18.94	20.46	17.45	18.62
60	18.32	18.68	15.90	16.85
28	34.35	14.44	14.29	16.45
18	17.86	15.75	15.19	15.75
43	15.94	13.60	16.18	15.22
22	14.75	15.93	13.17	14.68
70	15.82	16.12	12.11	14.31
58	9.80	15.75	14.29	14.18
7	20.93	11.08	12.83	13.47
61	10.51	15.12	13.45	13.25
21	19.53	11.57	12.33	12.54
39	8.94	11.08	13.58	11.11
38	9.00	9.67	18.54	10.86
41		9.47	8.44	8.74
Total	15.06	15.91	16.93	16.27

Context from our previous results

- **Production per bearing ha**



- **Export %**

-

-

-

Summary Per Cultivar (> 10bearing Ha)

Cultivar Info

- Income / Bearing Ha
- T/Ha
- % Export
- T/Ha Export
- R/kg Export
- % Export+Local 1
- T/Ha Export+Local 1
- R/kg (Export+Local 1)
- % UNSOUND
- R/kg Total Harvest

North vs South

- Select all
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#CULTIVAR	2019	2020	2021	Average
41		90%	92%	91%
43	90%	87%	94%	91%
44	89%	90%	91%	90%
2			87%	87%
39	81%	87%	88%	86%
24			85%	85%
3			83%	83%
62			80%	80%
25	87%	81%	78%	79%
61	93%	64%	86%	78%
69	83%	76%	69%	73%
13	81%	69%	72%	72%
38	77%	72%	56%	70%
60		69%	68%	68%
Total	82%	73%	73%	74%

Summary Per Cultivar (> 10bearing Ha)

Cultivar Info

- Income / Bearing Ha
- T/Ha
- % Export
- T/Ha Export
- R/kg Export
- % Export+Local 1
- T/Ha Export+Local 1
- R/kg (Export+Local 1)
- % UNSOUND
- R/kg Total Harvest

North vs South

- Select all
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- SOUTH

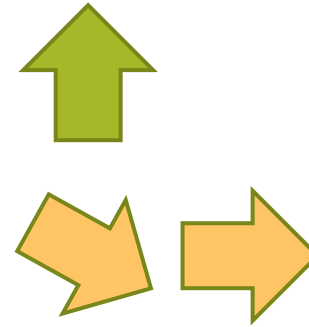
Area

- KAAP
- Limpopo
- Noord
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- Ver Noord

#CULTIVAR	2019	2020	2021	Average
61	93%	64%	86%	78%
69	83%	76%	69%	73%
13	81%	69%	72%	72%
38	77%	72%	56%	70%
60		69%	68%	68%
19	59%	67%	69%	68%
20	20%	64%	69%	67%
21	70%	69%	60%	65%
58	88%	69%	50%	64%
7	63%	56%	53%	56%
18	69%	60%	41%	53%
22	69%	35%	32%	43%
70	64%	42%	26%	40%
28	37%	5%		10%
Total	82%	73%	73%	74%

Context from our previous results

- **Production per bearing ha**
- **Export %**
- **Delivery weeks (timing)**
-
-



Packhouse-gate price R/KG and Volume (Export + Local 1) Per Week

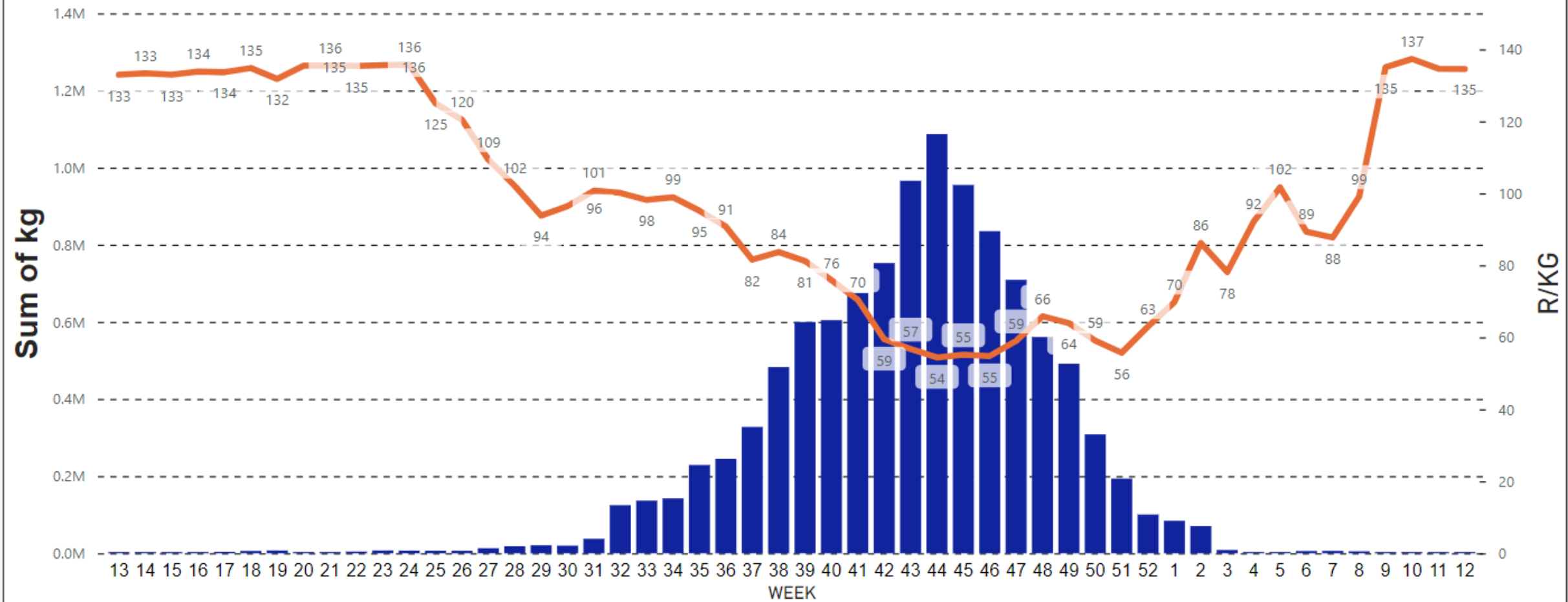
YEAR

2020

2021

Sum of kg and R/kg by WEEK and YEAR

YEAR ● 2020 ● R/kg



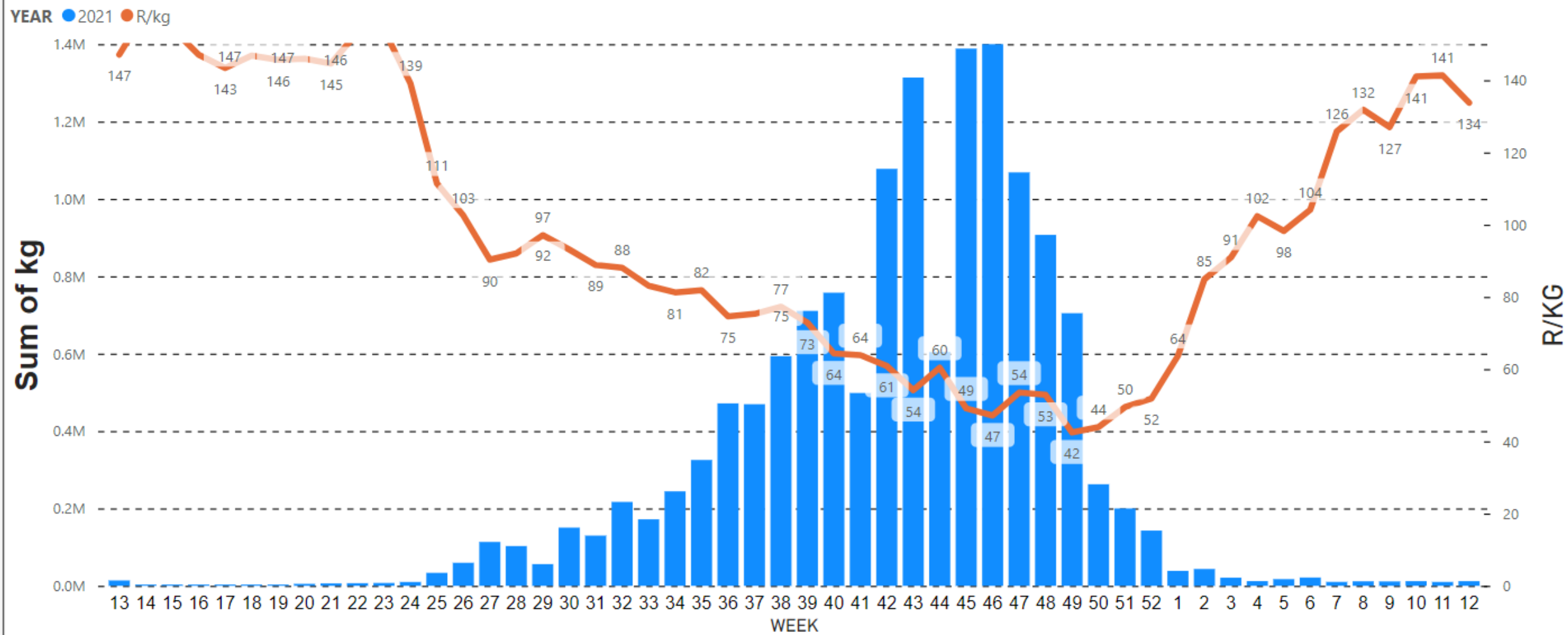
Packhouse-gate price R/KG and Volume (Export + Local 1) Per Week

YEAR

2020

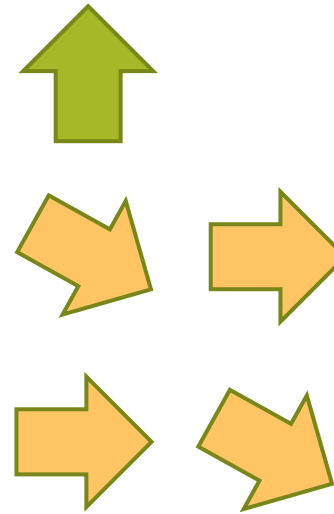
2021

Sum of kg and R/kg by WEEK and YEAR



Context from our previous results

- **Production per bearing ha**
- **Export %**
- **Delivery weeks (timing)**
- **Quality (Claims%)**
-



Summary Per Cultivar (>10bearing Ha)

Cultivar Info

- Income / Bearing Ha
- T/Ha
- % Export
- T/Ha Export
- R/kg Export
- % Export+Local 1
- T/Ha Export+Local 1
- R/kg (Export+Local 1)
- % UNSOUND
- R/kg Total Harvest

North vs South

- Select all
- NORTH
- SOUTH

Area

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#CULTIVAR	2019	2020	2021	Average
39	26%	48%	63%	47%
44	31%	45%	54%	47%
41		39%	48%	45%
38	25%	40%	73%	44%
43	23%	43%	51%	42%
2			14%	14%
28	62%			14%
19	8%	8%	17%	13%
62			11%	11%
20	81%	5%	10%	9%
61	11%	3%	16%	9%
7	23%	0%	7%	9%
13	11%	3%	13%	9%
21	11%	6%	9%	8%
Total	20%	19%	25%	22%

Summary Per Cultivar (> 10bearing Ha)

Cultivar Info

- Income / Bearing Ha
- T/Ha
- % Export
- T/Ha Export
- R/kg Export
- % Export+Local 1
- T/Ha Export+Local 1
- R/kg (Export+Local 1)
- % UNSOUND
- R/kg Total Harvest

North vs South

- Select all
- NORTH
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Area

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#CULTIVAR	2019	2020	2021	Average
20	81%	5%	10%	9%
61	11%	3%	16%	9%
7	23%	0%	7%	9%
13	11%	3%	13%	9%
21	11%	6%	9%	8%
24			8%	8%
18	11%	5%	8%	7%
60	99%	4%	7%	7%
22	11%	2%	7%	6%
3			5%	5%
69	9%	3%	6%	5%
25	8%	2%	6%	5%
58	6%	4%	5%	4%
70	10%	2%	3%	4%
Total	20%	19%	25%	22%

