



HORTGRO

Annual Review

2021

History

The South African deciduous fruit industry historically celebrates the 17th of April 1662 as the birth of the industry. On that day, the first two ripe Witte Wijn apples were picked in the Company's Garden of the Dutch East India Company at the Cape of Good Hope. Apples were followed by various stone fruit types and pears. Gradually small farmers started experimenting with other top fruit crops and sold their produce to passing trade ships. The South African fruit export industry was founded by Percy Molteno in 1892 when he successfully deposited a small consignment of peaches to the Covent Garden Market in the United Kingdom. The Britons, soon demanded more of the sweet-tasting sun-ripened Cape fruit—and the fruit export initiatives blossomed, so much so, that by 1903 more than 22 000 fruit packages were exported annually. Today, Hortgro, is proud to be the home of 1 140 South African deciduous fruit growers.

At HORTGRO we focus on production research and technology, communication, trade and markets, and transformation within the deciduous fruit industry. We support the grower.



Annual Review

This report provides an overview of the range of functions and services delivered by Hortgro and its related industry sub-structures throughout 2021.

HORTGRO-JAAROORSIG

Hierdie oorsig gee 'n blik op die reeks funksies en dienste wat deur Hortgro en verwante bedryfsubstrukture gedurende 2021 gelewer is.

NOTE

Due to constraints, it is not possible to provide all 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 ons twee hoofbedryfstale (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.

Our Vision

Inspiring Inclusive Growth —
Doubling the Industry by 2050

Our Mission

To create an enabling environment for all industry stakeholders to enhance equity, sustainability, profitability and competitiveness of the pome, stone and related horticultural industries through the following programmes:



-  Good governance, administration and financial management
-  Scientific research and development and technology transfer
-  Technical market access, protocols and product standards
-  Plant material acquisition, including breeding, cultivar development and procurement
-  Independent evaluation (cultivars and rootstocks)
-  Plant improvement and certification
-  Trade and market development, including market intelligence
-  Economic development and land reform
-  Skills and human resource development, including socio-economic development
-  Industry information and statistics
-  Communication and industry representation

More detailed reporting on activities relating to these programmes are contained in the various elements of this review.



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Our board of directors



Nicholas Dicey
| Hortgro
Chairman and
Hortgro Pome
Chairman



**Dr Mono
Mashaba**
| Director



**Angelo
Petersen**
| Director



**Pitso
Sekhoto**
| Director



André Smit
| Hortgro Stone
Chairman



Anton Rabe
| Executive
Director

CHAPTER 1

General review – 2021

ANTON RABE | Hortgro Executive Director

Despite all the Covid-19 challenges and associated uncertainties, the 2021 deciduous fruit season will be remembered as one of the best production years ever. Virtually all our production regions had good winter rains in the past two to three years (this year as well, with an optimistic outlook for 2022), but unfortunately, there are still areas with severe drought conditions and where the production base has materially been affected with loss of planted hectares. The crop mix and related economic activities of these areas will no doubt change over time.

With record crops for all fruit types, except apricots which have nearly doubled in yield but are still below record volumes, the trading environment proved a very challenging one with especially plum returns being severely depressed and below production costs. The main factors were logistical bottlenecks and uncoordinated (virtual) dumping of product in some markets by exporters who panicked and did not know how to deal with what in essence was a “normal” plum crop if compared with the projected crop production trajectory over a five year period.

Waardevolle lesse is hieruit geleer en heelwat gesprekke is intussen met belangegroepes gevoer om strategieë en planne te beraam om ’n herhaling gedurende die 2021/22-seisoen te voorkom. Benewens die verfyning van oesskattings en beter intelligensie met betrekking tot vrugvloei-inligting, sal daar voorts ook na die volgende gekyk word: meer markfokusgroepe met pro-aktiewe aksies om nie-tradisionele markte beter te ontgin; verbeterde kommunikasie en insigte na die handel met betrekking tot ekonomiese realiteite gekoppel

aan produksie-, pak- en verspreidingskoste; die koste van toenemende marknakomingsvereistes; asook gelykbreekpunte.

This is however not just a plum issue. Unfortunately, trade continues to concentrate, and with that concentration of bargaining power, the need to differentiate at all costs, irrespective of the impact on the production base and returns to producers, is highly problematic. It seems very unfair that trade continues to increase its compliance requirements and demands – some with little or no logic for the reality on production level. These ever-increasing demands keep piling on, while, ultimately, it seems as if it is just about the lowest possible price!

This is not sustainable, nor ethical behaviour. We need to challenge the trade on this and we will continue to do so by communicating perspectives of the impact of these practices on commercial and emerging producers, workers and rural communities. Prices and returns to producers should reflect the real costs associated with trade demands plus a fair profit to compensate for the increased climate and bio-security risks, and uncertainties at production level.

In dieselfde asem moet ons ook meld dat ons toenemend binne ’n sogenaamde “failed state”-scenario begin beweeg. Meer en meer dienste word deur bedrywe gelewer. Dit is absoluut krities dat ’n bemagtigende omgewing vir ons lede geskep word waarbinne hulle hul besighede optimaal kan bedryf, en die bedryf kan groei om ook noodsaaklike ekonomiese ontwikkeling en bemagtiging moontlik te maak. Die uitdaging is “om

nie alles vir almal te probeer wees nie”, maar om te fokus op daardie sleutelkwessies wat die grootste verskil kan maak.

In hierdie konteks het Hortgro ook ’n proses van stapel gestuur om na verskillende toekoms scenario's te kyk. Dit is ’n 30-jaar sagtevrugte-visie met inagneming van streeks-, vrugsoort- en kultivarbehoefes en volg op ’n projek van die Wes-Kaapse departement van landbou wat na post-Covid scenario's gekyk het. Ons is baie opgewonde oor die uitkoms van hierdie projek, gegewe dat dit sal help om bedryfsaksies te fokus ten einde bedryfs- en kommersiële-aksies te ondersteun sodat die sagtevrugtebedryf in beheer van “ons eie toekoms” sal bly.

However, many aspects remain where we need to ensure a focused and effective relationship with various government departments. Trade and Market Access related issues are primarily a government to government activity where we as industry can assist with expertise and capacity to augment the dwindling government capacity to ensure better trade regimes and trade agreements. The same is true with logistics, especially out-ports which currently are our single biggest risk given operational inefficiencies, poor and badly maintained equipment and an international trading and shipping regime which has been severely disrupted globally.

Apart from the range of industry and support activities within the administration, production, trade and transformation dimensions being reported on in this review, Hortgro also continued to interact and engage with like-minded structures and entities both locally and globally

within the context of FruitSA (trade and market access, logistics and transformation), AgBiz and AgriSA (policy and related issues relating to our various productions factors – labour, land, water, as well as rural safety and security), as well as the Southern Hemisphere Association of Fresh Fruit Exporters (SHAFPE) and World Apple and Pear Association (WAPA).

In terms of the transformation agenda specifically (implementation of a transformation strategy and plan; inclusive multi-media communications strategy and lobbying; identifying new and existing agripreneurs; identifying new and existing business models across the value chain) constructive progress has been made relating to the objectives that were agreed on at the end of 2020 for the deciduous fruit industry (DFI). Good progress has also been made with the alignment and focus of the Deciduous Fruit Development Chamber (DFDC) within the broader Hortgro umbrella structure. These industry activities and achievements within the value chain, relating to economic development, enterprise development, mentorship and training, are regularly communicated to the wide range of stakeholders we need to inform and empower with good information and context.

Transformation needs to have impact, meaning, and financially/materially benefit beneficiaries. The DFI have a long list of achievements and successes over an extended period of time which is not properly understood or valued outside the industry. Renewed communication actions focusing on context of these activities, with clear responsibilities, accountability, and related reporting and monitoring of these activities, will be enhanced going forward.

Here are some of Hortgro and DFDC-SA's achievements to date:

DFDC Commercialisation Programme (JF1): This programme was established in 2016 and has reached its four-year implementation period in 2020. The four-year progress made:

310
Hectares planted
(Target: 306)



1 667
Total jobs created



542
Trained beneficiaries
(Target: 97)



19
SIZA accreditations
(Target: 21)



19
Global GAP certifications
(Target: 21)



R134.2 million
Implemented funding
(Target: R120million)



Fruit Value Chain Financing Project - Hortfin (2018 - 2022)

Of the eight applications to the value of R144.1 million approved by the Hortfin board, six are within the pome and stone fruit industry.

The applications are spread across the value chain, ranging from pallet manufacturing, fruit tree nurseries, expanding primary production and the expansion of cold storage and packing capacity.

Bursaries: Over the last seven years, R8 million was spent on 179 undergraduate students through the industry transformation funding: 349 post-graduates and 21 post-doctorates were supported with R23.3 million.

Land Development Support Funding (LDS) in partnership with the Department of Rural Development and Land Reform - R4.5 million has been allocated to the to deciduous fruit farmers in the Western Cape.

Fruit Workers Development Trust -

The total dividends paid to 1 500 workers over the last five years is R6.1 million. A dividend of R1.2 million was declared for the 2020/21 financial year.

Under the Commodity Approach (2011 to current)

- A formalised PPP between the Western Cape Department of Agriculture (WCDOA), Directorate Farmer Support and Development, and Hortgro:

The DFPT administered and implemented R208.1 million in

collaboration with the WCDOA (60% of these funds were spent on 100% black-owned entities and 40% on shared equity).



Nog 'n area wat spesifieke aandag via VrugteSA gekry het, was, deelname aan "Agri and Agri-Processing Master Plan" (AAMP) se proses waar ons as deel van die tuinboubedrywe daadwerklik insette gegee het om bepaalde kwessies in die waarde-ketting aan te spreek. Ons uitgangspunt was (en is) dat dit nie nodig is om die spreekwoordelike wiel te herontwerp nie. Na ons mening is daar oorgenoeg planne en strategieë – soos die nasionale ontwikkelingsplan, die sektorplan vir landbou en verskeie ander raamwerke veral binne die departemente van landbou en handel en nywerheid. Hierdie implementering het tot dusver grootliks agterweë gebly.

A Social Accord has also finally been accepted within the Fruit Industry Value Chain Roundtable (FIVCRT) process by the social partners – governments, business, labour and communities. In essence this Accord encapsulates the commitment of the various role players to work collectively towards a better outcome for all. In short, what is intended in terms of the AAMP.

DFPT Finance: statutory levies 1 October 2020 - 30 September 2021

Pome fruit (per kg)		
FRUIT	STD LEVY *	EXPORT MDL
Apples	R0.053	R0.0100
Pears	R0.053	R0.0100

(No local MDL payable. only standard levy payable on local volumes)

Stone fruit (per kg)			
FRUIT	STD LEVY *	EXPORT MDL	LOCAL MDL
Apples	R0.210	R0.110	-
Nectarines	R0.134	R0.222	R0.045
Peaches	R0.134	R0.222	R0.045
Plums/prunes	R0.1750	R0.106	R0.0210

*Domestic, exports and imports

Processing (per ton)	
FRUIT	STD LEVY *
Juice (Apples)	R9.70

What a game changer and fresh breath of air such implementation will be! Actions that will heartily and enthusiastically be supported by Hortgro to assist in thinking and doing differently via sustained Public Private Partnerships (PPP's).

Benewens die administrasie en aanwending van bedryfsheffings waaroor deurlopend aan die verskillende produsenterade en fokusgroepe verslag gedoen en deur hulle goedgekeur word, het Hortgro weereens verskillende toelaes en gebruikerbetaaldedienste bestuur. Waar hierdie dienste en funksies slegs kern- en steenvrugte raak, word dit binne Hortgro en sy substrukture hanteer, maar waar dit ook ander belangegroepe soos die inmaak- en wingerdbedryf (tafel- en droogdruive) insluit, word dit in entiteite soos Suid-Afrikaanse Plantverbeteringsorganisasie (SAPO), Culdevco, FruitFly Africa (FFA), Tissue Culture Facility (TCF) en die SA Vrugtejoernaal hanteer en uitgevoer. Inligting oor die aktiwiteite van hierdie entiteite word later in die verslag gerapporteer.

(Was 0.0285, but changed due to Covid-19.)



TRANSFORMATION PLEDGE

We the undersigned, being the creators and custodians of the **DFI Transformation Alignment Initiative**, do hereby pledge our individual and collective support for the Transformation Vision and Mission that was unanimously agreed to:

“A globally competitive, equitable, unified and economically transformed Deciduous Fruit Industry”.

Thembi Xaba

Angelo Petersen

Anton Rabe

Mariette Kotze

Andre Smit

Job Mthombeni

Ismail Motala

Uthmaan Rhoda

Elton Jeffthas

Nicholas Dicey

Lien Visagie

Mono Mashaba

Bongani Ndimba

Ricardo du Preez

Stephen Rabe

Pitso Sekhoto

Z.T. Nkosi

Zodwa Nkosi

signed
October 2020



HORTGRO
Growing Fruit IQ

CHAPTER 2 | PRINCIPAL MEMBERS

Chairman's report

NICHOLAS DICEY | Hortgro Pome Chairman

Apple and pear producers can look back to a highly satisfying production season with record volumes of both fruits being produced and exported during the past year. Improved climatic conditions, world class production practices and increased yields from existing and newly planted orchards saw 1.1 million tons of apples and 475K tons of pears produced. An increase of 18% and 5% respectively from the 2020 season.

The positive sentiment experienced on the production front was somewhat negated by the turmoil caused on the logistics front. Changing world trading patterns led to a shortage of containers. Shipping opportunities on more profitable routes left exporters scrambling to find timeous opportunities to export produce to international destinations. Pressure on the South African logistic system also added to this unfavourable physical trading environment, but continuous engagement and monitoring between the related fruit industries' structures and state entities ensured that they were addressed in a more workable manner. Engagements will remain a high priority and will continue to ensure improved efficiencies and the pro-active management of risks on the logistics front.

