



HORTGRO

Annual Review | 2025

HORTGRO

Growing Fruit IQ



Purpose:

To create an enabling environment for the Deciduous Fruit Industry (DFI)

Mission:

To facilitate a fair, sustainable and competitive Deciduous Fruit Industry through a focus on:

- Research and development and associated technology transfer.
- Market access and trade facilitation, including logistics.
- Transformation, BEE and land reform, including economic development, socio-economic development and industry learning and development.
- Stakeholder/government engagement, influencing and collaboration, communications, and a unified voice of the industry.
- Industry support services, including administration and financial services, secretarial services, IT, HR and resource management and sustainability¹.

¹ Includes economic sustainability, environmental/climate change issues, water, carbon, tax, MRL and related compliance matters.

Hortgro Board of Directors



Anton Rabe
Executive Director



Nicholas Dicey
Hortgro Chairperson



Angelo Petersen
Independent Director



Unati Speirs
Independent Director



Calla du Toit
Hortgro Pome Director



Charl Herbst
Hortgro Stone Director

Hortgro's relevance and role as a gatekeeper in the industry are:

- One voice within organised agriculture and civil society, locally and globally.
- Knowledge repository – a relevant and trusted source of information, to empower members to make informed decisions about compliance issues, protocols, regulations, including self-regulation and industry discipline, information and intelligence.
- Influence, lobby, and access to the government and influential stakeholders.
- Collaboration and joint functions.
- Stable and broad funding base.

More comprehensive reporting on activities related to these programmes is included in the various sections of this review.

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DFPT Finance: Statutory Levies

1 October 2024 - 30 September 2025

Pome fruit (per kg)

Fruit	STD levy*	Export MDL	Total local levy	Total export
Apples	R0.0530	R0.0285	R0.0530	R0.0815
Pears	R0.0530	R0.0285	R0.0530	R0.0815

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

Stone fruit (per kg)

Fruit		Export MDL	Local MDL	Total local levy	Total export
Apricots	R0.2250	R0.1240		R0.2250	R0.3490
Nectarines	R0.1400	R0.2500	R0.0490	R0.1890	R0.3900
Peaches	R0.1400	R0.2500	R0.0490	R0.1890	R0.3900
Plums/prunes	R0.1860	R0.1190	R0.0230	R0.2090	R0.3050

Dried fruit (per kg)

Fruit	STD levy*	MDL levy	Total local levy
Apples	R0.2600	R0.0830	R0.3430
Pears	R0.2600	R0.0830	R0.3430
Apricots	R0.2600	R0.0830	R0.3430
Nectarines	R0.2600	R0.0830	R0.3430
Peaches	R0.2600	R0.0830	R0.3430
Plums/prunes	R0.2600	R0.0830	R0.3430

Processing (per ton)

Fruit	STD levy*
Juice Apples	R10.40

•Domestic, exports and imports



Algemene oorsig

Anton Rabe | Uitvoerende Direkteur

Hierdie jaar sal sekerlik onthou word vir die wêreldwye handelonsekerhede wat grootliks, tesame met oorloë en ander streekskonflikte, deur die VSA se lukrake, onvoorspelbare en onverstaanbare "executive orders" veroorsaak is. Deur die bietjie blootstelling wat ek gehad het in die onderhandelinge met die VSA, is ek telkens verstom oor dié land se ongebreidelde arrogansie. Hoe die wêreld hiervandaan weer by sinvolle, wen-wen handelsooreenkomste gaan uitkom met mededingende voordele vir alle partye, sal slegs tyd leer.

The handbook on trade agreements and negotiations has literally been torn up, and the role and response of the world trade organisation will be interesting to observe. However, in all this, we are exploring opportunities within our FruitSA and Agbiz alliance. Again, only time will tell us if we have effectively utilised a "good crisis" to secure better agreements with other nations, establish more favourable tariff regimes in key countries, and address critical capacity and expertise gaps in various government departments.

We experienced a good harvest, and trading conditions were better than expected. After another cold winter, albeit with less rain, we began the new season with good weather for flowering and fruit set. Although irrigation dams are not full in most production areas, the water situation is adequate, and we should experience another good season for most of our crop types.

Aan die logistieke kant was daar ook groot vordering met nuwe toerusting en "mid-life" versiening van die skip-tot-kus-hyskrane (STS cranes). Ons is deur die dip en ons

kan beslis verdere produktiwiteits- en diensvlakverbeteringe, veral in die Kaapse hawe gedurende die komende seisoen, verwag. Met 'n groter en goeie oes, kon dit nie op 'n beter tyd gekom het nie en behoort wagtye tydens hoë windspoed korter te wees, en opvangtye vinniger. Ek is van mening dat ons Wes-Kaapse vrugte-alliansie (wat die Fresh Produce Exporters Forum/FPEF en tafeldruiwe insluit) se agterdie-skerms-onder-die-radar benadering eerder as openbare media-gevegte, die regte strategie was. Ons het tans baie goeie verhoudinge met Transnetbestuur wat gewys het dat hulle bereid is om aanspreeklikheid te aanvaar en diensvlakke te verbeter.

Alle partye het uit die afgelope paar jaar se krisisse geleer, en ja, ons het nog 'n verpad om te loop – die Kaapse hawe is nou nét die vierde swakste hawe in die wêreld nadat dit die vorige jaar heel laaste was uit 403 hawens wat wêreldwyd gemeet is. Daar was groot vordering. Ons sal voortgaan met ons "stille diplomatie" en agter die skerms moeilike vrae vra en tawwe gesprekke hê.

We have invested many years of hard work on various levels to finalise export protocols for new key markets, with limited progress. Recently, we have experienced several successes, with the latest being the recent signing of the stone fruit protocol with China, which followed closely on the heels of the avocado protocol signed in 2024. This was the first time that such a protocol was finalised for multi-products being processed in tandem, and an approach we have equally tried very hard to achieve. The joint process for cherries and

blueberries is already underway, and we hope to finalise these protocols in a very short period.

Our sincerest gratitude and appreciation to the Ministry and Department of Agriculture, who have worked closely with Hortgro to achieve this.

Verdere en volgehoue samewerking met die ander vrugte-uitvoerbedrywe via FruitSA en koördinerende met veral die Department van Landbou, Handel en Nywerheid (dtic) en Internasionale Betrekkinge en Samewerking (DIRCO), en die gepaardgaande politieke wil, gaan krities wees om sukses op die terrein vol te hou.

The pressure to retain access to existing markets continues to grow, with increasing demands for the removal of key chemicals and related MRLs. We can anticipate ongoing attention in this area from both regulators and activists. Our focus is to ensure that the emphasis remains on:

1. Conducting risk-benefit analyses that reflected real-world agricultural contexts.
2. Recognising the role of agricultural products in sustainability.
3. Supporting innovation in biopesticides and resistance-breaking technologies.

Hortgro Pome en Hortgro Stone het die tweede jaar van die huidige vier-jaar statutêre heffingsiklus in 2025 voltooi. Die aanwending van fondse was ten volle belyn met Hortgro se strategiese raamwerk vir die siklus. Kern- en steenvrugheffings is onderskeidelik vir die derde en vierde agtereenvolgende jaar nie verhoog nie. Daar is weereens ten volle voldoen aan die nakomingsvereistes van die Nasionale Landboubemarkingsraad en die Ouditeur-Generaal.

As mentioned previously, the demand for industry services and functions continues to rise. The statutory levy is, however, not enough to provide for such increased activities, and we do realise that levy levels, especially for stone fruit, are on the high



end of the spectrum. Therefore, the need and pressure to unlock other sources, such as grant funding (which is starting to dwindle), user-pay services, and new sources, continue to grow. A renewed focus on the latter is planned for 2026.

Our main challenges for 2026 are:

- Dealing with an unstable global trading environment; focusing on market diversification; market access—retaining existing markets and opening new ones; protocols; preferential and free trade agreements; and tariff regimes.
- Quality of plant material with a reset given the plant improvement plan adopted within SAPO, PlantSA and the Deciduous Fruit Plant Improvement Association, with changes to the scheme, including virus elimination.
- Crop protection and pressure on, and loss of key chemicals.
- Addressing sustainability and compliance issues by providing our members with the critical knowledge and tools to ensure cost-effective and proactive adoption of requirements in this area.
- Continuing with a well-managed succession process for senior management and industry leadership, which began two to three years ago.

In wese, moet ons meer self doen. Ons moet kapasiteit skep en betaaldiensverskaffing (Payment Service Providers/PSP's) op verskeie gebiede insluitende energie, logistiek, veiligheid en sekuriteit en water, met die regering sluit. Ons moet bo die verwagte politieke geraas van die komende plaaslike verkiesings in 2026 uitstyg en daarop fokus om 'n verskil te maak en impak te hê. Bo alles, kan ons nie alles vir almal wees nie.

Hortgro Pome Chairperson's Report

Nicholas Dicey

The South African apple and pear industries continued to deliver growth, and the increased investments made in recent years have led to steady improvements in production and returns for growers. At the time of writing, apple exports are expected to increase by 3% and pear exports by 12% year on year.

Favourable growing conditions played a significant role in increasing yields across many apple orchards, particularly with excellent-quality cultivars, resulting in exceptional export packouts.

Hortgro Pome continues to play a significant role in creating an enabling environment that supports apple and pear farmers in thriving and producing top-quality products for both international and local markets. Challenges and needs were continuously identified and addressed, with substantial contributions in research and development, market access and retention, stakeholder and government engagement, communication, and economic growth within the transformation environment.