UN SOUND in our survey ALL Cultivars

Season	% CLAIMS	price diff
2019	18%	-23.24
2020	25%	-34.51
2021	33%	-39.95



UNSOUND **2022

Season	% Claims	Price difference
2022	38%	-60

**

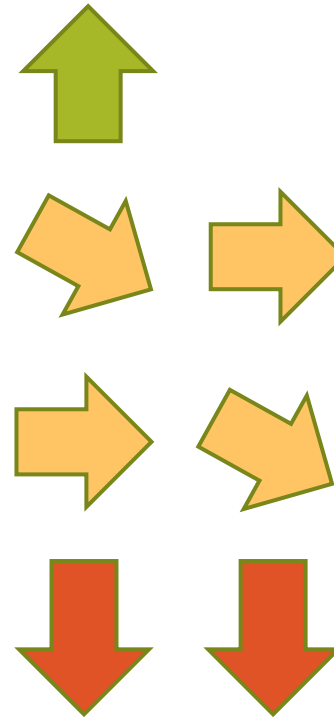
49% of claims in weeks 45-49 **

** only on volumes received so far



Context from our previous results

- **Production per bearing ha**
- **Export %**
- **Delivery weeks (timing)**
- **Quality (Claims%)**
- **Price**



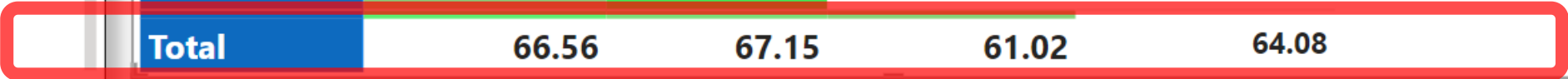
Summary Per Cultivar (>10bearing Ha)

- Cultivar Info**
- Income / Bearing Ha
 - T/Ha
 - % Export
 - T/Ha Export
 - R/kg Export
 - % Export+Local 1
 - T/Ha Export+Local 1
 - R/kg (Export+Local 1)
 - % UNSOUND
 - R/kg Total Harvest

- North vs South** ▼
- Select all
 - NORTH
 - SOUTH

- Area** ▼
- KAAP
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#CULTIVAR	2019	2020	2021	Average
58	85.98	85.36	75.41	82.43
3			74.75	74.75
25	73.88	83.58	68.40	73.72
62			71.73	71.73
7	67.64	82.70	62.51	70.06
24			69.29	69.29
69	72.25	73.62	63.37	68.41
13	72.50	77.95	60.41	68.12
60		69.85	62.47	65.26
20	79.49	70.09	63.53	64.89
2			64.86	64.86
21	70.67	66.87	59.03	63.83
61	64.09	74.45	51.26	63.15
28	58.59	74.84		62.26
Total	66.56	67.15	61.02	64.08



Summary Per Cultivar (> 10bearing Ha)

Cultivar Info

- Income / Bearing Ha
- T/Ha
- % Export
- T/Ha Export
- R/kg Export
- % Export+Local 1
- T/Ha Export+Local 1
- R/kg (Export+Local 1)
- % UNSOUND
- R/kg Total Harvest

North vs South

- Select all
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#CULTIVAR	2019	2020	2021	Average
20	79.49	70.09	63.53	64.89
2			64.86	64.86
21	70.67	66.87	59.03	63.83
61	64.09	74.45	51.26	63.15
28	58.59	74.84		62.26
43	67.35	61.67	59.67	62.10
44	64.47	60.01	57.95	59.74
18	63.29	60.37	54.42	58.96
41		54.79	60.02	58.36
19	74.58	62.09	51.76	56.98
70	50.30	65.55	48.12	56.52
39	57.28	57.22	53.12	55.94
38	54.17	55.39	54.79	54.81
22	43.81	53.39	53.40	49.28
Total	66.56	67.15	61.02	64.08

Summary Per Cultivar (> 10bearing Ha)

- Cultivar Info**
- Income / Bearing Ha
 - T/Ha
 - % Export
 - T/Ha Export
 - R/kg Export
 - % Export+Local 1
 - T/Ha Export+Local 1
 - R/kg (Export+Local 1)
 - % UNSOUND
 - R/kg Total Harvest

- North vs South** ▾
- Select all
 - NORTH
 - SOUTH

- Area** ▾
- KAAP
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#CULTIVAR	2019	2020	2021	Average
3			64.97	64.97
25	65.42	73.11	57.63	63.01
24			61.40	61.40
62			61.34	61.34
58	77.16	65.49	49.73	60.74
2			58.59	58.59
43	61.36	54.46	57.66	57.55
44	57.98	54.28	54.90	55.17
41		49.78	57.11	54.76
13	60.02	59.99	48.83	54.02
69	61.78	59.61	48.33	53.99
61	59.89	52.98	46.73	52.47
7	46.55	56.77	47.79	50.23
20	16.07	52.07	49.68	49.99
Total	55.77	53.33	50.24	52.14

Summary Per Cultivar (> 10bearing Ha)

- Cultivar Info**
- Income / Bearing Ha
 - T/Ha
 - % Export
 - T/Ha Export
 - R/kg Export
 - % Export+Local 1
 - T/Ha Export+Local 1
 - R/kg (Export+Local 1)
 - % UNSOUND
 - R/kg Total Harvest

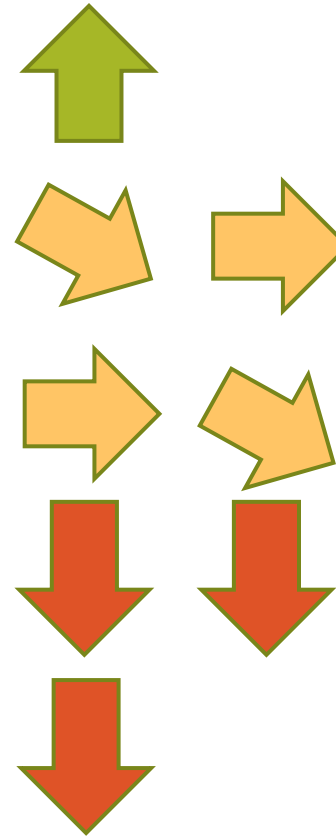
- North vs South** ▾
- Select all
 - NORTH
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- Area** ▾
- KAAP
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#CULTIVAR	2019	2020	2021	Average
13	60.02	59.99	48.83	54.02
69	61.78	59.61	48.33	53.99
61	59.89	52.98	46.73	52.47
7	46.55	56.77	47.79	50.23
20	16.07	52.07	49.68	49.99
60	0.07	52.42	47.94	49.22
39	47.22	50.32	48.29	48.99
21	52.58	50.83	42.86	47.19
19	49.42	47.79	40.76	44.06
38	42.81	41.37	38.16	40.94
18	46.71	42.29	36.13	40.29
70	36.29	37.58	33.05	35.64
22	33.31	28.40	27.47	29.45
28	21.85	20.81	22.63	21.66
Total	55.77	53.33	50.24	52.14

Context from our previous results

- **Production per bearing ha**
- **Export %**
- **Delivery weeks (timing)**
- **Quality (Claims%)**
- **Price**
- **Costs**



Costs per Ha (Bearing & non-bearing)

YEAR	2019	2020	2021
section	GROUP	GROUP	GROUP
(a) Packhouse	101,719	124,632	145,404
PACKING COSTS	67,578	75,858	71,957
PACKING MATERIAL	34,140	48,774	73,447
(b) Salaries & Wages	194,215	231,860	265,296
FARMWAGES-GENERAL		79,881	94,048
FARMWAGES-HARVEST		99,683	118,427
FARMWAGES-PRUNE		10,043	9,961
SALARIES	41,564	42,253	42,860
WAGES	152,652		
(c) Production	37,391	51,521	67,142
COMPOST		206	0
FERTILIZER	17,327	23,411	31,552
POLLINATION	7,111	10,055	11,304
SPRAYS	12,952	17,849	24,287
(d) Energy	20,525	20,835	28,153
ELECTRICITY	10,687	11,357	13,215
FUEL	9,838	9,478	14,938
(e) Admin	34,101	33,552	40,292
ADMIN	28,770	26,918	33,295
INSURANCE	5,331	6,634	6,997
(f) Farm	29,507	35,287	38,893
EQUIP HIRE	6,765	8,911	9,857
MISC	1,293	603	720
REPAIRS & MAINTENANCE	21,449	25,773	28,316
(g) Water	4,566	794	1,297
Costs per bearing & non-bearing ha	422,024	498,481	586,478

53% bearing

69% bearing

73% bearing

Costs per Ha (Bearing & non-bearing)

53% bearing
69% bearing
73% bearing

YEAR	2019	2020	2021
section	GROUP	GROUP	GROUP
(a) Packhouse	13.33	11.85	12.14
PACKING COSTS	8.85	7.21	6.01
PACKING MATERIAL	4.47	4.64	6.13
(b) Salaries & Wages	25.45	22.05	22.16
FARM WAGES-GENERAL		7.60	7.86
FARM WAGES-HARVEST		9.48	9.89
FARM WAGES-PRUNE		0.95	0.83
SALARIES	5.45	4.02	3.58
WAGES	20.00		
(c) Production	4.90	4.90	5.61
COMPOST		0.02	0.00
FERTILIZER	2.27	2.23	2.64
POLLINATION	0.93	0.96	0.94
SPRAYS	1.70	1.70	2.03
(d) Energy	2.69	1.98	2.35
ELECTRICITY	1.40	1.08	1.10
FUEL	1.29	0.90	1.25
(e) Admin	4.47	3.19	3.37
ADMIN	3.77	2.56	2.78
INSURANCE	0.70	0.63	0.58
(f) Farm	3.87	3.36	3.25
EQUIP HIRE	0.89	0.85	0.82
MISC	0.17	0.06	0.06
REPAIRS & MAINTENANCE	2.81	2.45	2.37
(g) Water	0.60	0.08	0.11
Costs per bearing & non-bearing ha	55.29	47.40	48.99

The Drivers of income

Production

- Cultivar
- Export %
- Jockey
- Climate

Price

- Cultivar
- Supply /Demand
- Timing
- Quality / Claims
- Size?
- Market placement
- Packing and marketing costs
- Commodity cycle
- Exchange rate

	SEASON			
	2018	2019	2020	2021
%full bearing	75%	53%	69%	73%
Ton/bearing ha	11.4	14.2	15.3	16.4
Export %	65%	73%	72%	73%
Export kg per ha	7.4	10.3	10.9	11.9
Price /kg	65.9	55.3	53.2	50.9
Farmgate Income / bearing ha	752,894	782,765	812,364	833,923
Farmgate income / ha	564,671	417,713	560,531	608,764
Costs / ha	389,006	422,024	498,481	586,478
NFI	175,665	- 4,311	62,050	22,286

Costs



The Drivers of income

Production

- Cultivar
- Export %
- Jockey
- Climate

Price

- Cultivar
- Supply /Demand
- Timing
- Quality / Claims
- Size?
- Market placement
- Packing and marketing costs
- Commodity cycle
- Exchange rate

	SEASON			
	2018	2019	2020	2021
%full bearing	75%	53%	69%	73%
Ton/bearing ha	11.4	14.2	15.3	16.4
Export %	65%	73%	72%	73%
Export kg per ha	7.4	10.3	10.9	11.9
Price /kg	65.9	55.3	53.2	50.9
Farmgate Income / bearing ha	752,894	782,765	812,364	833,923
Farmgate income / ha	564,671	417,713	560,531	608,764
Costs / ha	389,006	422,024	498,481	586,478
NFI	175,665	- 4,311	62,050	22,286