Market retention and access to new markets, coupled with improving ease of doing business, also remain key focus points for Hortgro Pome. The increased production that we are seeing in our pome industry requires new markets to

be opened and trade barriers to be eased while trade constraints need to be addressed by the responsible authorities. Without this new market access, future growth and the related spinoffs to filter down into our country's economy will be stunted. The Trade and Market access budget has also been realigned to focus more on the new markets (China, India and Africa) rather than the traditional markets such as the UK and Germany.

Daar is toenemende druk op die privaatsektor om funksies wat voorheen deur die staat gedoen is, oor te neem en word deur Hortgro Pome bestuur. Marktoegang, die behoud van bestaande markte, navorsing, en transformasie is van die groot fokus-areas wat addisionele insette en uitgawes verg om te verseker dat die appel- en peerbedryf kompetender in die wêreldmark bly. Baie van die kwessies bly egter die staat se verantwoordelikheid, derhalwe word 'n toenemende gedeelte van die begroting gebruik om basiese funksies te onderneem.

Die 2021/22-seisoen is die derde jaar van die bedryf se huidige vier-jaar heffingsiklus. Dit is verblydend dat besparings in die vorige twee jaar en die rekordoste dit moontlik kon maak om die heffing op dieselfde vlak as die 2019/20-seisoen te hou. Hierdie is ten spyte van die kostedruk op produsente. Volgehoue pogings word gemaak om maksimum waarde vir produsente te bied vir die heffing wat hulle moet betaal.

The devastation caused by the ongoing Covid-19 pandemic will be felt for many years to come and we continue to operate in an environment of hybrid meetings, limited travel, virtual trade shows, and what is commonly referred to as "the new norm." Notwithstanding the disruption caused by the pandemic, the South African pome industry has shown its resilience and adaptability in ensuring

"Without new market access opportunities, future economic growth will be stunted."

the wellbeing of its stakeholders while continuing to provide healthy food to a global market.

The Hortgro Pome board and producer councils functioned highly efficiently with hybrid meetings being held throughout 2020. As vaccinations roll out, we expect to move back to physical meetings. The enthusiasm shown during the first face-to-face meetings was noticeable, indicating that interaction between individuals was sorely missed during the course of the pandemic. The Hortgro Pome Council and various advisory boards must be thanked and commended for their time and effort and the continuous role that they play in ensuring that our industry follows the correct strategic direction.

Operationally, Anton Rabe and his team were once again on point in managing and running an organization that is highly appreciated locally and highly respected and envied internationally. The challenging environment that all the personnel operated in in the past year is greatly appreciated and commendable.

Although the South African apple and pear industry is faced with many challenges, I believe we are also an industry filled with many opportunities and blessings. As we head into the new season, I trust we will count our many blessings while we address the challenges – as we have done in the past.

I wish you all a productive and fruitful 2022 season.



Voorsittersverslag

ANDRÉ SMIT | Hortgro Stone Voorsitter

Good winter rains in most production regions, together with good winter chill and moderate spring conditions contributed to better overall fruit set of all stone fruit commodities during 2020. All fruit types registered record export volumes except apricots, which mostly returned to pre-drought levels. Unfortunately drought conditions continued in some areas in the Little Karoo and the Langkloof.

The South African stone fruit growers, packers and exporters remain committed to supplying consumers with excellent quality and great tasting products. The logistics chain, especially shipments from Cape Town, also proved very challenging with container shortages and equipment limitations causing delays. The plum exports were disrupted and that had a negative impact on producer returns.

Steps have been taken for better coordination between the various fruit industry bodies, packers, cold stores, Portnet, shippers and logistical service providers. Weekly meetings are now taking place to collectively and pro-actively deal with these issues.

Vermarmering het die laaste paar jaar onder veral pruipe voorgekom en het navorsers en produsente aanvanklik laat kopkrap, voordat 'n viroïed as oorsaak geïdentifiseer is. Vermarmerde vrugte presenteer met ligter en donkerder kolle op die skil, terwyl verkurking

van die vleis ook kan voorkom. Droë oneetbare vlees en vertraagde rypwording kom algemeen voor. Gepaste stappe is geneem om produsente teen die risiko van besmette materiaal te beskerm terwyl meer koste-effektiewe toetse ook ontwikkel is.

Produsente wat steeds vermoed hulle bome is met die viroïed besmet, word aangemoedig om so gou moontlik die bome te laat toets. SAPO kan in die verband 'n diens lewer. Produsente word ook aangemoedig om nuwe aanplantings met bome te doen wat aan Plant SA se bloukaartjie-sertifisering voldoen. Dit beteken dat die bome gemaak is van bronmateriaal wat negatief toets vir 'n verskeidenheid virusse en ander siektes. Alhoewel dit nie 100% kan waarborg dat elke enkele boom skoon is nie, sal dit wel die risiko van besmette bome tot 'n groot mate beperk.

Over the past five years, the most significant growth in export volumes has been brought about by an increase in production per ha due to better cultivar genetics as well as production technology. Plums and nectarines have been the biggest winners in this respect. The projections for plums and nectarines stabilising with continued

“I find it ironic that customers are constantly pushing suppliers for things they expect free of charge such as environmental sustainability while offering a financially unsustainable price. Now more than ever we need customers and suppliers to work together. Customers to accept costs are up across the card and suppliers to push for fair and reasonable price increases.”

– Excerpt from an article in the *Fresh Produce Journal* of 15 September 2021.



upward curve that should bring us to the 17 million cartons of plums within the next five years. Nectarines grew from four million export cartons in 2018/19 to an estimated 7.1 million for this year.

This will put access to new markets under pressure but also create a valuable opportunity for the industry to cement its ability as the dominant supplier to our traditional UK and EU markets as well as being very competitive in the Near and Far East. The importance of this sector as a strategic asset in job creation as well as contributing to foreign income cannot be overlooked.

As an industry we remain committed to the economic transformation of our sector, although we acknowledge that new entrants face many challenges such as access to new markets and inflation.

Given the high increases of key inputs, services and wages, a renewed focus on break-even price points have been communicated to the trade. It is vital that the trade and consumers understand that producers are under immense financial pressure and that price levels for all product lines must increase substantially. What should have been an exceptional season for growers turned into the exact opposite with plum returns per carton that were 30-40% lower during the 2020/21 season compared to the previous year.

Cost increases this coming season looks as follows:

- Sea freight: +30-50%
- UK haulage: 40%
- Fertilizer and crop protection: +20-30 %
- Electricity: +16 %
- Wages: +15 %
- Packaging: +10-15%

CHAPTER 3 - HORTGRO SERVICES

Management and Administration

LOUIS VAN ZYL | Hortgro General Manager

Since its inception in 2005, Hortgro has been providing a range of supporting functions, including financial and administrative services, to a number of horticultural industry structures.

The number of entities that Hortgro services, has since grown to 31 legal entities:

Hortgro Pome, Hortgro Stone, FruitFly Africa, SA Plant Improvement Organisation (SAPO), Deciduous Fruit Producer's Trust (DFPT), Fruit Workers Development Trust (FWDT), SA Fruit Journal, the Deciduous Fruit Industry Development Trust (DFIDT), Culdevco and Hortfin.

Cherries and Dried Tree Fruit have been fully integrated into Hortgro Stone and Hortgro Pome, respectively. Hortgro has also been contracted to provide support services to a range of alternative crops such as Cape flora, figs, pecan nuts and pomegranates, cultivar focus groups such as SA Pink Lady, International Prune Association, Greenstar-Kanzi and the Forelle producer group, as well as the SA Fruit and Vegetable Canners Association, Sustainable Initiative of SA (SIZA), and more recently the Tissue Culture Facility.

Hortgro administers various statutory measures as approved via the National Agricultural Marketing Council (NAMC) in terms of the Agricultural Products Marketing Act and collects statutory levies on behalf of the following organisations:

Hortgro Pome, Hortgro Stone, Fruit Fly Africa, Cape Flora SA, Pomegranate Association of SA

and SA Pecan Producers' Association. Levies are ring-fenced within dedicated accounts for every entity and accounted for to both the NAMC and the Auditor-General. In addition, Hortgro also invoices and collects payment for various user-pay industry services as provided by some of the entities listed above.

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

- The Treasury's Jobs Fund project in conjunction with contributions from the industry (including Vinpro and SATI) and the Land Bank – better known as Hortfin being a R600 million loan funding project.
- The US Department of Agriculture's Agriculture, Plant Health Inspection Services (USDA APHIS) for the pre-clearance programmes for citrus and deciduous fruit.
- The Alternative Crops Fund of the Western Cape Department of Agriculture in support of emerging horticultural industries.

Administratiewe steundienste en -funksies, insluitende menslikehulpbrondienste en salaris-administrasie, word ook aan die verskillende departemente binne Hortgro en die meeste van die aangeduide strukture, voorsien.

In totaal het Hortgro +R345 miljoen (waarvan R102 935 314 statutêre heffings) die afgelope jaar geadministreer.

Human resources

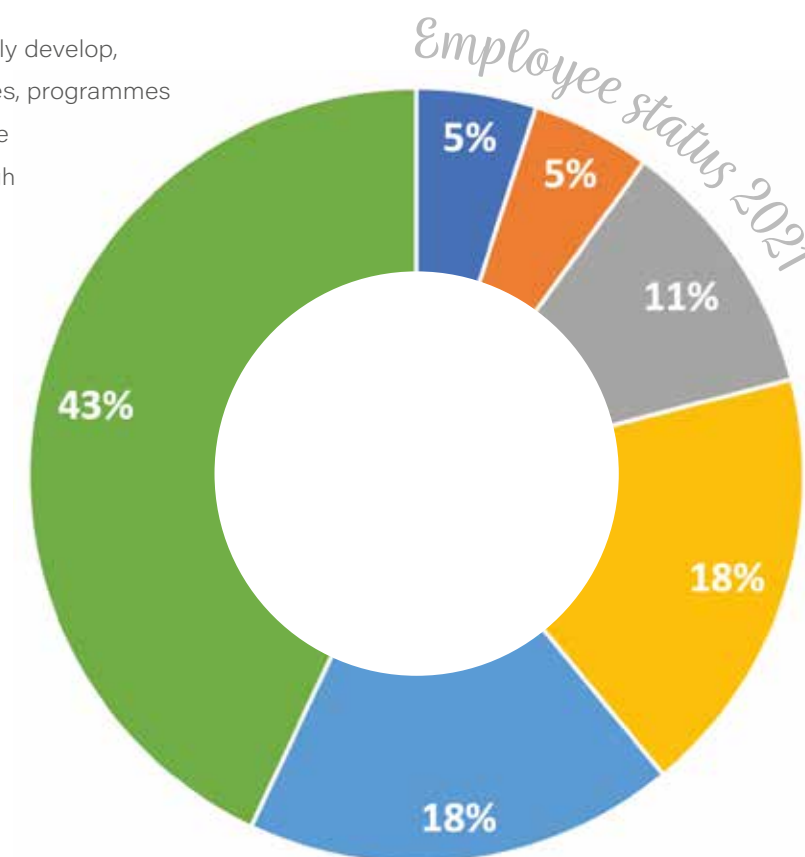
2021 proved to be yet another challenging year for the Human Resources (HR) department. As remote working and virtual meetings became the norm, and employees moved in and out of quarantine/isolation, our focus shifted to employee wellness. The HR department proactively provided support not only on a professional level, but also on a personal level. Many of our employees fought Covid-19, lost loved ones and for some, life will never be the same. As part of our role, we ensured that HR is aware of the challenges our employees are facing and thus providing sufficient support. Both physical and mental health issues will be an ongoing concern and we are dedicated to try and provide extra support.

Our core function is to effectively develop, establish and maintain HR policies, programmes and procedures that maximise the efficiency of the workforce through various HR functions including: recruitment, employee wellness, skills development, employee development and compliance to statutory requirements.



Workforce Planning and training

- We have two interns and appointed four new employees of which two were newly created positions.
- We continue to promote a culture of learning by encouraging employees to stay abreast with new developments in their respective fields. By empowering our employees we make sure they are able to adapt to change and develop resilience in the workplace.



Communications

ELISE-MARIE STEENKAMP | Group Manager

“The truly genuine problem ... does not consist of proving something false but in proving that the authentic object is authentic.”

These words by Umberto Eco encapsulate one of the biggest challenges that communication practitioners worldwide face today, namely misinformation, disinformation, manipulation of data, presentation of half-facts, and the deconstruction of context.

Negotiating the second year of the coronavirus pandemic was in no way easier than the first. According to mental health workers, a secondary pandemic, namely a mental health pandemic, is sweeping the world as people everywhere try to make sense of how to live and work in the time of Covid.

At Hortgro's Communications Department (HCD) our output goals regarding Covid misinformation were aimed at updating and supporting the industry value-chain with critical business information, while also debunking myths and rumours. During an unfolding pandemic, it is quite difficult to keep up with the latest data and research as it changes almost daily. Often, the information that was gospel last week, was inaccurate by the next.

Where did the information come from? Who said what, where?

What is their agenda?

This in itself, and what psychologist Steven Pinker calls the “curse of knowledge” combined with the general public's lack of understanding of how research works, created fertile soil for agents provocateur that deliberately pushed their own ideological (and political and financial) agendas, especially on social media. Thus creating confusion and a big challenge to remain relevant and credible as an information source.