The Hortgro Pome Board worked in tandem with the Pome Producer Council and Hortgro management to maintain strict financial discipline, ensuring desirable outcomes when budgeting for and spending levy income received from producers. The board and management remained acutely aware of the increasing costs faced by producers, and emphasis was continuously placed on achieving outcomes that maximised the return on levy investment.

Kwartaallikse vergaderings word deur beide die Hortgro Pome-raad en die Kernvrugprodusenteraad gehou om strategiese kwessies, begrotings- en ander korporatiewe sake te bespreek en so te verseker dat die lede op hoogte bly van bedryfsaksies wat op hulle behoeftes en uitdagings fokus. Tydens hierdie vergaderings gee die Hortgro-bestuurspan terugvoer oor die verskeie afdelings en programme, daar word beraadslaag en oplossings vir die reeks uitdagings bespreek en aanbeveel.

Logistieke uitdagings by die Kaapse hawe bly 'n kwelpunt, maar dit is verblydend dat daar teenoor die vorige seisoene, talle verbeteringe is. Dit kan toegeskryf word aan gereelde gesprekvoering, beter beplanning, beter begrip van bedryfsuitdagings en investering in nuwe toerusting, wat daartoe gelei het dat logistieke dienste in die hawens beter uitsette kon lewer. Ons sien uit na verdere verbeterings in logistieke produktiwiteit, namate oorblywende tekortkominge aangespreek word.

Marktoegang en die versterking en behoud van bestaande markte bly 'n kernfokusarea vir die bedryf, en die rol wat Hortgro Pome as 'n kollektief speel om gunstige uitkomst in hierdie veld te bewerkstellig, kan nie onderskat word nie. Die toenemende druk om beter kwaliteit vrugte aan die mark te lewer en die markvereistes wat daarmee gepaardgaan, bied talle uitdagings aan produsente. Hortgro Pome speel 'n groot rol om die speelveld so gelyk as moontlik te maak, sodat appel- en peerprodusente mededingend in die internasionale markte kan bly. Interaksie en samewerking met

beide die provinsiale en nasionale departemente van landbou is gesond en verseker dat 'n omgewing geskep word waarbinne ons bedrywe kan floreer.

The South African apple and pear industry remains in a very stable position with consistent production growth and renewed planting initiatives. We can also be proud of world-class producers, packhouses, researchers, and agricultural personnel. Likewise, we can be grateful and proud of Hortgro, a top-tier industry service organisation. With the retirement and impending retirement of senior staff from Hortgro after many years of service, succession planning and transition strategies have been a high priority on the board's agenda over the past year. Ensuring continuity, stability, and world-class service while attracting new talent has remained a top focus for Anton Rabe and his team.

I want to thank them for their professional and dedicated efforts in helping our industries maintain their status as world leaders.

The Hortgro Pome Board and Hortgro Pome Producer Council once again selflessly served the industry and demonstrated dedication and commitment in representing the various geographical regions of the apple and pear sectors. Here too, succession and transition strategies were implemented, with the next generation of producers set to be represented on the board and advisory structures. As outgoing chairperson, I would like to thank the industry and boards for their trust and immense support over the years, and I wish the new Hortgro Pome Chairperson, Calla du Toit, and the board all the best for the coming season and their term on the Hortgro Pome Board.

New Hortgro Pome Chairperson
Calla du Toit
calla@cfg.co.za



Hortgro Stone-voorsittersverslag

André Smit

Ek was bevoorreg om die afgelope agt jaar aan die stuur te staan van Hortgro Stone. Dit was 'n verrykende ervaring wat ek baie geniet het en dit was 'n groot voorreg en verantwoordelikheid om ons produsente groot en klein, se belange op die hart te dra. Ek dank elke produsent dat julle my toegelaat het om hierdie rol te vervul. Ons is as bedryf bevoorreg om vir Charl Herbst nou in hierdie posisie te hê. Hy het 'n diep kennis van die bedryf en benader die pos met 'n sterk kommersiële aanslag.

Die jaar 2025 was 'n goeie en opwindende steenvrugjaar. Ons is in 'n finansiële opwaartse kurwe waar al die steenvrug kommoditeite saam in die positiewe kwadrant is.

Hierdie is baie welkom omdat ons tussen 2020 en 2022 onder groot druk was en vernuwings en beleggings basies stilgestaan het. In landbou is stilstaan gelyk aan agteruitgaan weens inflasie-druk op die produksie-waardeketting.

Die oorsaak hiervoor was 'n mengsel van logistieke uitdagings, asook produksie en markplekkompleksiteite ná die voorafgaande jare se droogte. Die situasie by die hawe en logistiek neig positief met Transnet wat hawe-toerusting opgradeer wat gevolglik produktiwiteit verbeter. Hier wil ek 'n oomblik stilstaan en vir Hortgro en FPEF se personeel bedank vir hulle volgehoue druk en betrokkenheid om hierdie "skip" stadig maar seker in die regte rigting te begin draai. Daar lê wel nog uitdagings en werk voor. Ek glo, soos vele ander, dat die volhoubare oplossing in privaatsektor betrokkenheid lê.

Verder het ons bedryf sy kant gebring deur kwaliteitprodukte aan die mark te lewer. Dit het gehelp om ons mededinging met ons hoofkompetisie, Chili, te verbeter en van ons marktaandeel wat ons tydens die droogtejare en weens COVID verloor het, weer terug te wen. Die ontwikkeling van die VSA-mark op pruime was ook 'n hoogtepunt en die 1.6 miljoen kartonne wat daarheen gestuur is, het die ander marksektore in balans gebring wat positief tot winsgewendheid bygedra het. Daar heers tans groot onsekerheid oor die toekoms van die VSA-mark. Wat egter seker is, is dat ons nie nou moet opgee op die VSA-mark nie. Daar sal wel aanpassings en konsolidasies wees maar ons moet nie die momentum verloor nie. Politieke bestelle kom en gaan maar ons is 'n langtermynbedryf met 'n langtermynfokus.

Laat ons eerder ons aandag daarop rig om kwaliteitprodukte van top eetgehalte te lewer en só verbruikers aanvraag te behou en uit te bou.

Ons gaan voort met die fokus op skoon, hoë-kwaliteitplantmateriaal en wêreldklasweefselkultuurmateriaal, wat ons 25-jaar beleggingsbesluite ondersteun. Produsente word aangemoedig om seker te maak dat hulle die beste moontlike plantmateriaal verkry om hierdie doel te bereik.

Ons steenvrugvolumes het oor die afgelope agt jaar vanaf 18 miljoen in 2016 tot 27.9 miljoen kartonne in 2025 gegroei.

Dit is 'n 55% groei met 'n 6% jaar-op-jaar-groei oor hierdie periode. Die grootste toename was in pruime van 11 miljoen (2016) tot 14.9 miljoen (2025) wat 'n 35% (4% jaar-op-jaar) groei is. Nektariens het eksponensieel gegroei van 4 tot 10.4 miljoen – dit is 'n 159% (18% jaar-op-jaar) toename.

Hierdie volumes plaas groot druk op ons tradisionele noord-suidmarkroetes. Die 2025/26-seisoenskatting vir pruime staan op 15.4 miljoen en nektariens op 12.2 miljoen, perskes op 2 miljoen en appelkose 740,000 kartonne. Ons sal dringend nuwe markte moet ontwikkel, met die uitdaging dat die meeste nuwe markte koue sterilisasie met lang logistieke reistye vereis. Pruime is meer gehard en geskik as nektariens, om hierdie uitdaging te hanteer. 'n Moontlikheid is dat hierdie markte ons dwing om ons kultivarprofiel te wysig ten einde hierdie nuwe uitdagings te hanteer. Produsente moet dus baie seker maak dat hulle die regte aanplantingsbesluite neem met die regte aangepaste kultivars vir die regte mark. Inisiatiewe soos die

ProHort-persele speel 'n waardevolle rol om produsente met inligting oor geskikte kultivars te bemagtig.

Die hoogtepunt van hierdie jaar was sekerlik die ondertekening van die uitvoerprotokol vir China.

Ons is baie trots op ons Hortgro-span wat met Fruit SA en die Departement van Landbou saamgewerk het om hierdie suksesvol deur te voer. Ek wil ook vir Minister John Steenhuisen bedank vir sy bydrae. Hierdie groot nuwe mark bied groot geleenthede, maar ook groot uitdagings. Dit is 'n komplekse mark met unieke vereistes en eienskappe. Ons sal ons huiswerk moet doen oor wat hulle benodig om sodoende nog geleenthede te ontsluit. Die Chinese mark sal ook nie vir al ons kultivars geskik wees nie. Dit mag nodig wees dat ons ons bedryfsprofiel oor tyd herontwerp en aanpas om hierdie mark ten volle te ontgin.

Ek wil afsluit deur Hortgro en ons personeel te bedank vir hulle volgehoue toegewyde diens en passie vir ons mooi bedryf. Ek wens elke produsent 'n suksesvolle en voorspoedige seisoen toe. Onthou ons werk is eers klaar as die verbruiker terugkom en weer ons vrugte koop.

New Hortgro Stone Chairperson
Charl Herbst
charl@stanislaus.co.za



Hortgro Dried Tree Fruit

Ben Kotze | Chairperson

Dried tree fruit is as much a part of South African heritage as braaivleis and rugby. In the 17th century, the Dutch planted fruit trees and vineyards at the southern tip of Africa, which produced fruit that was then preserved and dried for later use.

The long, dry, and hot summers in the Western and Northern Cape are ideal for this process, and dried fruits from this region are popular world-wide.

As the deciduous fruit industry in South Africa has expanded and matured, food quality regulations have been implemented for both local products and exports. This ensures that both local and international consumers can enjoy premium, sustainably produced dried fruit. Hortgro Dried Tree Fruit (DTF) has also recently joined an international policy lobbying organisation called Frucom, enabling South Africa's voice to be heard on global industry-related matters.