Summary Per Cultivar

Cultivar Info

- Income / Bearing Ha
- T/Ha
- % Export
- T/Ha Export
- R/kg Export
- % Export+Local 1
- T/Ha Export+Local 1
- R/kg (Export+Local 1)
- % UNSOUND
- R/kg Total Harvest

North vs South

- Select all
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Area

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#CULTIVAR	2019	2020	2021	Average
24			1,885,893	1,885,893
33		625,869	2,090,938	1,804,874
3			1,573,708	1,573,708
51		350,849	1,451,335	1,419,893
48		1,193,218	1,544,405	1,368,812
53		709,174	1,425,231	1,367,172
62			1,299,527	1,299,527
20	360,918	1,359,753	1,254,267	1,270,141
25	1,224,022	1,615,500	1,076,465	1,238,950
50			1,232,211	1,232,211
2			1,210,272	1,210,272
32	1,087,588			1,087,588
49	128,845	1,198,606	1,026,893	1,061,788
44	1,133,946	1,069,225	1,002,912	1,046,684
13	1,066,466	1,266,803	888,072	1,040,254
69	1,170,247	1,219,602	843,562	1,005,232
Total	782,728	812,955	834,697	818,193

Summary Per Cultivar

Cultivar Info

- Income / Bearing Ha
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- R/kg Export
- % Export+Local 1
- T/Ha Export+Local 1
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North vs South

- Select all
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#CULTIVAR	2019	2020	2021	Average
63	801,315	991,719	986,809	969,693
43	977,929	740,563	933,292	876,089
58	756,238	1,031,707	710,473	861,478
16		408,415	1,071,352	858,582
30	858,078			858,078
23	918,429	569,565	840,462	857,249
52		477,494	870,438	838,578
19	1,123,631	805,184	831,567	833,324
60	1,361	979,368	762,111	829,219
29		804,258	796,424	798,774
36		640,164	934,785	780,796
31		607,640	830,548	765,999
47	742,482			742,482
40		734,201	704,069	707,882
61	629,268	800,844	628,327	695,248
37	681,847			681,847
7	674,137	630,030	613,030	676,136
Total	782,728	812,955	834,697	818,193

Summary Per Cultivar

- Cultivar Info** ▼
- Income / Bearing Ha
 - T/Ha
 - % Export
 - T/Ha Export
 - R/kg Export
 - % Export+Local 1
 - T/Ha Export+Local 1
 - R/kg (Export+Local 1)
 - % UNSOUND
 - R/kg Total Harvest
- North vs South** ▼
- Select all
 - NORTH
 - SOUTH
- Area** ▼
- KAAP
 - Limpopo
 - Noord
 - SWD
 - Ver Noord

#CULTIVAR	2019	2020	2021	Average
7	974,127	629,030	612,938	676,426
46		1,252,572	279,084	656,404
5		588,841	713,906	651,373
18	834,269	665,965	548,831	634,375
42	610,928			610,928
66		626,916	586,638	607,927
21	1,026,909	588,358	528,453	591,661
9	261,878	762,853	724,347	570,336
39	422,144	557,812	655,956	544,335
45	868,065	410,521	404,841	538,186
1	257,511	845,451	690,627	515,128
6		513,584		513,584
70	574,126	605,842	400,380	510,002
41		471,239	482,027	478,825
38	385,496	399,970	707,475	444,644
68	424,287	498,627	404,370	444,323
22	401,246	452,285	261,927	422,111
Total	782,728	812,955	834,697	818,193

Summary Per Cultivar

Cultivar Info

- Income / Bearing Ha
- T/Ha
- % Export
- T/Ha Export
- R/kg Export
- % Export+Local 1
- T/Ha Export+Local 1
- R/kg (Export+Local 1)
- % UNSOUND
- R/kg Total Harvest

North vs South

- Select all
- NORTH
- SOUTH

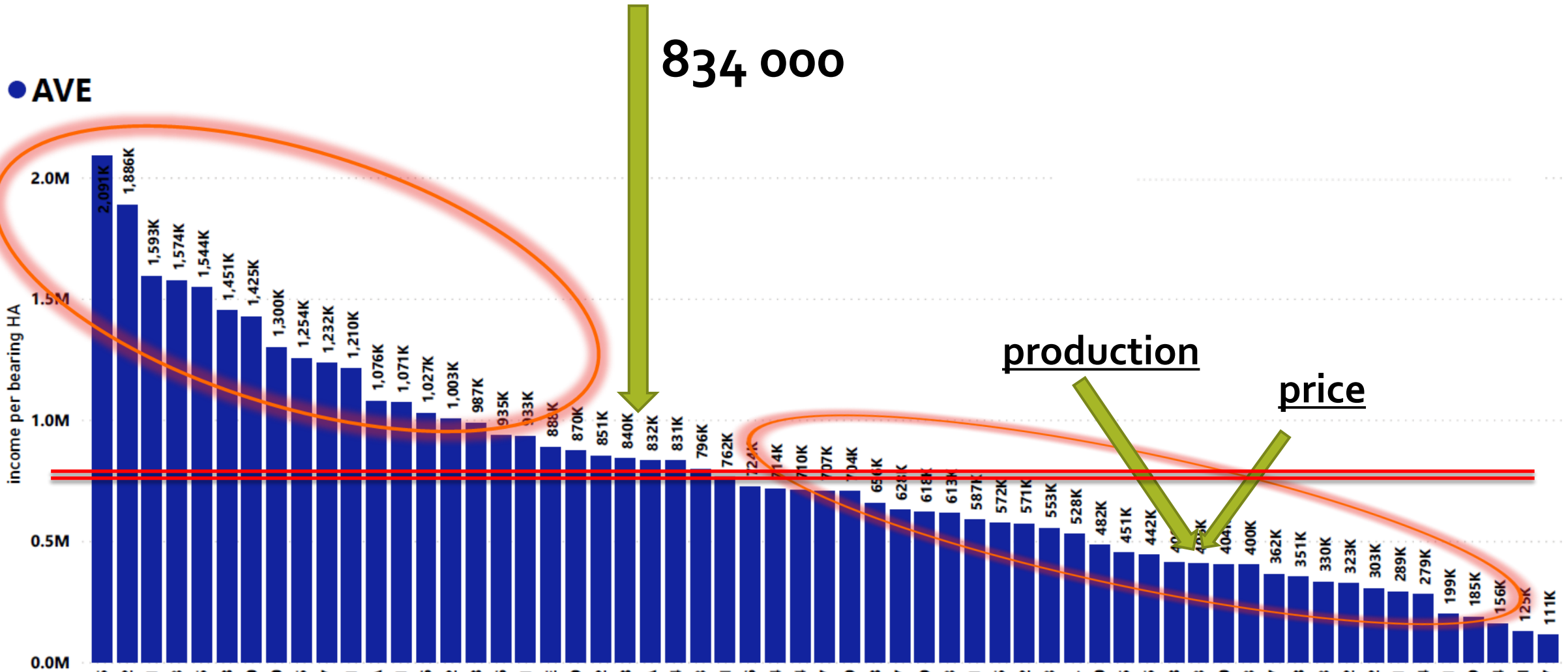
Area

- KAAP
- Limpopo
- Noord
- SWD
- Ver Noord

#CULTIVAR	2019	2020	2021	Average
57	400,291			400,291
17	204,723	458,572	570,958	379,274
11	276,720	416,360	409,349	367,530
28	750,559	300,532	323,384	356,322
4	296,545	419,429	302,747	339,574
59	355,214	282,063	572,175	329,356
67	283,823			283,823
26		521,605	124,632	272,600
54		15,798	289,337	246,912
71	687,294	120,129	156,245	165,621
65	161,235			161,235
64		40,698	185,452	113,075
27		82,480	198,539	108,924
55		58,728	102,908	80,818
14		51,187	20,800	41,058
10		4,926	110,540	40,131
Total	782,728	812,955	834,697	818,193

Income per bearing ha - 2021

● AVE



834 000

production

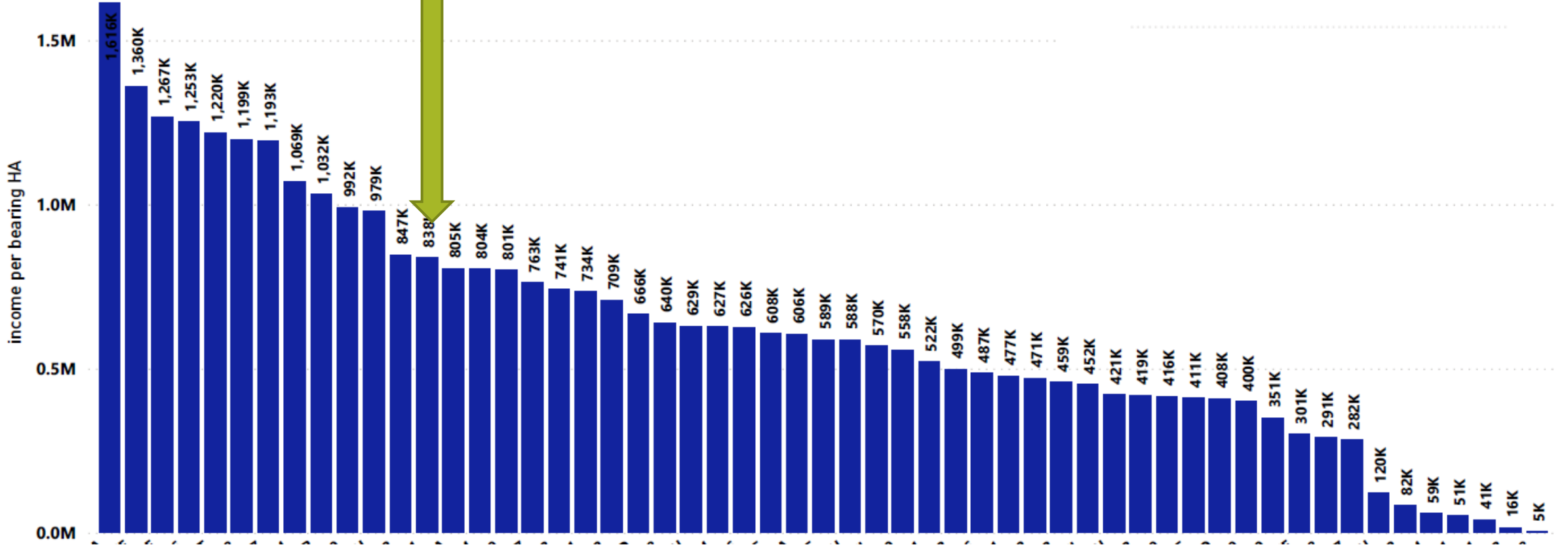
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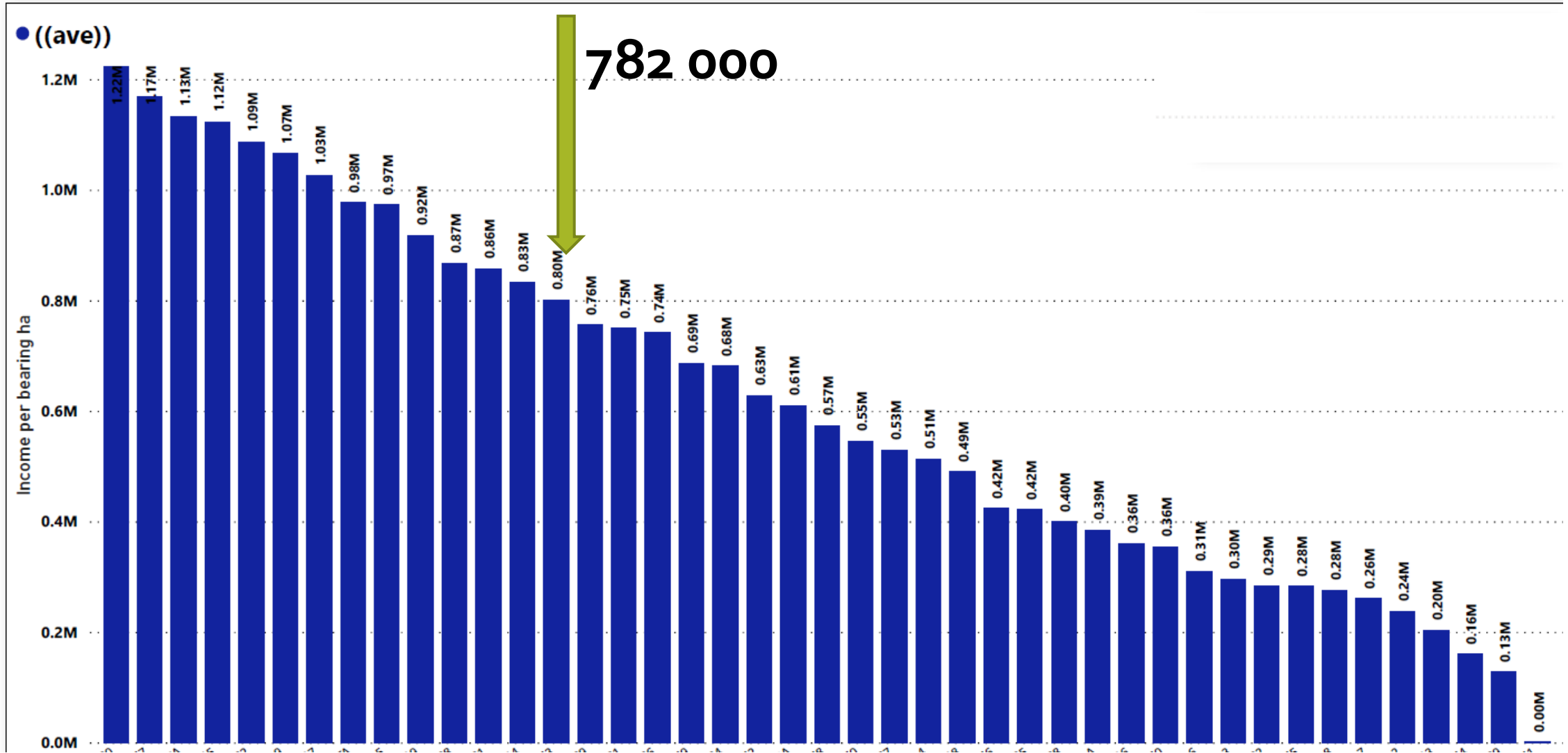
Income per bearing ha - 2020