In an effort not to overwhelm producers with information, the Covid Communiques continued as and when necessary using the most reliable information available. Several webinars were

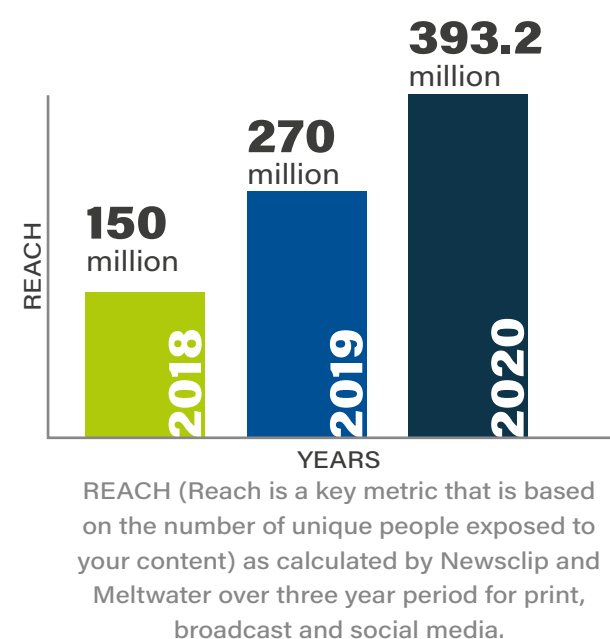
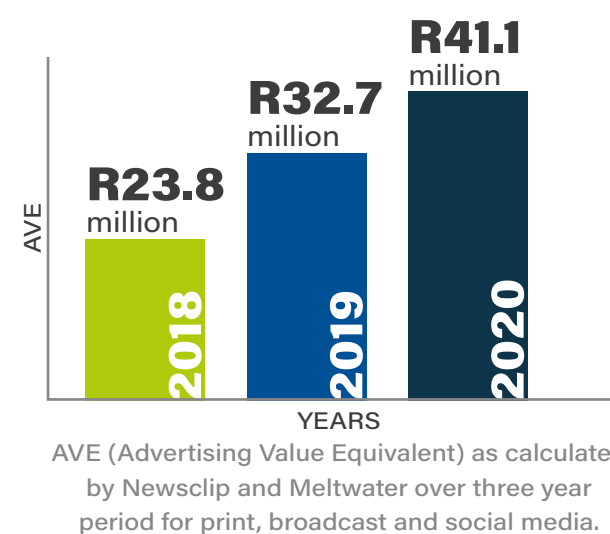


held that addressed business problems as they arose, including giving attention to difficult topics such as mental health in the workplace, vaccination protocols and related legal compliance information. HCD also represented the industry on various provincial and national forums, strategic communication and advisory groups in this regard.

Afgesien van disinformasie, was kuberterrorisme en die beskerming van persoonlike inligting, nog uitdagings waarmee Hortgro vanjaar moes stoei. Met die nuwe Wet op Beskerming van Persoonlike Inligting het die kommunikasie-span nou saam met 'n regsadviseur en ander afdelings binne Hortgro gewerk, om seker te maak dat aan alle wetgewingsvereistes voldoen word. Ons wil u dus die versekering gee dat u persoonlike data 'n hoë prioriteit is wat ten alle koste beskerm sal word.

In an effort to properly manage what we do, a communications audit was carried out over the past year. The HCD is happy to report an impressive growth trajectory over the past three years as the audit illustrated many successes aligned with strategic goals, but at the same time also scope for growth.

Within the Deciduous Fruit Industry structure, the HCD with the help of the Deciduous Fruit Development Chamber, extra energy was channelled to communication actions relating to transformation. Actions focussed on creating relevant content to be used on various platforms and in so doing reaching different stakeholder groupings. The DFDC's



newsletter, *The Transformation Times*, is at the time of writing this annual review, in production for its 10th edition and has matured into a source document that the industry is proud to share. The DFDC's website was rejuvenated and integrated with the suit of Hortgro's social media platforms. The end of the Jobs Fund Project was celebrated by stakeholders and dignitaries at an event in May, and captured with a video series and articles. We are excited about the year ahead with many new ideas that will showcase the economic transformation of the industry.

Ander glansgeleenthede wat vanjaar gevier is, was die 1662 Toekenning wat vanjaar gesamentlik aan Buks Nel en Henk Griessel

gemaak is vir hulle buitengewone ywer en toewyding om die geskiedenis van die kernvrugbedryf in Suid-Afrika vas te vang. Die 46ste Sagtevrugtebedryfstoeënning is in September op die plaas Bernheim, buite Paarl gehou. Te midde van die derde Covid-golf het die gewone glansryke aandfunksie vanjaar plek gemaak vir 'n statige middaggeselligheid. Die sagtevrugtebedryfstoeënning gee jaarliks erkenning aan 'n verskeidenheid van individue in die landbousektor, soos landbouwerkers, navorsers, wetenskaplikes en bedryfsleiers.

“Die toekenning motiveer en inspireer mense om hulle doelwitte na te streef en help om 'n bedryf te bou wat 'n belangrike speler in die internasionale vrugtearena is,” aldus Jacques Jordaan, voorsitter van die sagtevrugtebedryf se toekenningskomitee.

Nog 'n geleentheid wat die landbou-moraal letterlik en figuurlik nuwe hoogte laat bereik, is Agri's Got Talent (AGT).

Historically the South African agricultural sector carries a heavy burden and often gets media attention for all the wrong reasons. Against this backdrop, AGT stands firm as a beacon of the human spirit and celebrates people for the fact that they are also mothers, fathers, daughters, sons, part of a community, immensely talented, and also creating an opportunity to have their voices heard.

Due to the Covid-pandemic, the final event was, for the first time ever, live-streamed via social media platforms and saw the finalists bravely battle it out.

Faith Nogemane, a general worker from Wildekrans Wine Estate, Botriver became the eighth AGT winner, with Ronel Radloff from Diemersfontein, Wellington second, and Jack Jonas, from CRI Citrus Foundation Block, Uitenhage, in third place.

Apart from the singing competition, AGT is also a social development programme for agricultural workers in the fruit and wine industries (read more about AGT on page 39).

Met Covid-regulasies wat streng beperkings gestel het op die rondbeweeg van mense en die hou van geleenthede, het die kommunikasiespan baie energie ingesit in webinare. Saam met die Hortgro Science-span (sien bladsy 28) is verskeie relevante, tegniese inligting op dié en ander maniere gedeel. Die registrasie- en bywoningsyfers was oor die algemeen uitstekend, en wys waar en oor wat daar behoefte is. Verskeie besoeke is ook landswyd gebring wat geleenthede geskep het om die sagtevrugtebedryf in die Oos-Kaap, Vrystaat en Limpopo te belig.

Onwards and upwards

In a world where reality is being challenged we have to keep asking questions and not accept anything at face value. Where did the information come from? Who said what, where? What is their agenda?

At the same time let us not lose our sense of wonder at this remarkable world we live in. In the words of Tim Harford: "Let's peer beneath the surface of things, be curious about what we do and who we are and where we are going." That in a nutshell is what HCD aims for—to ignite the spark of curiosity by using story-telling, humour, and truths to communicate with our diverse groups of stakeholders and sustain our producers to stay ahead in the game. And with the guidance of the Hortgro Board and our producers, hopefully, we can achieve this.



2020/21 Events

 **Hortgro Science Plum Bloom Webinar**
06-Oct-20
Zoom attendance - **78**

 **Hortgro Science CA Meeting**
03-Nov-20
Zoom attendance - **116**
YouTube views - **153**

 **Hortgro Science Plum Marbling Webinar**
25-Jan-21
Zoom attendance - **60**

 **Hortgro National Minimum Wage Webinar**
16-Feb-21
Zoom attendance - **127**

 **Hortgro Science Provar Pome Fruit Exhibitions**
12-Mar-21
30 and 31-Mar-21
Grabouw and Ceres
Attendance - **105**

 **Hortgro Science Best practice protocol for preventing internal browning in Cripps Pink**
6-Apr-21
Zoom attendance - **75**
YouTube views - **116**

 **Hortgro Hortgro 1662 Industry Award**
16-Apr-21
Somerset West
Attendance - **42**

 **Hortgro Jobsfund Closing Ceremony**
22-Apr-21
Grabouw
Attendance - **43**

 **Hortgro Science CA Engineers Meeting**
25-May-21
Zoom attendance - **68**
YouTube views - **68**

 **Hortgro Science Provar Pome Fruit Exhibitions**
18-May-21
Misgund
Attendance - **54**

 **Hortgro Science Symposium Webinar Series**
1-3-Jun-21
The various chill models and how well (or not) they fit South African conditions
Zoom attendance - **167** | YouTube views - **145**
 How climate change may affect RSA deciduous fruit cultivation in future
Zoom attendance - **229** | YouTube views - **109**
The effects of fixed nets on deciduous crops and best practice installation guidelines
Zoom attendance - **246** | YouTube views - **165**

 **Hortgro Covid-19: The myths, the facts and the vaccine**
9-Jun-21
Zoom attendance - **82**
YouTube views - **183**

 **Hortgro Deciduous Fruit Industry Gala Awards**
17-Sept-21
Paarl
Attendance - **50**

 **Hortgro Dried Tree Fruit and Canning Producer Information Day**
18-Aug-21
Zoom attendance - **109**
YouTube views - **35**

 **Hortgro Covid-19: Sick leave and vaccinations in the workplace**
23-Sept-21
Zoom attendance - **136**

 **Hortgro Agri's Got Talent**
26-Sept-21
Zoom attendance - **50**
YouTube views - **67**
 Facebook views - **2077**

Hortgro Technical

HUGH CAMPBELL | General Manager

A Hortgro Technical Coordinating Committee (HTCC) has been created to provide strategic direction and support in all technical aspects to Hortgro and is charged with the key responsibility to coordinate and align technical activities of Hortgro Pome and Stone across the different entities where Hortgro has a direct and indirect interest.

The General Manager of Hortgro Technical, as the custodian, is charged with providing strategic leadership and coordination and should act as a link between the different technical entities servicing the pome and stone fruit industries. Prof Wiehann Steyn has taken over the role of General Manager of Hortgro Science and along with Plant Material Management will fall under Hortgro Technical portfolio where other production and technical related industry services will also be included in periodic review of functions and services.

The HTCC is scheduled to meet twice a year. The following diagram is a representation of the different technical entities involved.

Plant material management

Hortgro identified the need to have greater focus on all aspects of plant material to ensure the best

quality material is available for replacement and new plantings. To do this, it was necessary to have a person in place to coordinate and drive all aspects associated with plant material as many of these aspects are managed through separate organisations.

Hugh Campbell will play the dual role of General Manager of Hortgro Technical and Manager of Plant Material Management.

Access to cultivars of choice is a key driver of all growers – large and small. It is the objective of plant material management to enhance and facilitate this dynamic environment to maximise access to cultivars and where there is a collective need, to put mechanisms in place to address those needs without interfering in commercial initiatives.

Hortgro Pome and Hortgro Stone have supported the creation of five pome and six stone fruit evaluation sites in the different regions of South Africa. These ProHort sites are managed by Provar and enable the independent evaluation of

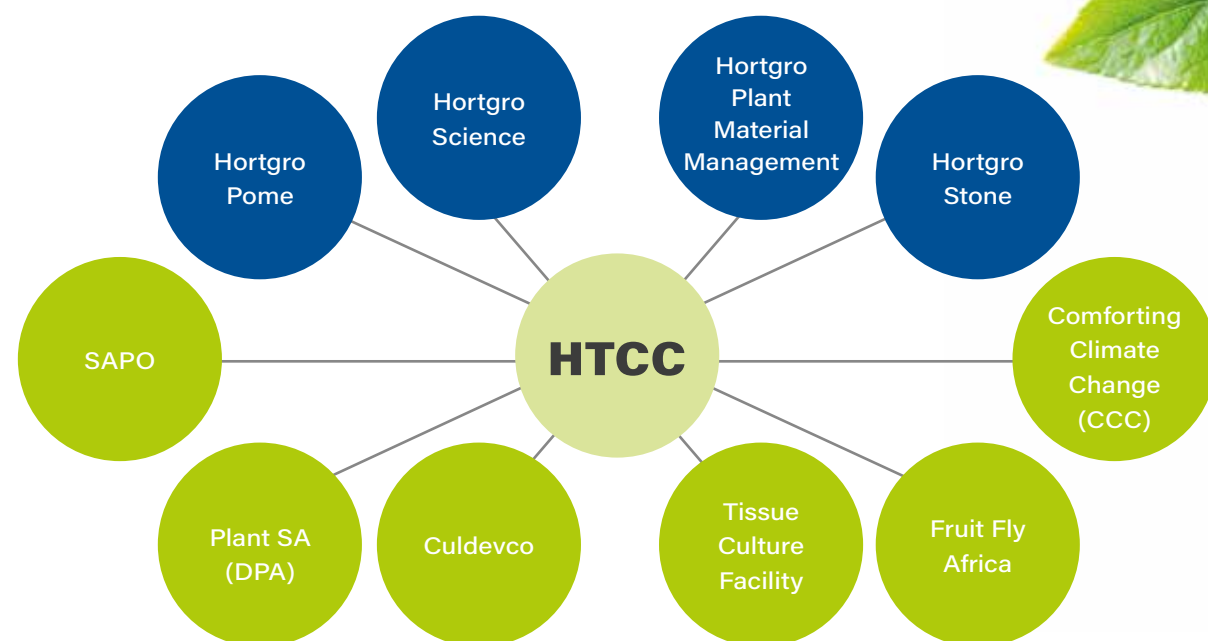
imported and local cultivars. We believe that these sites and the independent evaluation conducted by Provar will add great value to growers and will assist them in their decision-making relating to the planting of new cultivars. We

request growers to actively support this initiative by demanding that their suppliers have proper, relevant and independently verified data before they plant new cultivars.

