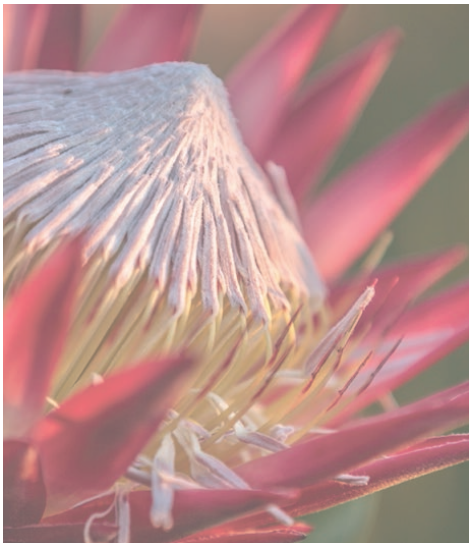




HORTGRO

Annual Review 2017



HOME OF THE SOUTH AFRICAN DECIDUOUS FRUIT GROWER

HORTGRO ANNUAL REVIEW

This report provides an overview of the range of functions and services delivered by Hortgro and its related industry substructures throughout 2017.

HORTGRO JAAROORSIG

Hierdie oorsig gee 'n blik op die reeks funksies en dienste wat deur Hortgro en verwante bedryfsubstrukture tydens 2017 gelewer is.

Note

Due to constraints, it is not possible to provide all of the content in both our operating languages (English and Afrikaans). We tried to balance the content as far as possible. Should you require a translation of a specific section in this report, or more detail on any aspect, please contact us. We appreciate your understanding in this matter.

Weens koste- en spasiebeperkings is dit nie moontlik om die verslag in beide die twee hoof bedryfstale (Afrikaans en Engels) te publiseer nie. Ons het sover as moontlik probeer om die verslag tussen die twee tale te balanseer. Indien daar 'n spesifieke gedeelte is wat u graag in die ander taal, of in meer detail wil sien, kontak ons gerus. Ons waardeer u begrip hiervoor.

CONTENT

Page 1

CHAPTER 1

Board of directors
General review

Page 7

CHAPTER 2

Principal members:
· SAAPPA
· SASPA
· DFTS

Page 15

CHAPTER 3

Hortgro Services
· Management and administration
· Communications
· Research & Technology
· Trade & Markets

Page 27

CHAPTER 4

Support services
· Information & Logistics
· Jobs Fund
· Deciduous Fruit Development Chamber
· Fruit Workers' Development Trust
· Deciduous Fruit Industry Development Trust
· Training & Corporate Social Investment

Page 35

CHAPTER 5

Industry Service Entities
· Sapo Trust
· Culdevco
· FruitFly Africa

Page 41

CHAPTER 6

Alternative Crops
· Cape Flora SA
· Pomegranate Association of South Africa
· SA Berry Producers' Association
· SA Cherry Growers' Association
· SA Honeybush Tea Association
· SA Olive
· SA Pecan Nut Producers' Association
· SA Fig Producers' Association

Page 51

CHAPTER 7

Contact list

1

GENERAL REVIEW



BOARD OF DIRECTORS

The horticultural knowledge group

At the back, André Smit, Nicholas Dicey, Anton Rabe and Mono Mashaba. In front, Pitso Sekhoto and Bongiwe Njobe.

"A Hortgro director must be finely tuned to the challenges facing the deciduous fruit industry, and must engage with a range of stakeholders in helping to build an enabling environment for its producers to operate in." – Nicholas Dicey, Hortgro Chairperson

- ALGEMENE OORSIG / GENERAL REVIEW: 2017 -

The continued drought and water crisis in many of our production areas was the main 'event' and focus point during the past year.

1

Anton Rabe - Hortgro Executive Director

Hortgro and its various sub-structures initiated a wide range of actions to support producers in order to minimize the impact of reduced irrigation water. The reality is that the scenario around water has changed dramatically and even in more normal rainfall periods (we hope!), the approach to water use will never be the same.

This has now become the 'new normal' and the industry will continuously have to adapt as climate change forces pro-active introduction of new technology and practices to manage risks, also those associated with a new pest and disease complex which provide further challenges in terms of market access – both relating to existing markets and new markets where we will have to continue to do things differently.

Hortgro has participated extensively within multi-stakeholder/multi-discipline forums and working groups to protect agriculture's water allocation, to influence policies and the development of support mechanisms to rural communities, and to coordinate communications to the wider stakeholder fraternity, including the local and international media and trade. More details relating to these activities are reported on elsewhere in this report.

Ondanks hierdie uitdagings, het die kern- en steenvrugbedrywe 'n gesonde onderbou met nuwe aanplantings van die afgelope vyf jaar wat toenemend in produksie kom en die invloed van watertekorte op bedryfsvolumes versag. Mediumtermynprojeksies lyk dus belowend en die bedryf is goed geposisioneer om internasionale markgeleenthede te benut. Die uitdagings raak egter nie minder nie, veral met betrekking tot: marktoegang - gegewe toenemende internasionale proteksionisme, beperkte kapasiteit en steun vanuit owerheidsgeledere, stygende inset- en arbeidskoste, tesame met voortgesette verpolitisering van die landbou in terme van arbeid, verblyfreg en grondhervorming.

Hortgro and its aligned service entities continued to join forces with the other fruit export industries through joint actions executed via Fruit SA in alignment with the citrus, table grapes and sub-tropical industries and the Exporters' Forum. This includes a wide range of activities within the Fruit Industry Value Chain Round Table (FIVCRT) where various key government departments assist with addressing transformation, trade, resources and labour-related issues, including a focus on rural housing where a national policy change is required to ensure meaningful change.

This included extensive participation in the Phakisa process which we hope will align and focus actions to address constraints and needs of the commercial and emerging producer base, as well as labour and rural communities. We will continue to do so in order to maximize the outputs with the limited resources we have.

During the past year we administered close to R350 million. This relates to three broad funding streams, namely statutory levies, user pay services and motivated grant funding for various activities which augment private initiatives. Levies remain critical to provide a stable capacity and base on which the other funding streams can be developed and motivated.

Ons het pas die derde jaar van die huidige heffingsiklus begin. Om dié rede het Hortgro en die verskillende produsentegroepe en diensstrukture reeds die afgelope jaar 'n reeks strategiese sessies gehou om die behoeftes en prioriteite van die verskillende belangegroepe te identifiseer – in die meeste gevalle is herbevestig dat ons met die regte "goed" besig is. Hierdie kwessies sal in die volgende klompie maande en in aanloop tot die motivering vir 'n verdere vier-jaar-heffingsiklus verder hanteer en implementeer word.

Hierdie kwessies sluit in:

- Mandaat en bestuur

- Bedryfstransformasie
- Bedryfstrukture en administrasie
- Kommunikasie

'n Hernude verbintenis op bedryfsvlak met betrekking tot ekonomiese ontwikkeling en grondhervorming is ook gedurende die jaar met die Sagtevrugte-Ontwikkelingskamer ooreengekom. Dit is gebaseer op 'n groeistrategie wat Hortgro se nuwe visie en missie direk ondersteun. 'n Nuwe Memorandum van Ooreenkoms (MvO) is tussen die partye ooreengekom waarvolgens die kern-/steenvrugtebedrywe die Kamer met fondse vir die skep van operasionele kapasiteit en aktiwiteite ondersteun. Hierdie proses en nasionale uitrol van verskeie gemeenskaplike projekte en inisiatiewe sal gedurende die komende jaar aandag en momentum kry.

Hortgro also continued its participation within the Laborie Social Dialogue Initiative despite resistance from some quarters. There is slow progress with more stakeholder groupings joining the initiative, and it is trusted that these engagements will ultimately assist with the development and agreement of a social compact between the various social partners – business, labour, government and civil society. A study to look at rural housing needs and policy environment was also commissioned and completed. This has been disseminated to stakeholder groups and it is trusted that this dire need in our farming and rural communities will find traction within the Phakisa process going forward.

We continue to support SIZA (Sustainability Initiative of SA) as the home-grown solution to ensure third party verified compliance to international ethical and social trade requirements. A module to address environmental compliance requirements has now been initiated. The aim is to have an electronic platform developed by April 2018 — with an instant proof of compliance facility for those who require such information.

LEVIES ADMINISTERED
DURING 2017

Apples (Fresh Fruit) Export and Domestic Volumes 4,25 cents per kg	Apricots Export and Domestic Volumes 17,0 cents per kg	Nectarines/Peaches Export Market Development 20 cents per kg
Apple Concentrate Export and Domestic Volumes R7,80 per fresh ton	Nectarines/Peaches Export and Domestic Volumes 10,6 cents per kg	Plums Export Market Development 9,5 cents per kg
Pears Export and Domestic Volumes 4,25 cents per kg	Plums Export and Domestic Volumes 14 cents per kg	Peach/Nectarines Local Market Development 4 cents per kg
Apples & Pears Export Market Development 2,8 cents per kg	Apricots Export Market Development 10 cents per kg	Plums Local Market Development 1,9 cents per kg



VISION

Inspiring | Inclusive | Growth

PRIORITIES

Mandate & Management

Industry Transformation

Communication

Structure & Governance

MISSION

To create an enabling environment to enhance equity, sustainability, profitability and competitiveness through:

Effective Communication | Market Access & Development | Logistics & Infrastructure
Plant Improvement / Acquisition | Economic Empowerment & Land Reform | Info & Stats
R&D and Technology Transfer | Human Resources, Skills and Socio-Economic Development

VALUES



Integrity



Reliable & Accountable



Knowledge & Intelligence



Passion & Pride



Change & Agility



Quality



Diversity



Attitude, Competence & Experience



Collaboration



Leadership

- 20 Years of fruit freedom -
HORTGRO
Growing fruit IQ

- FRUIT SA VALUES STATEMENT -

“Fruit South Africa strives — through its facilitative role — to contribute to a growing, profitable, sustainable and equitable fruit industry in South Africa within the context of the National Development Plan and related strategies and policies.”

Therefore, we, the members of Fruit South Africa, hereby declare our support for, and commitment to, the following values:

1

OUR PEOPLE

We regard the fruit sectors’ Human Resources as one of our most valuable assets and commit ourselves to a spirit, culture and actions aimed at enhancing the development of and opportunities for employees within profitable and sustainable businesses. This commitment relates to compliance with all relevant national and international labour legislation and practices.

2

ETHICAL BEHAVIOUR

We encourage compliance with ethical behaviour norms and best practice principles relating to the working and living conditions of agricultural workers; and dissociate ourselves from any actions which are unethical or in conflict with legislation.

3

FREEDOM OF ASSOCIATION

We commit to social dialogue, freedom of association, free choice of employment and free movement of people, and will diligently work towards a Social Compact to align and clarify the roles and responsibilities of various stakeholders in the public, private and community spheres.

4

COMMITTED TO TRANSFORMATION

We commit to the transformation of our industry (this includes agricultural economic development based on a value-chain approach) and to address socio-economic imbalances and challenges in rural areas in partnership with the public sector.

5

ENVIRONMENTAL STEWARDSHIP

We will protect our environment and encourage international best practices aligned with ensuring bio-diversity and the protection of our land and water resources.

Fruit South Africa (FSA) is a non-profit organisation formed by the Citrus Growers’ Association of Southern Africa (CGA); HORTGRO (representing pome and stone fruit); South African Table Grape Industry (SATI); SUBTROP (representing the avocado, litchi, mango and macadamia industries) and the Fresh Produce Exporters’ Forum (FPEF) to address common issues in relation to all aspects of the fruit industry of South Africa.

FRUIT SOUTH AFRICA STRATEGIC OBJECTIVES ARE AS FOLLOWS:

- Establish FSA as the collective platform for the fruit industry of SA
- Engage constructively with government and other public institutions on policy, legislation and other fruit industry matters
- Engage constructively with other strategic stakeholders
- Promote and coordinate Broad Based Black Economic Empowerment (BBBEE), transformation and skills development
- Gather and disseminate key industry related information
- Communicate industry information to broader public and industry stakeholders

MEMBERS



2

PRINCIPAL MEMBERS

SAAPPA - SASPA - DFTS



- SOUTH AFRICAN APPLE AND PEAR PRODUCERS' ASSOCIATION -

“The unifying role that SAAPPA plays in ensuring that communal needs are addressed within the South African apple and pear industry cannot be underestimated and I believe it is something that is admired in the international deciduous industry as well.”

2

Nicholas Dicey - Chairperson

The SAAPPA board and management once again spent a productive year in ensuring that the apple and pear industry could operate in the most producer-friendly environment possible. Board meetings were held at quarterly intervals with the executive board meeting more regularly to address pressing issues that needed immediate intervention. Sub-committees comprising of board members and industry role players with specific knowledge also met frequently to discuss a host of issues ranging from new cultivars, CA (controlled atmosphere) storage research, market access and retention all the way to land reform policies and models to mention just a few.

Soos in die vorige jaar het die hoof produksieareas weereens gelyk as gevolg van die nuwe-effekte van 'n droë 2016 winter met appel- en peeruitvoere wat onderskeidelik 2% af is op die vorige jaar. Die versterking van die rand teenoor die hoof geldeenhede waarin die bedryf handel dryf het ook 'n negatiewe impak gehad ten opsigte van verdienste. Nieteenstaande die stram produksie-omstandighede het markte goeie verdienste gelever en met die inskop van 'n gesonde aantal jong aanplantings in die bedryf was die volume vrugte wat gelever is, oor die algemeen beter as wat aanvanklik verwag is. Die 2018-seisoen gaan egter geweldig uitdagend wees met meeste produksie-areas wat ten tye van die skrywe

ernstige droogte en watertekorte beleef. Ten spyte van die krisistye wat in die appel- en peerbedryf heers is ek van mening dat die “boer maak 'n plan”-houding wat die landbou simboliseer tesame met nuwe besproeiingsmetodes, nuwe aanplantings en verbeterde tegnologie die bedryf in staat sal stel om nog steeds sy markte bevredigend te kan bedien.

The apple and pear producer remains the most important customer and client of SAAPPA and to this end a strategic session was held in 2017 to calibrate the board and management to ensure that the correct issues are addressed by the association, that all customers' needs are met and that their levy contributions produced the desired outcomes. Board members and management were joined by additional role players from all production areas in a two day workshop to analyse current focus areas and while not necessarily reinventing the proverbial wheel, direction was given which will be addressed in the new budget cycle which will kick in from 2019. Similar sessions were held with FruitSA, Hortgro, Culdevco and the Deciduous Fruit Development Chamber resulting in a confirmation of the industry's transformation vision and implementation policy.