● AVE

812 000



Income per bearing ha - 2019



Summary Per Cultivar (> 10bearing Ha)

Cultivar Info

- Income / Bearing Ha
- T/Ha
- % Export
- T/Ha Export
- R/kg Export
- % Export+Local 1
- T/Ha Export+Local 1
- R/kg (Export+Local 1)
- % UNSOUND
- R/kg Total Harvest

North vs South

- Select all
- NORTH
- SOUTH

Area

- KAAP
- Limpopo
- Noord
- SWD
- Ver Noord

#CULTIVAR	2019	2020	2021	Average
24			1,885,893	1,885,893
3			1,573,708	1,573,708
62			1,299,527	1,299,527
20	360,918	1,359,753	1,254,267	1,270,141
25	1,224,022	1,615,500	1,076,465	1,238,950
2			1,210,272	1,210,272
44	1,133,946	1,069,225	1,002,912	1,046,684
13	1,066,466	1,266,803	888,072	1,040,254
69	1,170,247	1,219,602	843,562	1,005,232
43	977,929	740,563	933,292	876,089
58	756,238	1,031,707	710,473	861,478
19	1,123,631	805,184	831,567	833,324
60	1,361	979,368	762,111	829,219
61	629,268	800,844	628,327	695,248
Total	840,120	848,666	850,606	848,320

Summary Per Cultivar (> 10bearing Ha)

Cultivar Info

- Income / Bearing Ha
- T/Ha
- % Export
- T/Ha Export
- R/kg Export
- % Export+Local 1
- T/Ha Export+Local 1
- R/kg (Export+Local 1)
- % UNSOUND
- R/kg Total Harvest

North vs South

- Select all
- NORTH
- SOUTH

Area

- KAAP
- Limpopo
- Noord
- SWD
- Ver Noord

#CULTIVAR	2019	2020	2021	Average
43	977,929	740,563	933,292	876,089
58	756,238	1,031,707	710,473	861,478
19	1,123,631	805,184	831,567	833,324
60	1,361	979,368	762,111	829,219
61	629,268	800,844	628,327	695,248
7	974,127	629,030	612,938	676,426
18	834,269	665,965	548,831	634,375
21	1,026,909	588,358	528,453	591,661
39	422,144	557,812	655,956	544,335
70	574,126	605,842	400,380	510,002
41		471,239	482,027	478,825
38	385,496	399,970	707,475	444,644
22	491,346	452,285	361,837	432,141
28	750,559	300,532	323,384	356,322
Total	840,120	848,666	850,606	848,320

The Drivers of income

Production

- Cultivar
- Export %
- Jockey
- Climate

Price

- Cultivar
- Supply /Demand
- Timing
- Quality / Claims
- Size?
- Market placement
- Packing and marketing costs
- Commodity cycle
- Exchange rate

	SEASON			
	2018	2019	2020	2021
%full bearing	75%	53%	69%	73%
Ton/bearing ha	11.4	14.2	15.3	16.4
Export %	65%	73%	72%	73%
Export kg per ha	7.4	10.3	10.9	11.9
Price /kg	65.9	55.3	53.2	50.9
Farmgate Income / bearing ha	752,894	782,765	812,364	833,923
Farmgate income / ha	564,671	417,713	560,531	608,764
Costs / ha	389,006	422,024	498,481	586,478
NFI	175,665	- 4,311	62,050	22,286



The Drivers of income

Production

- Cultivar
- Export %
- Jockey
- Climate

Price

- Cultivar
- Supply /Demand
- Timing
- Quality / Claims
- Size?
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The Drivers of income

Production

- Cultivar
- Export %
- Jockey
- Climate

Price

- Cultivar
- Supply /Demand
- Timing
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- Size?
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The Drivers of income

Production

- Cultivar
- Export %
- Jockey
- Climate

Price

- Cultivar
- Supply /Demand
- Timing
- Quality / Claims
- Size?
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NFI	175,665	- 4,311	62,050	22,286



Net Farm Income : Top3rd

	SEASON			
	2018	2019	2020	2021
%full bearing		71%	82%	80%
Ton/bearing ha		15.7	17.1	19.8
Export %		69%	74%	74%
Export kg per ha		10.8	12.6	14.6
Price /kg		56.3	66.5	59.1
Farmgate Income / bearing ha		880,469	1,135,131	1,168,639
Farmgate income / ha		625,133	930,807	934,911
Costs / ha		524,064	578,687	659,086
NFI		101,069	352,120	275,825



Net Farm Income : Baseline

	SEASON			
	2018	2019	2020	2021
%full bearing	75%	53%	69%	73%
Ton/bearing ha	11.4	14.2	15.3	16.4
Export %	65%	73%	72%	73%
Export kg per ha	7.4	10.3	10.9	11.9
Price /kg	65.9	55.3	53.2	50.9
Farmgate Income / bearing ha	752,894	782,765	812,364	833,923
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Costs / ha	389,006	422,024	498,481	586,478
NFI	175,665	- 4,311	62,050	22,286

Index

	2018	2019	2020	2021
production	100	124	134	143
price	100	84	81	77
costs	100	108	128	151



Index average

	2018	2019	2020	2021
production	100	124	134	143
price	100	84	81	77
costs	100	108	128	151

Index Top3rd

	2018	2019	2020	2021
production	x	100	109	126
price	x	100	118	105
costs	x	100	110	126



The Drivers of income

Production

- Cultivar
- Export %
- Jockey
- Climate

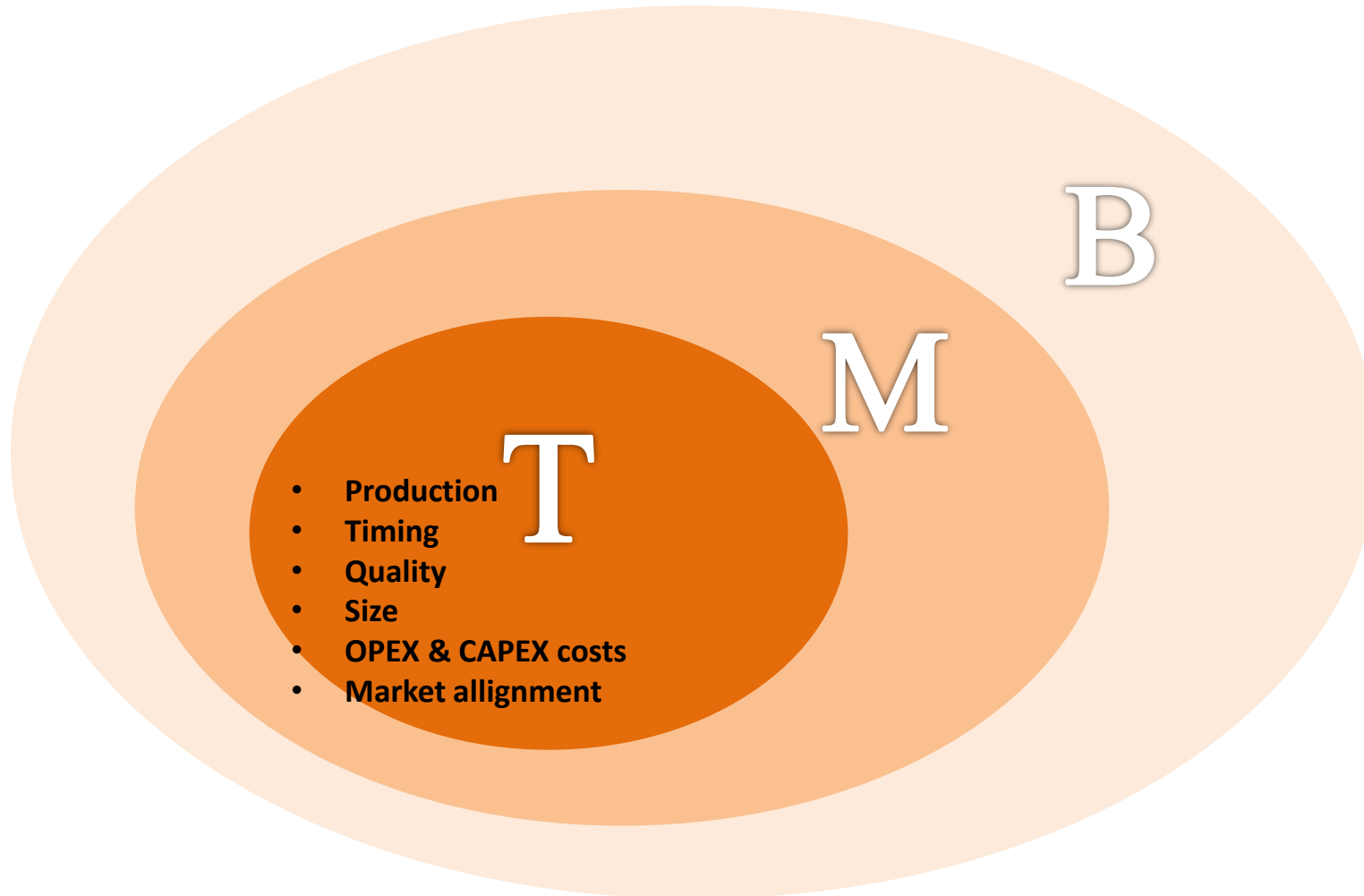
Price

- Cultivar
- Supply /Demand
- Timing
- Quality / Claims
- Size?
- Market placement
- Packing and marketing costs
- Commodity cycle
- Exchange rate