A local market development campaign, jointly funded by Hortgro and Raisins SA, has been launched to boost awareness of the Dried Fruit Industry. The main goal of the campaign is to introduce dried fruit to the younger generation and attract more consumers in this category. The campaign educates consumers about the key qualities of dried fruit and how these benefits their daily lives.

Market intelligence data revealed a clear gap in attracting a younger audience while retaining the older generation.

The campaign is built around key criteria, namely:

- The target audience is women aged 30-45, who are typically the primary household shoppers. They are motivated to buy the product for both themselves and their families.
- The product range is extensive.
- The products are used throughout the day, both at home and at work, in lunchboxes, while commuting, while baking, and during outdoor activities.
- Consumers should also buy the product for increased energy, nutrients, sustenance, vitamins, convenience, flavour, and versatility.

Dried Fruit SA is also now exploring the potential of AI to steer campaigns and offer insights into consumer preferences and behaviours.

The industry is investing in improving plant material to ensure producers have access to cultivars that are well-suited to their specific soil and climate conditions, maximising yield while meeting consumer demands. It is important to note that cultivars suitable for fresh fruit production may not be ideal for dried fruit, so breeders must focus on specific traits. Additionally, there is a need for apricot varieties that can extend the harvesting period for existing cultivars, such as Bebeco and Soldonné, allowing producers to manage on-farm resources more effectively.

Economic development has consistently been a key focus of transformation and remains a priority. DTF has invested in

several farms through a tree subsidy, enabling the establishment of new plantings and the expansion of existing orchards. These initiatives are supported by knowledge transfer, and future investments are likely to emphasise the development of essential skills for sustainable business growth.

Fruit farming is capital-intensive, and therefore, new entrants face numerous challenges on their journey to creating a sustainable business. DTF also invests in human capital by supporting agriculture students through bursaries. It is vital to invest in young leaders to ensure the long-term survival of the industry.

Die afgelope droogseisoen, 2024/25, is vooraf gegaan deur 'n baie goeie winter met genoeg koue-eenhede en winterreën, wat 'n goeie seisoen verseker het. Ongelukkig het die Karoo-produksiegebiede minder reën as die res van die streek gehad, maar dit was nog nie so beperkend soos die droogte wat 'n paar jaar gelede die area geteister het nie. Klimaatverandering is 'n realiteit, en Hortgro Science gee deurentyd aandag hieraan om te verseker dat vrugteproduksiepraktyke voorsiening maak vir die veranderende klimaat.

DTF het vanjaar saam met Raisins SA deelgeneem aan die ANUGA-voedselskou in Duitsland.

Hulp wat voorheen deur die regering gebied is, is nie meer beskikbaar nie, so die vereniging moes self hand in die sak steek.

Gelukkig help vennootskappe soos dié met Raisins SA om deelname bekostigbaar te maak.

Skerp stygende insetkoste bring 'n baie groot uitdaging en die bedryf is besig met 'n proses om met die deelname van rolspelers bedryfsnorme vir droog- en verpakkingskoste op te stel. Droogbane kan die norme dan as maatstaf gebruik om aanpassings te maak waar nodig en hulle produktiwiteit en koste-doeltreffendheid te verbeter en só winsgewendheid te verhoog.

Droëvrugte is nou al vir eeue 'n bron van vitamienes en vesel vir Suid-Afrikaners, en ons voorspel dat dit vir eeue nog 'n kernproduk in elke huishouding sal wees. Selfs al kan KI vir ons berge versit, kan dit nog nie die Suid-Afrikaanse sonskyn in 'n mondvul vrugtegeure vasvang nie.



Hortgro CherriesZA

Piet Bosman | Voorsitter

In 'n bedryf waar 41% van die aanplantings nog nie in volle produksie is nie, is daar baie potensiaal, maar ook baie uitdagings. Gelukkig word uitdagings in hierdie bedryf met optimisme aangepak, en spanwerk maak die onmoontlike moontlik.

Kersieboerdery is nie vir sissies nie. Dit is definitief eerder vir die boer wat glo dat volharding wen.

The association commissioned a literature study on cherry pitting in 2024. Although it is a well-known phenomenon, members face challenges in managing it. This year, the literature study was followed by a practical project to investigate how and where the fruit sustains the most damage under South African conditions. Practical research like this provides our members with tangible results that can help elevate good farming businesses to the next level.

Dit lyk asof kersies die bedreiging van die stompkopkewer (polyphagous shot hole borer/PSHB) gesystap het, maar ongelukkig bly die suzuki-asynvlieg (spotted wing *Drosophila*/SWD) nog 'n groot risiko, veral in die lig van die skade wat die bloubesiebedryf die afgelope seisoen ervaar het. Ons neem aktief deel aan gesprekke met die regering rakende die suzuki-asynvlieg. Ook word projekte, dikwels saam met ander bedrywe, geloods om die plaag te monitor en om pesbeheerbestuurspratyke te ontwikkel.

Dis net deur samewerking met ander bedrywe dat landbou in Suid-Afrika vorentoe kan beweeg.

Op die marktoegangfront is kersies hard besig om aan die Chinese mark te werk. Die steenvrugonderhandelinge vir kersies verloop tans vinnig en glad, en ons hoop dat ons hierdie seisoen die inspekteurs sal kan wys hoe ons kersies verbou en verskeep. Om die marktoegangonderhandelingsproses te versterk, het Hortgro se dr. Renate Smit reeds vir ons proewe gedoen om die effek van 'n koue-sterilisasië-protokol op ons vrugte te toets. Vir 'n produk wat meestal per lug uitgevoer word, is hierdie koue-behandelingsprotokolle uitdagend, en daarom moet die bedryf vroegtydig die potensiele impak bepaal.

We don't only sell cherries abroad, but also locally. In 2023, we recognised the need to increase local awareness, so last season we launched a marketing programme built on Hortgro Stone's initiatives. We didn't spend millions of rands, but we believe we received good value for money, and therefore will continue to build on this success in the coming season. If we work together and build on the existing initiatives in this manner, we can all benefit.

Ons glo aan aanhouer wen en dat daar baie potensiaal vir Suid-Afrikaanse kersies tuis en in die buiteland is. Watter boer glo nie dat volgende jaar nog beter gaan wees nie?



HORTGRO MANAGEMENT SERVICES:

Finance

Dirk Crafford | Hortgro Financial Manager

The deciduous fruit industry associations have made various changes since the 1970s. In 1998, following deregulation, the Deciduous Fruit Producers Trust (DFPT) was established between SAPP/SASPA and the Table Grape Industry.

DFPT managed all financial and administrative functions from inception until early 2005, when it was transferred to Hortgro (Pty) Ltd.

Since 2005, Hortgro has provided a range of support functions, including financial and administrative services, to various horticultural industry groups. Its main clients include Hortgro Pome, Hortgro Stone (including cherries and dried tree fruit), Fruit Fly Africa (FFA), SA Plant Improvement Organisation (SAPO), Deciduous Fruit Producers' Trust (DFPT), fruit Workers' Development Trust (FWDT), *SA Fruit Journal*, Deciduous Fruit Industry Development Trust (DFIDT), Culdevco, Cultipowered, Hortfin, and the Tissue Culture Facility.

Hortgro also manages various industry properties, which are recorded under Tps Properties and Upstars.

It is important to note that Upstars underwent restructuring this past year, as SATI and Raisins are no longer part of this entity. The remaining shareholders—Hortgro Pome, Hortgro Stone, and Canning Fruit Producers' Association—are all from the tree fruit sector.

Additionally, Hortgro has been contracted to provide financial and administrative support to various alternative crops, such as Cape Flora, BerriesZA, and cultivar

focus groups, including SA Pink Lady, Greenstar-Kanzi, and The Forelle Producers' Association, as well as the Sustainable Initiative of South Africa (SIZA).

Hortgro het volgens die strategiese raamwerk, reeds begin fokus op primêre bedrywe, naamlik die kern- en steenvrugbedrywe, en het sommige van die alternatiewe besighede en bedrywe begin afspoen. Die proses sal verder in 2026 verfyn word.

Hortgro kry egter deurlopend versoeke van nuwe en alternatiewe bedrywe om hulle te ondersteun. Dit word ongelukkig van die hand gewys omdat Hortgro nie oor voldoende kapasiteit beskik om nog bedrywe te diens nie. Daar sal voorts op die primêre bedryfsgroepe, Hortgro Pome en Hortgro Stone, en die substrukture waarin die bedrywe aandeelhouing het, gefokus word.

Hortgro also manages various statutory measures approved by the National Agricultural Marketing Council (NAMC) under the agricultural Products Marketing Act and collects statutory levies on behalf of organisations such as Hortgro Pome, Hortgro Stone (including Dried Tree Fruit), Fruitfly Africa, Cape Flora SA, and the Pomegranate Association of South Africa. Levies are kept in dedicated accounts for each entity, with reports provided to the NAMC and the Auditor-General.

Furthermore, Hortgro also invoices and collects payments for various user-pay industry services offered by some of the entities listed above.

Hortgro is also contracted to implement various programmes in collaboration with other roleplayers.

- The Treasury's Jobs Fund project, in collaboration with contributions from the industry (including Vinpro and SATI) and the Land Bank—commonly known as Hortfin—is a R600 million loan funding initiative, with all funds having been allocated.
- The US Department of Agriculture's Agriculture, Plant Health Inspection

Services (USDA APHIS) oversees pre-clearance programmes for citrus and deciduous fruit.