Fokusareas wat insluit navorsing en tegnologie, marktoegang en -behoud, inligting, kommunikasie,

transformasie en algemene administrasie, is herbevestig as die gebiede waarop SAAPPA hom moet toespits. Die druk wat daar egter op die bedryf heers om betrokke te raak by aktiwiteite wat voorheen deur ander instansies behartig is, plaas 'n groot las op bestaande bronne en daar moet slim gewerk word om te verseker dat die boeke klop sonder dat daar enige “pap op die grond val”.

The unifying role that SAAPPA plays in ensuring that communal needs are addressed within the South African apple and pear industry cannot be underestimated and I believe it is something that is admired in the international deciduous industry as well.

Anton Rabe and his team run a tight ship in a challenging environment and I would like to thank and commend them for a job well done. I also want to thank my fellow board members for their time and input that they put into serving the industry, often at times when it is difficult to shift focus away from their own businesses.

Finally I want to thank all the producers for their support. SAAPPA faces challenging times, yet I am confident that we will “pull through”. I wish you all a blessed and fruitful year ahead.





- SOUTH AFRICAN STONE FRUIT PRODUCERS' ASSOCIATION -

*"It is not the strongest of species that survives, nor the most intelligent that survives.
It is the one that is most adaptable to change."*

2

André Smit - Chairperson

According to a famous Charles Darwin quote: "It is not the strongest of species that survives, nor the most intelligent that survives. It is the one that is most adaptable to change". In the face of the third consecutive dry season and uncertainty regarding the climatic conditions for the current harvesting season, producers will need to think and act differently regarding the utilisation of available resources, especially water, in an effort to optimise and yield a return on investment. That being said producers have been innovative for decades and the prevailing conditions is nothing that the fruit industry have not dealt with before, and I am certain that they will adapt and keep producing quality produce.

Despite the drought conditions and in review of the past season (2016/2017), the stone fruit industry achieved average to above average local and export volumes. When compared to the previous season: apricot volumes increased by 11%; nectarines increased by 3% and plums by 12%. Peaches on the other hand decreased by a marginal 3% mainly due to unfavourable marketing conditions and the demand being greater in the domestic as well as export markets for nectarines.

'n Strategiese sessie om die aktiwiteite van SASPA te herbesoek soos vervat in die Hortgro strategieë raamwerk het in Maart 2017 plaasgevind. Die fokuspunte wat geïdentifiseer is, word tans in spesifieke aksies omvorm en gedefinieer. As deel van hierdie proses vorentoe sal hierdie fokuspunte met die begroting en ander prosesse geïntegreer word.

Hierdie fokuspunte sluit onder meer die volgende in:

- Marktoegang en markontwikkeling (insluitend eetgereed-produkte)
- Kommunikasie/beeld van die steenvrugtebedryf
- Kultivarverkryging (insluitend onderstamme); onafhanklike kultivar-evaluering en plantverbetering
- Regeringsverhoudinge
- Navorsing en ontwikkeling (insluitend tegnologie en innovasie)

- Finansiële volhoubare, effektiewe en doeltreffende bedryfsstrukture
- Bedryfsstransformasie, ekonomiese ontwikkeling en werkskepping
- Sanitêre en fitosanitêre (SPS) kwessies
- Internasionale netwerke en bande.

SASPA also effectively dealt with a number of trade protocols and exports standards during the season. The dominant issues to highlight were the establishment of minimum sugar level for peaches and nectarines on the domestic market in our continued effort to maintain eating quality; the reduction of the minimum export size for Angeleno plums to 40 mm; the standardisation of QC reports and colour charts as well as the development of a risk mitigation tool relating to false codling moth (FCM) in order to continue with peach and nectarine exports to Europe (including the UK).

Die grootste uitvoermarkte gedurende die 2016/2017-seisoen was Europa (40%); VK (31%); Midde Ooste (21%); Verre Ooste (4%) en Rusland (3%). Die plaaslike mark bly steeds 'n belangrike fokusarea en hoë prioriteit vir die steenvrugtebedryf. Hortgro tesame met die Departement van Landbou, Vrugte SA en Prokon (as die aangewese regeringsinspeksie-agentskap) is in besprekings rakende die plaaslike markinspeksie-metodologieë. Die doel hiervan is om op 'n meer koste-effektiewe, risiko-gebaseerde sisteem ooreen te kom wat waarde sal toevoeg vir die plaaslike markrospelers. In die afwesigheid van ooreengekome metodologieë gaan die bedryf voort met sy eie inisiatiewe via 'n privaat diensverskaffer – om plaaslike markinspeksies van tyd tot tyd te doen en só optimale kwaliteit op die plaaslike mark te verseker.

Die kwaliteit van kwekerybome bly 'n uitdaging vir die bedryf en verskeie stappe is reeds gedoen om hierdie kwessie aan te spreek. Dit is belangrik dat produsente ag slaan op PlantSA se formele klagteprosedure in hierdie verband. Die dryfkrag om die mark te voorsien met nuwe variëteite is kenmerkend van die steenvrugtebedryf. Oor die afgelope tien jaar was daar 'n skerp toename in nuwe variëteite wat beide suksesvol gevestig is en ook 'n gedeelte wat onsuksesvol was.



Onsuksesvolle aanplantings kom produsente duur te staan. In 'n poging om aan die behoefte van onafhanklike evaluering van variëteite te voldoen het die bedryf ook die oprigting van Provar as onafhanklike diensverskaffer ondersteun. Provar doen hortologiese en na-oesevaluering van variëteite in toetsblokke onder verskillende klimaatstoestande. Produsente word aangemoedig om seker te maak dat enige nuwe variëteite behoorlik onder Suid-Afrikaanse en plaaslike klimaatstoestande geëvalueer is, alvorens 'n finale aanplantings besluit geneem word.

A challenging season for 2017/2018 is anticipated, however I remain optimistic. The theoretical stone fruit estimate has been released indicating export volumes is likely to be down with between 3% to 4%, with the exception of apricots which are anticipated to be down by 17% due to a down alternate bearing year that will likely come into play. Many new orchards have been established in the last 5 years, and this will have a significant impact on the total export estimate as these trees come into bearing this season – it counters the production decrease that is expected as a direct result of the drought. In a normal year these new orchards would have

added 1.4 m cartons to the plum estimate, 420 000 cartons to the nectarine estimate and 235 000 cartons to the peach estimate. Although a slight decrease in export volumes is expected, the SA stone fruit industry will remain a credible and reliable source of supply and will be able to service its marketing commitments.

I would like to thank my fellow board members, stone fruit producers and all industry stakeholders for their contribution and support at the various levels required to ensure that SASPA can effectively serve its constituents.



- DROËVRUGTE TEGNIESE DIENSTE -

“Dried fruit forms part of the larger fruit industry’s structured approach to empower and restructure the industry.”

2

Dappie Smit - General Manager

Droëvrugte Tegniese Dienste (DTD) het die afgelope jaar ondersoek ingestel na sy funksies in ooreenstemming met die behoeftes van produsente. Vinnige verspreiding van akkurate bedryfsinligting blyk steeds 'n groot behoefte te wees. 'n Groot uitdaging is om alle bedryfsrospelers ingelig te hou, sonder om hulle te oorlaai. Om almal op hoogte te hou word verskillende inligtingstelsels ondersoek. Die webblad is ook aangepas om te verseker dat produsente toegang tot relevante inligting het.

Die besluit om kapasiteit uit te brei na die Oranjerivierstreek is in werking gestel en 'n kantoor is in Upington geopen, waar Ferdie Botha aangestel is. Hy sal daarop fokus om al die rosyne-kwessies te hanteer, terwyl al die boomvrugtesake volledig onder Hortgro se kern- en steenvrugteafdelings ingefaseer sal word. Hierdie herstrukturering sal boomvrugprodusente laat deel vorm van die hele sagtevrugtegroepering en rosyne sal bedien word vanuit die streekkantoor wat meer

geredelike toegang vir hulle moontlik sal maak. Die vinnige toename in produksie van veral rosyne plaas groot druk op die gehalte wat verder bemoeilik word deur strenger vereistes wat deur markte gestel word. Dit het daartoe gelei dat *South African Good Agricultural Practices (SAGAP)* - voedselveiligheidsoudits van droogfasiliteite onder regulasie R707 drasties versnel moes word om in drie jaar afgehandel te word.

Food safety and pressure to minimize the use of chemicals on all foodstuff is forcing the industry to research alternative methods to control pests and diseases. Climate change and financial pressure together with the need for more environmentally friendly production methods are increasing the need for dedicated research.

Verskeie lande se fitosanitêre vereistes word strenger om hulle teen indringerplae te beskerm. Hoewel verwerkte vrugte soos droëvrugte minder

onderhewig aan handelsbeperking is as gevolg van hierdie plae, sal dit in ag geneem moet word omdat dit 'n effek op meer bedrywe sal hê. Marktoegang bly gevolglik 'n belangrike saak wat onder oë gehou moet word.

Dried fruit forms part of the larger fruit industry’s structured approach to empowerment and restructuring of the industry. DFTS have just completed a restructuring programme leveraging five times their total levy income for empowerment. The biggest project which established 220 ha of raisin grapes for 55 land owners is now moving into the quantification and evaluation stage. As all these vineyards are not producing yet, a fund was established to support these growers until full production. This project further gave birth to an empowerment company, Innofruit, with three beneficiaries who now have permanent employment and serve as directors and owners of the company.



A database, integrating previously disadvantaged producers into industry structures, and to support emerging farmers to become commercially successful is a high priority. Evaluating business plans and expansion of training programmes are some of the supporting actions in this process.

DTD se “Saamboer-model” is baie goed ontvang en het reeds gehelp om verskeie bemagtigingsprojekte suksesvol af te skop. Die model sluit in grondhervorming, opleiding, ekonomiese ontwikkeling, sosiale ontwikkeling, sowel as tegniese ondersteuning en navorsing. Evaluering van besigheidsplanne en opleidingsprogramme is reeds uitgebrei na 'n beursskema en ondersteuning aan studente om die skaars wetenskaplike vaardighede wat in die landbou benodig word aan te vul. Opleiding en sosiale ontwikkeling word hoofsaaklik gefinansier uit fondse wat van ander bronne verkry word.

The industry's research focus is on the most urgent needs of growers and to ensure 'they survive' profitability while competition in the market is mounting. Mechanisation is one of the methods receiving a lot of attention in research together with breeding and evaluation of new cultivars. New cultivars must be well adapted, preferably more resistant to pests and diseases and offer different characteristics to satisfy different markets.

Nuwe kultivars wat aan die droogbedryf beskikbaar gestel is, lewer reeds 'n groot bydrae om mededingendheid van plaaslike produsente te verhoog en beskikbare hulpbronne beter te benut. Geen nuwe kultivar is volmaak nie en gevolglik lei elke nuwe vrystelling tot tegniese ondersoeke en navorsing om die ideale praktyke vir elkeen te vind. 'n Verspreiding van rypwordtipe vir elke vrugsoort is 'n prioriteit om ook ander produksiemiddels optimaal te kan benut en groter

volumes te kan hanteer. Vanweë unieke plaaslike klimaatsomstandighede is daar meer klem op kultivars met laer kouebehoefes. Plaaslike teel- en evaluasieprogramme is 'n noodsaaklikheid.

With the focus on new cultivars it is essential to make sure plantings are made with the best possible plant material. Since the Department of Agriculture phased out some of these functions, the industry invested in SAPO Trust, who manages all aspects of plant improvement. Sapo is currently the only local plant improvement organisation for deciduous fruit which delivers all services required for certified plant material under the Plant Improvement Act. Facilities have also been expanded for mass importation of *in vitro* rootstock plant material and budding – which will speed up commercialisation of imported cultivars.



3

HORTGRO SERVICES

Management & Administration - Communications - Research & Technology
Trade & Markets - Market Access - Research & Technology



- HORTGRO MANAGEMENT SERVICES -

Since its inception eleven years ago, by its principal members, SAAPPA and SASPA, Hortgro has been providing a range of industry services, financial management, information technology and administrative services to a number of horticultural industry structures.

3

Louis van Zyl - General Manager

The principal industry entities which Hortgro currently provides services to include: FruitFly Africa (FFA), Dried Fruit Technical Services (DFTS), SA Plant Improvement Organisation (SAPO), Culdevco, Fruit Workers Development Trust (FWDT), Deciduous Fruit Industry Development Trust (DFIDT), Deciduous Fruit Producer Trust (DFPT), SA Fruit Journal (SAFJ), the Deciduous Fruit Development Chamber (DFDC), as well as SAAPPA and SASPA. Hortgro has also been contracted to provide services to a range of alternative crops (such as berries, cape flora, figs, cherries, honeybush tea, olives, pecan nuts, pomegranates), focus groups such as Greenstar, Pink Lady and Forelle Associations, SA Fruit and Vegetable Cannery Association (SAFVCA) and Sustainable Agricultural South Africa (SIZA). A total of 34 legal entities are currently being serviced and functions as various departments within Hortgro itself.

Hortgro has been contracted to implement various provisions of the Agricultural Products Marketing Act and collects statutory levies on behalf of the following organisations: SAAPPA, SASPA, DFT, FruitFly Africa, SA Olive Industry Association, Cape Flora SA, SA Pomegranates and the SA Pecan Producers' Association. It also administers and collects payments for a number of user-pay industry services.

Hortgro was also contracted to implement various programmes in conjunction with other role players including:

- Comprehensive Agricultural Support Programme (CASP) with the Western Cape Department of Agriculture pertaining to support for emerging producers, for both deciduous fruit and citrus via the industries and the Commodity Project Allocation Committee (CPAC).

- Alternative Crops Research Fund (ACF) with the Western Cape Department of Agriculture.
- Jobs Fund – economic development of 21 entities in the Western and Eastern Cape in conjunction with the Western Cape Department of Agriculture, National Treasury and Deciduous Fruit Development Chamber.
- SIZA Platform – Sustainable Agricultural South Africa (SIZA), IDH and the Dept of Agriculture of the Western Cape.
- Pre-clearance programme for Deciduous & Citrus Fruit – trust fund with US Department of Agriculture's Agriculture, Plant Health Inspection Services (USDA APHIS).



MENSLIKE HULPBRONNE

- Die menslikehulpbrondepartement hanteer bedryfsvoorleggings, die jaarlikse vaardigheidsplan, asook diensbillikheidsplanne en -verslagdoening.
- Werknemerwelstand is baie belangrik vir ons organisasie en ons bied voortgesette ondersteuning aan ons werknemers.