Nursery tree quality is another aspect that has elicited a lot of emotion over the years. The industries' role in this environment is through the Deciduous Fruit Plant Improvement Association (DPA) where it is represented on the board and various advisory committees. Hortgro Pome is represented by Angelique Pretorius and Hortgro Stone has Dana Morkel as its representative. Hugh Campbell is an additional member and chairs the Technical Committee which advises the board. Plant SA administers the certification scheme on behalf of the deciduous fruit industry.

At a recent strategy meeting called by Hortgro in August 2021, there was a confirmation of the need to have a plant certification scheme in place but there was also a call to make better use of available technology to raise the level of testing of plant material. The DPA sets the minimum standards for the scheme. Currently, only 49% of plant material that is sold is certified.

Mechanisms are being pursued to increase this percentage substantially. SAPO as the industry-owned Plant Improvement Organisation (PIO) has a pivotal role in the supply of certified budwood to the nurseries that make the trees that growers buy. The SAPO business model is currently being reviewed to ensure it remains financially viable in the changed environment it has to operate in. SAPO has reported on its operational activities elsewhere in this annual review.





Hortgro Science

WIEHANN STEYN | General Manager

Hortgro Science is guided in its strategies and operations by the Hortgro Science Advisory Council that reports to the Hortgro Board as well as the Hortgro Pome and Stone Boards, and Producer Councils, respectively. The Hortgro Science Advisory Council members are Stephen Rabe (Chairman), Grant Smuts (Vice-chair), Linde du Toit, Frikkie Jacobs, Charl Stander, Raymond Koopstad and Wesley Hendricks. Anton Rabe (Hortgro Executive Director) and Thembi Xaba (DFDC-SA CEO) are non-voting, ex-officio members.

Research questions are identified and screened through 17 focus workgroups. The industry remains indebted to the 200 odd individuals who participate in these workgroups. The research questions form the basis of the new project proposals submitted to Hortgro and evaluated by four peer workgroups and three technical advisory committees for scientific merit and industry relevance, respectively. The workgroups and advisory committees also review the progress and final reports of each of the research projects funded by the pome and stone fruit industry. In addition, the technical advisory committees advise Hortgro Science on the dissemination of results to industry.

Covid-19 had a limited impact on research activities during the past funding cycle, aided in part by Hortgro Science migrating project management to a newly developed digital platform. The efforts of Adriaan Oelofse of Winetech, Anita van Staden of Hortgro Science and the various committee members and researchers ensured a relatively smooth transition from paper to cloud.

The digital platform enables remote reviewing of project proposals and reports, resulting in considerable time and cost-saving for all involved.

The leverage of external funding and access to government funding remains a challenge. Sixteen research facilities and private researchers were utilized to conduct 116 research projects during 2020/21 with 69% of the project budget being spent at seven departments of Stellenbosch University. We have observed an increase in multidisciplinary projects and a broadening of the research scope in alignment with our research strategy. All new projects funded during the current cycle were identified by the fruit growers, technical advisors and researchers forming part of the focus workgroups.

Research Programmes

Crop Production

The main research driver of the Crop Production Programme is to increase the production of high-quality fruit to maximise yields and profits per hectare. The main risks addressed through research are water quality and availability, climatic extremes and plant material availability and quality.

Crop Protection

The Crop Protection Programme is multidisciplinary and focuses on nematology, entomology and plant pathology. There is a strong focus on the effective management of various phytosanitary pests and diseases. A major driver is to find biological alternatives for pest and disease control, in light of the increasing market resistance to chemical use and the decreasing availability of acceptable chemical control options. Soil health is becoming an increasingly important theme. Research on plum marbling was concluded and resulted in a fast, affordable and reliable test to identify infected plant material.

Trade and Markets

JACQUES DU PREEZ | General Manager - Trade & Markets

None of us expected the rough ride we unwittingly embarked on in early 2020 would still be tumbling us around in 2021, but there is light at the end of the tunnel. An industry we have, and will hopefully continue to be, very resilient and great at managing those factors within our control. Our growers, packers and marketers are in the top category in the world despite all the inherent and unique challenges we face.

The industry continues to face unprecedented challenges on the logistical front. This is not unique to South Africa as global shipping and trade flows have been dramatically disrupted by Covid-19 and led to huge shipping increases. We expect this to remain extremely problematic for at least the

coming season. Add to that many years of neglect in terms of re-investment in infrastructure and equipment in our major ports and you have the perfect storm that has been battering us for the last 18 odd months.

It is a tragedy, specifically for plum growers, who after recovering from the drought, were let down by logistics the past season that resulted in very poor returns. Unfortunately, 2021/22 will again be a challenge that we will have to face in terms of logistics. The pome fruit industry has almost a full season behind its back of managing the new challenges while the stone fruit industry luckily missed most of the chaos of 2021. We fear that this will not be the case for 2021/22 with increased costs on various fronts pressurising producer profitability.

Public-Private Partnerships is the only solution in addressing the port inefficiencies. Without progress on this front it is difficult to see sustainable, long-term

improvements in SA's ports. Vessel and container availability will remain problematic for the near future as global shipping dynamics remains highly distorted due to the impact of the pandemic. We know what's wrong, but now we need to address it.

Die kritiese rol wat tydige en akkurate inligting speel is weereens die laaste jaar bewys. Met die stelsels wat oor jare in plek gesit is, is die bedryf in staat om produsente, bemarkers, die logistieke ketting en die markte ingelig te hou oor wat gebeur, wat gepak en wat verskeep is. Die waarde hiervan kan nie onderskat word vir doeltreffende beplanning nie.

Albeit later than normal and with more frustration than usual, all the so-called "special market programmes" (USA, Mexico, China and Taiwan) continued without inspectors from these countries travelling to SA. For the first time ever, the verification of PUC's and PHC's were conducted with Chinese officials via online engagements. SA also achieved "Country of Recognition Status" again during 2021, enabling us to continue with exports to Indonesia.

On the phytosanitary front, we have to remain extremely vigilant. The risk management systems (to the EU) we have in place for stone fruit (false codling moth and fruit fly) are under investigation as other (more risky) fruit types have had continued interceptions in the market despite the risk management system. Having said that, we had no interceptions on stone fruit during 2020/21 and will

Our growers, packers and marketers are in the top category in the world despite all the inherent and unique challenges we face.

Fresh Quarterly

The *Fresh Quarterly*, our online technical magazine, is going from strength to strength as the key vehicle to communicate research results to growers.

Hortgro research showcase and symposium

The 2021 Hortgro Science Technical Symposium did not take place due to Covid-19. However, an online symposium webinar series on the topical issues of climate change, netting and chill models was well attended. A technical symposium and a research showcase are planned for 2022.

Stone fruit App

The Stone Fruit App is currently being updated with additional cultivars, a Phytclean protocol, marbling management information and cross-pollination compatibility being added functionalities.

Fresh Notes, Timely Hints and Hortgro Science website

The Hortgro Science website is used to provide information on the research process and who is involved in the different workgroups, peer workgroups and technical advisory committees. Information and context on the different research programmes and the projects that are part of the programme are also conveyed. The Fresh Notes and the stone fruit Timely Hints can be downloaded from the website.

Postharvest

Research within this programme is aimed at ensuring that product integrity is maintained and that a quality and safe product is available to the end-consumer in local and distant markets. The programme overlaps with the other programmes in studying and finding solutions to postharvest defects and decay. Significant effort is spent on finding plastic packaging alternatives that will maintain product integrity and quality during the often long voyage to the consumer.

Capacity development

The development of the next generation of scientists and technical people who can service the industry is an important focus of the research process. Forty post-grad students were funded during 2020/21 of which there were two Honours, 23 MSc's, 10 PhDs and five Postdocs. Fifty-five percent of the students are female and 53% of the students are black. One-quarter of the research budget is directed towards funding research posts seconded to Stellenbosch University. The appointment of two applied entomology researchers and a phytosanitary facility, that will become operational during 2022, will further strengthen the capacity to deal with phytosanitary issues.



ensure that we maintain this record and prove that our system works.

Due to time-delays in government funding, the eCert (electronic phytosanitary certificates) and PhytClean (special markets orchard and packhouse registrations and risk management systems) platforms were completely understaffed and the service to growers were not close to the professional level it should have been. Funding has now been secured and the funding model adjusted that will add stability to the system and a consistent service going forward.

One of the main goals for 2021 was to regain permission to ship apples and pears to India using in-transit cold treatment. After successfully completing trial shipments four years ago, it was finally confirmed by the Indian authorities that the pome industry can return to this treatment instead of a 10-day land-based cold treatment. The official notification process is currently underway and we are hopeful that this regime for pome fruit will be available for the 2021 harvest. This will have huge cost and trade benefits.

The other main market access goal for 2021 remains access for pears to China. This has been an extremely protracted and frustrating process and we will do all in our power to achieve this milestone before the start of the 2022 season. This

will also open the way for stone fruit to initiate its market access process to China. Regaining access for apples and pears to Thailand, unfortunately, is still progressing at a snail's pace, but there is some movement for access to the Philippines.

Trade awareness and consumer education (market development) campaigns were successfully completed during 2020/21 for the following markets:

UK: apples, pears, plums, peaches, nectarines

Germany: pears, plums, peaches, nectarines, apricots

Middle East (Dubai focussed): plums, peaches, nectarines, apricots

Local market: plums, peaches, nectarines

New campaigns:

Indian: apples and pears

China: apples

The pilot campaigns launched during 2021 in India and China exceeded all expectations in terms of interest, partnerships, and volumes of pome fruit shipped to these markets.

Across all agricultural sectors we see significant increases in production and logistical costs. Buyers and final consumers of fruit will have to acknowledge the fact that the price of food (read fruit) will have to be adjusted upwards to ensure long term sustainability of the industry. We cannot accept that the inputs price goes up, but the price realised for the product does not. Without growers there will be nothing to sell. If we can get through the 2021/22 season, the worst will hopefully be behind us.



Information and Logistics

MARIETTE KOTZÉ | Group Operations Manager

Every now and then we experience certain disruptors that change the landscape within which we operate forever. It is during times like these when the value of the investment made by growers and other role-players into an organized industry body, such as Hortgro, is reconfirmed. The fourth Industrial Revolution, which until recently was only a “buzz-word”, has now become reality and is radically changing the world around us through massive and rapid technological changes and the merging of technologies driving the digitized era.

At Hortgro we strive to create and facilitate an environment where our growers can adapt to this fast-changing environment and capitalize on the opportunities presented herein and to better manage their risk. To do this, the credible, reliable and timely provision of data and information is a prerequisite. Hence, the continued emphasis on data and information management and intelligence at production, trade and marketing level to enable better decisions and strategic planning for the support and growth of our industry.

Hortgro is currently in the process of exploring means of integrating various datasets to develop a holistic information management system to increase the availability and accessibility of near real-time data. This comes with a big responsibility to each of our growers and stakeholders regarding the protection of personal information (POPI) and compliance with legislation in this regard. We have always regarded personal information with the highest level of confidentiality and have implemented additional and reasonable measures to safeguard growers against possible compromises as far as possible.

The Covid-19 pandemic has also resulted in

unprecedented increases in production and marketing related costs, coupled with rising costs in wages, electricity, fuel and chemicals. On top of these, there is the cost of compliance with stringent export requirements. All these aspects are negatively impacting the sustainability and profitability of our grower base and are hampering the inclusive transformation and growth of our industry. Hortgro, through our collaboration with Agbiz, AgriSA (and provincial bodies) FruitSA and sister fruit exporting bodies, to name but a few, will continue to address these issues at a national level in an effort to illustrate the impact on the fruit industry at large and workers, rural communities, food security and job creation specifically. Economies of scale, productivity and greater efficiencies will remain key to address the economic pressures on growers and value chain actors.

Hortgro has continued to play an instrumental role in the development of new generation farmers through various economic and socio-economic initiatives to sustainably transform the industry. To achieve this, collaboration with key stakeholders (public and private sector) remains crucial. At Hortgro we value our partners in the development process with specific reference to our commercial growers and stakeholders, Western Cape Department of Agriculture, and the Jobs Fund. Collectively these partnerships have proven themselves and are changing the narrative of economic transformation and empowerment. The various articles published to showcase the progress made is a clear testimony to that. The rate of transformation in our industry remains a challenge and therefore a key focus area within Hortgro at a primary and value chain level.



Jobs Fund

CHRISMAINE ABRAHAMS | Producer Support Programmes Manager

As things are slowly returning to the “new normal” this year, we were able to resume regular site visits to farms we support through our economic development transformation initiatives. Although the DFDC Commercialisation Programme was concluded towards the end of 2020, we still have a monitoring and evaluation role to fulfil as per our grant agreement with the Jobs Fund. Due to the lockdown restrictions that were eased, we could physically go out to the farms and engage with farmers to discuss and monitor the progress that was made given the Jobs Fund, Western Cape Department of Agriculture (WCDA) and Hortgro’s investment of R137 million.

In general the beneficiaries are performing well considering the challenges that the drought of two to three years ago and the Covid-19 pandemic presented. The majority had a good harvesting season with increased yields and income. Unfortunately three out of the seven Langkloof beneficiaries experienced a devastating hailstorm in January 2021 which resulted in over 90% loss on production. Luckily, all of them had insurance in place and could claim back a percentage of the losses that were made.

Die droogte bly maar steeds ‘n groot uitdaging vir ons Langkloof-produisente. Tans is die Haarlemdam op slegs 30% van die totale

The beneficiaries are performing well considering the challenges that the drought of two to three years ago and the Covid-19 pandemic presented.

kapasiteit. Effektiewe besproeiing in hierdie geval is krities – baie het reeds die besluit geneem om die onproduktiewe boorde te verwyder sodat daar genoeg water is vir die presterende boorde. Nog ‘n uitdaging wat in die algemeen na vore kom by al ons opkomende swart boerdery-entiteite, is die vervalle toestand van die infrastruktuur. Dit het ‘n geweldige impak op die boerdery se vermoë om effektiewe produksiebestuur uit te voer en hoë opbrengste te verseker.