The finance department also gives administrative support and advice to all other departments within Hortgro. Keeping up with the times, Hortgro has also begun modernising the accounting department by implementing Xero Accounting, Syft Analytics, Aad ApprovalMax.



HORTGRO MANAGEMENT SERVICES:

Human Resources

Astrid Arendse | Manager Human Resources

At the heart of Hortgro's success is its people and culture, consisting of passionate, skilled, and dedicated individuals who thrive in an environment founded on respect, integrity, collaboration, and a shared commitment to achieving excellence throughout the organisation.

Hortgro continues to strengthen internal systems and enhance service delivery across the organisation by focusing on key human resource functions, including compliance, employee training, employee wellness and cultivating a culture built on mutual respect. The HR department remains committed to fostering a supportive, fair working environment that enables all employees to thrive.

Professional development and growth

- The ongoing development of employees remains a priority, and Hortgro promotes a culture of lifelong learning and professional growth through training

and bursary opportunities. The Hortgro employee bursary programme provides financial support to employees pursuing further studies, while targeted training programmes, promotions, and internal opportunities continue to nurture and retain talented individuals. Through these initiatives, employees are empowered to enhance their personal and professional development.

Workforce profile - Hortgro employs a dedicated team of professionals and specialists across various functional areas, including management services, science, trade and market access, resource management and sustainability, communications, economic development, information and market intelligence, learning and development and human resources. The organisation is committed to promoting diversity and gender equity.

Communications

Elise-Marie Steenkamp | Group Manager

Hortgro-kommunikasie het die afgelope jaar sy 10de bestaansjaar gevier. Wat begin het as 'n beskeie inisiatief met twee webwerwe, 'n paar sosiale media-platforms, 'n paar *Sagtevrugtejoernaal*-artikels en 'n een-en-'n-halfdag simposium, het gegroei tot 'n robuuste kommunikasienetwerk wat dien as 'n strategiese funksie en alle afdelings binne en buite Hortgro ondersteun.

Geskiedkundig en kultureel, is kommunikasie as organisatoriese funksie, as "sagte vaardighede" (soft skills) beskou en derhalwe onderwaardeer, of saamgegroepeer in ander afdelings. Verskeie kommunikasieaksies, soos persvystellings, nuusbriewe, veldtogte en geleenthede is takties sigbaar, maar die strategiese denke daaragter is dikwels onsigbaar.

With technological advancements, companies were compelled to develop a robust strategic communications framework, as without it, they risk damaging their reputation, trust, employee engagement, and stakeholder alignment—issues that only become evident during crises, internal cultural problems, or when stakeholder confidence is lost.

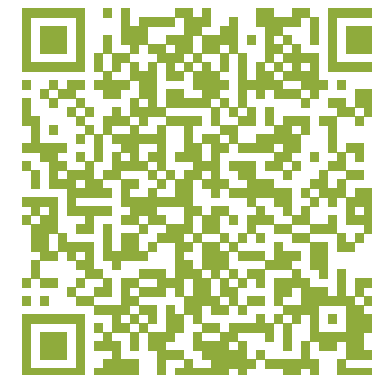
With this group-level approach, Hortgro endeavours to avoid this often-made mistake.

Reputation management and brand integrity

- Unlike sales or production, communication outcomes are more challenging to quantify in terms of rands or measurable output, making impact and ROI harder to assess, but not impossible. Although monitoring online followers and engagement, event attendance, surveys, and advertising value equivalent (AVE)

provides insights into how stakeholders perceive your brand, they are often not enough.

That is why Hortgro commissioned an independent service provider, Reputation Matters, to analyse our outputs and their perception.



Summary reputation survey

The results were significant. Hortgro scored 85% overall, eight percentage points above the industry average. With 335 stakeholders participating—including producers, packhouses, and service providers—the survey confirmed Hortgro's credibility, highlighted strengths, and identified opportunities for ongoing growth. This achievement reflects a decade of consistent messaging, credible storytelling, and strategic communication.

Navigating complex challenges

- Over the years, the department has not shied away from complex, often contentious topics such as the recent activism against the use of agricultural remedies. In 2025, activism efforts intensified when, under the auspices of the Human Rights

Hortgro management team

From left:

Back: Jacques du Preez, Mariette Kotzé, Wiehann Steyn, Dirk Crafford

Middle: Nitasha Bajjnath-Pillay, Astrid Arendse

Front: Anton Rabe, Elise-Marie Steenkamp

Commission, a "People's Tribunal Against Agrottoxins" featuring a "court of public opinion" was held in Stellenbosch in March 2025, with the subsequent "evidence" presented to the parliament's portfolio committee on agriculture in May 2025. Following this, the Department of Agriculture convened a two-day colloquium in Stellenbosch in August, and a report was compiled based on the presentations.

Hortgro, through partnerships, media engagement, and our own anti-activism strategy, acted as the voice of reason for growers, scientists, agricultural workers, and rural communities in this national discussion about agriculture and regulation.

Hortgro supports evidence-based regulation and sustainable agriculture, and we called on the government for meaningful policy adjustments, considering:

- Food safety and food security imperatives.
- Economic realities, including employment, rural livelihoods and export competitiveness.
- Environmental stewardship programmes, grounded in South African data and context.

Furthermore, we urged all growers, packhouses, exporters, and others to adopt ethical and sustainable practices into standard operating procedures.

We need calm minds and compassionate hearts to achieve balance and stability in our industry; otherwise, activists will influence policy and regulation, endangering agricultural workers, emerging growers, and the socio-economic stability of our region.

Expanding the digital and media landscape - Over the past decade, Hortgro's digital presence has expanded considerably. Beginning with just two websites, the network now includes over 10 specialist platforms, including the Phytosanitary ID Guide, the Postharvest

portal, and the Climate Change App. Social media has grown beyond Facebook and X to form a comprehensive digital ecosystem, encompassing LinkedIn, Instagram, YouTube, TikTok, and even Spotify, reaching audiences across generations and regions. Podcasts, video storytelling, and data-driven campaigns now form part of a cohesive digital strategy that informs, educates, and inspires.

Connecting through events and publications - From its humble beginnings, the annual technical symposium has grown into a comprehensive platform for technology transfer and networking, featuring a four-day Technical Symposium that alternates every other year with the Research Showcase. It also includes a Stone Fruit Seminar and Field Day, a Postharvest Symposium, the Langkloof Seminar and Field Day, information days, and webinars. Alongside the Hortgro Awards, Hortfin events, Bursary Function, and Agri's Got Talent Show, these forums strengthen industry voices, networking, and foster collaboration.

Over the decade, the publication range has also expanded, from one to four newsletters — *Hortgro News*, *New Roots*, *Fresh Notes*, and *Fruitloops* — as well as external journals (*Fresh Quarterly*, *SA Fruit Journal*, and *Annual Review*), offering a lively mix of research, insights, technology transfer, public relations, and storytelling.

'n Platform vir die toekomst - Die afgelope dekade het getoon dat effektiewe kommunikasie nie net gaan oor die deel van inligting nie — dit gaan oor die vorming van persepsies en die skep van realiteite, die bevordering van veerkragtigheid en om die bedryf relevant te hou in 'n vinnig veranderende wêreld.

Terwyl Hortgro-kommunikasie sy tweede dekade betree, bly die doel duidelik: om groter wedersydse vertroue te vestig, aan die spits te bly van tegnologiese innovasie, en die kollektiewe stem van Suid-Afrika se sagtevrugtebedryf as die mees geloofwaardige en betroubare bron van inligting te versterk.



Over the past decade,
Hortgro's communication platforms
have grown to include:

12 WEBSITES

8 MAJOR RECURRING EVENTS AND
KNOWLEDGE-EXCHANGE INITIATIVES

5 PUBLICATIONS

4 NEWSLETTERS

8 SOCIAL MEDIA CHANNELS



Follow the Hortgro Linktree to
access our online content.

Hortgro Science

Wiehann Steyn | General Manager

Governance - Hortgro Science operates under the guidance of the Hortgro Science Advisory Council, which reports to the Hortgro Board and the Pome and Stone Producer Councils. Its members include Stephen Rabe (Chair), Grant Smuts (Vice-Chair), Linde du Toit, Frikkie Jacobs, Charl Stander, Raymond Koopstad, Prof. Karen Theron, Dr Ilze Trautmann, Graeme Krige, James Hutton-Squire, and Gerrit van der Merwe.

Anton Rabe (Hortgro Executive Director) and Cynthia Mahlathi (Hortgro Economic Development Manager) are ex officio, non-voting members.

Strategic review - A comprehensive review of Hortgro Science's strategy, functions, and operations was conducted in 2025 to identify key focus areas for achieving objectives.

Summary of 2020-2025 strategy

execution - Over the last five years, significant progress has been made on the strategic goals established in 2019. Notable accomplishments include:

- The establishment and training of PHYLA.
- Managing the biosecurity risks associated with polyphagous shothole borer (PSHB) and spotted wing *Drosophila* (SWD).
- Participation in the founding of a Centre of Excellence for monitoring at Fruitfly Africa.
- Enhanced crop protection at Stellenbosch University through new entomology staff.
- Led the industry foresight study, resulting in the creation of the Hortgro

sustainability and resource management programme.

- Internal capacity grew with postharvest and research implementation managers.
- Smooth management succession with new general and crop protection managers appointed.
- Online research application, reporting system, and research library launched.
- Supported the development of research capacity at Provar.
- Expanded international collaboration.
- Completed industry climate change response strategy.
- Launched climate change, stone fruit and phytosanitary pest applications.
- Navigated Covid-19 with minimal disruption.