VAARDIGHEIDSONTWIKKELING

- Hortgro is verbind tot gelyke geleenthede vir alle werknemers. Ons werknemers word aangemoedig om te leer en te groei as deel van hul reis om hul persoonlike en professionele stel vaardighede te ontwikkel. 'n Interne beursskema is beskikbaar aan ons werknemers wat hul studies wil voortsit.
- Deur geleenthede te verskaf om te ontwikkel en groei, verseker ons dat ons uitstaande individue met 'n passie vir landbou na die organisasie aantrek en behou.



GELYKE INDIENSNEMING

- Gelyke indiensneming bly 'n uitdaging aangesien ons werknemeromsetkoers baie laag is en nie baie nuwe poste ontstaan nie. Nuwe poste is egter gevul met werknemers vanuit voorheen benadeelde groepe.

Die administratiewe funksies wat deur Hortgro verskaf word, sluit die volgende in:

Om as agent vir verandering op te tree rakende grondhervorming, opleiding en ander maatskaplik-ekonomiese dimensies wat die landbousektor affekteer.

Om inligting te koördineer wat uitgeruil word onder die substrukture en alternatiewe gewasse, provinsiale en nasionale regering en ander belanghebbers en belangegroepe.

Om tuinbouprodukte in 'n gunstige posisie onder teikengehore te plaas deur die verlaging van insetkoste, en doeltreffendheid van die uitvoerwaardeketting te verhoog deur middel van langtermynvennootskappe en strategiese verhoudings.

Beskerming en uitbreiding van marktoegang en marktaandeel gebaseer op tegniese ondersteuning en kommunikasie.

Verskaffing van inligting en perspektiewe op alle aspekte wat verband hou met die tuinboubedryf en sagtevrugte in besonder.

Om die langtermyn ekonomiese lewensvatbaarheid en volhoubaarheid van die bedryf te verhoog ten einde 'n omgewing te skep waarin bedryfsbelanghebbers kan floreer.



- HORTGRO COMMUNICATIONS -

Communication works for those who work at it. It is the language of leadership.

3

Elise-Marie Steenkamp - Communications Manager

At Hortgro communication is a golden thread that runs through all the departments where we share the same goal: to inform and provide growers with quality information, stimulate knowledge in order to increase profit and enable transformation.

Hortgro's Communications Department is responsible for: the generation of content (writing, photography, video's, design), repackaging of information (business-critical and marketing material), science communication and technology transfer, public relations activities, press releases, events, liaising with the media, crisis communication, internal communications, management of three websites (www.hortgro.co.za, www.hortgroscience.co.za, www.agrisgottalent.com), social media, and advertisements.

Our collaboration with kykNET/Grootplaas continued and resulted in another series of industry video clips that were broadcasted during the year.

Our overarching strategic themes this year were: building the Hortgro brand; transformation (social impact, new entrants, youth, women in agriculture and agricultural workers), stimulating market-related information (assisting with marketing campaigns, social media strategy, health), technology transfer (science communication) and general news items.

2017 was 'n strategiejaar. Verskeie opnames is aan belanghebbendes gestuur om elke aspek van Hortgro se funksies te toets. In die kommunikasiedepartement het ons data ingesamel oor al die platforms wat ons tans gebruik en vir beide die steen- en kernvrugte het ons hoofsaaklik goeie tot uitstekende terugvoer gekry. Produsente het aangedui dat hulle die tegniese inligting soos vervat in die freshNotes, Tydige Wenke, spesiale tegniese e-pos-inligtingstukke die hoogste gradeer. Vind die belangrikste publikasies hier:

- Tech E-Book <http://bit.ly/2kj6cFv>,
- Symposium Review <http://bit.ly/2mt9usj>
- Irrigation Seminar Review <http://bit.ly/2jq9nwm>

Die twee jaaroorigte: Hortgro <http://bit.ly/2kmqxuy> en Hortgro Science <http://bit.ly/2kKz7l8>; Suid-Afrikaanse Vrugtejoernaal, asook die maandelikse

nuusbrief het ook baie positiewe terugvoer gekry. Wat geleenthede betref bly die tegniese simposium, inligtingsdae, velddae en seminare baie gewild.

In their turn producers indicated that they would prefer more one-on-one communication activities such as field days and information days. In an effort to identify growers' needs and challenges Hortgro established regional offices in Grabouw, Ceres, Free State and the Langkloof – each with their own office representative. These offices will stimulate two-way communication between Hortgro and producers on the ground. In the survey feedback producers also acknowledged that they are slow on social media uptake. Social media, however, is here to stay. It is an inevitable tool in the communication box, one that is free and powerful. A tool we use to connect with younger generations and different stakeholder groups across the board and internationally. Therefore, we encourage producers to join us on Facebook (Hortgro and Hortgro Science), Twitter, Instagram and visit our websites: www.hortgro.co.za and www.hortgroscience.co.za.

In 'n inligtingsoorlaaiende wêreld is ons sensitief vir produsente se min tyd. Ons het weeklikse e-pos-verkeer verminder en inligtingstukke word eerder saam in die maandelikse elektroniese nuusbrief verpak. Om op hoogte van bedryfsnuus te bly, is dit belangrik dat produsente die nuusbrief lees. Vir hierdie platform om effektief te wees, is dit eweneens belangrik dat ons produsente se korrekte e-pos-kontakbesonderhede het. Hortgro se databasis word saamgestel uit die boomsensus-inligting wat ons een maal per jaar van produsente ontvang. Dit bly produsente se verantwoordelikheid om toe te sien dat hierdie inligting opgedateer word en dat die regte persone by besighede inligting ontvang. Indien dit onder u aandag kom dat u inligting nie ontvang nie, moet u ons kontak: elise-marie@hortgro.co.za

In November 2016 het ons namens SAAPPA en AREFLH (Assembly of the European Regions producing Fruit, Vegetables and Ornamental Plants) die negende Interpera Wêreldkongres by Simondium aangebied. Meer as 'n honderd internasionale peerentoesiaste het hierdie prestige

geleentheid bygewoon. Dit was die eerste keer dat hierdie kongres in Suid-Afrika aangebied is en dit was 'n groot eer om deel te wees hiervan en so 'n netwerkgeleentheid te skep vir plaaslike produsente en internasionale rolspelers.

Agri's got Talent – our song contest for agricultural workers – is going from strength to strength. Music has no boundaries, and the 2017 competition saw a super-talented Top Ten competing for the title at Nederburg Estate in August. Currently the project is funded by SAAPPA, SASPA, VinPro and the Western Cape Department of Agriculture. We are grateful that Sati came on board to sponsor the after-care programme. We have big dreams for this competition but are in dire need of additional funding. One thing is for sure, we have a talented pool of individuals operating in the orchards, pack houses and on farms.

Early in the year we joined our sister industry organisations to host Max MacGillivray and Gareth Jones on their Great Fruit Adventure. These two adventurers motorbiked all the way from London through Africa, to raise awareness of the importance of fresh fruit and vegetables in your daily diet. Max was nominated for the UK Food Hero award, and received a special award from the British Prime Minister, Theresa May.

In general our events are well attended with a new record for the Symposium's Pome Fruit Field Day with 321 delegates attending.

- Technical Symposium 2017 – 640 delegates over five days/ 24 sponsors/ 55 speakers
- Irrigation Seminar Simondium - 335 delegates
- Agri's got Talent – sold out with 500 people attending
- Langkloof Irrigation Seminar: 79 delegates
- Langkloof Seminar & Orchard Walk 2016: 70 delegates
- Pome Field Day (March 2017) 56 attendees

Twenty years ago, during 1997, the agricultural arena changed when the deregulation of the fruit industry took place, to create a free market system for fruit exporters. To celebrate 20 years of fruit freedom, we compiled a book, video and hosted a gala event. Download the book, 20 Years of Fruit Freedom: A Review, here: <http://hortgro.co.za/publications/>



PRINT

SAFJ
 Tech E-Book
 Hortgro Annual Review
 Hortgro Science Annual Reports
 Symposium Review
 Irrigation Seminar Review
 20 Years of Fruit Freedom: A review
 False Codling Moth Fact File
 Bactrocera dorsalis Document
 Advertisements



EVENTS

Technical Symposium
 Pome and Stone Field days (3)
 Researcher Thank-You Breakfast
 Irrigation Seminar (Simondium)
 Irrigation Seminar (Langkloof)
 Langkloof Seminar | Media outreach
 Gala Evening | Agri's got Talent
 Book distributions
 Great Fruit Adventure



PERSONAL

e-mail | sms
 regional office
 business-critical information
 advisory meetings
 telephone
 strategy planning
 crisis communications



E-COMMS

Monthly newsletter
 FreshNotes | Timely Hints
 Press releases
 Hortgro YouTube Channel
 kykNET/Grootplaas collaboration
Websites
 Hortgro | Hortgro Science
 Agri's got Talent
Social Media
 Facebook | Instagram | Twitter



SOCIAL MEDIA UPDATE

(at time of writing)

Hortgro Facebook

1 542 followers

Hortgro Twitter

1 050 followers

Hortgro Instagram

171 followers

Hortgro Science Facebook

821 followers

Agri's got Talent

1 301 followers

Don't miss out. Visit the Hortgro newsroom here:
<http://hortgro.co.za/newsroom/>

"An educated, enlightened and informed grower is the surest way of promoting the health of an industry." – with apologies to Nelson Mandela.

- HORTGRO SCIENCE -

Hortgro Science has five research programmes that utilise the skills of researchers from 14 different organisations to address the research and technical needs of the South African pome and stone fruit industry.

3

Hugh Campbell - General Manager

GOVERNANCE AND FUNDING

The Hortgro Science Advisory Council chaired by Stephen Rabe provides strategic leadership to Hortgro Science. Five key initiatives drive the focus of the organisation and are monitored regularly at the quarterly Advisory Council meetings. They are: industry future vision; long term research; communications; funding; operational excellence.

The industry has benefited from government funding from different government departments. The Post-Harvest Innovation Fund which came to an end during 2017 was sourced through the sector fund of the Department of Science and Technology. The Technology and Human Resources for Industry Programme (THRIP), a Department of Trade and Industry initiative, has implemented a new funding mechanism which requires industry rather than the research organisation to make the funding application. These programmes, along with the parliamentary grant to the ARC from the Department of Agriculture, Forestry and Fisheries are all based on co-funding and therefore require industry levies to leverage the funding from government. The SAAPPA and SASPA levies therefore remain the key driver of research in the pome and stone fruit industries.

NAVORSINGSPROGRAMME/TEGNIES

Valskodlingmot (VKM) en die droogte in die Wes- en Oos-Kaap was op die voorgrond van die tegniese agenda gedurende 2016/17. Die Europese Unie (EU) se besluit dat VKM moontlik die EU via perskes en nektariens kan binnekom, het gelei tot die aanpassing van die pesstatus van VKM van h mindere tot h kwarantynpes op perskes en nektariens. Verskillende aspekte van VKM-beheer word tans deur middel van elf navorsingsprojekte ondersoek. Die projekte behels van fundamentele navorsing, soos die bepaling van die basispaarvolgorde van die VKM-genoom, tot evaluasie van verskillende beheeropspies insluitende paringsontwrigting en die gebruik van entomopatogeniese nematodes en fungi.

Die besproeiingsfokusarea is reeds vir h aantal jare een van Hortgro Science se kern navorsings-prioriteite. Verskillende aspekte van waterbestuur word in 6 projekte ondersoek. h Aantal van hierdie projekte is daarop gemik om wetenskaplike data te genereer om die konsep van fisiese en/of ekonomiese watergebruikproduktiwiteit (onderskeidelik tonne produk/m³ water of randwaarde van produk/m³ water) in die bedryf te vestig.

COMMUNICATIONS

Managing with limited water was a strong theme that came through in Hortgro Science's communication during this past year. The 2016 Technical Symposium dedicated a number of sessions to managing water. Prof Elias Fereres from Spain and various local experts shared their knowledge with the delegates. In October 2016 a freshNotes was circulated on managing orchards in drought conditions and in August and September 2017 irrigation seminars in Simondium and the Langkloof focused on farm planning, scheduling and measuring and drought management. Comprehensive summaries of all the talks were published and circulated to growers.

The theme of the 2017 Technical Symposium was: "Game of Fruit – A Survival Guide". This was the second year that a 5-day programme was put in place. Four overseas experts added an international flavour to the symposium. Local speaker Willem van der Post blew delegates away with his talk on "Disruptive technologies that will shape the future." Hans Fleuren, a Dutch nurseryman, gave local growers something to think about in his talk titled: "Growing the nursery trees that the grower wants – a European context."

Technical experts were contracted to contribute to a monthly "Timely Hints for Stone Fruit". This document was well received by growers and was particularly welcomed by extension agents servicing emerging growers. In addition to the normal communication vehicles (SAFJ, scientific publications, web, Facebook, seminars, symposium, videos, pamphlets, orchard walks, field days) an app is being developed and tested for stone fruit post-harvest aspects.

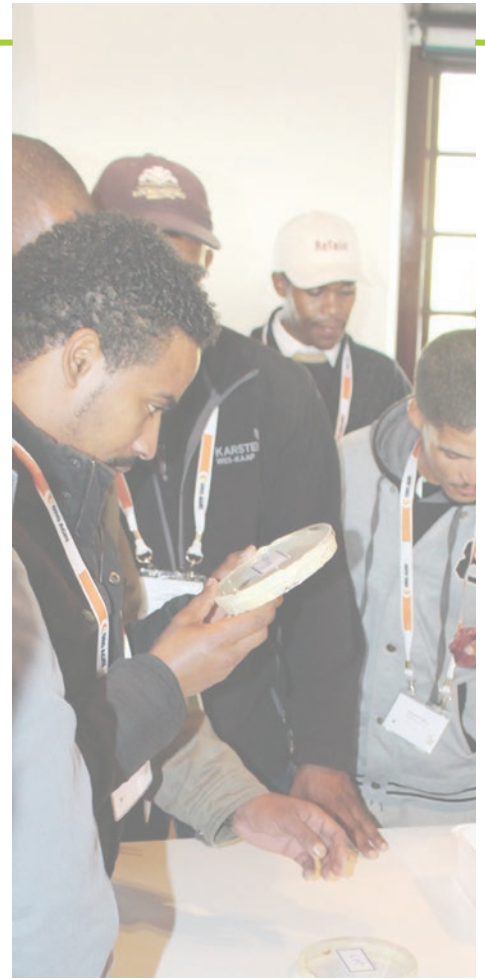
MENSEKAPASITEIT

Navorsingsprojekte verg kundigheid en kundigheid ontwikkel stadig oor tyd. Suksesvolle navorsers ontwikkel hulle kennis in h vakgebied deur aktiewe navorsing op die gebied te doen. Die ontwikkeling van kundigheid benodig dus die langtermynbefondsing van spesifieke navorsers se werk in h bepaalde vakgebied. Dus vereis die geredelike toegang vir h bedryf tot relevante kundigheid dat die regte mense in plek is, asook genoegsame befondsing oor tyd. Bykomend moet die volgende generasie tegniese kundiges en navorsers ook ontwikkel word – ons benodig dus h konstante pyplyn van mensekapasiteitontwikkeling. h Meer aktiewe rol deur die bedryf word benodig om te verseker dat daar aan ons huidige en toekomstige mensekapasiteitsbehoefes voldoen word. In hierdie opsig het Hortgro Science reeds strategieë in plek en word nog verdere strategieë in samewerking met kerninstellings ontwikkel om ons langtermynbehoefes aan te spreek.