The programme aimed to address this lack of production infrastructure, but the main focus was on increasing the production footprint of black producers. Funding was limited, hence orchard development was prioritised above other infrastructure requirements. It was also concluded that once the orchards start producing an income, the return on the investment could be leveraged to source alternative funding for their other capital requirements such as through Hortfin, given a somewhat stronger balance sheet. Fortunately Hortgro, the DFDC, and the WCDA committed to continue supporting these beneficiaries past the period of the Jobs Fund project. For us it is vital that viability and sustainability are encouraged on a long term basis, hence our commitment towards exploring alternative funding initiatives.

Dit is al op ‘n vorige geleentheid genoem dat sekere Jobs Fund-begunstigdes verdere finansiële ondersteuning na afloop van die projek benodig. Sommige gaan derhalwe steeds gedurende die 2021/22 finansiële jaar deur die 50 kommersiële program en die CASP-program van Wes-Kaapse departement van landbou (WKDL) befonds word. Hortgro is tans besig om hierdie befondsing te implementeer volgens die ooreenkoms met die WKDL. Nog ‘n Jobs Fund-begunstigde was suksesvol om ‘n Hortfin-lening te bekom, wat vir verdere

aanplantings, masjinerie en implemente, asook die ontwikkeling en verbetering van plaasinfrastruktuur aangewend sal word.

The 50 Commercialisation Programme from the Department of Agriculture, Land Reform and Rural Development (DALRRD) also focusses on the development of black smallholder farmers to become commercially successful. In 2020 the WCDA appointed Hortgro to implement funding allocated towards this programme. Implementation not only focusses on fruit commodities, but also some other commodities. The WCDA is a good partner and continues to commend Hortgro on the successful implementation of the DFDC Commercialisation Programme and the 50 Commercial Programme.

Although some of our farmers are still struggling with issues such as the continued drought (Langkloof) and cash flow constraints, the majority are on track to remain or become profitable businesses.



Deciduous Fruit Development Chamber

THEMBI XABA | CEO

The financial year started off with the Deciduous Fruit Industry (DFI) holding a strategy alignment session in October 2020. This session was meant to place emphasis on the economic development plans with the aim of developing an implementable, measurable and future-focused transformation strategy and plan for the DFI that is “equitable, fair and just for all”.

The two-day session resulted in the industry coming up with five goals to form the common vision. In summary, these were:

- Transformation strategy being integrated into the broader Hortgro strategy;
- Integrated multi-media communication strategy;
- Identify new and existing black agri-entrepreneurs that possess the right mind set, attitude, and entrepreneurial skills to become successful commercial farmers;
- Identify existing and new successful business models across the DFI and other value chains, abstracting guidelines and success factors that are fit for this purpose; and
- Developing a lobbying strategy and plan.

The above goals culminated in a pledge signed by all participants. The DFDC-SA had to align its strategic focus to deliver on the goals, with emphasis on identifying existing and new successful business models across the value chain.

Successes

- **An increasing number of hectares owned by black producers** – through agreements, which now has implementation plans and feasibility studies having started in Mpumalanga province.
- **Leveraging access to finance** – through implementing the Land Development Support (LDS) programme, where total disbursement of R8.4 million has been managed through the DFDC-SA as commodity partner to DALRRD.
- **A deal pipeline for production finance** in excess of R40 million has been approved, which is tied with a guaranteed funding of R60 million (totalling R100 million funding solution).
- **Branding** – transformation initiatives communicated through roadshows, radio broadcasts and the quarterly issue of *Transformation Times*. This communication shift has strengthened the brand of the deciduous fruit industry with stakeholders and, importantly, funders.

On the strategic partnership front, over and above concluding a memorandum of agreement (MOA) with the Free State Department of Agriculture, it was reported in the last Annual Review that engagements are at the final stage with Joe Gqabi Development Agency (JoGEDA). The MOA has since been signed with JoGEDA and budget allocation is now in the expenditure phase as the ARC will commission the farm assessment for the stone fruit development in Senqu Municipality, in October 2021.

Training and capacity building

The focus was to empower producers on entrepreneurship while also strengthening compliance to labour-related legislation and access to markets. Training was delivered on the Labour Relations Act (66 of 1995), Basic Conditions

of Employment Act (75 of 1997), Employment Equity Act (55 of 1998), and Occupational Health and Safety Act. The latter Act was found to be more relevant as producers needed to align with Covid-19 regulations and safety in the workplace.

On access to markets, Fresh Produce Exporters' Forum (FPEF), through AgriSETA funding, coordinated training on Export Value Chain training (top of the class). The National Agricultural Marketing Council workshopped producers on African Continental Free Trade Agreement (AfCFTA) and trade opportunities linked to the African continent.

Challenges

We have witnessed political changes in some of the provincial governments and the impact it has on rolling out approved plans. There is appreciation that moving forward, economic development support initiatives should not have too much reliance on government but rather a combination of both government and private sector investment.

In conclusion, as we start the 2022 financial year, there is an investment appetite, with prospective funding opportunities and tailor-made funding solutions for deciduous fruit producers.



Corporate Social Investment

ASTRID ARENDSE | Human Resources

Undergraduate bursary programme

The Hortgro undergraduate bursary programme has 16 students currently enrolled for various agricultural qualifications namely, Horticulture, Plant Pathology, Soil Science and Agricultural Economics. Our students are registered at institutions across South Africa including Stellenbosch University, Northwest University, University of the Free State, Potchefstroom College of Agriculture and Elsenburg Agricultural Training Institute. Most of these students hail from previously disadvantaged groups with 75% of our students being young women with a passion for Agriculture.

The undergraduate bursary fund for 2021 is R 1 million received from Hortgro Pome, Hortgro Stone and augmented by the Agriseta.

Ons studente gaan steeds gebuk onder die uitdagings rondom die Covid-19 pandemie en moes die laaste twee jaar aanpas by 'n vinnig veranderende omgewing en nuwe maniere van studeer aanleer. Ons is met reg trots op ons studente wat steeds floreer in hierdie onsekere tye.

Mentor- en internskapprogram

Die Hortgro Mentorskapsprogram bestaan tans uit 30 interns wat hul Internskappe voltooi by verskeie produsente en pakhuse. Hierdie interns is studente wat praktiese ondervinding moet opdoen as deel van hul kwalifikasie, asook gegradueerdes wat vir die eerste keer toetree tot die werksmag.

Tydens die internskap word die student blootgestel aan praktiese werk en kry die geleentheid om die teorie wat hul tydens hul kursus geleer, toe te pas. Verskeie van die interns word na hul internskap permanente

posisies aangebied by die pakhuis of plaas waar hul geplaas was.

Die mentorskapsprogram word gefasiliteer deur Khutsa en die fokus is om die student holisties te ontwikkel en hulle sodoende beter toe te rus met lewens-, sosiale-, interpersoonlike en kommunikasievaardighede.

Management and leadership development programme

In 2019 Hortgro, along with a discretionary grant from the Agriseta, funded the design and pilot phases of a Development Leadership Assessment Centre for Production Managers with Mazars Advisory as the service provider.

The key objectives of the intervention included the following:

- A leadership competency model, indicating the behaviours that are associated with a high performing production manager.
- A designed developmental leadership assessment centre.
- A skills audit against the behavioural competency model and a personal development plan with development objectives.

The programme is designed to target three leadership layers in agriculture namely, team leaders, production managers and farm managers and is presented in a blended approach with face-to-face and virtual facilitation. Participants have the opportunity to build networks and lifelong support systems as well as the opportunity to learn from their peers who are in similar positions as themselves.

Our first group of students completed the programme and graduated at the end of 2020. Our



2021 group is in the final stages of completing its programme.

With this leadership development programme, we hope to equip our managers and team leader with the specific tools to lead, motivate and inspire their team to increase productivity and job satisfaction.

Agri's Got Talent

Agri's Got Talent, a social upliftment project giving talented farm, packhouse and cellar workers in the fruit and wine industries the opportunity to showcase their singing and rapping talent whilst developing their personal and life skills.

Each year 10 talented agriworkers, through a selection process are chosen to form part of the AGT Top 10. The finalists come together for a week of training where they undergo voice and stage training focussing on their singing talent and preparing them for the Agris' Got Talent showcase at the end of the week. The finalist receive media training which came in handy when they were interviewed by Jason Baartman from Net 'n Bietjie Liefde who was the first runner up in the 2017 AGT final. Procure provided emotional support and life skills training with a focus on personal development and life skills.

For the second year due to the Covid-19 pandemic, we were unable to host a live show but for the

first time, the Agri's Got Talent performances were streamed live via social media, reaching more than the 500 live audience members from previous years.

Each finalist received a smartphone for virtual training by the voice coach and which enabled the AGT team to effectively communicate with them.

Faith Nogobane, a general worker from Wildekrans Wine Estate, Botrivier walked away as the winner with Ronel Radloff from Diemersfontein in Wellington in second place and Jack Jonas from CRI Citrus Foundation Block, Uitenhage in third place.

Agri's Got Talent is a beacon of hope and continues to inspire and motivate agriworkers to share and develop their talent.

AGT is a joint venture between, Hortgro, Vinpro, The South African Table Grape Association, the Citrus Growers Association and the Western Cape Department of Agriculture.

CHAPTER 4 | INDUSTRY SERVICE ENTITIES

SAPO Trust

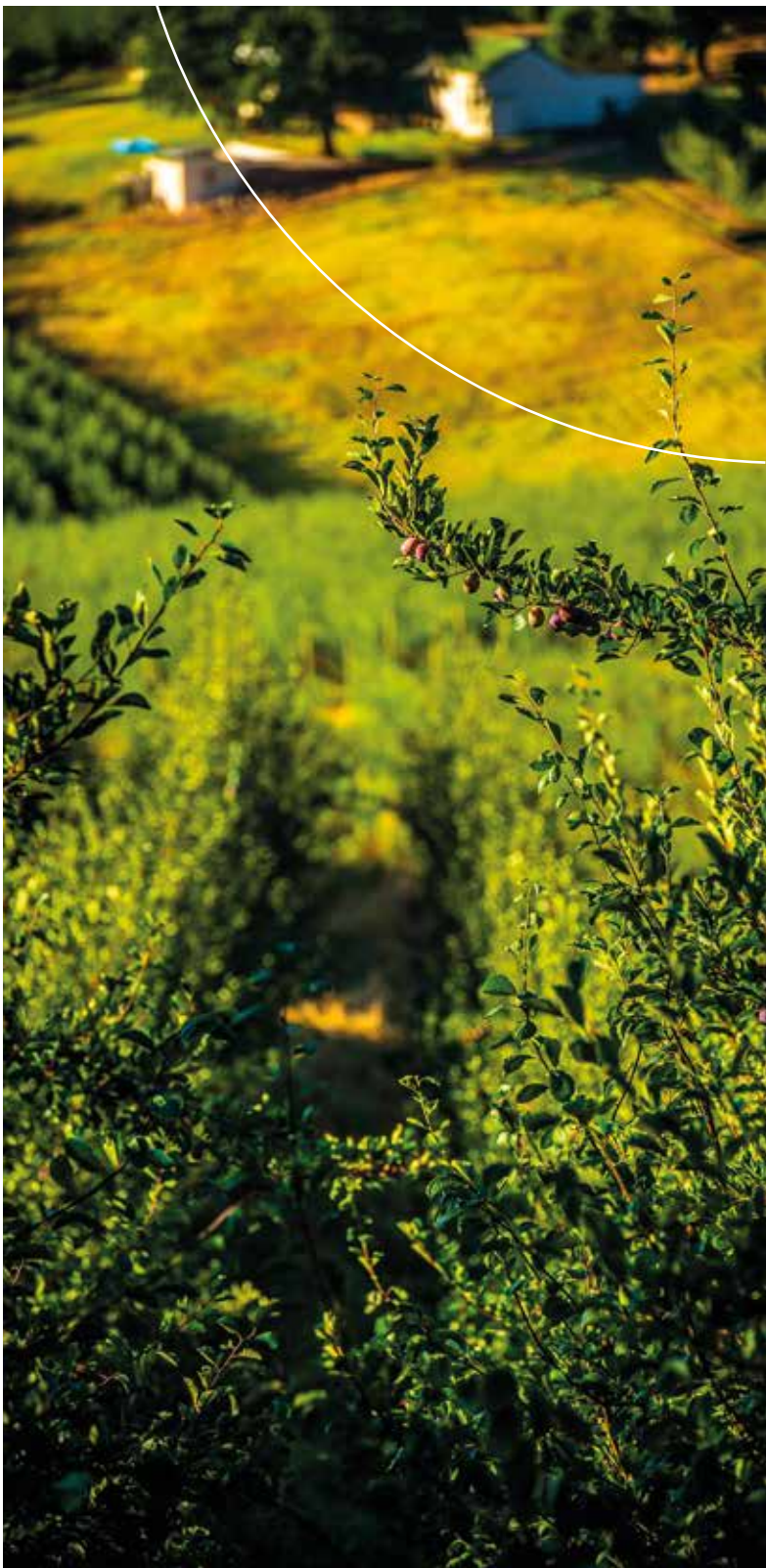
SHAWN COETZEE | CEO

Amidst a constantly evolving industry landscape, it remains important for all role players and service providers to stay relevant and to optimize their value proposition. SAPO Trust (SAPO), the official plant improvement organization of the South African deciduous fruit industry, is not immune to this process and therefore continues to move with the times in support of the pome and stone fruit producer.