Updated strategy - Based on SWOT and risk analyses, along with priority areas identified in a strategic workshop, a new one-page strategy and a revised Balanced Scorecard (BSC) were created to guide strategy implementation.

- Overarching strategic objectives:
- Improve value chain efficiency.
- Mitigate major sustainability risks in the industry.
- Provide guidance on accessing and maintaining markets.

Aligned with these objectives, the primary research and development strategies are:

- Market access, phytosanitary measures, and management of invasive pests and diseases.

- Production efficiency (quantity of exportable fruit per unit area).
- Climate change mitigation and water productivity.
- Plant material quality.
- Sustainable pest- and disease-specific crop protection.
- Postharvest quality maintenance and risk reduction.
- Support for compliance requirements.

The following additional priorities have been identified and incorporated into the Balanced Scorecard (BSC):

- Strengthen internal capacity.
- Strengthen external research capacity.
- Ensure biosecurity preparedness.
- Address funding and monetisation of outputs.

2024/25 Research and Development Summary

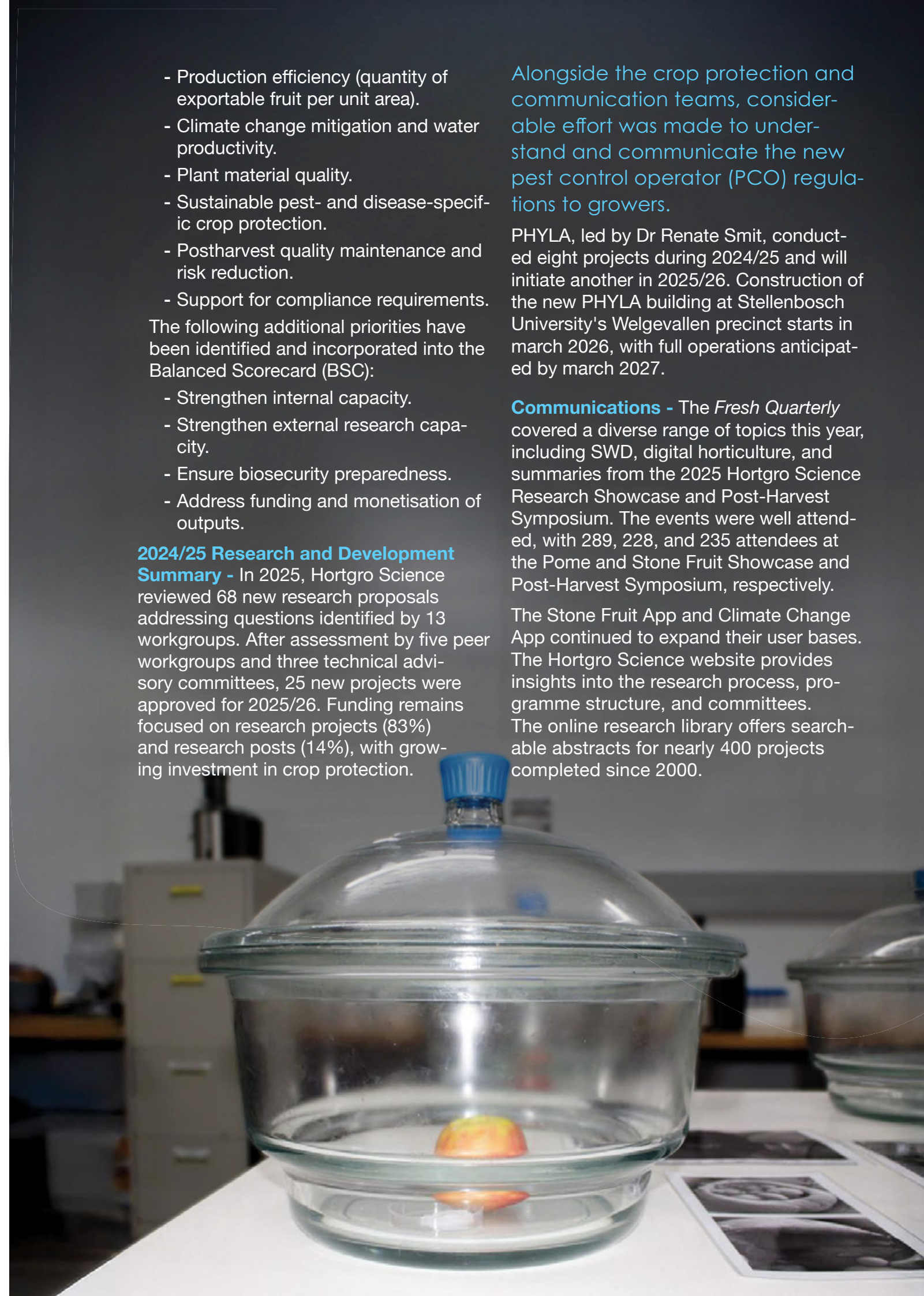
- In 2025, Hortgro Science reviewed 68 new research proposals addressing questions identified by 13 workgroups. After assessment by five peer workgroups and three technical advisory committees, 25 new projects were approved for 2025/26. Funding remains focused on research projects (83%) and research posts (14%), with growing investment in crop protection.

Alongside the crop protection and communication teams, considerable effort was made to understand and communicate the new pest control operator (PCO) regulations to growers.

PHYLA, led by Dr Renate Smit, conducted eight projects during 2024/25 and will initiate another in 2025/26. Construction of the new PHYLA building at Stellenbosch University's Welgevallen precinct starts in march 2026, with full operations anticipated by march 2027.

Communications - The *Fresh Quarterly* covered a diverse range of topics this year, including SWD, digital horticulture, and summaries from the 2025 Hortgro Science Research Showcase and Post-Harvest Symposium. The events were well attended, with 289, 228, and 235 attendees at the Pome and Stone Fruit Showcase and Post-Harvest Symposium, respectively.

The Stone Fruit App and Climate Change App continued to expand their user bases. The Hortgro Science website provides insights into the research process, programme structure, and committees. The online research library offers searchable abstracts for nearly 400 projects completed since 2000.



Capacity development - Developing the next generation of scientists and technical experts remains a priority. In 2024/25, Hortgro Science funded 30 postgraduate students, including 22 MSc, six PhD, and two postdoctoral candidates.

Hortgro Science co-funded a sabbatical by international research leader, Prof Stefano Musacchi from Washington State University, to strengthen research collaboration.

Personnel - Hugh Campbell and Matthew Addison retired in September 2025. Hugh, who joined the Deciduous Fruit Producers Trust in 1998, built and led the research structure for the pome, stone, and table grape industries. He played a pivotal role in shaping Hortgro Science's programme framework, spearheaded initiatives like Orchard of the Future, and redefined the industry's plant improvement strategy. Matthew was instrumental in establishing integrated pest management in the deciduous fruit industry, particularly in the areas of mite biological control, the codling moth sterile insect programme, and emphasising the importance of soil health and cover crops.

Following Hugh's retirement, Wiehann Steyn took over the plant material portfolio while Marno van der Westhuizen assumed responsibility for managing the crop production programme. Marno recently completed a postgraduate diploma in Business Management and Administration at the Stellenbosch University Business School.

To assist Wiehann and Dr Minette Karsten, Crop Protection Programme Manager, in navigating the complex crop protection landscape, a Crop Protection Technical Specialist will be appointed in 2026 to operate between academia, practical crop protection, and regulatory bodies.

International engagement included Wiehann and Marno attending canopy systems and plant bioregulator symposia in New Zealand and Chicago, respectively. Wiehann also delivered a keynote address at the Mexican apple growers' congress in Chihuahua. Dr Mariana Jooste, Post-harvest Programme Manager, and Renate Smit attended the Controlled Atmosphere Symposium in Washington State, USA.

**Pro-Hort cultivar evaluation
block near Robertson**



Plant Material Management

Wiehann Steyn | Manager

The Hortgro Plant Material Management (PMM) portfolio provides leadership, strategic direction, coordination, and support for plant material activities, enabling growers to access a range of adapted cultivars and healthy planting material. The main body is the Plant Material Management Advisory Committee (PMMAC), which comprises experts and representatives from the pome industry (Graeme Krige, Alexander Gibson and Tanith Freeman), the stone industry (André Smit and Charl Stander), and the dried fruit industry (Potgieter van Zyl). The committee is answerable to the respective producer associations. Hortgro Executive Director, Anton Rabe, serves as an ex officio member. The programme focuses on two key areas: independent evaluation and plant improvement.

Independent evaluation - The plant material programme aims to reduce the risk for growers when planting new cultivars. This is achieved by enhancing and standardising the screening of new cultivars and selections across the industry via the Pro-Hort evaluation sites and independent, scientifically based assessments conducted by Provar.

The industry's role in the independent evaluation of cultivars is to provide growers with reliable, scientifically supported information to aid informed planting choices and minimise associated risks.

The 12 representative Pro-Hort sites, located across different regions, are funded by industry, covering establishment costs and annual per-tree costs of cultivars accessible to all growers.

Over five years, an average of 144 pome fruit and 198 stone fruit cultivars were evaluated each year. Of these, 86% were culled, while approximately 20 cultivars of both pome and stone fruit advanced annually to the next stage of evaluation or commercialisation. This process represents a significant contribution to the industry, as it facilitates the removal of unviable cultivars.

Hortgro Pome and Hortgro Stone fund two additional projects – notably the "Tasting and Fruit Evaluation project" and the "Advanced screening project".

This past season, 54 apple and 23 pear cultivars and selections were displayed and analysed at six Provar tasting events.