The industry's continued commitment to support post-graduate students working on industry projects is an important element of its strategy to ensure that a stream of well-trained scientists and technical experts are delivered to industry.

Please refer to the Hortgro Science 2016/17 annual report and Technical E-book 2016/17 on www.hortgro-science.co.za for a comprehensive report of the R&D activities funded by the levy.

Verwys na die Hortgro Science 2016/17-jaarverslag en Tegniese E-Boek 2016/17 op www.hortgro-science.co.za vir 'n volledige verslag van die navorsingsaangeleenthede befonds deur die heffing.



- TRADE & MARKETS -

The world we find ourselves in is a rapidly changing one.

3

Jacques du Preez - General Manager

When one pauses for a minute and just reflect on some of the global political happenings it almost seems unreal: the slanderous war of words between Donald Trump, the “tweeting” US President and Kim Jong Un; Brexit; the President of the Philippines calling ex-US President Obama names not to be repeated here. One big circus, but these shenanigans are also influencing us directly and indirectly as a fruit industry.

We are in an era of protectionism and self-interest with the dynamics of trade and age old trade relationships under fire. Back home we are faced with political instability and corruption that cause great uncertainty over the short term. And we are in for a bumpy ride towards the end of 2017 and 2018 with the rating agencies looking over our shoulders.

Die samekoms van hierdie faktore is ‘n aanslag op ons ekonomie wat ons nog nie vantevore teëgekom het nie. Dit plaas ook enorme druk op ons marktoegang vir uitvoere. Ten spyte hiervan was landbou, en spesifiek tuinbou, die bedryf wat ons ekonomie in 2016/17 van ‘n volkskaalse resessie gered het deur werk te skep. Dit het boonop die potensiaal om steeds meer werksgeleenthede te skep, buitelandse valuta te verdien en landelike ontwikkeling en stabiliteit te skep. Behoud van en toegang tot nuwe markte gaan nie makliker raak nie, maar dit is en sal steeds ons grootste prioriteit bly. Vereistes gaan net strenger word, soos tarief- en nie-tariefversperrings, voedselveiligheid en verlaagde chemiese toedienings toeneem.

The industry faced a number of unforeseen challenges during 2017 that will hopefully be resolved soon. Amongst these are the Indian authorities forcing SA shipments back to land based cold treatment instead of the preferred in-transit; the temporary loss of market access to Taiwan due to the interception of a codling moth larvae in an apple consignment; and additional phytosanitary requirements to retain market access to Russia that were quickly and efficiently addressed. Frustratingly the final approval for pear exports to China is still being awaited as are the results of the in-transit trial shipments to India.

The government is an essential partner in these endeavours and we maintain a close working

relationship with various departments and directorates in our efforts to maintain and gain market access. Just as important though, is the responsibility of all industry role players to maintain discipline and ensure that they comply with all the strict protocols and requirements to reduce the risk of market closures and to maintain SA's status below the proverbial radar screen.

The industry and DAFF also pulled together to enable exports of apples to Mexico during 2017 - the first time in more than ten years. This proved to be quite a feat considering the requirements, but goes to show what can be achieved when everyone works together. During the first half of 2017 Africa, our biggest market for Golden Delicious apples, was under pressure, so hopefully Mexico will become an additional option in the future.

Die onbedoelde gevolge van druk vanuit die Afrika-mark was dat die bedryf alternatiewe markte soos Bangladesj, moes vind en ontgin. Kollektief het die Verre Ooste en Asiatiese markte die grootste appeluitvoermark geword gedurende 2017 en so Afrika as hoofuitvoermark verbystee — ‘n posisie wat dekades lank aan die VK behoort het.

Die Forelle-vroeëmarktoegangsprogram (FEMA) het vanjaar, bo verwagting, ‘n nuwe rekortvolume van 1.8 m kartonne bereik. Dit is egter belangrik dat die program gedissiplineerd bestuur word, om die langtermynvolhoubaarheid daarvan te verseker.

In samewerking met die Sitrusprodusentevereniging en Vruchte SA is ‘n diensvlakkooreenkoms met die Departement van Landbou Bosbou, en Vissery (DLBV) onderteken om die PhytClean-platform — as aanlyn hulpmiddel vir produsente en pakhuisse om hul boorde en pakhuisse elektronies te registreer – te vestig. Dit is in ‘n rekordtyd gedoen as deel van die vereistes om uitvoere na spesiale markte (die VSA, Mexiko, Taiwan en nou ook die EU vir perskes en nektariens) moontlik te maak. Hoewel die kernvrugbedryf jare lank reeds na spesiale markte uitvoer, was dit ‘n opdraande stryd vir die steenvrugbedryf. PhytClean sal ook die platform wees wat die valskodlingmot-bestuurstelsel vir uitvoere na die EU implementeer

en bestuur. ‘n Zero-toleransievlak vir enige onder-skepping geld. Ons is egter vol vertroue dat produsente risiko's effektief sal bestuur.

On the same front AgriHub has now truly established itself as the ‘real-time supplier of shipping information’ to the pome and stone fruit industries. This enable marketers and growers to make timeous and informed marketing decisions. Hortgro also participated in various trade delegations and trade shows from Europe to South East Asia.

Tydens strategie-sessies wat vroeg in die jaar gehou is, het die steenvrugtebedryf aangedui dat hulle tevrede is met die markontwikkelingsaktiwiteite wat in die VK, Duitsland en Midde-Ooste (via Doebai) onderneem word. Die kernvrugtebelanghebbers het egter aangedui dat hulle ‘n verandering in strategie wil sien met ‘n groter fokus op aktiwiteite op bedryfs- en handelsvlak. Hierdie veranderinge sal in 2018 deurgevoer word en is as sulks binne SAAPPA se begroting vervat. Marktoegang is ook as van kritieke belang deur beide groepe geïdentifiseer.

Die aksies geloods deur die steenvrugtebedryf in Duitsland oor die afgelope drie jaar begin nou vrugte afwerp. Die afgelope drie seisoene het uitvoervolumes jaar-op-jaar toegeneem met ‘n verstommende vyfvoudige toename in nektarienuitvoere en 75%-toename in perske-uitvoere vanaf 2015/16 tot 2016/17. Pruimvolumes het met 14% toegeneem en is nou byna op dieselfde vlak as vier jaar gelede. Die volgende uitdagings in hierdie mark is om rypwording aktivering van steenvrugte te takel. Vir hierdie mark sal bedryfsvlaksamewerking voortduur, terwyl die fokus ook na suidelike Europa sal skuif. Veral Spanje en Frankryk, waar voor deregulering groot volumes steenvrugte verhandel is, sal geteiken word.

On the local market there were some problems with the quality of imported stone fruit from Europe. Although we operate in a free market it is important that we protect our local market from phytosanitary risks, make sure that the quality of imported produce adheres to our minimum standards and educate and inform the trade and consumers about new season SA stone fruit when



it becomes available. This space will be monitored earlier and more closely in the future with a specific focus on the start of the local production from the early areas to the market.

Local market development campaigns (plums, peaches, nectarines) targeting consumers, the formal (retail), informal (hawker) and municipal markets also continued during the past season. Although stone fruit has made inroads on this front there is still great untapped potential, and even more so for the apple and pear industry to again consider some industry level market development activities.

The technological changes we are currently experiencing have never been as rapid in the history of the world, and it will never again be as slow as it is now...we need to embrace change and technical advances to come out on top.

- MARKET ACCESS -

3

Lindi Benić - Manager

Technical trade and market access compliance requirements, including sanitary/phytosanitary (SPS) regulatory requirements remain one of the key Hortgro objectives. This requires continued monitoring of international development to ensure current market access is either maintained or improved, or new markets are unlocked, through interaction and networking at all levels. Specific issues which received attention during the past year include:

- SA pear access to China.
- Re-access of pome fruit to Thailand.
- Re-application of SA's Food Safety System (SA Country Recognition — all fruits) by Indonesia post April 2018.
- Re-activation of SA pome fruit exports (mainly GD) to Mexico.
- Exports to Russia (new quarantine and marking/labelling requirements).
- Export to India (mainly land-based vs in-transit cold-steri challenges).
- SA exports to the EU – issues related to grain chinch bug (GCB); Phosphonates and false codling moth (FCM).
- Consolidated industry responses provided to DAFF-PRA relating to various import/export requests, amongst others from Korea, Vietnam, Myanmar, Portugal and the Netherlands.

Any producer or exporters wishing to obtain more detailed information relating to key dates, processes and pest/diseases regarding the above and other activities in this portfolio, is welcome to contact suzette@hortgro.co.za



- TECHNICAL SERVICES -

3

Richard Hurndall - Manager: Research & Development



Stone/Pome Technical and Joint Marketing Forums

Representative for research and technical aspects.

Export/local standards/dispensations

Co-ordination of local and export standards and dispensations for pome and stone fruit.

Represent industry on visits to fresh produce markets.

Represent Fruit SA on Project Rebirth for fresh produce markets. Certain markets have been targeted for rehabilitation and a code of best practice is being instituted across markets.



SA Pink Lady Alliance (SAPLA)

Technical representative.

Forelle Producer Association

Representative of FPA and Forelle Research Programme.

Manage process of Forelle release and shipping dates.

Facilitate Forelle Smartfresh (FEMA) commercial protocols.



AfricaBio

Verteenwoordiger sal op hoogte bly van Biotech-aktiwiteite.

DPA

Voortsetting van navorsingstrategie na die ondersoek van alternatiewe strategieë vir brandvlekbeheer.

Finaliseer DPA-kruiskontaminasieprojek en maak inligting beskikbaar aan EU-werkgroep.

Weather Stations

Outsource industry weather station service to Hortec.

Supply cold/heat units, temperature and rainfall data to producers and researchers.

Pakhuisaksiegroep

Voortsetting van pakhuisproduktiwiteit-standaardstelling ('benchmarking')-projek.

Uitvoering van energiebestuur-opleidingskursus vir pakhuisse.

Finalisering van plan vir beheerde-atmosfeernavorsingsfasiliteite by US.

Hersien doel, prioriteite en verteenwoordiging van PAG.

Hou BA-opberging- en na-oesgroeptvergadering.

Fresh Notes-verspreiding na pakhuisse wat vergaderings opsom.



Hortec

Kontak Hortec vir volwassenheidsindeksering-monitoring en Forelle-monitoring.

4

SUPPORT SERVICES

Information & Logistics

Jobs Fund

Deciduous Fruit Development Chamber

Fruit Workers' Development Trust

Deciduous Fruit Industry Development Trust

Training & Corporate Social Investment



- INDUSTRY INFORMATION & LOGISTICS -

Vanjaar is die herdenking van 20 jaar na deregulering en soos met enige besigheid is dit belangrik om na te dink oor wat gebeur het, die lesse wat geleer is en om 'n nuwe pad vorentoe te formuleer.

4

Mariette Kotzé - Group Operations Manager

Die omgewing waarin ons werk het deur die hele waardeketting oor die afgelope twee dekades drasties verander. Die tempo van verandering sal na verwagting toeneem deur die gebruik en toeganklikheid van onwrigtende tegnologieë. Dit laat die vraag ontstaan – is ons as bedryf fiks genoeg om deurlopend mededingend te bly?

Een van die belangrikste ontwrigtende tegnologieë is gebaseer op die beskikbaarheid van data, die vermoë om toegang tot hierdie data te kry en om waarde toe te voeg deur data in intelligensie te omskep. Hierdie intelligensie sal in die toekoms 'n impak hê op grondvlak besluitneming asook deur die verskaffingsketting. Met die uiteindelijke voordeel vir die produsent, die entrepreneur, en die risikonemer.

The key highlights that have been achieved over the past 20 years, and shaping our future to ensure that we enable growers to remain competitive, are:

- The development and maintenance of a detailed database of all growers and key stakeholders in the supply chain to ensure that we are able to organise and communicate to our constituents on a regular basis.
- The development and maintenance of a detailed database for all fruit plantings, per producer, per farm (PUC), per region including the year planted, cultivars and tree densities. This information is updated on an annual basis. Recently Hortgro has also introduced an online platform for growers to update their individual records and to access these records as and when required. This is vital information required for long-term and strategic planning as an industry and on individual level from production, infrastructure, and logistics including supply to markets.
- Hortgro has managed to publish the 17th edition of the popular key deciduous fruit statistics which is regarded as a credible and reliable source of information on the pome and stone fruit industries by producers and a range of other stakeholders. This publication provides

aggregated information on production costs, production regions, fruit kind trends, employment trends and a global perspective on exports and production.

- Weekly local market and export information is shared via the Hortgro website, which is easily accessible to producers, containing information on volumes supplied to the fresh produce markets, per fruit kind, per cultivar and per market in an effort to contribute to informed marketing decisions. A detailed database has also been developed and maintained enabling the industry to timeously provide key information and respond to enquiries locally and internationally.
- Die verskaffing van deurlopende ondersteuning aan die gesamentlike bemakingsforums (kern en steen) en ander gebruikerbetaaldienste aan kleiner alternatiewe bedrywe op 'n projekbasis.
- Voortgesette rol om as die 'go-to' diensburo op te tree wat bedryfsnavrae hanteer en fasiliteer, en bystand verskaf aan produsente onder meer lewensvatbaarheidstudies, beleggingsbesluite, besigheidsplanne, skade-eise om enkeles te noem.
- Die konsolidering van reaksies vanaf die bedryf op beleid- en wetgewende aangeleenthede ten einde besluite wat deur die regering geneem word te beïnvloed asook die impak daarvan op produsente en die sektor. Hiervoor is bedryfs- en streeksmodelle per vrugsoort deur Buro vir Voedsel en Landboubeleid (BFAP) ontwikkel. Hierdie is nuttig om die impak van wetgewing, die droogte en ander landboukwessies te kwantifiseer.
- Die vestiging en versterking van streekskapasiteit om produsente in spesifieke streke in staat te stel om hulself te organiseer, streeksaangeleenthede te hanteer, bedryfstrategie te beïnvloed en om verteenwoordiging te verseker op besluitnemingsvlak.