	SEASON			
	2018	2019	2020	2021
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"Sweetspot"



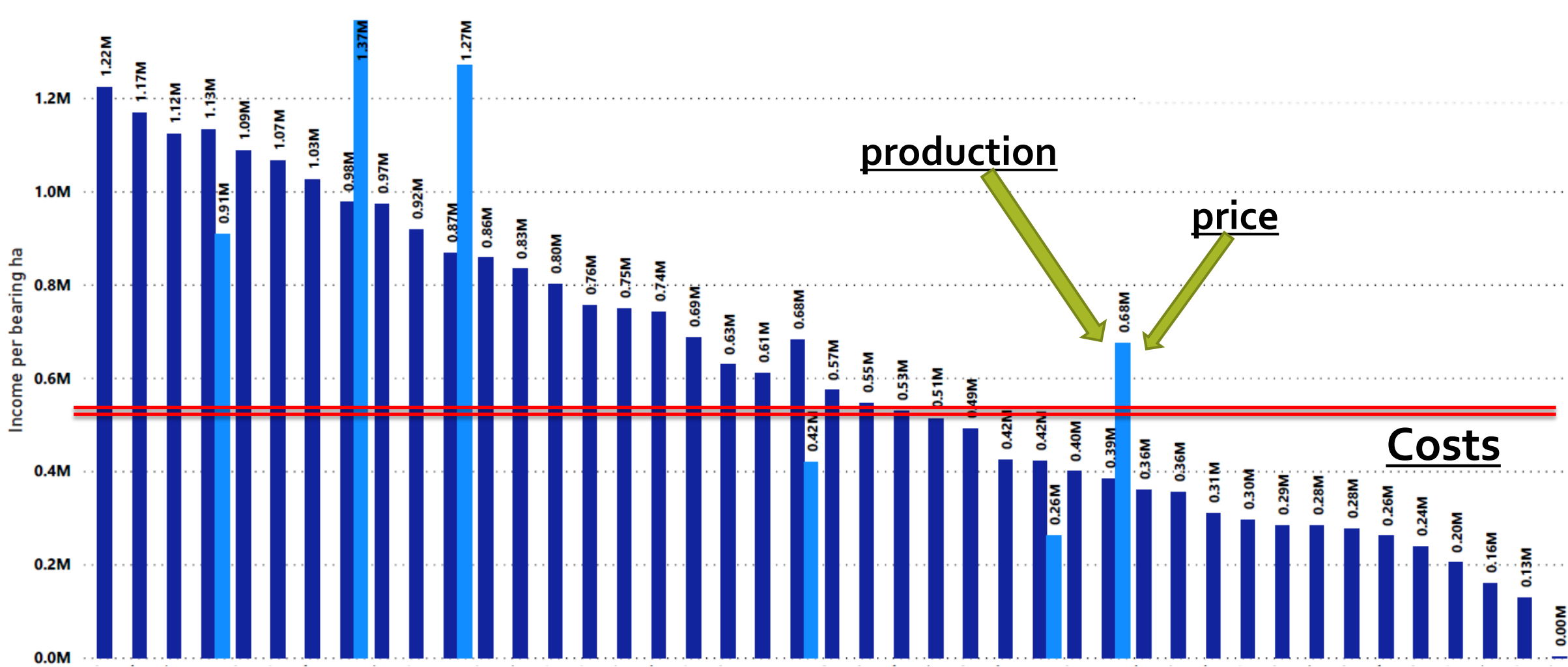
Lessons from other commodities we do

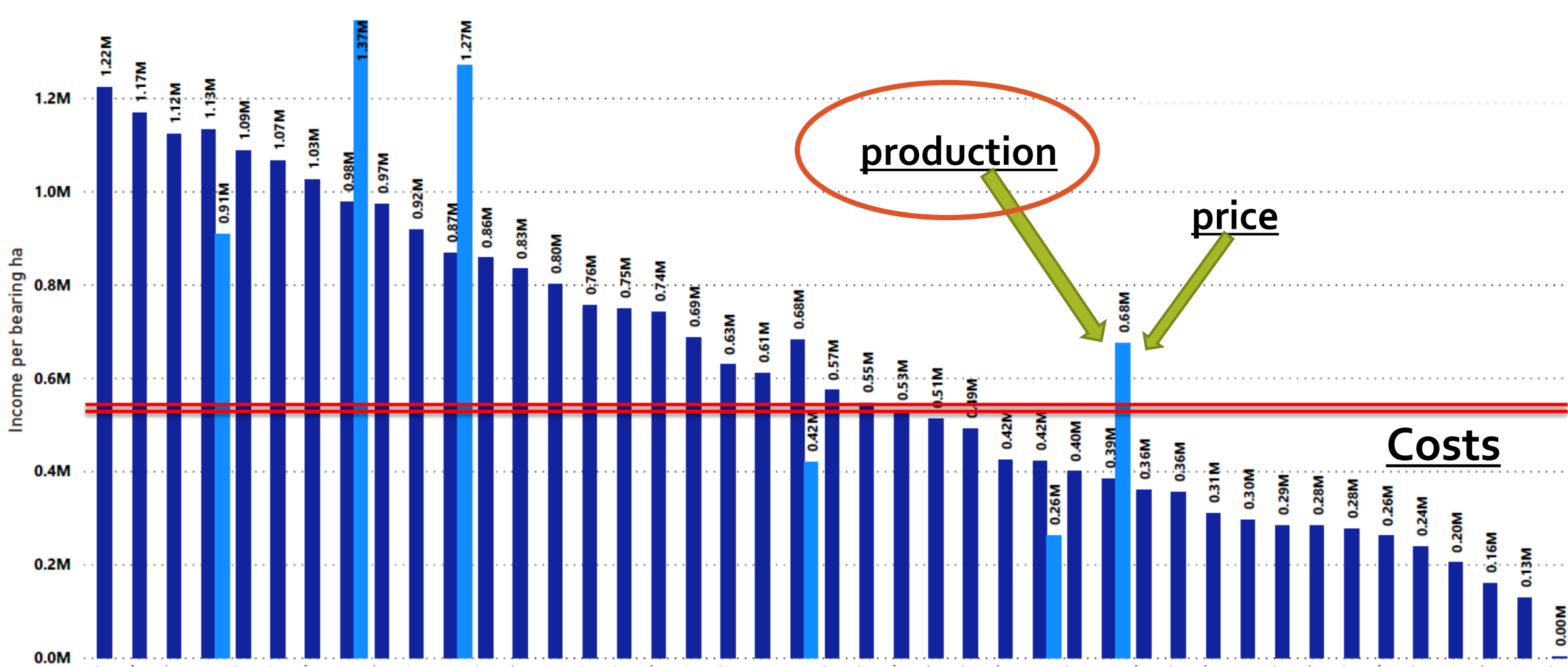
- **Cyclical nature of export fruit commodities**
- **Top 3rd make 2x the ROI than average regardless (stay in the sweetspot)**
- **Soft Citrus (Inbalance between IRR & Cashflow)**
- **Nectarines (high cultivar density commodity)**
- **Pears (use of technology)**

- **We are not alone! Risks all over!**

- **Find your sweetspot (and keep your eye on it as it is dynamic!)**

- **Frudata has a benchmark product**





production

price

Costs





Production and Packout (ton/bearing ha) - My Farm

Class	(a) EXPORT		(b) LOCAL-1		(c) LOCAL-2		(d) PROCESSED		(e) CULL		Total	
	t/ha	%	t/ha	%	t/ha	%	t/ha	%	t/ha	%	t/ha	%
Total	12.69	53.93%	1.68	7.16%	1.45	6.17%	7.62	32.41%	0.08	0.33%	23.52	100.00%
HHHHHH	5.56	15.14%	1.73	4.72%	2.72	7.40%	26.44	72.01%	0.27	0.73%	36.71	100.00%
KKKKKK			1.25	3.58%	9.18	26.38%	24.13	69.34%	0.24	0.70%	34.80	100.00%
NNNNNN	25.00	72.39%	2.18	6.32%	0.51	1.49%	6.77	19.60%	0.07	0.20%	34.53	100.00%
FFFFFF	22.39	65.18%	1.41	4.09%	1.34	3.90%	9.12	26.56%	0.09	0.27%	34.35	100.00%
BBBBBB	24.11	82.29%	0.26	0.88%	0.62	2.10%	4.27	14.58%	0.04	0.15%	29.30	100.00%
MMMMM	16.30	55.88%	2.94	10.08%	1.45	4.98%	8.39	28.78%	0.08	0.29%	29.17	100.00%
DDDDDD	13.45	47.29%	1.41	4.96%	1.62	5.69%	11.85	41.64%	0.12	0.42%	28.45	100.00%
JJJJJJJ	17.27	64.98%	2.53	9.53%	0.35	1.31%	6.36	23.94%	0.06	0.24%	26.58	100.00%
CCCCC			5.51	21.37%	8.75	33.90%	11.43	44.28%	0.12	0.45%	25.80	100.00%
LLLLLLL	7.92	31.64%	0.29	1.14%	5.04	20.13%	11.66	46.61%	0.12	0.47%	25.02	100.00%
AAAAAA	4.25	17.12%	7.01	28.26%	2.46	9.90%	10.98	44.27%	0.11	0.45%	24.81	100.00%
PPPPPP	17.96	77.20%	0.61	2.60%	0.10	0.43%	4.55	19.57%	0.05	0.20%	23.26	100.00%
RRRRRR			1.91	8.80%	7.51	34.69%	12.11	55.94%	0.12	0.57%	21.65	100.00%
EEEEEE	9.76	67.85%	0.73	5.10%	0.78	5.41%	3.08	21.43%	0.03	0.22%	14.39	100.00%
IIIIIIII	3.58	25.43%	1.84	13.09%	4.97	35.26%	3.66	25.96%	0.04	0.26%	14.09	100.00%
QQQQQ	10.56	76.14%	0.17	1.21%	0.67	4.82%	2.45	17.65%	0.02	0.18%	13.87	100.00%
GGGGGG	8.94	69.85%	0.01	0.07%	0.11	0.86%	3.70	28.93%	0.04	0.29%	12.80	100.00%