Additionally, 80 stone fruit cultivars and selections (28 plums, 27 nectarines, 23 peaches, and two apricots) were evaluated at five tasting events. Based on the results, the Fruit Expert Groups selected eight pome and eight stone fruit cultivars or selections for advancement to screening trials. The outcomes will be shared with growers. Currently, 48% of the available space at Pro-Hort sites is occupied, which will gradually be filled by Hortgro projects and IP owners utilising the facilities.

The Pro-Hort ecophysiology platform, which includes apples, pears, and plums, was established at three Pro-Hort sites and is funded by Hortgro Science. Since its inception, it has supported five research projects involving 12 postgraduate students, three international, and five local collaborators.

Plant improvement and plant certification - The mantra "Start clean, end clean" guides the planning and execution of the plant improvement scheme.

The Deciduous Fruit Plant Improvement Association (DPA)/ Sagtevrugteplantverbeteringsvereniging (SPV) is the designated authority responsible for coordinating deciduous fruit plant improvement in South Africa and managing the "SA Deciduous Fruit Plant Improvement Scheme". Hortgro Pome and Stone are represented on the DPA board by Angelique Pretorius and Ross Heyns (Pome), Charl Stander and Tanith Freeman (Stone), along with co-opted member Wiehann Steyn (Chair of the Technical Committee). Hugh Campbell acts as the independent chair of the DPA, and Charl Stander was elected vice-chair, serving alongside Campbell on the SA Plant Board.

Certification levels in the industry

remain low:

Apples: 49%

Pears: 49%

Plums: 69%

Nectarines: 24%

Peaches: 45%

Apricots: 19%

Certification levels have improved somewhat since 2024, owing to changes made to accommodate tissue-cultured rootstocks. However, certification of plums has declined since 2024, indicating that producers are becoming less concerned about plum marbling.

'n SPV strategiese werkswinkel is in Junie gehou waartydens die sertifiseringsproses hersien is om 'n duidelike plantverbeteringspadkaart en implementeringsplan te ontwikkel. Deelnemers het ses sleutel-aksies geïdentifiseer:

1. Virustoetsing, patogeenidentifikasie en virusreiniging.
2. Vlakke van sertifisering.
3. Bepaling van die ekonomiese belang van virusse.
4. Inspeksiediens.
5. Kommunikasie en inligting vir produsente rakende sertifisering.
6. Befondsingsmodel en koste-effektiewe toetse.

Tydens 'n latere SPV-raadsvergadering is spanne vir elke aksiegebied aangewys. Vordering sal gemonitor word en by komende DPA-raadsvergaderings gerapporteer word.

Several research initiatives are currently ongoing to evaluate new virus testing methods and assess the economic impact of viruses in new plantings, including:

- Performance comparison of tissue culture-derived plants versus those propagated via layering.
- Sensitivity of high-throughput sequencing for the detection of pome viruses during certification.
- Investigation of latent viruses and graft incompatibility in apple rootstocks in South Africa.

Furthermore, a new project endorses action three of the strategy:

- Impact of virus-infected plant material on apple tree growth and productivity in South Africa.

Finally, three stone-fruit concept orchard trials have been established to compare trees derived from tissue culture with those from cuttings. Provar will collect comparative data for these trials.

Natural Resource Management and Sustainability

Nitasha Baijnath-Pilay | Manager

A year ago, we began a journey to lead and facilitate the implementation of various existing and new interventions within the Natural Resource Management and Sustainability (RMS) portfolio, and this past year has been full of events.

South Africa is implementing a comprehensive strategy to decarbonise its agriculture sector through a combination of legal frameworks and policy instruments, such as the Carbon Tax Act (Act 15 of 2019) and the Climate Change Act (Act 22 of 2024), which aim to measure and manage the country's greenhouse gas emissions. Reporting under these regulatory tools—covering sectoral emissions and carbon taxation—generally involves corporate carbon footprinting, which is increasingly becoming the minimum standard that any business should measure and manage.

This is where sustainable agricultural practices come into play. These efforts are not only essential for meeting the country's climate change commitments and ensuring the long-term sustainability of the agricultural sector, but also for transforming agribusinesses in SA. We have recognised that maintaining our market share heavily relies on addressing growing consumer concerns and investor preferences that align with global agreements on climate change and sustainable development.

This past year, Hortgro RMS established an Environmental, Social, and Governance (ESG) and Sustainability Working Group, which includes representatives from our pome and stone fruit producers and packhouses. This serves as a platform to share our efforts and respond to an evolving regulatory and environmental landscape.

At the July meeting, SIZA reported that out of 104 pome and stone packhouses, 102 achieved Platinum status in quarter four of 2024, and two received Gold status in terms of compliance.

We want to encourage this level of participation and commend this high standard of compliance. We are proud to see statistics that show our current ESG compliance status.

This platform provides space for sharing expert knowledge, tools, and ideas that benefit the sector as we work towards meeting our sustainability obligations.

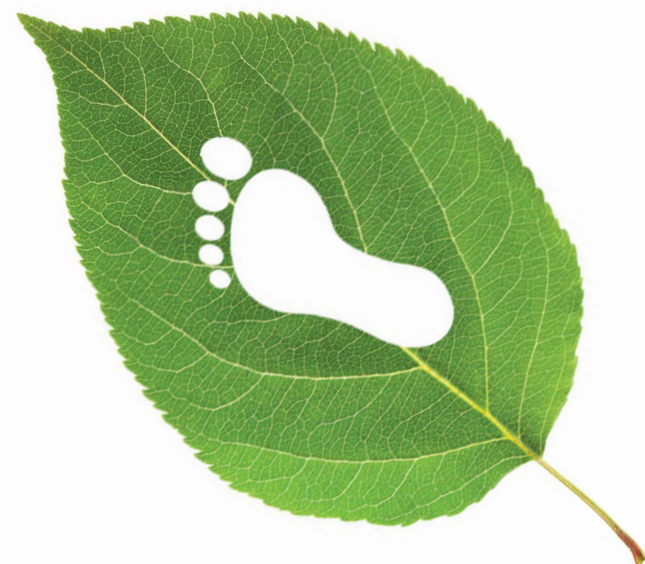
We often hear the phrase "we cannot manage what we do not measure" or, "if you can't measure it, you can't improve it," which emphasises that measurement is vital for understanding progress and making informed decisions to improve processes or business results. Retailers and consumers, especially in the United Kingdom and Europe, increasingly demand ethically and sustainably produced fruit and want to know the carbon footprint of products.

Our Confronting Climate Change (CCC) Initiative continues to produce meaningful reports that detail our carbon footprint since 2011. These benchmarks help producers compare emissions, monitor progress, and enhance sustainability. From 2011 to 2024, the CCC database has expanded to include 16 796 hectares of pome fruit farms (representing 44% of the pome fruit industry) and 5 544 hectares of stone fruit farms (representing 34%). Between 2024 and 2025, there has been an overall 6% increase in stone fruit CCC coverage.

Businesses' or corporate carbon footprints generally include direct emissions (such as fuel use by tractors or forklifts), indirect emissions from electricity, and other indirect emissions in the value chain (such as those associated with producing fertilisers or packaging).

Hortgro continues to represent the DFI at sectoral emission target discussions nationally and in the development of Global G.A.P. Environmental Sustainability Solutions internationally. We expect that G.G.A.P. will require product environmental footprinting at a minimum. This mainly pertains to the emissions associated with a unit of product, such as a kilogram of apples or plums. It is based on a life cycle assessment (LCA) that accounts for every emission linked to the product.

The good news is that Hortgro is a step ahead—we will fund the first LCA project for apples and stone fruit in South Africa this coming year. This will provide a foundational, science-based profile of the industry's environmental footprint, covering all stages from input production to post-harvest handling and end-of-life (e.g., packaging disposal, food waste). This initiative represents cutting-edge work for the industry. Additionally, a pilot soil carbon removal project will be launched to assess the potential for monitoring and accounting for carbon removals in sustainable agriculture supply chains.



Our discussions and aspirations to engage with global retailers such as Tesco and comply with the EU's Packaging and Waste Regulations (PPWR) have led to a reduction in the plastics used in our packaging materials, and we are sourcing alternatives. They are now driving our research into various options to replace the recycled content in some of our products. Although the PPWR requirements are scheduled to be implemented by 1 January 2030, we await the release of supporting guidelines and regulations to facilitate effective implementation.

Water will be the primary focus in the coming year. We anticipate the release of the Hortgro Strategic Water Resource Plan for the Deciduous Fruit Industry in the coming months. Our Packhouse Action Group (PAG) will build upon their work related to water and energy efficiency benchmarking at a packhouse level. Resource efficiency, after all, means cost efficiency. The PAG and Hortgro will continue working together to promote sustainability, carbon projects, and green ag-tech discussions.

Lastly, our growers need to be aware of, for example, the implications of the European Vision for Food and Agriculture, so that we can stay competitive and sustain our businesses. We aim to communicate research results, management options, and expert information clearly, so growers can understand what they must do and why. Our communication with producers helps ensure proactive compliance with sustainability standards at both primary and secondary levels.

Hortgro launched and hosted the first webinar a year ago as part of the Hortgro Sustainability Footprint Webinar Series. To date, the webinar series remains very popular, and we have covered relevant topics such as soil health, green financing, sustainable packaging, and carbon footprinting for sustainable agriculture over the past year (five in total). The Hortgro Sustainability Advisory Committee continues to provide invaluable guidance and support to the RMS portfolio.

Trade and Markets

Jacques du Preez | General Manager

The pieces of the puzzle that many people worked on so hard for so long are now finally starting to fall into place. Great strides have been made in logistics, market access, and market development. However, new challenges have arisen, but we will tackle them head-on as always. Stability and predictability at a national level are slowly but surely returning; however, the USA has set the cat among the pigeons with its international tariff war. There are, however, also opportunities within this global turmoil that SA should seize with both hands.