COMMODITY APPROACH

The commodity approach is a programme that has been implemented by the Western Cape Department of Agriculture (WCDoA) whereby the WCDoA partners with the industry to leverage resources and access to expertise that will result in an increase in the success rate of land and agrarian projects, smallholder farmers supported and new entrants into the industry. Through this partnership smallholder farmers will gain access to industry networks, mentorship and technical support and existing marketing networks. This agreement has been in effect since 2011. For this programme, Hortgro has been gazetted by the WCDoA as an implementing agent and since the inception has managed R110 million within the Comprehensive Agriculture Support Programme (CASP) in partnership with the WCDoA. About 62% of these funds were spent on 100% black-owned entities and 38% on equity partnership where commercial stakeholders leveraged additional funding through this intervention.

Hierdie program is die afgelope jaar genomineer vir die Wes-Kaapse Premier se toekennings vir Uitnemende Diens onder die kategorie vir Besgeïmplementeerde-program. Uiteindelik het die program 'n silwertoekenning ontvang. Hortgro is ook deur die Wes-Kaapse Departement van Landbou (intern) geoudit om te verseker dat die prosesse en beleide wat gebruik is om die program te bestuur en implementeer grondig en deursigtig was. Hortgro is trots daarop dat ons 'n positiewe ouditverslag vir alle prosesse wat geïmplementeer is, ontvang het.

Die vennootskap met die Wes-Kaapse Departement van Landbou was tot dusver 'n voordelige verhouding vir alle betrokke partye. Dit het die bedryf in staat gestel om 'n doeltreffende en deursigtige openbare-private-vennootskap te vestig om optimale benutting van addisionele befondsing, hulpbronne, vaardighede en kundigheid te verseker om die bedryf op 'n verantwoordelike, ekonomiese en volhoubare manier te transformeer.

- JOBS FUND -

The DFDC Commercialization programme (JF), which started in 2016 aimed at graduating a group of smallholder farmers to commercial status by 2020 is on its second year of implementation with another two years to completion.

4

Halalisiwe Msigmango - Project Manager

Currently there are 21 entities in the programme. The programme aims to establish and/or replace 315 new hectares of orchards that will result in the creation of 504 new jobs. To date the programme has established 100 ha in different regions, with implements, machinery and upgrades to infrastructure at different entities. Thus far the initiative has created 120 permanent jobs and about 800 seasonal jobs — in line with the increase in hectares planted. 301 people have been trained for different aspects relating to their farming enterprise.

Kennisgapings is vroeg reeds by die verskillende entiteite geïdentifiseer en verskeie kundiges is ingebring om enige probleemkwessies wat 'n potensiele risiko vir die program as geheel kan inhou, op te los en waar nodig bystand te verleen. Die doel is om alle JF-boere Global Gap- en SIZA-geakkrediteer te kry teen die einde van die program om te verseker dat hulle toegang kan hê tot enige mark van hul keuse hetsy plaaslik of internasionaal. Verdere markverwante opleiding word beplan om te verseker dat boere die hele waardeketting van hul produk verstaan en nie slegs op produksie gefokus is nie.

A clean annual audit was obtained with a mid-term monitoring and evaluation review underway. The drought situation in the Western Cape has caused concerns for the fruit industry as whole but the Jobs Fund farmers have found ways to mitigate the impact and continue with production.

Vanjaar het Ricard Myburgh van Starking Fruit Packers, 'n Jobs Fund-begunstigde, die Toyota Nuwe Toetreder-toekenning vir 2017 gewen. Hy sluit aan by drie ander JF-begunstigdes wat die toekenning in vorige jare gewen het, naamlik André Cloete in 2016, Jacky Goliath in 2015 en Trevor Abrahams in 2014. 'n Ander JF-begunstigde, Errol April, is deur die Sagtevrugtebedryf vereer en het die Nuwe Toetreder-toekenning vir 2017 by die Gala-aand ontvang.

This project also received an award from the National Treasury – in recognition for good performance and ongoing contribution to job creation within the agricultural industry.



- DECIDUOUS FRUIT DEVELOPMENT CHAMBER -

With the implementation of the commercialisation programme of the Deciduous Fruit Development Chamber (DFDC) of South Africa, R120m was invested in 23 farms.

4

Ismail Motala - Chairperson

Over the past two years the DFDC has actively participated in the development of black producers by implementing programmes and creating structures, and is extremely proud of all the achievements over the past two years. The final outcome and goal is that these producers will become financially viable commercial farmers within the next three years.

Een van die uitdaginge vir die bedryf is dat transformasie te stadig plaasvind. Transformasie van die waardeketting is ook gedemp. Die strategiese plan van die DFDC is dus om die ekonomie van die sektor te ontwikkel en te transformeer deur die sagtevrugtevoetspoor te vergroot.

The vision of the DFDC is to transform the deciduous fruit industry by 2050, by achieving the following:

- single unified deciduous fruit organization
- be the best deciduous industry in the world

- establish partnerships in the value chain based on business principles
- by increasing footprint in provinces other than the Western Cape and Eastern Cape
- by increasing the participation of black entrepreneurs in the value chain
- expand education and training
- have access to land, water and funding
- and by influencing policy changes.

Die DFDC werk nou saam met SAAPPA en SASPA om die doelwitte van die 2050-visie te bereik, en te verseker dat ons 'n toekoms vir die bedryf het, met 'n stewige ekonomiese nalatenskap vir ons land. Die DFDC beskou dit as sy verantwoordelikheid om fundamente te bou vir die nuwe sagtevrugtebedryf van die toekoms en om verwagtinge te bestuur om sodoende 'n suksesvolle asook getransformeerde bedryf vir almal te verseker.



- FRUIT WORKERS' DEVELOPMENT TRUST -

*2017 has been a good year for the Fruit Workers' Development Trust.
More and more beneficiaries joined the Trust and reaped the benefits of belonging to it.*

4

Wimpie Paulse - Chairperson

The Trust is gaining momentum, and is financially stable. The Trust gained greater visibility on the farms, resulting in more people wanting to join. The challenge remains to use the funds in such a manner as to maximise benefits for the beneficiaries.

Die afgelope jaar was die Trust in so 'n gunstige posisie dat 'n kontantvoordeel aan begunstigdes

uitbetaal is. Fondse is ook aangewend om begunstigdes persoonlik te bemagtig in die vorm van opleiding. Twee instansies, Philani en ProCare, is ingespan om persoonlike groei-programme op plase aan te bied. Die meeste van die begunstigdes is so bereik. Hierdie verbintenis met die twee diensverskaffers sal voortgesit word, en daar sal voortgebou word op die programme wat hulle reeds aangebied het.

Die Trust wil ook graag vir Stephen Hobson bedank vir sy volgehoue ondersteuning en die wyse waarop hy die 'vinger op die pols van beleggings hou'. Die Trust wil ook vir Hortgro vir hulle administrasie bedank, asook vir Philani en ProCare se uitnemende diens. Laastens dank en waardering aan die Trustees.

Philani se program fokus op huis en gesinsbestuur. Altesaam 219 werkers het aan die Volwasse Man en Volwasse Vrou programme deelgeneem. Die volgende modules is behandel:

- Selfbeeld en persoonlike sorg
- Stres en depressie
- Gesinsbeplanning, die huwelik en ouerleiding
- Seksueel-oordraagbare siektes
- Middelafhanklikheid
- Persoonlike finansies
- Veiligheid in en om die huis
- Kommunikasie
- Konflikbestuur

Die koste van die program beloop R355 680.

ProCare's Boosting and Sustaining Staff Morale programme had the following modules:

- Self awareness
- Interpersonal Skills
- Attitude
- Cultural Diversity
- Conflict Management
- Stress Management
- Positive Thinking
- Laughter

R500 000 was spent on the programme which was implemented on 22 farms and reached 986 individuals directly and 2658 individuals indirectly. Areas reached – Witzenberg, Elgin, Northern Cape, Montagu, Drakenstein, Matzikama, Swellendam & Villiersdorp.



- DECIDUOUS FRUIT INDUSTRY DEVELOPMENT TRUST -

The Deciduous Fruit Industry Development Trust (DFIDT) manages the Deciduous Fruit Board's remaining assets, and is administered by Hortgro.

4

Ismail Motala - Chairperson

Trustees may only allocate the return on capital to projects as the trust fund needs to be maintained. Due to relatively low interest rates the last few years, a decision was made to invest the funds in various financial investments in order to grow the capital base. Currently the DFIDT has R15.7 million invested.

The Trust approved that R400 000 of the proceeds of the investment be utilised for bursaries at Stellenbosch University during 2017. Those bursaries were awarded to seven previously disadvantaged students. These students are all in the process of obtaining their BSc degrees in Agriculture, Horticulture, Agri Business Management, and Agricultural Economics. They received between R 50 000 and R 60 000 each towards their studies.

- TRAINING & CORPORATE SOCIAL INVESTMENT -

4

Astrid Arendse - Human Resource Officer

Bursary Programme

The bursary scheme had 27 undergraduate students studying towards a degree in Agriculture, Agricultural Economics and Business Management.

These students are enrolled at various institutions across South Africa namely: University of Pretoria, Elsenburg Agricultural Training Institute, University of Limpopo, University of the Free State, Cape Town University of Technology and Stellenbosch University respectively.

The Hortgro Bursary Scheme is funded by Hortgro as well as AgriSETA and DFIDT. A total amount of R 1 369 100 was spent in 2016/17, an increase of 42% in Funding.

Noodhulp- en Veiligheidsopleiding

Hortgro in samewerking met AgriSETA het vanjaar weer gefokus op opleiding in Noodhulp Vlak 1, gesondheids- en veiligheidsverteenvoordigers asook komitee-opleiding vir veiligheidsverteenvoordigers.

Hierdie opleiding was onder andere op NQF vlak 1 & 2 en 'n totaal van 575 werkers in verskeie produksie areas is opgelei.

Noodhulp en veiligheid speel 'n belangrike rol in die produksieprosesse en dit is belangrik vir werkers om vroegtydig risiko's te kan identifiseer en ook om die nodige opleiding te hê om vinnig en doeltreffend op te tree in geval van nood.

School Tours

A group of 65 high school learners interested in pursuing careers in Agriculture along with 4 teachers visited various institutions which included Elsenburg Agricultural Training Institute, FruitFly Africa, SAPO Trust as well as Stellenbosch University.

These students had the opportunity to meet employees in agriculture, visit various laboratories and experience a day in the life of such agricultural employees.



5

INDUSTRY SERVICE ENTITIES

Sapo Trust

Culdevco

FruitFly Africa



- SAPO TRUST -

Sapo signed important agreements on testing and commercialisation of fruit varieties during the past year.

5

Burgert van Dyk - Acting General Manager

PERSONEELAKTIWITEITE

Talle veranderinge het plaasgevind in ons personeelkorps in die afgelope jaar. Dr. Philip Fourie het na 13 jaar se diens weens mediese redes afgetree. Burgert van Dyk het vanaf Oktober 2017 die leisels oorgeneem as waarnemende algemene bestuurder. Die innovasie-en-ondersteuningbesigheidseenheid sal voortgaan onder Burgert se bestuur.

Jessica Paul (Rochefort), patoloog wat in Maart 2016 by Sapo aangesluit het, het bedank en is in November vervang deur Roleen Carstens.

Ons kwekery-aktiwiteite was die afgelope paar maande onder bestuur van Paul Stemmet en Johan Laubscher. Johan Laubscher het na afloop hiervan afgetree. Leander Gagiano het op 1 Oktober 2017 by die span aansluit as kwekerybestuurder.

Die ontvangsdames by beide Fleurbaix en Tygerhoek het verander en jy sal nou gegroet word deur die vriendelike gesigte van onderskeidelik Jeniley Anthony en Lydia Daries.

NEW AGREEMENTS

SAPO signed important agreements on testing and commercialisation of fruit varieties during the past year. The most important ones are (a) the agreement with the California Table Grape Commission for

commercialisation of five table grape varieties, i.e. Princess (formerly named Melissa), Summer Royal, Sweet Scarlet, Scarlet Royal and Autumn King, (b) an agreement on cherries managed by Cornell University and (c) a test and commercialization agreement for Q-Eline quince rootstock. Sapo is currently in the process of sub-licensing Q-Eline to other interested nurseries.

INTERNATIONAL FORUM

Burgert van Dyk and Emcee Coetzee attended a DNA Techniques and Variety Identification Workshop at NAK Tuinbouw, Netherlands during May 2017.

Burgert represented Sapo at the Annual General Meeting of CIOFORA (International Community of Breeders of Asexually Reproduced Ornamental and Fruit Varieties) in June 2017 where he also reported on the current status of plant breeder rights legislation in South Africa. In his capacity as head technical expert (Ciopora), Burgert van Dyk also joined the UPOV work group for fruits during November 2016 in Angers, France and September 2017 in Kelowna, Canada.

Frederik Voigt delivered a lecture on the SA cherry industry during the 8th International Cherry Symposium in Yamagata, Japan during June 2017.

PLANTMATERIAAL VOORSIENING

Sapo het 'n uitsonderlike jaar beleef met die verspreiding van geënte druiwestokke, veral die droogdruifkultivar Selma Pete en Joybells-tafeldruifkultivar. Die aanvraag vir tafel- en droogdruifentmateriaal het met 20% toegeneem.

Vanaf die vorige plantseisoen het die aanvraag na perske- en appelkoossaad van die kwekerye met 16% vermeerder.

Die voorsiening van steenvrugplantmateriaal gedurende herfs, winter en somer 2016 het met 44% toegeneem. Dit was hoofsaaklik weens die hoër aanvraag vir amandel-, appelkoos- en pruimplantmateriaal.

Kernvrugplantmateriaal het toegeneem met 48% (appels +49% en pere +47%). Big Bucks het die grootste aanvraag gehad gevolg deur Royal Beaut, Golden NIVV en Granny Smith. Cape Rose (Cheeky™), Early Bon Chretien, Forelle, Packham's Triumph en Rosemarie was ook gewilde kultivars en op aanvraag.