Production and Packout (ton/bearing ha) - per Farm in the group

Class	(a) EXPORT		(b) LOCAL-1		(c) LOCAL-2		(d) PROCESSED		(e) CULL		Total		
	Farm per line below	t/ha	%	t/ha	%	t/ha	%	t/ha	%	t/ha	%	t/ha	%
		21.75	71.03%	1.50	4.89%	1.52	4.98%	5.85	19.10%			30.62	100.00%
		22.06	86.73%	0.80	3.16%	0.03	0.10%	2.03	7.97%	0.52	2.04%	25.44	100.00%
		18.23	72.21%	1.33	5.25%	2.12	8.39%	3.57	14.14%			25.24	100.00%
		12.13	48.09%	3.30	13.10%	1.35	5.35%	8.44	33.46%			25.22	100.00%
		17.43	70.65%	3.13	12.70%	4.00	16.23%			0.10	0.42%	24.67	100.00%
		23.65	98.07%	0.25	1.05%	0.15	0.63%	0.06	0.25%			24.11	100.00%
		14.71	62.44%	1.65	7.01%	0.53	2.25%	6.67	28.31%			23.55	100.00%
	XYZ	12.69	53.93%	1.68	7.16%	1.45	6.17%	7.62	32.41%	0.08	0.33%	23.52	100.00%
		11.82	53.81%	0.90	4.09%	0.78	3.54%	8.47	38.57%			21.97	100.00%
		18.59	90.04%	0.56	2.73%	0.05	0.23%	0.93	4.52%	0.51	2.48%	20.64	100.00%
		10.52	51.64%	6.74	33.10%	0.62	3.05%	0.67	3.31%	1.81	8.90%	20.37	100.00%
		12.16	59.67%	1.07	5.25%	0.26	1.28%	2.80	13.77%	4.08	20.03%	20.37	100.00%
		8.20	42.83%	0.44	2.28%	9.50	49.60%	1.01	5.29%			19.15	100.00%
		10.89	57.31%	1.95	10.25%	0.96	5.05%	0.48	2.54%	4.72	24.85%	19.01	100.00%
		13.68	77.40%	2.52	14.25%	0.37	2.10%	0.81	4.59%	0.29	1.65%	17.68	100.00%
		16.32	92.57%	0.72	4.06%	0.18	1.04%	0.41	2.34%			17.63	100.00%
		15.54	88.36%	0.28	1.60%	0.14	0.80%	1.12	6.37%	0.50	2.87%	17.58	100.00%
		8.60	52.85%	0.73	4.49%	2.09	12.87%	1.31	8.03%	3.54	21.76%	16.28	100.00%
	GROUP	9.97	65.23%	0.96	6.31%	0.98	6.43%	3.01	19.72%	0.35	2.30%	15.28	100.00%
		14.26	94.67%	0.06	0.39%	0.01	0.05%	0.30	1.99%	0.44	2.90%	15.07	100.00%
		11.78	78.16%	1.14	7.54%	2.10	13.94%			0.05	0.36%	15.07	100.00%
		11.76	88.39%	0.47	3.50%	0.05	0.34%	0.67	5.01%	0.37	2.76%	13.30	100.00%
		11.22	89.13%	0.21	1.66%	0.37	2.96%	0.72	5.75%	0.06	0.50%	12.59	100.00%
		4.49	35.72%	0.46	3.65%	0.23	1.80%	7.39	58.83%			12.56	100.00%
		5.15	41.17%	5.04	40.26%	0.72	5.73%	1.05	8.39%	0.56	4.45%	12.51	100.00%
		9.70	78.02%	0.89	7.15%	0.56	4.54%	1.22	9.78%	0.06	0.50%	12.43	100.00%
		8.00	66.32%	0.13	1.09%	2.64	21.91%	1.29	10.67%			12.06	100.00%
		9.39	79.74%	0.16	1.34%	0.07	0.61%	1.81	15.37%	0.35	2.94%	11.77	100.00%
		6.18	53.08%	2.29	19.72%	0.67	5.72%	2.44	20.98%	0.06	0.50%	11.64	100.00%
		7.44	66.72%	1.39	12.44%	0.66	5.90%	1.02	9.13%	0.65	5.81%	11.14	100.00%
		6.19	56.63%	0.75	6.87%			3.78	34.54%	0.21	1.96%	10.93	100.00%
		5.06	46.63%	1.66	15.30%	1.02	9.36%	3.06	28.21%	0.05	0.50%	10.86	100.00%
		4.90	49.68%	1.06	10.76%	3.44	34.89%	0.46	4.67%			9.86	100.00%
		7.77	86.65%	0.24	2.73%	0.14	1.53%	0.82	9.10%			8.97	100.00%

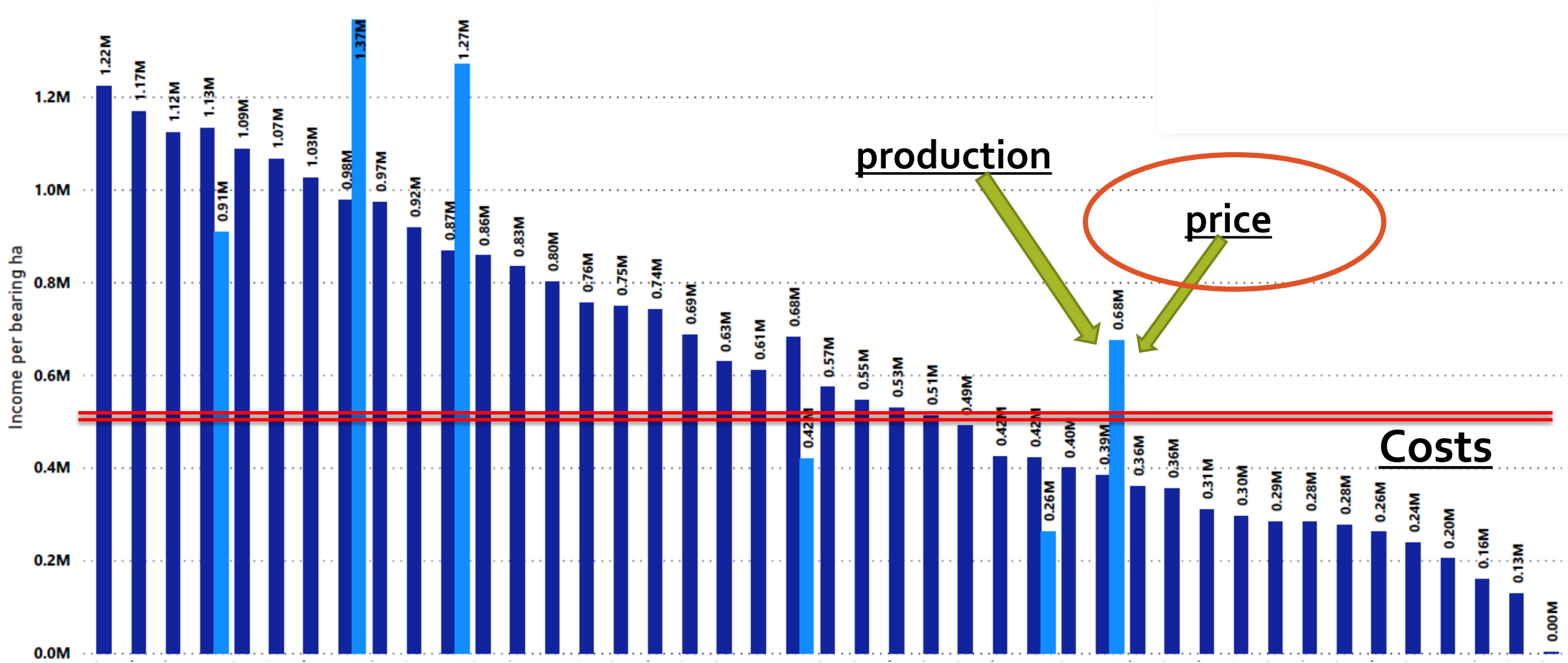


Production and Packout (ton/bearing ha) - **per cultivar**

CLICK TO SELECT CULTIVAR: EEEEEEE ▼

AAAAAA	EEEEEE	IIIIIIII	MMMMM	RRRRRR
BBBBBB	FFFFFF	JJJJJJJ	NNNNNN	
CCCCCC	GGGGGG	KKKKKK	PPPPPP	
DDDDDD	HHHHHH	LLLLLLL	QQQQQ	

Class	(a) EXPORT		(b) LOCAL-1		(c) LOCAL-2		(d) PROCESSED		(e) CULL		Total		
	Farm per line below	t/ha	%	t/ha	%	t/ha	%	t/ha	%	t/ha	%	t/ha	%
		22.13	78.71%	0.04	0.15%	1.16	4.14%	4.78	17.00%			28.12	100.00%
		12.76	51.87%	0.04	0.14%	0.83	3.37%	10.98	44.62%			24.60	100.00%
		19.77	88.63%	0.13	0.59%	0.93	4.18%	1.47	6.59%			22.31	100.00%
		13.37	66.28%	0.08	0.39%	0.20	0.97%	6.53	32.36%			20.17	100.00%
		13.51	67.42%	1.79	8.93%	0.49	2.46%	0.39	1.96%	3.85	19.23%	20.04	100.00%
		12.33	66.63%	0.29	1.56%	0.02	0.09%	2.39	12.93%	3.48	18.80%	18.50	100.00%
		5.07	27.89%	0.98	5.37%	1.90	10.44%	10.24	56.30%			18.19	100.00%
		11.03	69.20%			1.16	7.27%	1.01	6.34%	2.74	17.18%	15.95	100.00%
		9.74	64.54%	0.12	0.83%	3.47	23.03%	1.75	11.61%			15.09	100.00%
	XYZ	9.76	67.85%	0.73	5.10%	0.78	5.41%	3.08	21.43%	0.03	0.22%	14.39	100.00%
		9.43	69.78%	0.15	1.13%	3.56	26.34%	0.37	2.75%			13.52	100.00%
		5.88	57.24%	0.07	0.66%			4.33	42.10%			10.27	100.00%
		6.16	96.16%	0.10	1.55%	0.02	0.33%	0.13	1.96%			6.40	100.00%
		3.92	72.67%	0.40	7.45%			0.97	17.92%	0.11	1.96%	5.39	100.00%
		1.10	87.31%			0.08	6.15%	0.08	6.54%			1.26	100.00%





Packhouse-gate price - My Farm

Class	(a) EXPORT		(b) LOCAL-1		(c) LOCAL-2		(d) PROCESSED		(e) CULL		Total	
	R/kg	%	R/kg	%	R/kg	%	R/kg	%	R/kg	%	R/kg	%
Total	63.62	53.93%	82.18	7.16%	47.12	6.17%	8.38	32.41%	0.00	0.33%	45.82	100.00%
BBBBBB	83.85	82.29%	96.39	0.88%	43.10	2.10%	9.59	14.58%	0.00	0.15%	72.15	100.00%
NNNNNN	77.40	72.39%	92.18	6.32%	53.30	1.49%	9.94	19.60%	0.00	0.20%	64.60	100.00%
JJJJJJJ	74.53	64.98%	88.62	9.53%	44.09	1.31%	14.56	23.94%	0.00	0.24%	60.94	100.00%
PPPPPP	70.28	77.20%	91.07	2.60%	40.98	0.43%	8.74	19.57%	0.00	0.20%	58.52	100.00%
QQQQQ	59.61	76.14%	75.99	1.21%	47.74	4.82%	19.13	17.65%	0.00	0.18%	51.98	100.00%
GGGGG	66.55	69.85%	68.50	0.07%	42.45	0.86%	11.48	28.93%	0.00	0.29%	50.22	100.00%
FFFFFF	55.98	65.18%	105.32	4.09%	36.97	3.90%	15.98	26.56%	0.00	0.27%	46.49	100.00%
MMMMM	53.95	55.88%	76.58	10.08%	51.14	4.98%	14.23	28.78%	0.00	0.29%	44.50	100.00%
EEEEEE	50.02	67.85%	76.70	5.10%	41.24	5.41%	10.10	21.43%	0.00	0.22%	42.24	100.00%
AAAAAA	54.20	17.12%	86.81	28.26%	49.70	9.90%	4.32	44.27%	0.00	0.45%	40.65	100.00%
IIIIIIII	53.11	25.43%	77.40	13.09%	40.88	35.26%	9.18	25.96%	0.00	0.26%	40.43	100.00%
CCCCCC			67.52	21.37%	46.35	33.90%	9.02	44.28%	0.00	0.45%	34.14	100.00%
DDDDDD	50.29	47.29%	71.18	4.96%	44.78	5.69%	8.78	41.64%	0.00	0.42%	33.51	100.00%
LLLLLLL	41.76	31.64%	74.48	1.14%	47.10	20.13%	8.34	46.61%	0.00	0.47%	27.44	100.00%
RRRRRR			63.78	8.80%	47.00	34.69%	2.72	55.94%	0.00	0.57%	23.44	100.00%
HHHHHH	32.94	15.14%	59.18	4.72%	42.64	7.40%	10.87	72.01%	0.00	0.73%	18.77	100.00%
KKKKKK			68.23	3.58%	48.17	26.38%	0.05	69.34%	0.00	0.70%	15.19	100.00%