The arrival and commissioning of new equipment was a much-welcomed relief for the Port of Cape Town, particularly the Container Terminal. By September 2025, nine brand-new RTGs (Rubber-Tyred Gantry) had been added to the ageing fleet to gradually replace older units, with another nine being assembled for deployment by mid-November 2025. The final batch of 10 arrived in September, three months ahead of schedule, and is expected to be operational in early 2026. Refurbishment and maintenance of other vital equipment are also ongoing, and we have seen continuous improvement as these initiatives begin to translate into increased productivity. While we acknowledge that we still have a way to go, we anticipate enhanced service from the Cape Town Port Terminals and, hopefully, from other SA ports as well, given the interconnected nature of the ecosystem.

The process of gaining access to new markets is frustrating, tedious, and lengthy, but collaborative efforts between industry and government, along with global pressure

on trade relations, helped SA achieve a significant breakthrough this year.

Access for apples was restored to Thailand, and in a historic move, China granted access for SA apricots, peaches, nectarines, plums and prunes.

This achievement shortens many years usually required for stone fruit access, as fruit types are generally handled individually. Cherries are expected to follow soon, and if all goes according to plan, an online site inspection will be conducted by Chinese authorities at the end of November 2025.

Currently, new market access is being actively pursued for apples and pears to the Philippines, and in-transit cold treatment is being obtained for plums to India.

Taiwan sadly remains closed to SA apples and is likely to only reopen in the first quarter of 2026. It is vital that no shortcuts or risks be taken for these sensitive special markets.

After many years of behind-the-scenes work and lobbying, the government is now fast-tracking various trade and tariff agreements, mainly driven by global trade turmoil caused by the USA. The spotlight has also been focused on SACU, which has been a burden when it comes to trade agreements, as well as on SA's member position and role within it.

Over the past decade and more, the pome fruit industry has achieved significant success in penetrating markets outside the UK and EU, while the stone fruit industry is also expanding into other markets, such as the Middle East and India. The growth in

recent years plums to the USA, will however be impacted by the new tariff regime.

The growth of stone fruit in the USA has been supported by proactive research conducted locally, along with commercial trials. This is precisely where commercial realities and science/research intersect to create a supportive, enabling environment.

Our traditional markets for both pome and stone fruit remain a vital part of our market development strategy. In the 2024/25 season, a major focus was on expanding and strengthening new and emerging markets across both categories. Acknowledging the changing global trade environment and shifting consumer preferences and market dynamics, efforts continue to focus on enhancing market presence through stronger trade relationships, increased market penetration through targeted trade development and consumer awareness activities, and improved brand recognition for South African produce in key regions.

In the 2024/25 season, marketing campaigns were continued in the following markets:

United Kingdom: plums, nectarines, peaches, and apricots.

Germany: plums, nectarines, peaches, and apricots.

United States: plums.

Local market (formal and informal): plums, nectarines, peaches, apricots and cherries

Middle East: apples, pears, plums, nectarines, peaches, and apricots.

China: apples and pears.

India: apples, pears, and plums.

Africa: apples and pears; a co-branding strategy was followed.

The plum campaign in the United States offered a valuable entry point into this key market and served as an important learning opportunity for future engagement. The initiative included both trade- and retail-focused activities aimed at introducing South African plums to US consumers

and retail partners. In-store campaigns and product sampling helped to boost brand visibility and foster positive associations with South African produce. Insights gained from this inaugural campaign—particularly regarding consumer preferences and retail dynamics—will inform future marketing strategies.

In the Middle East, momentum persisted through in-store promotional activities for apples and pears within one of the region's largest retail chains, significantly expanding market reach beyond Dubai. Key insights from previous pome fruit campaigns were applied to the stone fruit category, enabling a more integrated and impactful market engagement strategy across both product lines. Campaigns in India and China achieved notable success through comprehensive, multi-channel marketing approaches that spanned digital, retail, and trade engagement platforms. A combination of social media promotions, influencer collaborations, in-store activations, and trade partnerships effectively increased awareness and preference for South African apples and pears.

Strong consumer response, coupled with positive feedback from importers and distributors, underscored the growing potential of these markets and highlighted the importance of sustained, market-specific promotional efforts for our high-quality fruits.

With the reintroduction of South African apples into the Thailand market, a comprehensive consumer awareness campaign was launched to educate both consumers and trade stakeholders about South Africa's premium apple offering. The campaign strategically targeted key areas within the trade sector, particularly the wholesale market, to enhance visibility. Complementing this approach, influencer collaborations and consumer-focused public relations activities were implemented to build trust, increase engagement, and emphasise the distinct quality, taste, and reliability of South African apples.

Building on the success of this initial campaign in Thailand, the 2025/26 season will focus on further strengthening consumer engagement through targeted in-store activities, digital storytelling, and strategic partnerships with key retailers and wholesalers. Additional efforts will include expanding influencer collaborations, launching educational content highlighting the nutritional benefits of South African apples, and utilising data-driven insights to optimise trade and consumer outreach. This strategy aims to regain market share, enhance brand loyalty, and ensure the ongoing growth of SA apples in Thailand.

Overall, the 2024/25 season has reinforced South Africa's role as a dependable and high-quality supplier of pome and stone fruits across major global markets.

Building on these successes, targeted and innovative market development initiatives for 2025/26 will further strengthen brand presence, increase consumer preference, and support sustainable growth in both established and emerging markets.

We've faced many challenges over the past few years, but it seems that the tide has turned in the 2024/25 season. SA has positioned itself very well, from a southern hemisphere perspective, to drive growth, profitability, job creation, and sustainability back into the industry.



Hortgro Information and Market Intelligence

Mariette Kotzé | General Manager: Industry Support Services

The 2024/25 year was marked by collaboration, progress, and innovation. Our focus remained on delivering accurate, relevant, and timely information to guide decision-making across the deciduous fruit industry. We strengthened our data systems, enhanced access to market and production insights, and worked closely with partners both locally and internationally to ensure that our information continues to support a resilient and competitive sector.

Key highlights

- Improved the accuracy and consistency of crop estimates and export data through stronger regional collaboration.
- Enhanced our online information dashboards for easier, real-time access to industry data.
- Improved dataflow systems through the Agri-Hub stack upgrade, which will also facilitate data sharing.
- Prepared regular market reports and trend analyses to assist producers and exporters in navigating changing conditions.
- Enhanced involvement in industry and policy debates, offering data-driven insights to guide strategy and planning.

Partnerships and collaboration -

This year, we proudly strengthened our partnerships both locally and internationally with the following groups:

- Agricultural Conditions Assessment Committee (ACAC): our involvement enhanced the deciduous fruit industry's role in production assessment, contributing to better seasonal outlooks and fostering closer collaboration with various government

departments. This participation is essential for more accurate forecasting of the agricultural gross value added and GDP.

- The Southern Hemisphere Association of Fresh Fruit Exports (SHAFFE) has undergone a rebranding and is now known as the Southern Hemisphere Fruit Alliance (SFA). Dedicated work groups were established, with Hortgro well represented and included in all relevant groups, including the statistical work group. International collaboration has facilitated the exchange of valuable information and benchmarking with other fruit-producing countries, thereby broadening our global outlook.
- Ongoing collaboration with BFAP, the Department of Agriculture, and other industry partners continues to produce reliable, relevant, and independent data outputs at both farm and sector levels.

Looking ahead - In 2025/26, we aim to further develop and improve the usability of our data dashboards, expand the availability of information, and continue to broaden our collaborative networks. Our goal is simple — to turn information into insights that support informed decision-making at all levels, thereby enhancing competitiveness, profitability, and sustainability.

Closing thought - Reliable information remains one of the most powerful tools our industry possesses. We thank all our partners, contributors, and colleagues for their ongoing trust and collaboration in fostering a shared understanding of our current position — and our future direction.

Hortgro Economic Development

Cynthia Mahlati | Manager

Over the past year, South Africa's agricultural sector has navigated a complex mix of environmental, economic, and policy factors. For Hortgro and the broader deciduous fruit industry, these dynamics have presented both challenges and opportunities, informing the strategic direction of our economic development efforts. Hortgro remains a key player in fostering inclusive economic growth within the industry.

At the start of the current levy cycle, the industry's focus was on stabilising existing enterprises following a period of economic hardship. In response, Hortgro introduced a series of strategic measures aimed at strengthening enterprise resilience and supporting long-term transformation. These included expanding the Hortgro Skills Accelerator Programme, providing increased technical support in non-traditional areas, and focusing strategically on orchard replanting and establishing new orchards. Furthermore, Hortgro initiated the development of a Pome and Stone Fruit Production Scheme in consultation

with the National Agricultural Marketing Council (NAMC) as part of the Agriculture and Agro-Processing Master Plan (AAMP). This scheme consolidates all strategic initiatives into a coordinated, stakeholder-driven approach to support structured transformation and growth in both traditional and non-traditional regions.

Strategic objectives - Hortgro's strategic objectives for economic development and transformation aim to promote inclusive participation, sustainable growth, and resilience within the deciduous fruit industry. Central to this strategy is integrating black growers into formal industry structures, ensuring their meaningful involvement in decision-making platforms. To support emerging entrepreneurs, Hortgro is developing and scaling diverse business models that facilitate entry and growth in the industry.

Progress is monitored through objective criteria focused on commercialisation. At the same time, innovative approaches are being explored to improve access to land, water, finance, and production resources,



especially in regions affected by climate change. Strategic partnerships with public and private institutions are utilised to align support with the needs of growers. The organisation also prioritises the active inclusion of women, youth, and persons with disabilities across the value chain. Export readiness and compliance with standards such as Global G.A.P. and SIZA are promoted to enhance market access.