Sapo Trust het 'n voorspoedige twaalf maande beleef en streef daarna om dit in die toekoms vol te hou.



- CULDEVCO -

“In general all of the deciduous fruit industries had a profitable last couple of years. The fact that Culdevco (Pty) Limited also had a significant increase in its annual income during the 2016/17 financial year is largely due to the result of the increasing profits of deciduous fruit growers within South Africa over recent seasons.”

5

Dr Leon Von Mollendorff - Manager

Despite the increase in income the 2016/17 season was a more challenging season. The main reasons for this were the strengthening of the rand, and in the case of pome fruit more competition from fruit produced in competing countries. However, since the middle of 2017 the rand weakened again. If this trend continues it may result in a positive effect on the profitability of growers the coming fruit season. Unfortunately, the prevailing drought conditions in the Western Cape may have a negative effect on fruit quality, pack out and yield of especially late ripening deciduous fruit cultivars.

CULTIVAR DEVELOPMENT

During this past year Culdevco managed 469 pome fruit, stone fruit, and grape cultivars and selections. This number includes 19 apples, 29 pears, 44 apricots, 93 nectarines, 89 peaches, 118 plums, four stone fruit rootstocks and 73 grapes. During the last nine years Culdevco, in cooperation with the Agricultural Research Council (ARC), released 45 new cultivars to the South African Deciduous Fruit Industry. More information on all released Culdevco-licensed cultivars can be found on the Culdevco website (www.culdevco.co.za). Culdevco has recently upgraded its website to make it more user-friendly.

Culdevco het 'n evaluasie-ooreenkoms met Provar gedurende Augustus 2016 gesluit. Met die sluit van die ooreenkoms het Culdevco 'n strategiese besluit geneem om alle Culdevco gelisensieerde kultivars aan onafhanklike derdeparty-evaluering te onderwerp. Alhoewel Provar hoofsaaklik sal fokus op fase 3 kern- en steenvrugte wat op kommersiële plase geplant is, sal hulle ook 'n aantal belowende nuwe fase 2 kern-en steenvrugte evalueer.

Culdevco continues to pro-actively market the full range of released deciduous fruit cultivars under its management - locally and international. Tree sales still contributed the most to the annual total income of Culdevco. A number of varieties are still in high demand including Afri Star, Afri Blush, Cape Rose (Cheeky™), African Delight, Ruby Star, Ruby Sun, Ruby Crunch, Cascade, Golden Pride, Autumn Crunch, and Joybells. All these ARC bred cultivars were released and commercialised through Culdevco in cooperation with the ARC. The above-mentioned cultivars are some of the most profitable cultivars ever bred by the ARC. During the winter of 2017 there was an increase of tree sales of lower chilling apples (+60%), plums (+25) and Joybells vines (+40%), while a significant decrease of peaches and nectarines (-25%) trees occurred.

Daar is 'n hele aantal belowende nuwe rooivleispruimseleksies wat tans deur Culdevco geëvalueer word en alreeds semi-kommersieel in verskillende streke in Suid-Afrika, Spanje en Engeland aangeplant is.

MARKETING

During the past year the manager of Culdevco visited licensees in Spain, Italy and France to market table grapes, plums and low chill apples. As a result of these visits, one new table grape agreement was signed and the first commercial propagation of Ruby Star and African Rose are initiated to be planted in 2018. The first commercial plantings of African Delight, Ruby Star and Sun Kiss will also be established in Italy during the winter of 2019.

Die bestuur van Culdevco wil die direkteure van Culdevco bedank vir hulle waardevolle insette aangaande strategiese sake die afgelope aantal jare. Laaste maar nie die minste nie wil Culdevco ook alle kern- en steenvrugte- asook tafel- en droogdruiweprodusente hartlik bedank vir hulle volgehoue steun met die aanplant van Culdevco-gelisensieerde kultivars oor die afgelope aantal jare.



- FRUITFLY AFRICA -

FruitFly Africa (FFA) glo onwrikbaar in 'n area-wye geïntegreerde plaagbeheerbenadering (AW IPM) vir die beheer van vrugtevliegebevolkings.

5

Nando Baard - General Manager

Tans bestaan hierdie benadering uit die volgende beheerstrategieë in areas gediens deur FFA:

- monitering van die plaag,
- alternatiewe gasheerbestuur deur monitering en die toepassing van chemiese beheer of die steriele-insektegniek (op plase asook in dorpe),
- die monitering en bevordering van boord-sanitasie,
- gekoördineerde area-wye lugtoediening van vrugtevlieglokaas (GF-120), en
- die gebruik van die steriele-insektegniek (SIT).

SIT bly steeds 'n sleutelkomponent van die program in areas waar die wilde Medvliegpopulasies laag genoeg is om die gebruik van hierdie tegniek te regverdig. Die afgelope seisoen (sedert September 2016) het FFA vir die eerste keer in die geskiedenis van die program meer as 50 miljoen steriele Medvlieë per week geproduseer. Die fasiliteit in Stellenbosch produseer tans 56 miljoen steriele mannetjies per week — 'n 124%-toename in weeklikse produksie sedert 2015. Hierdie toename is moontlik gemaak deur verskeie veranderings aan produksietegnieke oor die afgelope paar jaar, wat gelei het tot laer insetkoste per uitset-eenheid ('n nominale verlaging van 37% sedert 2011).

The changes to sterile male production did not only result in increased and more efficient production, but also in a higher quality fly. Changes in the main quality control (QC) parameters were as follow:

- The daily egg production per cage increased by 45.3% while the standard deviation (SD) for this parameter decreased by 18.2%.
- The egg hatch percentage increased by 7.3%, with a decrease in the SD of 50%.
- Egg-to-pupa efficacy increased by 21.9%.
- The flight ability of the irradiated flies has gone up by 6.4% and the SD was 64.8% lower.

Of the 56 million sterile males, 6 million are still released from the ground by use of brown paper bags. The rest are released aerially (by means of a chilled release machine) over an area of 39 000 hectares (± 15 000 hectares of commercial orchards included) in various production regions. Aerial releases during the past season took place

using a hopper that can accommodate 15 million flies per load, this meant that an area could be covered with a single load, thereby saving on ferrying costs of the helicopter.

Monitoring went on as usual during the past year, with 1 Medfly trap per ± 18 ha and 1 *Bactrocera dorsalis* (BD) trap per 100 ha or PUC. FFA also started monitoring an additional ± 11 000 hectares of table grapes for false codling moth (FCM) at a density of 1 trap per 4 hectares.

Tydens die afgelope seisoen het ons BD-onderskeppings in drie verskillende areas onder die FFA-vrugtevliegmoniteringsprogram gehad. In twee van hierdie gevalle is 'n afbakingsopname (hoë-digtheid) uitgevoer en geen verdere vangste is gemaak nie, hierdie areas is dus na 12 weke BD-vry verklaar sonder enige verdere beheermaatreëls. In die derde geval is 'n tweede onderskepping in dieselfde gebied gemaak en die manlike-uitwissingstegniek (MUT-blokke) is gebruik as 'n beheermaatreël. Sedertdien is geen vangste in hierdie gebied gemaak nie en die area is weereens BD-vry verklaar.

Gedurende die 2016/17 seisoen is ± 150 000 hektaar deur die luglokaasbespuiting-gedeelte van die program gedek. Drie verskillende kontrakteurs is gebruik, wat gelei het tot baie minder logistieke probleme. Hierdeur is ook die vermoë geskep om wanneer die weer dit toelaat, lokaas in 'n area toe te dien.

'n Groter gedeelte van die begroting is soos met die 2015/16-seisoen, vir die winterprogram aangewend. Die doel was om lae populasievlakke aan die begin van lente/somer te verseker. Die volgende maatreëls is tydens die winterprogram op die alternatiewe gasheer (plase en dorpe) toegepas: monitering, lok-en-dood-lokvalstasies, grondbespuitings van GF120, verwydering van vrugte onder bome en SIT.

The 2016/17 season saw (in most areas) significantly lower levels of fruit fly populations than the 2015/16 season, but even more encouraging is the long term trends we are

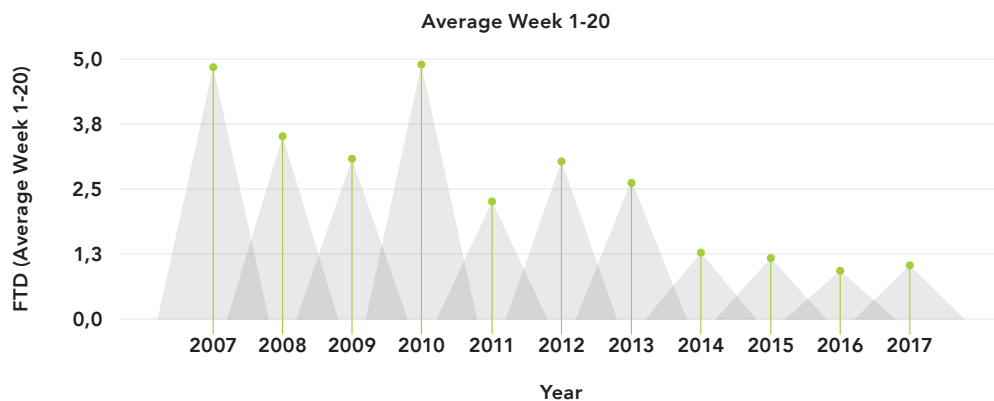
seeing in population levels in the areas under the full AW IPM. During May 2017 the following highlights were presented during a poster session at the third FAO-IAEA International Conference on Area-wide Management of Insect Pests — Integrating the Sterile Insect and Related Nuclear and Other Techniques:

- When comparing the average flies per trap per day (FTD) during the harvesting period for 2007-2008 (period before AW IPM strategy) with that of 2015-2017, the FTDs in the Hex River Valley declined by 73% from an average of 4.32 to 1.14.
- The same comparison for the Elgin/Grabouw area indicates a population reduction of 19% (although the reduction from the 3 year period immediately following the implementation of an AW IPM strategy is 32%), from a FTD of 0.50 to 0.41.
- No reliable data prior to 2010 (implementation of the full programme) is available for the Warm Bokkeveld area. When comparing the average FTD for 2010-2011 with that of 2015-2017, the FTDs in the Warm Bokkeveld declined by 78% from an average of 1.46 to 0.32.

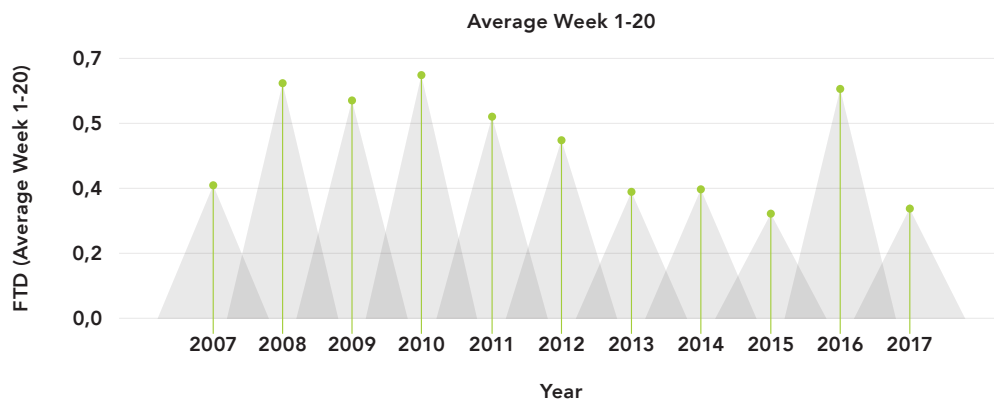


AVERAGE MEDFLY POPULATION DURING HARVESTING SEASON (MEASURED IN FTD)

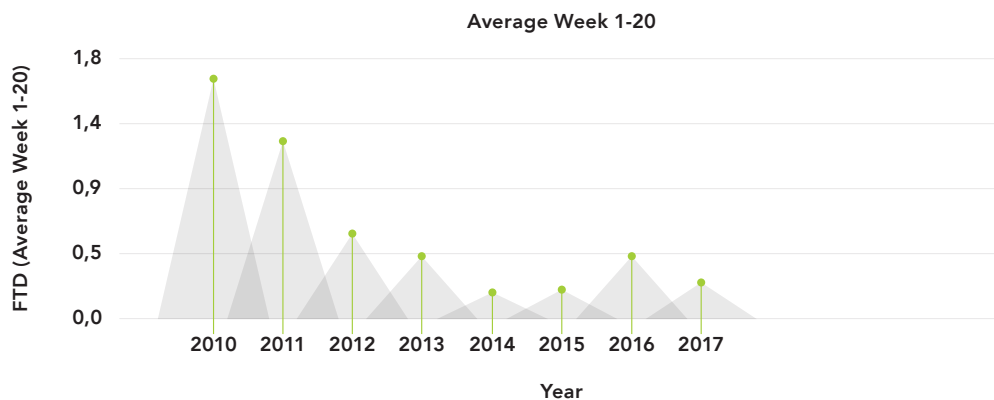
Graph 1 — Hex River Valley



Graph 2 — Elgin/Grabouw



Graph 3 — Warm Bokkeveld



Vrugtevliegbeheer vereis heel jaar lank 'n verbintenis tot 'n strategie en kan dus nie behaal word sonder die samewerking en ondersteuning van almal wat betrokke is nie. FruitFly Africa wil produsente en ander rolspelers bedank vir hul bydrae tot suksesvolle vrugtevliegpopulasiebeheer in die Suid-Afrikaanse sagtevrugtebedryf.