Packhouse-gate price per class - per Farm in the group

Class	(a) EXPORT		(b) LOCAL-1		(c) LOCAL-2		(d) PROCESSED		(e) CULL		Total	
	R/kg	%	R/kg	%	R/kg	%	R/kg	%	R/kg	%	R/kg	%
	98.40	86.65%	109.54	2.73%	47.19	1.53%	14.00	9.10%			90.24	100.00%
	95.27	70.65%	99.76	12.70%	38.87	16.23%			0.00	0.42%	86.29	100.00%
	87.90	78.16%	97.99	7.54%	45.20	13.94%			0.00	0.36%	82.39	100.00%
	72.48	49.68%	87.90	10.76%	63.80	34.89%	12.00	4.67%			68.29	100.00%
	77.64	71.03%	86.22	4.89%	97.74	4.98%	13.00	19.10%			66.72	100.00%
	73.78	72.21%	90.65	5.25%	63.78	8.39%	12.80	14.14%			65.20	100.00%
	62.60	98.07%	50.58	1.05%	46.86	0.63%	12.96	0.25%			62.26	100.00%
	80.39	48.09%	64.95	13.10%	55.32	5.35%	27.82	33.46%			59.44	100.00%
	65.78	41.17%	73.15	40.26%	53.77	5.73%	-2.85	8.39%	0.00	4.45%	59.37	100.00%
	66.33	78.02%	86.62	7.15%	16.15	4.54%	1.99	9.78%	0.00	0.50%	58.88	100.00%
	61.93	89.13%	83.76	1.66%	66.96	2.96%	3.27	5.75%	0.00	0.50%	58.75	100.00%
	60.95	90.04%	61.46	2.73%	24.22	0.23%	4.88	4.52%	0.00	2.48%	56.83	100.00%
	57.58	92.57%	51.49	4.06%	49.78	1.04%	4.16	2.34%			56.01	100.00%
	71.29	62.44%	96.11	7.01%	56.42	2.25%	10.91	28.31%			55.60	100.00%
	61.04	51.64%	68.49	33.10%	29.96	3.05%	-1.74	3.31%	0.00	8.90%	55.05	100.00%
GROUP	65.52	65.23%	82.96	6.31%	43.91	6.43%	11.95	19.72%	1.88	2.30%	53.20	100.00%
	55.51	94.67%	53.42	0.39%	46.33	0.05%	-5.24	1.99%	0.00	2.90%	52.68	100.00%
	62.70	79.74%	65.58	1.34%	51.97	0.61%	6.24	15.37%	0.00	2.94%	52.15	100.00%
	56.23	88.36%	59.01	1.60%	48.81	0.80%	3.50	6.37%	0.00	2.87%	51.24	100.00%
	67.95	56.63%	92.24	6.87%			18.53	34.54%	0.00	1.96%	51.22	100.00%
	56.49	86.73%	51.88	3.16%	23.00	0.10%	0.51	7.97%	0.00	2.04%	50.70	100.00%
	48.34	77.40%	80.96	14.25%	58.12	2.10%	0.67	4.59%	0.00	1.65%	50.21	100.00%
	57.04	66.32%	77.48	1.09%	40.40	21.91%	12.00	10.67%			48.81	100.00%
	71.62	53.81%	93.94	4.09%	51.07	3.54%	11.34	38.57%			48.56	100.00%
	61.94	57.31%	89.18	10.25%	41.37	5.05%	12.00	2.54%	0.00	24.85%	47.03	100.00%
	47.89	53.08%	97.14	19.72%	43.09	5.72%	-2.85	20.98%	0.00	0.50%	46.44	100.00%
	48.84	88.39%	84.18	3.50%	27.21	0.34%	-2.62	5.01%	0.00	2.76%	46.08	100.00%
XYZ	63.62	53.93%	82.18	7.16%	47.12	6.17%	8.38	32.41%	0.00	0.33%	45.82	100.00%
	54.91	59.67%	92.85	5.25%	54.37	1.28%	12.00	13.77%	7.03	20.03%	41.40	100.00%
	48.09	66.72%	51.12	12.44%	33.74	5.90%	-2.77	9.13%	0.00	5.81%	40.19	100.00%
	61.79	42.83%	65.87	2.28%	21.60	49.60%	12.80	5.29%			39.36	100.00%
	50.97	46.63%	87.46	15.30%	17.35	9.36%	-1.44	28.21%	0.00	0.50%	38.37	100.00%
	49.97	52.85%	77.33	4.49%	32.94	12.87%	12.00	8.03%	0.00	21.76%	35.08	100.00%
	63.24	35.72%	80.20	3.65%	56.58	1.80%	12.98	58.83%			34.17	100.00%



Packhouse-gate price - per Cultivar

CLICK TO SELECT CULTIVAR: GGGGGG ▼

AAAAAA	EEEEEE	IIIIIIII	MMMMMM	RRRRRR
BBBBBB	FFFFFF	JJJJJJJJ	NNNNNN	
CCCCCC	GGGGGG	KKKKKK	PPPPPP	
DDDDDD	HHHHHH	LLLLLLL	QQQQQ	

Class	(a) EXPORT		(b) LOCAL-1		(c) LOCAL-2		(d) PROCESSED		(e) CULL		Total		
	Farm per line below	R/kg	%	R/kg	%	R/kg	%	R/kg	%	R/kg	%	R/kg	%
		73.27	95.02%			62.59	1.94%	12.80	3.04%			71.23	100.00%
		74.43	72.53%	92.89	2.60%	84.02	6.35%	13.00	18.52%			64.14	100.00%
		75.94	59.34%	73.76	12.84%	62.14	0.22%	10.91	27.59%			57.69	100.00%
		74.15	71.60%	76.63	2.08%	29.59	6.78%	12.00	5.27%	0.00	14.28%	57.32	100.00%
		64.15	68.20%	100.15	5.37%			18.53	24.47%	0.00	1.96%	53.66	100.00%
XYZ		66.55	69.85%	68.50	0.07%	42.45	0.86%	11.48	28.93%	0.00	0.29%	50.22	100.00%
		67.05	66.19%	83.33	0.21%	49.14	0.64%	11.34	32.96%			48.61	100.00%
		68.58	50.95%	86.56	1.63%	19.92	42.57%	12.80	4.86%			45.45	100.00%
		50.20	80.65%	95.93	1.92%	0.00	0.91%	12.00	1.53%	0.00	15.00%	42.51	100.00%
		56.21	59.96%	98.23	1.91%			12.98	38.13%			40.53	100.00%
				76.80	8.54%	40.00	60.80%	12.00	30.65%			34.56	100.00%
		65.03	22.47%	77.45	7.26%	44.22	0.60%	12.00	28.38%	7.03	41.29%	26.81	100.00%



QUALITY

- Select all
- SOUND
- UNSOUND

MARKET

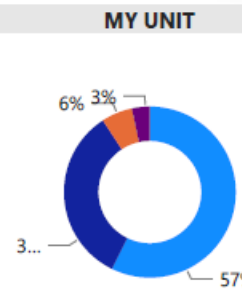
- Select all
- EU
- FE
- ME
- OT
- RU
- UK

PACKTYPE

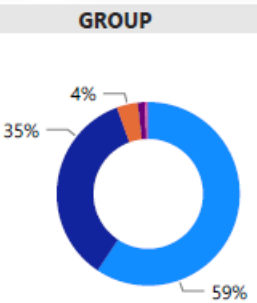
- Select all
- FINALPACK
- LOOSE

WEEKS

- Select all
- 202017
- 202018
- 202022
- 202023
- 202025
- 202027
- 202028
- 202029
- 202030
- 202031
- 202032
- 202033
- 202034
- 202035
- 202036
- 202037
- 202038
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- 202040
- 202041
- 202042
- 202043
- 202044
- 202045
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- 202047
- 202048
- 202049
- 202050
- 202051
- 202101
- 202102
- 202106
- 202107
- 202108



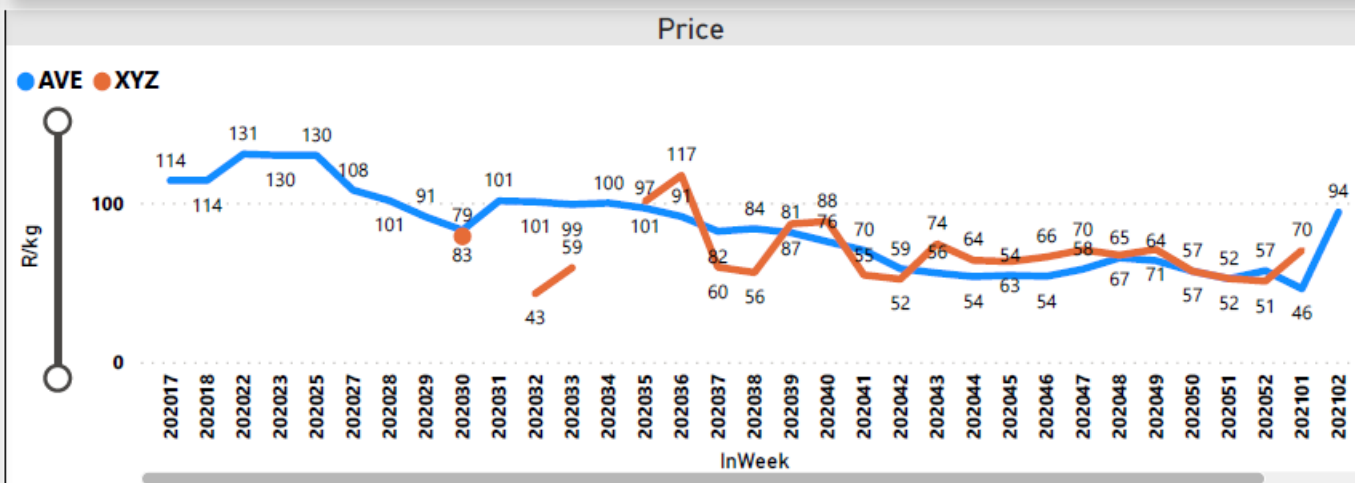
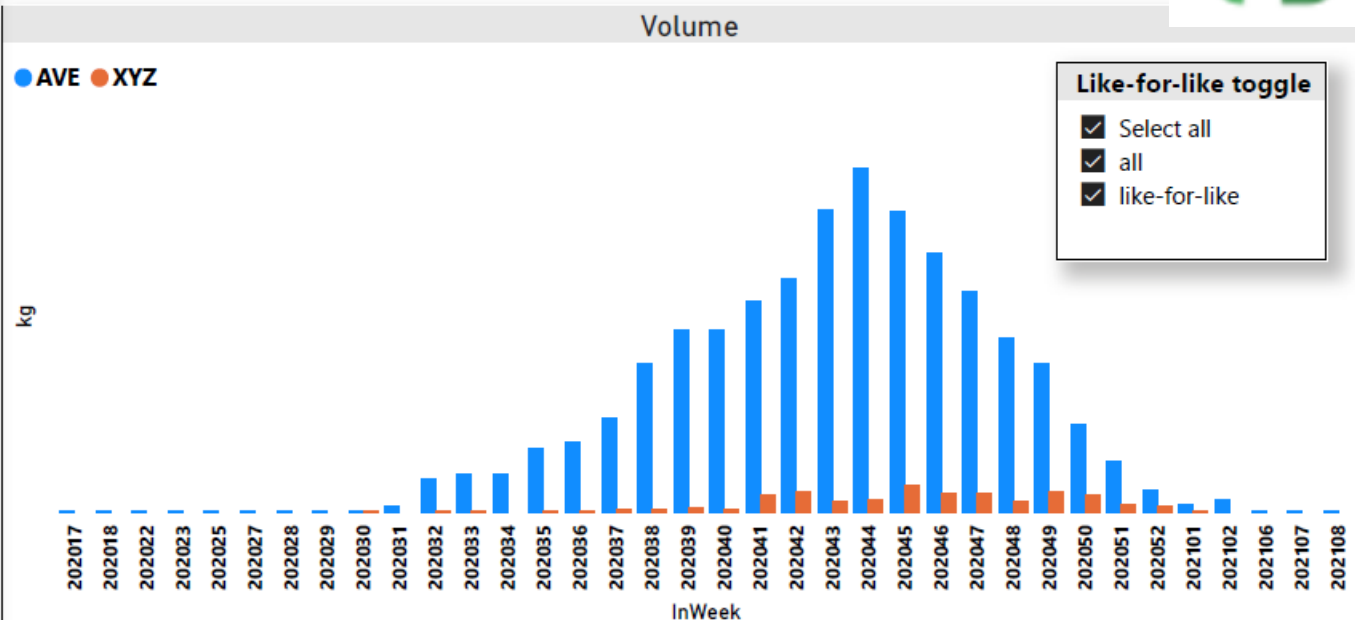
- EU
- UK
- FE
- ME
- RU
- OT