During the 2020/21 season, SAPO has undergone a strategic development process to reignite its offering in pursuit of achieving world-class plant improvement services. A revised mandate is in the process to be agreed on amongst its five beneficiary organizations. Plant improvement has been reaffirmed as the main objective of SAPO to further elevate plant health, plant material quality and to ensure continued access to new plant genetics.

Notwithstanding SAPO's 46-year long experience in the field of plant improvement, SAPO is, for all practical purposes, in a phase of transition – customized service-level agreements are therefore envisaged with each of the beneficiary organizations as representative bodies of the SA producer. To further bolster SAPO's renewed plant improvement drive, new positions have been added to its business structure – a senior plant improvement manager has been appointed to lead the earmarked transition in this specialized field and a dedicated plant diseases specialist has been appointed to support the intended objectives.

SAPO's Variety Development and Intellectual Property (IP) Management service continues to reach new heights and the testing scope of its ISO 17025 accredited laboratory continues to evolve. Its Nursery Services unit, a key supplier of high-quality budwood and rootstocks to the pome-and stone fruit industries, is earmarked for a structural review following a decision



to exit the commercial nursery tree business to ensure greater impetus on critical plant improvement functions. In addition, SAPO has revitalized its website platform and continues to improve stakeholder communications through its LinkedIn platform – please follow us to obtain first-hand information on plant improvement matters, SAPO assigned scion- and rootstocks varieties, and more.

Governance

SAPO has been fortunate to have convened its full suite of board and sub-committee meetings as planned despite the Covid-19 challenges. A total of four board meetings, four audit committee meetings and two human resources committees were conducted during the 2020/21 period.

SAPO continued to ensure sound financial governance and prudent financial management practices. During the 2020/21 period, SAPO again received an unqualified (clean) audit by its external auditors, Exceed Chartered Accountants (SA). Despite not receiving any industry funding, SAPO managed to once again declare a dividend to its beneficiary organizations. A down-cycle is however projected on plant material volumes and income over the ensuing years.

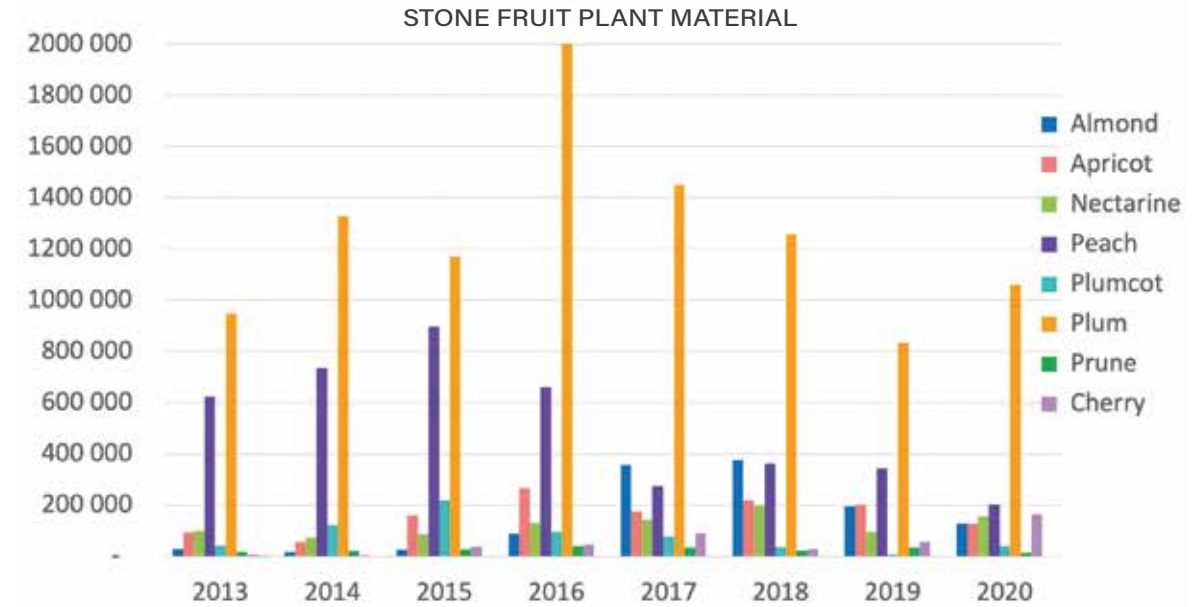
SAPO's IP management practices, in particular the administration and collection of royalties as well as the authenticity of product information channelled to and from its contracted nurseries, have also been exposed to a separate external audit – again resulting in an unqualified audit. These audit outcomes are testimony to SAPO's well-established systems. This provides continued reassurance to stakeholders, being mindful of SAPO's wide footprint across the entire South African deciduous fruit industry, the vast amount of attractive fruit varieties, and an array of customized IP contracts in line with the desires of IP owners and the SA fruit industry.

Operational highlights

Plant material supply

The demand and supply of plant material again revealed the volatile nature of the industry. An increase in stone fruit demand was experienced, whilst pome fruit demand showed a slight downward trend compared to the previous year.

The supply of stone fruit plant material to nurseries during autumn, winter and summer of 2020 increased by 7% compared to 2019. This was mainly driven by a 27% higher demand for plums compared to the previous year. The varieties which attracted the highest demand were African Delight, Ruby Sun, Fortune and Laetitia. There was also a 63% higher demand for nectarines, although from a lower base.



Graph 1. Stone fruit plant material from 2013 - 2020

Increased demands for cherries (190%) and plumcots (515%) were also observed. The demand for stone fruit over the past eight years is depicted in **Graph 1**.

The demand for pome fruit plant material decreased by 9% (apples decreasing by 6% and pears by 13% respectively) in comparison to the previous year. The highest demand was for Fuji Royal, followed by Big Bucks (Flash Gala™) and Granny Smith. The most popular pear variety for 2020/21 was the new Rosemarie selection with better colour. Other pear varieties in demand were Celina and Forelle.

Variety development and intellectual property management

SAPO's Variety Development and IP Management service has made significant strides in improving on systems, communication and aiding industry partners and clients in various capacities. Our strength lies in our dedicated team that endeavours to provide high-value services to our IP clients. Strong relationships with the Quarantine Station and Department of Agriculture, Land Reform and Rural Development (DALRRD) have proven to be invaluable in many respects, especially during the COVID-19 pandemic when services were disrupted.

On the variety development front, SAPO Trust is currently in the process of securing four new pear rootstocks and one new apple rootstock for testing and evaluation in South Africa. The testing and evaluation of new varieties is an on-going process. With a large amount of new genetics continuously flowing into the deciduous fruit space, evaluations are important. In light of this, a total of 48 pome fruit evaluations, 33 stone fruit evaluations and eight rootstock trials were undertaken. Furthermore, SAPO has received 33 new varieties from quarantine over the 2020/21 period and 10 new varieties were imported during 2021. This illustrates the efforts made by SAPO Trust to provide as many options as possible to meet the needs of the South African producers.

EVALUATIONS CONDUCTED	POME	STONE	VITIS
Rootstock trials	3	5	0
Scion evaluations			
fruit, tree and advance screening avaluation	48	33	5
Full trail evaluation	1	0	0

Pathology services

SAPO continued to strengthen its ISO 17025 accreditation status to ensure compliance with Good Laboratory Practices (GLP). An additional Technical Signatory has been endorsed by the South African National Accreditation Service (SANAS) and more tests are included in the accreditation scope. During the year under review, SAPO's pathology laboratory performed a total of 50 873 ELISA tests and 1 897 PCR tests. The number of tests is expected to increase significantly over the ensuing years to support the enhanced industry plant improvement drive.

Nursery services at a glance

The nursery produced a total of
66 254 commercial trees,
3 360 test and evaluation trees,
715 400 stone fruit rootstocks,
105 150 apple rootstocks and
117 750 pear rootstocks.

In addition, the nursery produced
around 80% of the stone fruit industry's
budwood in cooperation with SAPO
contracted stone fruit nurseries.
For pome fruit, 20% of the industry's
budwood has been produced by the
SAPO nursery.

Culdevco

LEON VON MOLLENDORFF | Manager

Stone fruit growers, especially plum growers, faced several challenges over the past five years which resulted in below cost returns and breakeven prices for many growers. These challenges, amongst others, include a severe drought, the Covid-19 pandemic, logistical threats, and increased costs.

Especially plum growers will struggle to survive if substantial price increases are not realized in both the local and overseas markets in the coming season.

The impact of these challenges also had a significant negative impact on the sales of Culdevco licensed stone fruit trees, especially plum trees. For the fourth consecutive year, a significant decrease in tree sales of Culdevco licensed cultivars was realised, which resulted in a direct and significant decrease in tree royalties. However, the total income of Culdevco increased in the 2020/21 financial year by 12% compared to the 2019/20 financial year. This increase is mainly due to increases from royalties abroad and the production royalties on new plantings that are starting to kick in. It is estimated that the total income will further increase for the 2021/22 financial year due to the reasons indicated above.

BBBEE activities

Culdevco continues to make significant progress to comply with the BBBEE requirements as

agreed in the Culdevco/ARC agreement. In this regard, about 65% of trees from Culdevco licensed cultivars were propagated by BBBEE compliant and certified nurseries. Culdevco also made financial contributions to support emerging producers to establish pome and stone fruit cultivars. Since the establishment of Culdevco in 2006, a total of 102 ha of Culdevco licensed cultivars have already been planted at BBBEE entities. During the past year Culdevco also made a bursary available for a black female student to study in Agricultural Sciences as well as funding for another black female student to gain more experience in the quality management of deciduous fruit. This support will continue for at least the next two years.

Nuwe kultivars vir toekoms

Die eerste semi-kommersiële uitvoere van 'n nuwe vroeë rooiblospeer, Cape Blush (met seleksie-nommer P07-03), is na Europese markte gestuur. Die positiewe terugvoer wat ontvang is, hou belofte in vir toekomstige Cape Blush-aanplantings.

Nog 'n nuwe pruimkultivar met seleksienommer PR06-23 het ook baie goed gevaar met die eerste semi-kommersiële uitvoere na die VK. PR06-23 het dieselfde smaakprofiel as Flavour Star, maar word alreeds in week twee in die Robertson-area ryp.

Die aanplanting van Culdevco gelisensieerde laer - / koue-behoefte-appels, brei steeds uit, veral in

die Limpopo. Die kultivars Afri Star en Afri Glo vaar besonder goed. Daar is reeds ongeveer 200 ha van dié appels in die Limpopo en sowat 300 ha in totaal in Suid-Afrika, aangeplant.

Marketing of cultivars outside South Africa

Since March 2020 when Covid-19 made international travel virtually impossible, Culdevco managed to negotiate and sign 13 new international license agreements of which only three were renewal agreements. These agreements included the commercialization of mainly lower chilling apples, table grapes and plums in France, Spain, Chile, Ecuador, Namibia, Zimbabwe and Angola. Culdevco also signed three new international lower chilling apple, table grape and pear evaluation agreements with companies in France, Tunisia and Angola.

Nadat die “Roots” projek in Namibië ‘n ooreenkoms met Culdevco in 2017 geteken het, is daar reeds sowat 15 ha laer - / koue-behoefte-appels op Stampriet, naby Mariental in Namibië geplant. Dit is ook die enigste kommersiële appels wat tot nog toe in Namibië geplant is. Die projek is daarop gemik om nie net die ekonomie van die Mariental-streek te stimuleer nie, maar om ook ander doelwitte soos die opleiding van opkomende produsente en werkskepping in die streek aan te spreek. Die eerste appelbome van

die projek wat in 2018 geplant is, het ook die afgelope seisoen begin dra en is baie positief in die vernaamste Namibiese markte ontvang. Die aanplantings op Stampriet hou groot belofte in vir verdere uitbreiding in Namibië.

The management of Culdevco wishes to thank its board members for their valuable inputs on strategic matters as well as their loyal support over the past years. Lastly, Culdevco also wishes to thank all our stone, pome, table and raisin grape growers for their continued support in planting Culdevco licensed varieties in recent years.



FruitFly Africa

GHIAN DU TOIT | Manager

By October 2020, the world has had some time to adapt to the “new world order” brought on by the coronavirus. Likewise, FruitFly Africa (FFA) has had to shift gears and tailor its processes slightly. Agriculture and industry services were in the fortunate position to operate within the ambit of “essential services” and mostly outside of the confined space of a typical office environment. Maintaining social distancing and complying with Covid restrictions are therefore easier. FFA’s day to day operation was thus minimally impacted by the Covid-19 restrictions and we were able to maintain our production levels and monitoring and release services in the various production regions. These services cover Mediterranean fruit fly (*Ceratitis capitata*), Oriental fruit fly (*Bactrocera dorsalis*), false codling moth/FCM (*Thaumatotibia leucotreta*) and mealybug (*Pseudococcidae spp.*).

Een van FFA se doelwitte is om ons voetspoor en reikwydte te vergroot deur ons dienste ook aan ander landbou-areas te bied. Met die hulp van Raisins SA en ander rolspelers het ons dit reggekry om in Januarie 2021 vir die eerste keer lugspatte te doen vir rosyntjie-produsente in die Noord-Kaap. Net meer as 17 000 ha se rosyntjies is met twee lugspatte met ‘n “kometers” van die organiese middel GF-120 bedek om vrugtevlieggetalle vas te vat. Dit, tesame met die vier lugspatte oor 4 113ha se tafeldruiwe (in November en Desember 2020), gee geweldige stukrag aan die konsep van area-wye geïntegreerde plaagbestryding in die Noord-Kaap. Die resultate was uiters bemoedigend en sal in die - / 2021/22-seisoen verder uitgebrei word. Nog, ‘n loodsprojek wat belowende resultate gelewer het, was die vrylating van steriele medvlieë in Blouputs.

The Hex River Valley remains on top of the charts (see table 1) with its 6x statutory and 6x extra aerial baitings, which covered as much as 45 348 hectares in total.