6

ALTERNATIVE CROPS

Cape Flora SA

Pomegranate Association of South Africa

SA Berry Producers' Association

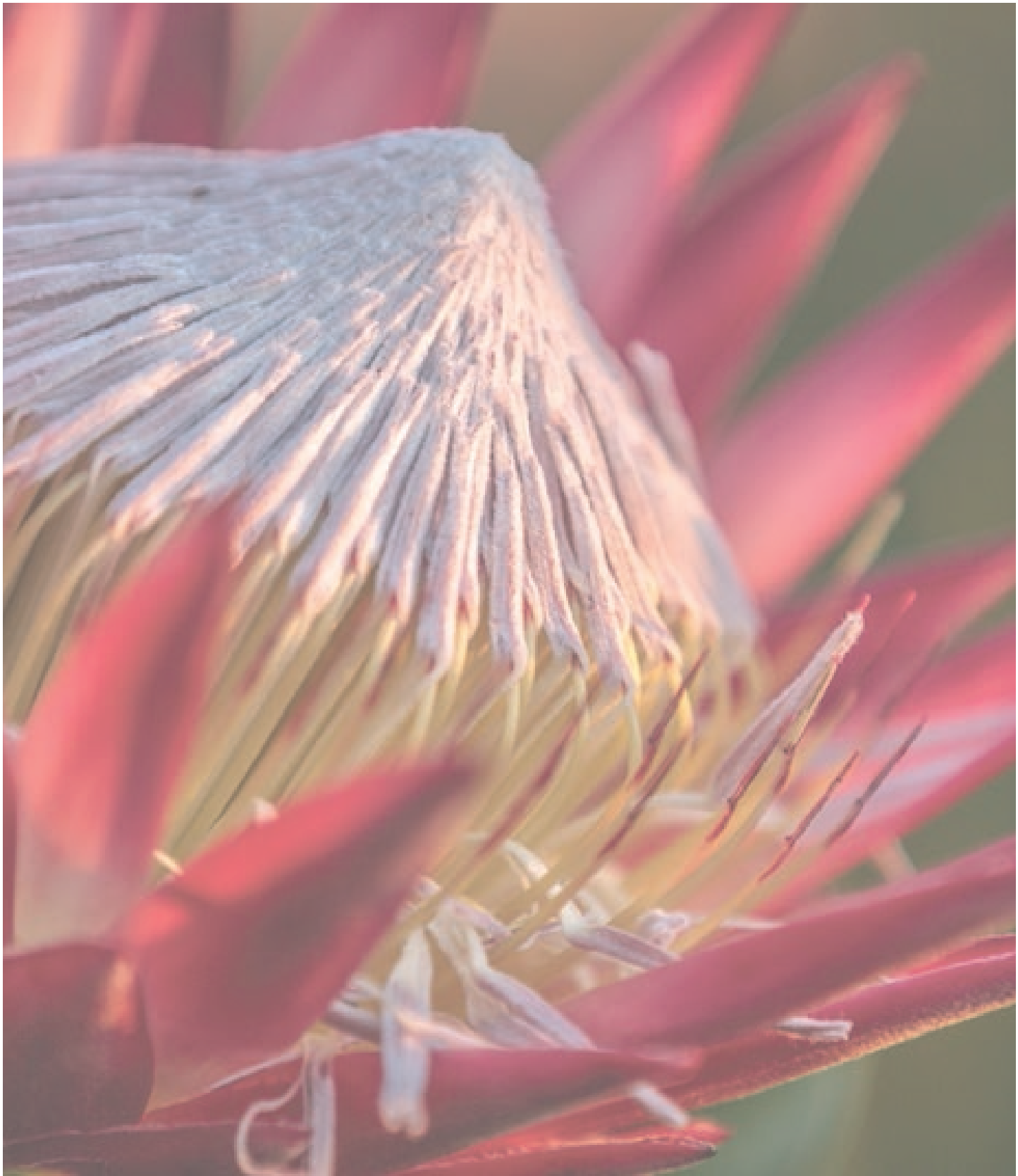
SA Cherry Growers' Association

SA Honeybush Tea Association

SA Olive

SA Pecan Nut Producers' Association

SA Fig Producers' Association



- CAPE FLORA SA -

The period 2016-2017 has been particularly challenging in many respects, due to climatic factors such as the drought, but also within the context of a challenging and ever changing global economic environment.

6

Anton Rabe - Chairperson

Thus, it has been an exciting time for Cape Flora SA (CFSA) which concluded its third year of full operations in its new form as an inclusive industry body.

Die statutêre heffing wat nou op alle fynbos-produkte wat in die koue ketting uitgevoer word van toepassing is, bied 'n stabiele befondsings-basis en het CFSA in staat gestel om gedurende 2017 ook bykomende fondse spesifiek vir navorsing en ontwikkeling, asook die registrasie van sleutel chemiese middels vir die bedryf, vanuit alternatiewe bronne, te bekom. Dié fondse spruit uit die Wes-Kaapse Departement van Landbou se alternatiewe gewasse-fonds, die Departement van Wetenskap en Kuns se 'Post Harvest Innovation Fund', die Departement van Handel en Nywerheid en onlangs ook die Wêreld-Natuurfondse (WWF) se Tafelbergfondse.

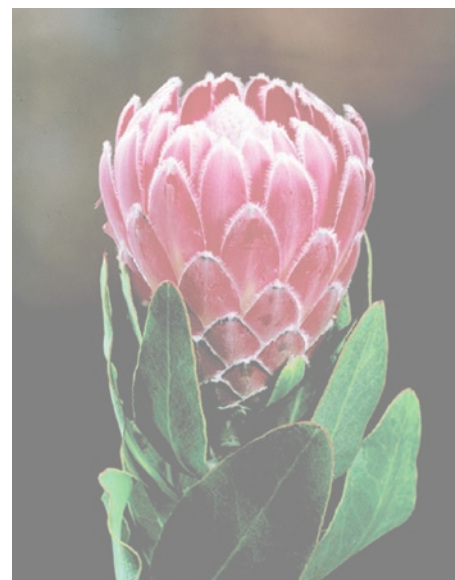
Significant progress has been made with the application of having Cape Flora recognised as a Geographical Indicator (GI). This will offer protection to a product of a specific origin which will further differentiate and protect our unique products in the international market. Our thanks for the guidance and assistance from Ms Bongiswa Matoti and Dr Dirk Troskie from the Western Cape Department of Agriculture to CFSA during this process.

The availability of funds from the EU and WWF Nedbank Green Trust motivated in conjunction with the Flower Valley Conservation Trust enabled significant progress to be made on the flagship programme for the wild harvesting of fynbos, the Sustainable Harvesting Programme (SHP). One of the aims of the SHP is to develop an assurance programme to provide an integrated approach with the social and labour environment. One of the highlights for this programme was the release of a *Field Guide for Wild Flower Harvesting* aimed at fynbos harvesters and landowners. The guide provides information on fynbos, the threats to fynbos and the need to harvest responsibly. It also describes 41 fynbos species picked on the Agulhas Plain for the commercial market. The Field Guide was produced in partnership with the Universities of Durham and Newcastle, through the Newcastle University's Economic and Social

Research Council Impact Acceleration Scheme. The Field Guide is available in three languages: English, Afrikaans and Xhosa.

Cape Flora SA het ook gasheer gespeel vir die jaarlikse kongres van die Internasionale Protea-vereniging (*International Protea Association, IPA*) wat gedurende September 2017 op Stellenbosch gehou is. Meer as 'n honderd verteenwoordigers van tien lande het die kongres bygewoon en het boere, planttelers, opvoeders, navorsers en bemerkers ingesluit. Die doel van hierdie forum is om die internasionale proteabedryf te belig en te laat groei. Suid-Afrika bly die leidende party in die verband.

The implementation of CFSA's Go-to-Market Strategy to create a platform from which sustainable benefits could be unlocked and maximized for all role players in a unified industry value chain remains the key strategic focus for Cape Flora SA.



- POMEGRANATE ASSOCIATION OF SOUTH AFRICA -

The 2017 pomegranate season once again delivered good results, although fruit were generally smaller, with the export volume being approximately 6% higher than in the 2016 season. A total of 1 421 065 million cartons (3.8 kg equivalent) were exported.

6

Jack Wittles - Chairperson

Approximately 88% of the fruit delivered for packing was exported and 8% was juiced. The main markets to which the fruit was exported were the EU (56%), the Middle East (16%), UK (12%) and the Far East and Asia (7%). There is an increased demand for good quality pomegranates in the export markets although the local market decreased with 5%.

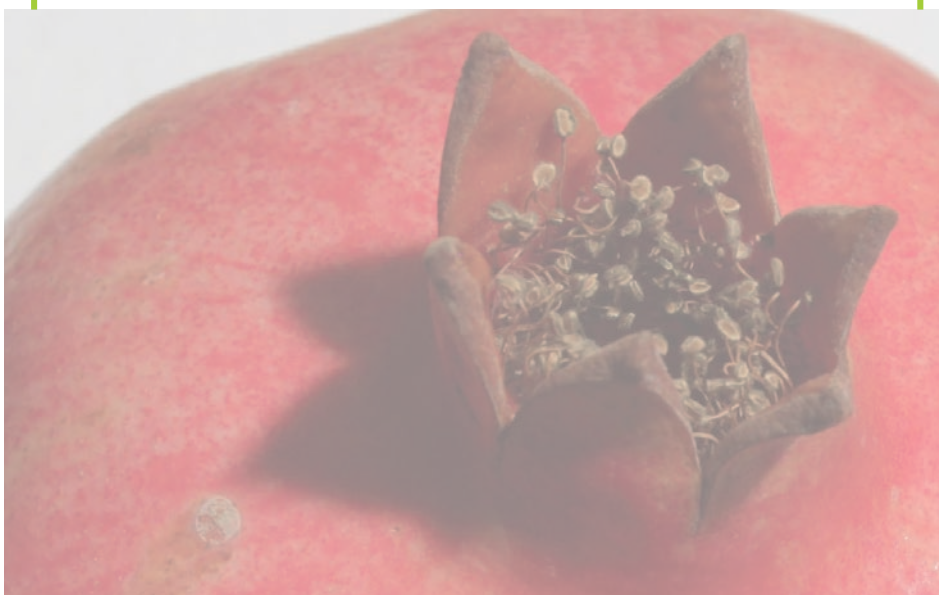
A colour chart was developed by Pomasa as a reference for producers, pack houses and exporters to communicate market expectations. The three main varieties of pomegranates being planted are Wonderful (64%), Herskowitz (15%), Acco (14%). The latest study indicates that pomegranates in full production (as from year 8) are yielding a net farm income of R95 083 and the cost per hectare at approximately R226 815.

Statutêre fondse is aangewend vir die registrasie van noodsaaklike chemiese middels en Pomasa werk nou saam met die Departement van Landbou en maatskappye in die chemiese bedryf om die registrasieproses te bespoedig.

Verskeie navorsingsprojekte is ook befonds. Die projekte handel onder andere oor die na-oes hantering van granaat en die besproeiing en effek daarvan op granaatbome. Met die beperkte waterbronne in veral die Wes-Kaap sien ons uit na die resultate van hierdie studie.

The regulation of false codling moth in the European market comes into force on 1 January 2018 and will have a significant effect on exports to this market. A pomegranate FCM management system has been developed to guide producers in the effective management of FCM.

Ons is optimisties oor die toekoms van die granaatbedryf en glo dat ons kreatiewe oplossings sal vind vir die talle uitdagings wat wag.



- SOUTH AFRICAN BERRY PRODUCERS' ASSOCIATION -

“The South African berry industry, while still a minor industry both locally and globally, has grown so vigorously over the past few years that it has even taken industry experts by surprise.”

6

Elzette Schutte - Manager

Total berry hectares planted in South Africa will double within the next five years (if not sooner) according to the latest industry survey and mid-term projections.

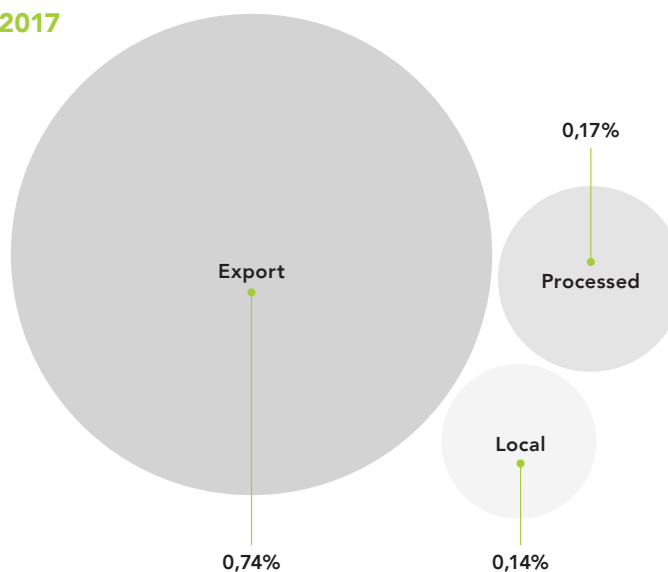
SABPA currently has 60 members. To assist with the coordination of this fast growing industry, an operational manager has been appointed by SABPA in conjunction with Hortgo.

Die bessiebedryf, spesifiek bloubessies, is besig om baie positiewe groei te toon.

- Hektare geplant vermeerder van 471 in 2015/2016-seisoen tot 1 068 in 2016/2017-seisoen.
- Die Wes-Kaap is steeds die grootste produksie-area met 640 ha.
- Limpopo gaan in die volgende 5 jaar die meeste groei toon in terme van hektare geplant.
- Meer as 50% van bestaande produksie eenhede is groter as 50 hektare.
- Bloubessie-uitvoere maak 74% van die totale bloubessie-produksie uit, gevolg deur geprosesseerde produk 17% en plaaslike verkope 14%.
- 57% of the total raspberry production is exported, 26% sold locally and 17% is processed.
- Only 18% of all blackberries produced are exported.
- 61% of blueberries are planted under net, 25% in the open field, and 14% in tunnels.
- 70% of blueberries are planted in soil vs 30% in substrate.
- SA exports of blueberries increased from 2 150 tons in 2015/16 to 4 154 tons in 2016/17. That's a hefty 93% increase! We expect our export volume to double to 8 000 tons in the 2017/2018 season.
- Europe and the UK still remain our most important markets with 90% collective market share.
- South Africa currently contributes to 3% of the world's blueberry production.

Graph — Crop Distribution

2016/2017



- SA CHERRY GROWERS' ASSOCIATION -

Die kersiebedryf staan voor 'n nuwe begin. Beplande aanplantings in Noordwes, Gauteng, Limpopo, en die Wes-Kaap beloop meer as 1 000 hektaar in die volgende 2 tot 5 jaar.

6

Koos Pretorius - Chairperson

Bogenoemde aanplantings sal die bedryf tienvoudig vergroot en produksie van sowat 10 000 ton tot gevolg hê. Dit gaan egter nie sonder pyn geskied nie.

The increased production will also extend the production time from end September to end December. Such a large production window will put a global spotlight on our industry and create immense opportunities. When these opportunities become available, the industry must be prepared to seize and utilise them to the fullest.