VOLUME & WEIGHTED PRICE FOR SELECTION

TEST PLAASNAAM	kg	R/kg
<input type="checkbox"/> AVE	9,924,788	65.52
EU	5,891,526	60.75
FE	366,955	78.36
ME	126,920	74.85
OT	19,999	72.07
RU	34,528	38.40
UK	3,484,862	72.12
<input type="checkbox"/> XYZ	669,892	63.62
EU	383,800	53.08
FE	38,997	63.51
ME	22,421	75.38
UK	224,674	80.46
Total	10,594,680	65.40

EXPORT PRICE PER WEEK





EXPORT PRICE PER MARKET

QUALITY

- Select all
- SOUND
- UNSOUND

MARKET

- Select all
- EU
- FE
- ME
- OT
- RU
- UK

PACKTYPE

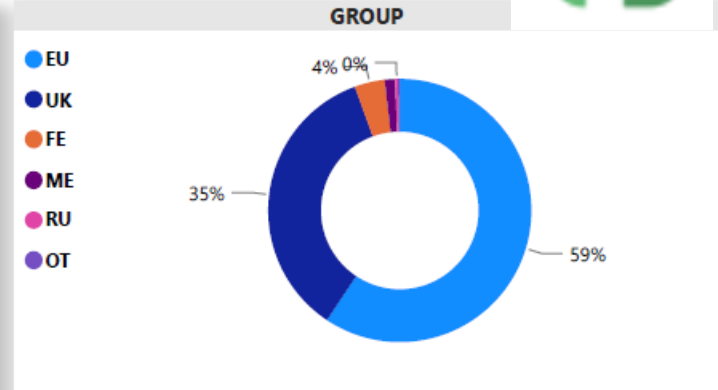
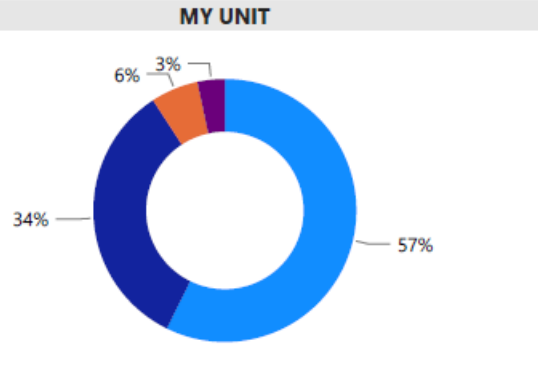
- Select all
- FINALPACK
- LOOSE

- WEEKS**
- Select all
 - 202017
 - 202018
 - 202022
 - 202023
 - 202025
 - 202027
 - 202028
 - 202029
 - 202030
 - 202031
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 - 202051
 - 202052
 - 202101
 - 202102
 - 202106
 - 202107
 - 202108

- Select all
- LOOSE
- 150-400g PUNNET
- >400g PUNNET
- <150g PUNNET

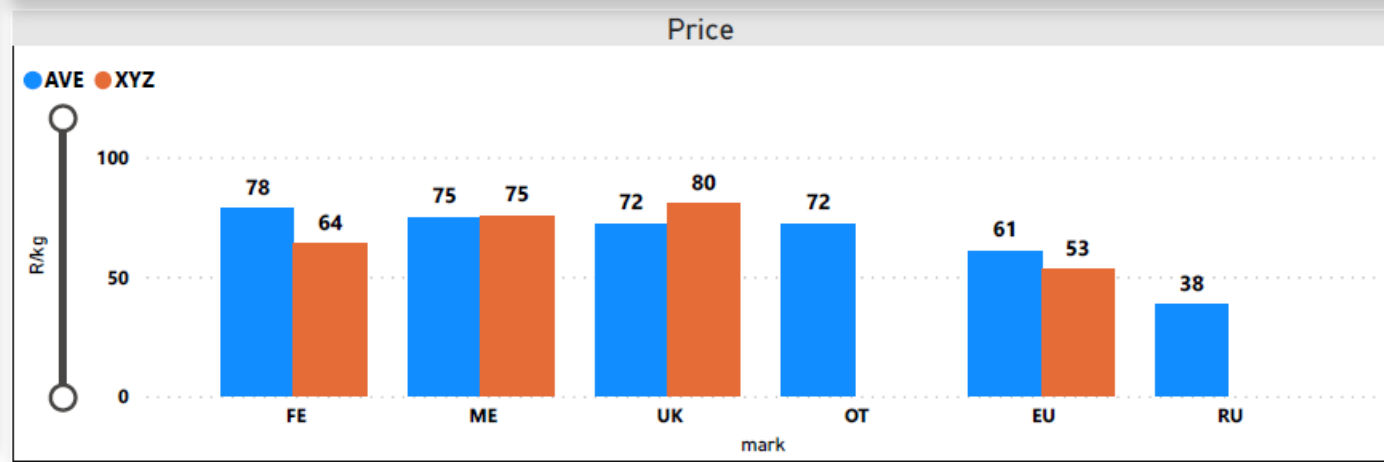
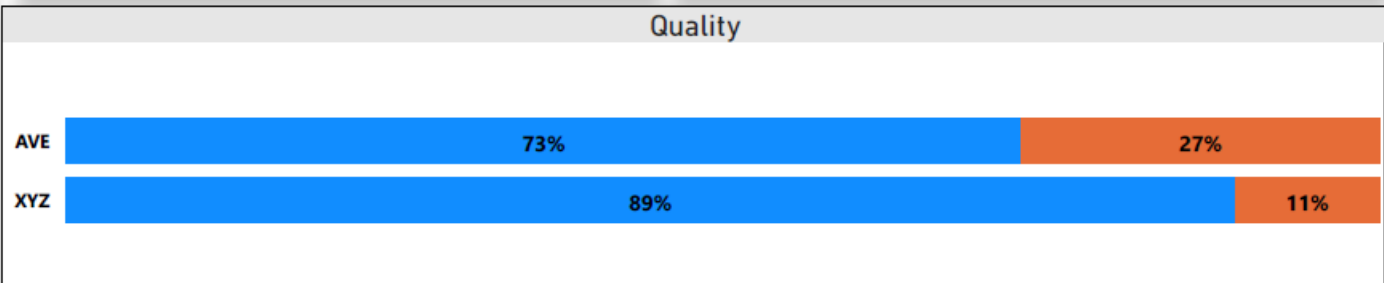
Like-for-like toggle

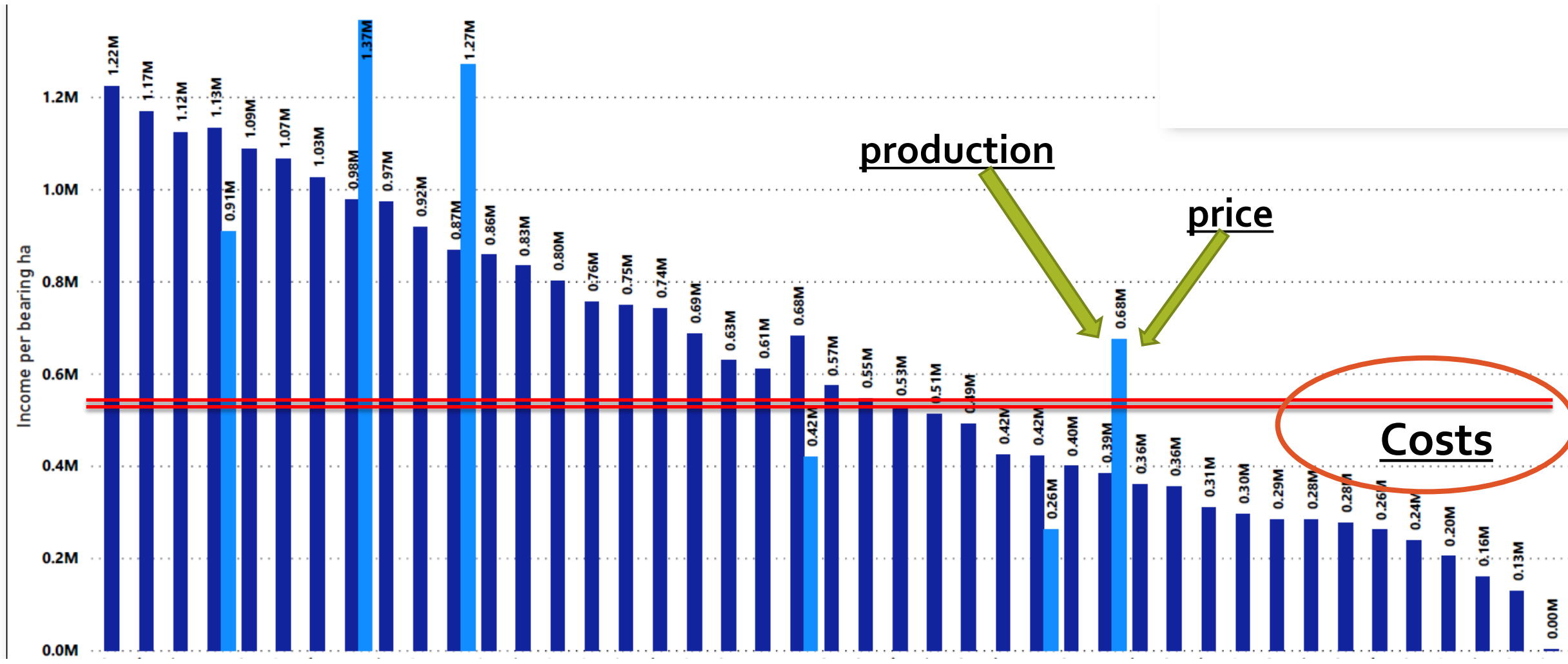
- Select all
- all
- like-for-like



VOLUME & WEIGHTED PRICE FOR SELECTION

TEST PLAASNAAM	kg	R/kg
<input type="checkbox"/> AVE	9,924,788	65.52
EU	5,891,526	60.75
FE	366,955	78.36
ME	126,920	74.85
OT	19,999	72.07
RU	34,528	38.40
UK	3,484,862	72.12
<input type="checkbox"/> XYZ	669,892	63.62
EU	383,800	53.08
FE	38,997	63.51
ME	22,421	75.38
UK	224,674	80.46
Total	10,594,680	65.40

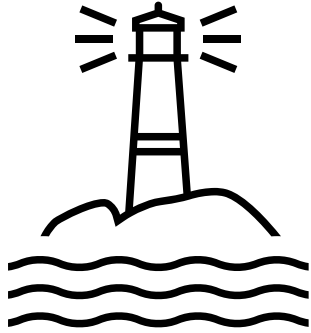




Costs

production

price



- Plant cultivars under a stricter set of criteria
- Plant with Cashflow in mind and not only ROI
- Align with a commercial plan
- Produce what you can timeously handle (quality)
- Crop load
- Quality!
- Do not get into a marketing position where risks for "claims" are high
- Develop markets outside our current markets
- Get logistics on par asap
- Move into the (dynamic) sweetspot
- Develop markets (new and segmentation in older markets)



Thanks !
Baie dankie!

pietman wessels
076 468 7110