Table 1: Total hectares covered with aerial baitings.

AREA	HECTARES (LITRES GF-120)	NUMBER OF APPLICATIONS
Hex	45,348	6 (12)
Warm Bokkeveld	18,196	4
Wolseley	7,970	4 (5)
Tulbagh	7,949	5 (7)
Elgin/Grabouw (incl. H-en-A)	25,588	4 (H-en-A only 3)
Vyeboom	15,752	4
Villiersdorp	3,246	4
Langkloof	18,703	4
Orange River	16,451	4
Orange River (Raisins)	34,247	2
Breë River	2,939	4 (10)
TOTAL:	196,389	

Like trained firemen always on the lookout for the slightest hint of smoke, our FFA staff is always on high alert to identify this fly and act swiftly upon its discovery.



TOP: Jerome Johnson, production manager at the Stellenbosch facility busy checking on the development of colony larvae in larval trays.
MIDDLE: At 05:29 on November 16th, 2020, all was ready for the aerial baiting to take place on table grape vineyards. Location: 28°37'48.3"S - 20°19'07.5"E, Dundie Lodge airfield, Northern Cape. Wiebe Obbes, area co-ordinator in the Northern Cape was there to make sure everything goes according to plan.
BOTTOM: After loading the sterile male fruit flies into a custom-made container, pilots Duan Zaaiman and Jaco Vermeulen (from Ross Air) were ready for the aerial release taking place near Ceres (September 2021). Johan Claassen, area co-ordinator for the Warm Bokkeveld, Wolseley and Tulbagh areas and Ghian du Toit were there to observe.



Table 2

AREA	TOWN	CASES	DATE
Northern Cape (Orange River)	Karos	3	24 and 31 March 2021
	Upington	1	25 March 2021
	Louisvale	1	7 April 2021
Eastern Cape (Langkloof)	Haarlem	1	20 April 2020
	Louterwater	1	4 May 2020
TOTAL:		7	

The word *Bactrocera dorsalis* (Oriental fruit fly) sends a shiver down most fruit producers' spine, and unfortunately this pest is still a very real risk to our industry. Like trained firemen always on the lookout for the slightest hint of smoke, our FFA staff is always on high alert to identify this fly and act swiftly upon its discovery. On request of producers in a number of areas where this insect has not yet settled, a special area levy has been motivated to the NAMC and DALRRD which will be used in case an eradication drive is required in any of these areas. At the time of writing of this report, the application was in its final review stages at the Department.

Production of sterile male Mediterranean fruit flies (*Ceratitidis capitata*) continues to be a vital end-product and focal point for FFA with area releases being one of the pillars of a successful integrated area-wide risk mitigation approach. The importance of this programme is confirmed with more and more importing countries insisting on product from participating areas only. The requirement to issue such confirmation letters to producers and exporters, are growing annually.

Our facility complies with relevant international protocols and best practices and produces some 65 million flies per week (Summer season) and 35 million flies per week (Winter season). During the period October 2020 to May 2021, flies are air released in the Warm Bokkeveld, Wolseley, Hex River Valley, Elgin/Grabouw, and ground releases take place in Tulbagh, Vyeboom and Hemel-en-Aarde.

FFA in numbers

196 389 total hectares covered
with aerial baitings
49 722 total hectares monitored for pests
6 816 total number of insect traps
monitored weekly
41 743 total hectares of aerial releases
(of sterile male Medflies) per week
40 dedicated staff
1 supreme goal: service excellence

Thank you

Without the support, financially and otherwise, of the following groups, FruitFly Africa would not have been able to do its work:

- Department of Agriculture, Land Reform and Rural Development
- Participating Producers
 - Hortgro
 - Rainsins SA
 - SATI
- Canning Producers' Association
- ARC

Hortfin

MICHAEL BRINKHUIS | CEO

Hortfin continued its pursuit, the uniquely crafted plan by the deciduous fruit industry and its allies, to provide tailor-made funding solutions to fit the needs of the industry's "missing middle". This innovative programme is enthusiastically supported by the Jobs Fund.

Many challenges were experienced during the past year. The most significant is probably the Covid-19 pandemic and its impact on the business environment and broader economy. Hortfin managed to add to its tally of approved transactions and to date has six approved projects. This brings the total value of approved projects to R137 million. These projects range from a nursery, primary production and the value chain represented by a fruit packing and distribution business.

Die afgelope jaar se onsekere en onstabiele besigheidsomgewing het egter 'n beduidende impak gehad op baie besighede en die landboubedryf is nie gespaar nie. Besighede reageer egter verskillend op eksterne faktore en sommige ontwikkel die vermoë om uitdagings die hoof te bied sonder te veel negatiewe impak en skade. Kontraktuele verpligtinge en voorbehoude het veroorsaak dat Hortfin sommige van sy doelwitte nie kon bereik nie.

Hortfin's appointment of a project coordinator and a credit analyst augmented its internal capacity. A concerted effort was made to speed up the processing and evaluation of transactions in the attempt to reach programme targets, which are still lagging behind schedule. A catch-up plan was developed and is feverishly being

The key focus is therefore to speed up the turn-around time to process transaction approvals and disbursements.

implemented and monitored with the support of the various industry bodies.

The balance of activities was devoted to the processing of new applications, canvassing for new deals and monitoring of implemented projects. The projects that received disbursements since 2019 have successfully been implementing their project plans and are on schedule with performance against targets.

To date, the Hortfin board approved deals to the value of R152 million. Over 600 new jobs have been created.

The achievements of the projects and the quality of their implementation is impressive and rewarding to witness and experience.

Heelwat tyd en energie is spandeer, en waardevolle lesse is geleer, deur 'n nuwe denkwysie te ontwikkel en te vestig om kwalifiserende besighede te ondersteun; veral om by die kommersiële stroom van die bedryf in te skakel. Die vennote betrokke by hierdie baanbreker-inisiatief het ook 'n idee ontwikkel oor hoe om hul besighede die beste te posisioneer om hierdie bedryfsbehoefes aan te spreek. Dié lesse stel Hortfin in staat om operasionele prosesse te verfyn en nuwe aansoekers beter te bedien.

Die kommersiële finansieringsoplossing wat Hortfin bied is uniek en 'n broodnodige inspuiting vir die sagtevrugtebedryf se transformasie-doelwitte.

The Deciduous Fruit Producers Trust and Hortfin also initiated processes to explore new and alternative financing for the continuation of the programme. Engagements with various potential financiers have resulted in a number of activities, including due diligence assessments on Hortfin and its operations. Valuable feedback was received during these interventions.

While Hortfin is not pleased with the number of approved deals to date, the current impact of the

implementing projects is an encouragement that we are on the right track and provide the incentive to work even harder at this very ambitious and important task. We are confident that a good foundation has been laid from where new deals can be launched in the near future.

The key focus is therefore to speed up the turn-around time to process transaction approvals and disbursements. While the monitoring of the implemented projects is underway and the industry-supported post-investment initiatives implemented, a fresh advertising drive has been initiated to ensure a steady supply of project applications.

Hortfin-funded transactions have provided good evidence of the impact that can be achieved when funding and support are extended to worthy businesses at an early stage of their development. The industry partners can be proud of the progress and achievements to date. With the above results obtained we are inspired more than ever to make a lasting difference in the industry, its role players and businesses.



Tissue Culture Facility

CHARMAINE STANDER | Manager

Die afgelope jaar was 'n baie opwindende jaar vir die Tissue Culture Facility (Edms.) Bpk. (TCF). Verskeie fasette van die weefselkultuurproduksieproses is uitgesorteer en geïmplementeer personeel is opgelei, van die groeimediums vir spesifieke onderstamme is geoptimeer, die plantmateriaal het begin vermeerder, en die eerste onderstamme is bewortel en afgehard.

Die volgende onderstamme is reeds in vitro beskikbaar - Steenvrugte: Atlas, Viking, GF677, Marianna, Flordaguard en Cadaman, Appels - G202, G210, G890, G969 en Wingerd - 143B. Hierdie seisoen word die volgende kultivars geïnisieer en sal volgende jaar beskikbaar wees vir afhending - Steenvrugte: Guardian, SAPO778, Appels - G222, G228, G778, G213, G214, M9 T337, M9 N29 en B10 en Wingerd - Paulsen en Ramsey.

Daar was ook ander mylpale wat behaal is. In Februarie 2021 is die afhending en uitgroei tonnels in gebruik geneem. Terselfdertyd is daar begin werkskaf om die weefselkultuurlaboratorium op te rig. Die laaste week van Julie is daar oorgetrek

vanaf die tydelike fasiliteit na die nuwe laboratorium met werksaamhede wat begin Augustus amptelik in die nuwe fasiliteit afgeskop het.

Die vorige laboratoriumtoesighouer, Gizela Saal, het einde Maart 2021 bedank, en Sané van Wyk is in haar posisie aangestel. Daar is tans ses permanente personeellede en vyf tydelike personeellede in die laboratorium. Leander Gagiano is vanaf November 2021 as kwekerybestuurder aangestel en sal verantwoordelik wees vir die afhending en uitgroei van die plantmateriaal, asook dienste aan Upstars en Hortgro se plantmateriaal-program op Bernheim.

'n Groot hoogtepunt was toe die eerste Flordaguard, GF677 en G202 materiaal aan kliënte gelewer is. 'n Detail bemarkings- en kommunikasieplan is in wording.



Vrugtewerkers-ontwikkelingstrust (VWOT)

WIMPIE PAULSE | Voorster

Dis met groot dankbaarheid dat ons terugkyk na 'n baie goeie jaar wat die Vrugtewerkersontwikkelingstrust (Fruit Workers Development Trust/FWDT) agter die rug het. Die uitdagings en impak van Covid-19 is egter nog geensins verby nie, tog was daar baie positiewe groei in die batewaarde van die trust.

Die VWOT het ten doel om die lewenskwaliteit van die begunstigdes (permanente swart werkers in die vrugtebedryf) te verbeter deur opleiding en bemagtigingsaksies. 'n Hoogtepunt hierdie jaar was die aanbieding van werkswinkels wat op geslagsgebaseerde geweld gefokus het. Dié opleiding is in samewerking met Procure, op verskeie van die trust se deelnemerplase aangebied. Die terugvoer was oorweldigend positief en soortgelyke aktuele opleiding word in die toekoms beplan.

Die VWOT kon ook die afgelope jaar 'n kontant dividend aan die begunstigdes verklaar. Dit is danksy die harde werk en toewyding van ons finansiële adviseur, Stephen Hobson wat voortdurend op die uitkyk is vir nuwe geleenthede.

Ons wil weereens ons dank uitspreek aan ons

administratiewe vennoot, Hortgro, wat verseker dat alles op die finansiële bestuurs- en administratiewe front seepglad verloop. Ek gee ook graag erkenning aan my mede-trustees te wete Anton Rabe, Konanani Liphadzi en Dora Ndaba. Dankie vir jul bydraes en heelhartige toewyding.

Die uitdaging van sosiaal-maatskaplike opheffing en om die lewenskwaliteit van mense te verbeter gaan nog lank met ons wees. Met dit in gedagte sien die VWOT uit na 'n toekoms waar ons 'n daadwerklike bydrae kan lewer ter verwesenliking van hierdie doelwit en om ons sagtevrugtebedryf se landbouwerkers op te hef.





CHAPTER 5 | ALTERNATIVE CROPS

Cape Flora SA (CFSA)

KARIEN BEZUIDENOUT | Manager

The 2020/21 period has been challenging in many respects due to the impact COVID-19 had on the physical and mental well-being of people and on the global economy. Even 18 months after the start of the pandemic, we still find ourselves facing adversity in all aspects of daily life. Thankfully, challenges also bring opportunities – which was also true for CFSA.

Die statutêre heffing, wat nou in die eerste jaar van 'n nuwe heffingsiklus is, bied steeds 'n stabiele befondsingsbasis. Dit het ook CFSA in staat gestel om bykomende fondse, spesifiek vir navorsing en ontwikkeling, vanuit alternatiewe bronne te bekom. Dié fondse spruit uit die Wes-Kaapse departement van landbou se alternatiewe gewasse fonds en die departement van wetenskap en kuns se "Post Harvest Innovation Fund". Die vyf jaar herplantprojek het vanjaar tot 'n einde gekom en het heelwat vrae beantwoord oor die vervanging van boorde met soortgelyke kultivars.

Significant progress has been made with the application of having Cape Flora recognized as a geographical indicator (GI). This offers protection to a product of a specific origin, which will differentiate and protect our unique products in the international market and ensure a premium price. We offer our thanks to Dirk Troskie from Western Cape Department of Agriculture and Theo van Rensburg from DALRRD for guidance and assistance in this process.

CFSA identified a need to work closer together with Cape Nature in order to protect our vulnerable fynbos species and to ensure a profitable cut-flower industry. Negotiations were initiated to streamline the permit process and to support Cape Nature with information from industry in order to

focus their efforts where it is most needed. We all love a bunch of fresh fynbos flowers in our homes, but we have a responsibility to make sure this resource will also be there for future generations to enjoy via ethical and sustainable practices.

Die bedryf kom al 'n lang pad met opkomende fynbos produsente. Gedurende Maart 2021 is 'n baie suksesvolle opleidingsessie, wat op basiese besigheidsbestuur gefokus het, vir opkomende boere gehou. Die inhoud van die werkswinkel is saamgestel deur 'n fynbosprodusent met in-diepte kennis van die bedryf en hierdie materiaal sal voortaan vir opvolgssessies gebruik word. Daar word ook aandag geskenk aan opkomende produsente se individuele behoeftes. Bystand word sover moontlik verleen. Dit bly 'n groot beloning wanneer opkomende produsente se nuwe boorde floreer en hulle produkte winsgewend op oorsese markte verkoop word.