Produksie in die 2016-seisoen was aansienlik laer as die vorige seisoen — met 871 ton, teenoor die 1 181 ton van 2015. Hierdie wisseling tussen produksiejare is nie ongewoon nie, maar dit dui ook op die geweldige produksie-risiko's van die bedryf. Die noordelike provinsies se produksie was 252 ton en die suidelike produksie-areas was 449 ton — teenoor 929 ton die vorige jaar.

The impact of the increased production will have particular consequences regarding the availability of air freight, local supply, foreign supply, as well as technical knowledge. Demand will have to be stimulated to support prices. As the producer corps becomes bigger, new thoughts and inputs, which could be beneficial for industry growth, will also develop. The funding pool to support industry issues and research will also grow and create opportunities which have not existed until now.

Aspekte van marktoegang, veral na China en Korea, asook die impak op die huidige gunstige binne- en buitelandse pryse sal op bedryfsvlak aangespreek moet word. Veral aangesien die goeie pryse wat tans ondervind word, bloot nie volhoubaar is wanneer produksievlakke die omvang van 10 000 ton nader nie.

Die vereniging sal verder prioriteit moet gee aan die samestelling van 'n Suid-Afrikaanse Kersieproduksie-handleiding. Sodanige handleiding sal onder andere produksiepraktyke, klimaatsverandering, pryse, kwaliteitstandaarde, onderstamme, variëteite en navorsing aanspreek. Daarsonder gaan die bedryf moeilik die oorgangsfase vanaf die huidige klein voetspoor tot 'n wêreldspeler oorkom.



To conclude I would like to thank the members and other role players, especially within Hortgro, for the support during the past year. There are big challenges ahead, but with the current cooperation these industry challenges will be overcome.

- SOUTH AFRICAN HONEYBUSH TEA ASSOCIATION -

The South African Honeybush Tea Association (SAHTA) is the representative body formed in 1999 to coordinate activities in the honeybush tea industry in South Africa.

6

Eugene Smith - Chairperson

During the 2017 season the honeybush industry was negatively impacted by the severe drought experienced in the Eastern Cape as well as the Western Cape. This was exacerbated by the many wild fires over the same period.

HEUNINGBOS GEMEENSKAPSPRAKTYK

Die doel van die Heuningbos Gemeenskapspraktik (Honeybush Community of Practice, HBCoP) is om samewerking tussen nasionale en provinsiale regeringsdepartemente, asook alle ander nie-regeringsorganisasies te verbeter. Daar word ook verder gepoog om alle wetgewing en regulasies rakende die heuningbosbedryf relevant te hou en suksesvol te implementeer. Daar word ook onder die sambreel van SAHTA werkgroepe gestig om uitdagings in die heuningbosbedryf te identifiseer, te prioritiseer en om oplossings vir moontlike probleme te kry.

HONEYBUSH TEA NAME NOW OFFICIALLY PROTECTED

Proudly South African products like Rooibos, Honeybush tea and Karoo lamb will now have their names protected, in terms of an agreement concluded with the European Union (EU). Minister Jeff Radebe briefed Cabinet on the bilateral protocol on Geographical Indicators at its meeting on 25 May 2016. This implies that no-one in the European Union is allowed to use the name Honeybush tea.

Heuningbostee, rooibostee, Karoolam en sommige wyne vorm nou deel van 'n handelsooreenkoms tussen die Suid-Afrikaanse Ontwikkelingsgemeenskap en die Europese Unie en is sedert 17 Oktober 2016 van toepassing. Alhoewel heuningbostee en rooibostee geografiese gebiedsbeskerming geniet vanaf vroeg 2016, moes dit steeds deur die onderskeie parlemente goedgekeur word. Dit is in Junie 2016 gedoen, wat beteken die wetgewing het van toepassing gekom op 17 Oktober 2016. Enige persoon wat dus die geregistreerde name gebruik buite die geregistreerde gebiede kan dus nou beboet word.

WE HAVE TO REDUCE DEPENDENCY ON WILD HARVESTING

The Honeybush tea industry has to find a way to increase the cultivation of honeybush significantly. At the same time we have to ensure that the interest of those who produce from wild harvesting in a very responsible way are protected.

Ons hoop dat die skepping van die HBCoP 'n betekenisvolle en positiewe effek op die bedryf sal hê met die spesifieke doel om heuningbostee-aanplantings te vermeerder deur die kleiner produsent en veral gemeenskappe te ondersteun.

SAHTA's directors are elected from producers, processors, nursery owners and BEE partners. SAHTA, together with some government departments created a Community of Practice forum to support and help with the upliftment of communities.



- SA OLIVE -

World olive oil production for 2016/17 is forecasted at 2.5 million tons which is a 20% decline from the previous year with overall demand forecasted to exceed supply.

6

Nick Wilkinson - Chairperson

Here in South Africa, the drought has put severe pressure on production and our industry has shown great resilience. The hectares planted to olives are growing and oil production currently is estimated at 1.6 million litres.

The growing industry is also reflected in the number of local extra virgin oils participating in the annual SA Olive Awards, a total of 87 oils. Quality has remained exceptional. Nineteen gold medals were awarded in three categories and were judged for the Absa Top 10 competition. This competition used to award only 5 oils but due to the growth in the industry they decided to up their support of the industry and double the number of winners.

International appreciation for the quality of South African extra virgin olive oil continues to grow, as demonstrated by the accolades won by a number of our producers at prestigious international competitions.

Engagement with government has been active. Our olive oil standard was published by SABS and

now awaits formalization as regulation by DAFF. We have also made use of government support for our Mentorship Programme (as part of the SA Olive transformation portfolio) which has contributed substantially to our most important asset, namely our people.

A generic marketing strategic plan is taking shape and its building blocks have been shared with government officials and other stakeholders, with a view to identify synergies and funding opportunities to support our import substitution and export development efforts.

Gereelde toetsing van olies op supermarkrakke het plaasgevind as deel van 'n deurlopende poging om verbruikers op te voed en te beskerm teen die koop van onsuier olyfolies. Olies is uitgekies vir toetsing op grond van 'n minimum prysdrempel afgelei van relevante Europese prysindekse.

Ons vrywillige *Commitment to Compliance* (CTC)-sertifiseringskema word steeds goed bestuur danksy die uitstekende werk van ons

organoleptiese proepaneel. Die paneel kom op 'n twee-weeklikse basis byeen om olyfoliemonsters te proe en gradeer, in ooreenstemming met internasionaal aanvaarde praktyk. Die leier van ons proepaneel is uitgenooi deur die Sol D'Oro Suidelike Halfronde EVOO-kompetisie om een van hul hoogaangeskrewe internasionale beoordelaars te wees en Suid-Afrika kan moontlik die volgende gasheer wees vir hierdie internasionale kompetisie.

Die statutêre heffing vorm steeds die lewensaar van die bedryf met 'n tweede vierjaarperiode wat goedgekeur is deur die Minister van Landbou. Die aantal registrasies het stadig maar seker toegeneem oor die laaste vierjaarperiode, ook te danke aan strenger bekragtiging van ons kant af.

Ons fokus in die komende maande sal stewig gerig bly op die strewe na kwaliteit en volhoubare groei vir ons bedryf.



- SUID-AFRIKAANSE PEKANNEUTPRODUSENTE ASSOSIASIE -

Die Suid-Afrikaanse Pekanneutprodusente Assosiasie (SAPPA) het 25 jaar gelede ontstaan toe 'n aantal pekanneutboere 'n vereniging gestig het.

6

André Coetzee - Chairperson

Die eerste pekanneutbome is reeds meer as 80 jaar gelede deur boere in Natal en die Laeveld aangeplant. Dit was aanvanklik ongeënte saailinge en mnr. H.L. Hall het later die eerste kommersiële kwekery in Nelspruit begin, met enthousiasme wat van Amerika ingevoer is. Die Universiteit van Natal in Pietermaritzburg het met die eerste navorsing begin en verskeie boorde is gevestig. Die Ukulinga-kultivar wat bestand is teen skurfsiekte (scab) is toevallig ontdek en word steeds in die natter oostelike dele van die land aangeplant. Die LNR se Instituut vir Tropiese en Sub-tropiese Gewasse in Nelspruit het nuwe kultivars ingevoer en alle inligting oor pekanneute wat in Suid-Afrika beskikbaar was, het van hulle gekom. In 1991 het die LNR 'n vergadering van alle belanghebbendes in die pekanneutbedryf gereël en die ontstaan van SAPPA in 1992 het hieruit voortgevolg.

The 2017 harvest of more than 16 500 tons is 50% more than that of 2016. The effect of an on-year increase combined with the increased tree plantings over the last decade resulted in this bumper crop. The big question is: What will happen next year? Unfortunately we don't know what the individual contributions of the on-year and young orchards were. The historic production figures also do not give clear trends.

The PPECB figure of 13 300 tons in-shell exports is 81% of total production and is within the range

of 78% and 81% for 2014 to 2016. The bigger crop therefore did not have an effect on the in-shell export ratio.

Die inwin en verspreiding van inligting is 'n spesifieke doelwit en om dit te bereik is 'n volledige databasis noodsaaklik. In 'n groeiende bedryf bly dit 'n uitdaging om met alle rolspelers kontak te maak en die SA Pekan-tydskrif, simposiums, die SAPPA-webtuiste en nuusbriewe word hiervoor gebruik. Daar word gereelde streeksbyeenkomste en opleidingssessies gehou. Snoeikursusse, 'n tweedagkursus vir nuwe toetreders en terugvoersessies oor die huidige navorsingsprojekte is aangebied.

Since the introduction of the statutory measures, research has been the most important priority and remains the biggest item on the budget, making up more than a third of the total expenditure.

The UFS project on plant pathogenic risks associated with pecans in SA, entered its second phase and students visited the regions to collect samples and give feedback to local producers.

The results of the ARC project on an integrated pest management strategy led to further research. A new project on the water use of pecan nut trees is at the stage where the Water Research Council is evaluating research proposals and an

announcement should be made before the end of the year.

Research requirements received from the regions were prioritised and depending on the urgency and availability of funds, new research projects will receive attention.

Die bedryf groei steeds teen 'n ongekende koers en vrae soos "waar kan ek meer inligting oor pekanneutboerdery bekom?", "waar kan ek pekanneutbome koop?" en "waar kan ek pekanneutsaad kry, ek wil 'n kwekery begin?" word gereeld gevra. Die boomverkope het in 2017 weer gestyg en alle beskikbare bome is reeds vroeg uitverkoop. Die kwekers dui aan dat hulle in 2018 baie meer bome beskikbaar sal hê.

The transformation objective is to introduce more black farmers to the pecan nut industry. After a slow start in 2012 and 2013, some projects were started in 2014 and gained momentum since 2015. To date a total of 30 individual farmers, 9 trusts, 3 schools and 1 joint venture were assisted. A total of 4 860 trees were donated and planted, support such as training and mentoring were also provided. Due to the long period before trees come into production, a commitment to a relationship of at least ten years with beneficiaries is required.



- SOUTH AFRICAN FIG PRODUCERS' ASSOCIATION -

The South African Fig Producers' Association was officially registered in September 2017.

6

Avril de Villiers - Chairperson

The SA fig industry is in fact not that new, and has been around for about 14 years. It is however only now that an official industry association has been established. Hortgro will assist SAFPA with the coordination and administration of the fig industry. SAFPA currently has 34 producer members.

Industry issues which need critical attention include water management, registration of chemicals, false codling moth strategy and market access.



Ons dra tans 0.12% van die wêreldproduksie by.



SA exported 445 tons in the 2016/17 season.

SAFPA in samewerking met bemarkers werk tans hard daaraan om Suid-Afrikaanse vye as 'n waardige mededinger op die wêreldmark te vestig.

Weens die grootte van die Suid-Afrikaanse vye word die vrugte hoofsaaklik na die VK en die Verre Ooste uitgevoer.

Die Suid-Afrikaanse vyebedryf se vernaamste variëteit is Parisian/Evita. Dit het 'n pragtige pers skil en helderrooi vleis – die eetervaring is uitstekend en word as 'n beter kwaliteit vrug as vele ander gewilde variëteite in die wêreld beskou.



7

CONTACT LIST



HORTGRO

021 870 2900

Anton Rabe

(Executive Director)
anton@hortgro.co.za

Louis van Zyl

(Management Services)
louis@hortgro.co.za

Hugh Campbell

(Hortgro Science)
hugh@hortgro.co.za

Elise-Marie Steenkamp

(Communications)
elise-marie@hortgro.co.za

Mariette Kotze

(Operational, Information, Statistics)
mariette@hortgro.co.za

Jacques du Preez

(Trade and Markets)
jacques@hortgro.co.za

Lindi Benić

(Market Access, MRL's)
lindi@hortgro.co.za

Halalisiwe Msimango

(Jobs Fund)
halalisiwe@hortgro.co.za

Astrid Arendse

(Social Corporate Investment, HR)
astrid@hortgro.co.za

SAAPPA

Nicholas Dicey
(Chairperson)
ndicey@laplaisante.co.za

SASPA

André Smit
(Chairperson)
andre@fruitecsa.co.za

DFTS

Dappie Smit
(Manager)
dappies@hortgro.co.za

DFDC

Ismail Motala
(Chairperson)
waveren@telkomsa.net

FWDT

Wimpie Paulse
(Chairperson)
wimpie@graaff-fruit.com

DFIDT

Ismail Motala
(Chairperson)
waveren@telkomsa.net

SAPO Trust

Burgert van Dyk
(Acting General Manager)
burgerw@saplant.co.za

Culdevco

Leon von Mollendorf
(Manager)
leon@culdevco.co.za

FruitFly Africa

Nando Baard
(Manager)
nando@fruitfly.co.za

Cape Flora

Karien Bezuidenhout
(Manager)
karien@hortgro.co.za

SAHTA

Eugene Smith
(Chairperson)
eugen smith@conquer.co.za

SAPPA

André Coetzee
(Chairperson)
andrecoetzee@hortgro.co.za

POMASA

Jack Wittles
(Chairperson)
jwittles@paarlmail.co.za

SABPA

Tiaan Steyl
(Chairperson)
berryselect@telkomsa.net
Elzette Schutte
(Manager)
elzette@hortgro.co.za

SA Cherries

Koos Pretorius
(Chairperson)
koos@sacherries.co.za

SA Olive

Nick Wilkinson
(Chairperson)
chairman@saolive.co.za
Karien Bezuidenhout
(Manager)
manager@saolive.co.za

SAFPA

Avril de Villiers
(Chairperson)
avril@starsouth.co.za
Elzette Schutte
(Manager)
elzette@hortgro.co.za