An unexpected advantage of the Covid pandemic was that our local retailers (re)discovered the fynbos cut-flower industry. It is still early days but we are very excited to have retail on-board who are able to supply beautiful, indigenous bouquets at affordable prices to South Africans. God surely blessed this country with beautiful people and beautiful flowers.

Pomegranate Association of South Africa (POMASA)

CARNEL GEDDES | Chairperson

Na die besonder moeilike 2020-seisoen is die granaatbedryf dankbaar dat sake meer normaal verloop het in 2021.

Due to Covid-19 and the subsequent lockdown, some of our research projects had to be put on hold for a few weeks. As a result, some parts of the projects had to be repeated at own cost. The POMASA Board considered the research of vital importance to the industry and therefore funded the repetition. We are thankful for the Post-harvest Innovation Fund for sourcing co-funding to make the financial burden a bit lighter and enabling us to complete the study.

Research studies commissioned by POMASA have offered valuable insight to producers. The research project regarding the rehabilitation of soil affected by severe drought and irrigation with brackish water, was concluded with positive results. POMASA also commissioned a study from the Western Cape Department of Agriculture regarding "The Economic Contribution of South Africa's Pomegranate Industry" which yielded valuable information regarding our industry.

Phytopathological pests such as false codling moth (FCM) pose a big risk for the pomegranate industry and we are very happy to report that the Pomegranate FCM Management System, that was devised and implemented four years ago, is proving to be successful. We believe that the training video that was developed this year for monitoring and inspecting this phytopathological pest will be a helpful training tool for producers and packhouses.

POMASA is continuing to look for alternative methods to manage pests like FCM.

The three main varieties of pomegranates planted in South Africa are Wonderful (78%), Herskowitz (8%) and Acco (8%). Wonderful and Angel Red account for the majority of the new plantings in 2021.

The export volume for 2021 was approximately 4% up from the 2020 season with a total of 1 664 717 cartons (3.8kg equivalent) exported. The Middle East remains an important market for South African pomegranates. 42% of the 2021 crop exported was exported to the Middle East, followed by the EU (25%) and the UK (25%).

POMASA kon voortgaan met alle werksaksies hoofsaaklik weens die invordering van heffings en die granaatuitvoervolumes wat terugkeer het na normaal toe.

Finding new markets is a high priority and POMASA is continuously discussing market trends with exporters to ensure that we are staying up to date with market demands. The minimum standard for exporting

pomegranates, which was reviewed by all role players, was recently Gazetted and will be implemented in the coming season. POMASA is also investigating ways to focus on the excellent internal quality of South African pomegranates and to encourage local sales.

Die registrasieproses van oesbeskermingsprodukte bly steeds 'n uitdaging vir alle gewasse en daarom is die een nuwe registrasie wat op granate goedgekeur is, verblydend. POMASA het 'n konsultant afgevaardig om saam met die NLBR vier transformasieprojekte in die Oos-Kaap te besoek en te evalueer. Op grond van sy aanbevelings sal daar dan besluit word hoe POMASA betrokke kan raak by die projekte. Suid-Afrikaanse granate gaan in die wêreldkollig wees tydens die "International Symposium on Pomegranate and Minor Mediterranean Fruits" wat in Februarie 2022 in Stellenbosch aangebied gaan word. Ons nooi alle belangstellendes uit om dit by te woon.

SA Fig Producers' Association

BRETT STANDER | Chairman

The 2021 fig season fared much better than the previous season with more available flights to export produce. South African figs are known for its superior eating quality and has been marketed at a price point in line with this quality, mainly to the Northern Hemisphere. The route to the market as always been solely dependent on airfreight for export markets, which became a massive challenge when planes were grounded during our various stages of lockdowns locally and abroad.

The fig industry is hopeful that the more favourable weather for production in the Klein Karoo production areas the coming season and increased rainfall over the last two seasons has assisted orchards across the Western Cape.

Fig stem borer has been and continues to be a considerable problem for many fig producers and therefore a research project, funded by the Alternative Crops Fund of the Western Cape Department of Agriculture was done during the past season to find possible control measures. Some of the measures show promising results but further work needs to be done to confirm the results.

The need to grow supply and demand is key to strengthening SA Figs marketability. The developed markets in the EU and Far East have been reliable, but underserved compared to pre-Covid export figures, the ability to re-secure these and further retail markets in these trade areas is crucial. This should be coupled with a coordinated study to target new developing markets.

Fig trends

- South Africa exported an estimated 233 tons of figs in the 2020/21 season, which is 28% more than the previous season.
- 213 ha commercial fig plantings.
- UK and Far East are main export destinations with development in the Europe and Middle East.



South African Pecan Nut Producers' Association NPC

ANDRE COETZEE | Manager

Production and Prices

Early in the 2021 season indications were that the 23 000 tons attainable with the main uncertainty the expected price for the producer.

The final annual production of 19 000 tons were 10% lower than 2020's of 21 300 tons. The question is why the gap between realised production and expectation was so big. The answer is not simple and there is much speculation as to why, but the long and the short is we had an unprecedented fruit drop, first early in the season and another later with nut size between 10 and 20mm.

Looking forward to the 2022 crop, if there are no unexpected circumstances, first indications are that of an excellent crop. Massive amounts of pollen and early developing nuts are observed, although it is

still early days the potential is there. Furthermore, there are positive signs of a healthy demand for South African pecans.

During the season the pecan nut dollar price stabilised and even started showing some upward momentum, but unfortunately for commodity exporters the price to the producer is dependent on the strength of the rand.

MRL'e en die gebruik van geregistreerde middels.

Kort voor die oes is daar onverwags 'n nuwe vereiste op die uitvoer van indop pekanneute ingestel naamlik dat MRL toetse gedoen moet word. Aanvanklik is gedink dat dit 'n baie negatiewe impak op die bedryf mag hê. Alhoewel almal in die bedryf verstaan wat die waarde van MRL'e is, was ons maar net nie voorbereid nie. Op baie kort kennisgewing met geen of bitter min kans om vooruit te beplan moes ons die uitdaging hanteer.



Daar was egter op die einde goeie samewerking tussen SAPPA en verwerkers en hoewel daar maar frustrasies was met die tydsamheid van terugvoer op die toetsing, het ons ongeskonde deur die seisoen gekom.

Ons gaan egter nou moet seker maak dat ons as produsente voldoen aan die vereistes van MRL'e. In die eerste plek gaan produsente moet seker maak dat hulle boekhou van die middels wat hulle spuit en dat dit op pekkante geregistreer is. Aan die verwerkers se kant sal hulle naspeurbaarheid moet kan verseker.

The road ahead

In December 2020 a strategic session was held that was attended by the SAPPA board of directors and the processors. The impact on and direction going forward was agreed on and a few committees were established and/or refined.

Bemarkingskomitee

Die SAPPA raad het die Bemarkingskomitee 'n mandaat gegee om 'n paar bemarkingsverwante take te verrig, wat dan verder in kort-, medium- en langtermyn doelwitte verdeel is.

In die korttermyn was prysstabiliteit die doelwit gewees en ons glo die doelwit is bereik. Of dit nou 'n direkte uitvloeisel van die komitee is, of bloot markkragte, is debatteerbaar, maar hoe dit ook al sy die korttermyn doelwit is bereik.

Samewerking tussen verwerkers en produsente was nie sonder uitdagings nie en die pad vorentoe om by langertermyn doelwitte uit te kom sal in oënskou geneem word. Die deel van inligting alhoewel met anonimiteit deur Agri Hub was beperk, maar vir 'n begin is ons tevrede. Daar is nuusbriewe uitgestuur tydens die seisoen om produsente te kry om ook van hul kant af druk uit te oefen om samewerking te bewerkstellig.

Verder is SAPPA se direksie bewus van die belangrikheid van markontwikkeling en besef dat deeglike beplanning geleenthede met alternatiewe skep.

Inligtingskomitee

Daarstel van 'n inligtingskomitee wat onder andere ten doel het om die bemarkingskomitee van tydige, akkurate inligting te verskaf. Dit sal onder andere tot gevolg hê dat die produsente-databasis op datum kom, asook noukeurige oëskattings, prys, vraag en aanbodbewegings op internasionale markte vir die beskikbaarstelling vir besluitneming. SAPPA het ook onlangs begin adverteer vir die aanstelling van 'n inligtingsbeampte en hoop om teen Januarie 'n geskikte persoon aan te stel.

Transformation committee

A transformation committee was established to ensure that a transformation plan is formalised and executed. The focus of the transformation projects will shift from helping smallholder farmers to include assisting beneficiaries to become commercial farmers. Technical support and on farm evaluation and advice also form an integral part of the assistance provided.

During 2021 just more than 3 500 trees were sourced from seven nurseries and provided to 49 beneficiaries.

Transformation is seen as more than just ticking a box but making a real change by establishing successful projects.

Navorsingskomitee

Die navorsingskomitee is hersaamgestel en het ten doel om navorsingsbehoeftes deurentyd te identifiseer, na te gaan en te prioriseer. Die komitee moet ook toesien dat navorsing relevant bly en gereelde terugvoering gee aan SAPPA lede.

Slotsom

Terugvoer van verskillende produsente in die verskillende streke is dat die voorlopige waarnemings in boorde baie positief is en dat 2022 'n positiewe jaar gaan wees vir neutproduksie. Ons het 'n besonderse produk en alhoewel ons uit 'n moeilike seisoen kom is die oortuiging dat dit goed sal gaan met produksie en pryse.

Mag 2022 die seisoen wees wat almal van praat as "Volgende Seisoen."

HOOFSTUK 6 Hortgro in pictures



1 Newly appointed Postharvest Physiology Research Chair in Deciduous Fruit at Stellenbosch University (SU), **Dr. Elke Crouch** (third from left) with industry role-players, **Linde du Toit**, **Hugh Campbell**, **Prof. Wiehann Steyn**, **Nicholas Dicey** and **Prof. Karen Theron**. **2** Prof. Karen Theron, die eerste bekleër van die Leerstoel in Toegepaste Vooroes-sagtevrugtenavorsing het vanjaar afgetree. Hier is prof. Theron by **Anton Rabe**, Hortgro se uitvoerende direkteur, en **Nicholas Dicey**, Hortgro-voorsitter. **3** Training and paying-it-forward in the orchards: Industry expert **Chris Jurisch**, EGVV producer **Albert Rust**, and **Danny Blom**. **4** The finals of Agri's Got Talent 2021 was held on 1 October and **Faith Nogomane** (in the center) was crowned the winner. **5** **Buks Nel** and **Henk Griessel** received the 1662 Industry Award for their invaluable contribution to the pome industry, both as historians, cultivar and postharvest experts.

6 The Jobs Fund project came to a close this year. At the event was: **Elton Joffa**, **Dr Mogale Sebopetsa**, H.O.D. Western Cape Department of Agriculture, **Jacky Goliath**, and **Ismail Motala**, DFDC Chairperson. **7** By **Prof. Karen Theron** se afskeid: **Wiehann Steyn** (Hortgro Science algemene bestuurder), Theron, en **Hugh Campbell** (Hortgro algemene bestuurder van navorsing en tegnologie). **8** The Deciduous Fruit Industry Gala Evening winners were announced in September. Here are from left to right: Advanced Agricultural Worker: **Dumisani Jackson Booï**, Graymead, Fruitways, General Agricultural Worker: **Xolani Nameko**, Kromfontein, Dutoit Agri, OSH Reinecke Industry Frontrunner Award: **Johannes Fourie**, Specialist Agricultural Worker: **Gert Jantjies**, Kromfontein, Dutoit Agri, New Entrant Award: **Ricard Myburgh**, Research and Technology Award: Gariep Watch represented by **Fritz Bekker**. Absent was **Carolize Jansen** WHO received the Izethelo Media Award. **9** **Doug Osler** (39) from the farm Fourieshoek in the Fouriesburg area, was named Free State Agriculture's 25th Young Farmer of the Year, **10** **Alexander Gibson** van Ceres was die Wes-Kaap se jong boer van die jaar.



11 **Sheila Storey**, industry soil health expert, helped compile a document and video about bioproducts. **12** Hortgro se groepsoperasionele bestuurder, **Mariette Kotze** besoek Montagu-producent **Dawie van Deventer**, om bestekopname te maak van die droogte. **13** Die bedryf het saam met Provar-kultivar vrugteproeë gereël in Ceres, Grabouw en die Langkloof. **14** Jobs Fund Project Function: Hortgro Ladies' Team from left: **Carmé Naudé**, **Thea van Zyl**, **Chrismaine Abrahams**, **Mariette Kotze** and **Elise-Marie Steenkamp**. **15** Boere van die Klein-Karoo trotseer die droogte. Hier is **Jaer Joffa** en **Niel Joubert** van Montagu-streek.

Contact list

16 Topfruit COO **Hein Coetzee** doen 'n studie oor organiese vrugteverbouing. **17** The Tissue Culture Facility at Bernheim, Paarl, started producing its first rootstock plants on large scale seen here is the Western Cape Minister of Agriculture, **Dr Ivan Meyer**, in the lab, to his left is **Charmaine Stander**, TCF Manager, and behind him, **Gizela Saal**, lab technician. **18** The industry lost two pillars of the agri community, **Dr. Piet Stassen** and **19 Mr Tippiie Malgas**. **20 Dekker Esterhuysen** van Applethwaite (Capespan Farms) net buite Grabouw het sy insigte na die windstorm in Maart oor die gebruik van nete gedeel. **21 John Driver**, an international tissue culture expert from the USA visited the industry. Here he is with **Sane van Wyk**, Driver, **Charmaine Stander** and **Leander Gagiano**. **22 Prof. Stephanie Midgley** doing stellar work regarding climate change and model forecasting for production areas.



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