Recognising the importance of entrepreneurial aptitude, Hortgro supports the identification and empowerment of individuals with the passion and potential to succeed in the agri-business sector.

Tailored support programmes, including business development, technical assistance, and capacity building, are implemented efficiently to ensure sustainable transformation. Furthermore, Hortgro works to align industry and government policies, advocating for reforms that support land reform and rural economic development. These objectives are reinforced by dedicated operational support

to ensure the achievement of key transformation and development outcomes.

Strategic response and organisational focus - In response to the complex environment, Hortgro has strategically aimed to foster stability within the industry. This has been accomplished through several key initiatives:

- Expansion of the Hortgro Skills Accelerator Programme addresses critical gaps in budgeting, planning, and enterprise management. Developed in partnership with the Jobs Fund, the programme has onboarded over 30 enterprises, matched them with tailored expertise, and launched an online interactive learning platform to broaden access to information and tools. Training has been delivered in technical operations, financial literacy, and institutional governance. The programme is gaining momentum, with incremental impact becoming evident. It has been highlighted that many entrepreneurs, especially in volatile environments, may need foundational business skills essential for sustainable enterprise development.

La Vouere Stonefruit (Pty) Ltd—an example of how collaboration can lead to successful agricultural production within the economic development arena.
The partners are Peter Wolfaardt, Mary Koopstad, Georgie Hewit, and Raymond Koopstad.



- Scaling up orchard establishment support aimed at replacing ageing orchards and expanding production in both traditional and non-traditional regions.
- Improving monitoring and evaluation frameworks, including expanding the transformation baseline assessment to incorporate new data variables for a clearer view of progress. Currently, the transformation footprint includes 84 registered legal entities, serving around 4 404 beneficiaries. The Western Cape holds the majority, with 69 entities and 4 073 beneficiaries. Black-owned primary production covers 4 161 hectares, which is 8% of the total deciduous fruit area.

AAMP Implementation and industry collaboration - The AAMP has gained momentum in 2024/25, with stakeholders across government, industry, and civil society collaborating through Value Chain Round Tables (VCRTs) and working groups.

These platforms have facilitated dialogue, data sharing, and the co-creation of strategies to address critical issues such as infrastructure, market access, and producer support.

The Government of National Unity (GNU) has reaffirmed its dedication to implementing the AAMP, which acts as a pathway for inclusive growth, transformation, and job creation in agriculture. Hortgro has actively supported the AAMP by developing a production scheme for the pome and stone fruit industry, aimed at expanding the reach of emerging growers and enhancing access to resources and markets through collaboration and facilitation.

Transformation levy and leveraged funds - Both levy funding and strategic partnerships have supported Hortgro's transformation initiatives. In the past year:

- R13.4 million was invested in economic development initiatives through transformation levy funding.

- An additional R3.7 million was released through collaboration with industry stakeholders, including the Jobs Fund, DFIDT, and Cultipowered, supporting the Hortgro Skills Accelerator and orchard establishment programmes.

Challenges and lessons learned -

Despite progress, numerous systemic challenges still hinder transformation.

- High capital and management demands, with lengthy crop cycles and delayed returns.
- Limited availability of affordable financing and infrastructure, particularly in non-traditional sectors.
- Market access barriers and high compliance costs persist regardless of the size of the business unit.
- Governance issues within beneficiary structures, such as trusts and CPAs.

As we progress, Hortgro's efforts will continue to align with national priorities, ensuring that the deciduous fruit industry remains a driver of inclusive growth and rural development, with a focus on key strategic areas for the upcoming year, which include:

- Expanding the production scheme and involving public and private sector stakeholders to ensure coordinated implementation.
- Enhancing the baseline assessment of transformation to guide targeted interventions.
- Enhancing capacity-building initiatives and technical assistance to bolster past and ongoing investments.
- Promoting policy alignment and sustainable funding strategies.
- Fostering inclusive growth through strategic partnerships and innovative solutions.

Learning and Development

Astrid Arendse | Manager Learning and Development

Hortgro Learning and Development is committed to empowering individuals within the deciduous fruit sector. We strive to equip and develop agricultural workers by identifying specific skills and knowledge gaps across various roles and addressing these through targeted training and development programmes. We work closely with our stakeholders—including producers, agri-workers, universities, colleges, training centres, and SETAs—to ensure our programmes stay relevant and responsive to the changing needs of the sector.

Through this ongoing engagement, we aim to foster growth, innovation, and excellence throughout the agricultural value chain.

Hortgro Undergraduate Bursary

Programme - This programme was founded in 2001 with just one student and has since grown over the past 24 years into a highly sought-after agricultural bursary scheme. This is evidenced by the 2 380 applications received in 2025 for funding in 2026, demonstrating the increasing interest in the agricultural sector. However, due to funding limitations, only a select number of these deserving students can be supported. This emphasises the ongoing need for investment in the bursary scheme and unlocks other sources of funding in the value chain to ensure that the next generation of professionals can pursue their studies and make meaningful contributions to the sustainability and progress of our industry.

This year, the programme offered 25 bursaries with an total expenditure of R1.7 million, from which 12 students will graduate at the end of 2025. These students' study

areas are aligned with scarce and critical skills, including studies in agricultural sciences, horticulture, and agribusiness.

Hortgro Pome, Hortgro Stone, AgriSETA and Hortgro Dried Tree Fruit funded the bursary programme this past year. We will strive to raise additional funds from these sources and explore other untapped opportunities.

Work Integrated Learning Programme

This programme has 41 interns placed at various employers within the deciduous fruit industry. Most of these students are required to complete a 12 or 18 month practical experience module to finish their qualifications. At the same time, the rest are graduate placements where students have already completed their qualifications and are entering the workforce for the first time. As most students are placed on farms and packhouses, these placements face challenges such as accommodation and transportation, and stipends received are not always enough to cover these costs.

The Hortgro Skills Accelerator programme addresses some of these needs. This programme is a partnership between Hortgro and the Jobs Fund to assist interns with accommodation fees, transportation fees, and stipends to help both interns and employers to accommodate interns in the workplace.

What makes this internship different is the additional mentorship programme facilitated by Khutsa, focusing on both soft skills and social and life skills. Throughout the year, they participate in blended learning training to further develop these skills and

prepare for the workplace. Over 80% of interns are permanently absorbed into the workplace, with a further 10% continuing their studies.

Gesondheids- en beroepsveiligheidsopleiding -

Gesondheids- en beroepsveiligheid bly 'n belang-rike kwessie, aangesien dit deel vorm van nakoming van wetgewing en dus noodsaaklike opleiding is vir elke werkplek. Om die behoefte aan te spreek, het Hortgro in November 2022 Philani Training and Development Solutions gekontrakteer om opleiding in ons verskeie produksie-areas aan te bied. Die onderskeie programme sluit in Noodhulpopleiding Vlak 1, Gesondheids- en Beroepsveiligheids-beamptes, asook Komitee-opleiding vir veiligheidsvertegenwoordigers.

Industry Launchpad: The Next-Generation Industry Programme

- Co-Hort 2 comprised 24 young leaders who took part in the next generation industry programme during 2024/25. This two-year initiative was created to identify, develop, and empower future leaders within the deciduous fruit industry.

The programme aims to equip participants with knowledge and understanding of the industry, including the various stakeholders, structures and industry partners that collaborate within the sector.

Furthermore, it strives to develop a sustainable pipeline of capable, informed leaders who can make meaningful contributions to the industry.

Over the two years, participants were exposed to leadership development, the Hortgro Science research programmes, Trade and Market Access, and other programmes and industry activities and services that enabled them to gain a thorough understanding of industry challenges and opportunities.

The formal sessions have now been completed. Co-Hort 2 will conclude with an international and/or domestic study tour.

A further 20 participants will be recruited through a nomination process and will join Co-Hort 3 during 2026/27.

Participants in the Hortgro Work Integrated Learning Programme on an industry visit



Leierskapsontwikkelingsprogram vir produksiebestuurders - Hierdie unieke program is spesifiek ontwikkel vir produksievlakbestuurders in die landboubedryf en word reeds sedert 2019 met groot sukses aangebied. Ko-Hort 10 het in September 2025 hul opleiding voltooi en tydens 'n seremonie in Ceres hul sertifikate ontvang.

Die doel van die program is om produksiebestuurders in die vrugtebedryf se vaardighede verder te ontwikkel om produktiwiteit en doeltreffendheid op plase en pakhuse te verbeter.

Die program plaas sterk klem op persoonlike ontwikkeling, bestuurstyle en die verfyning van elke deelnemer se unieke leierskapsvaardighede. Daar word ook gefokus op die bou en versterking van professionele netwerke wat dien as 'n blywende platform vir ondersteuning en kennisdeling waardeur produksiebestuurders van mekaar kan leer om saam die leierskap en uitnemendheid op produksievlak te bevorder.

Opleidingsvideos - 'n Totaal van 36 gratis praktiese videos is tans in die proses om hernu en aangepas te word. Twaalf van hierdie videos is reeds gefinaliseer en is vertaal in Afrikaans, Engels en isiXhosa. Bestaande video-inhoud word deeglik nagegaan, en waar nodig sal van die videos heropgeneem en die inhoud met die jongste inligting en tegnologie

aangepas word om te verseker dat die opleiding relevant is.

Agri's Got Talent - Agri's Got Talent (AGT) is a social development initiative that provides a platform for talented agricultural workers in the fruit and wine industries to showcase their singing and rapping abilities while fostering their personal growth, social and life skills. The project not only nurtures talent but also promotes confidence and individual well-being, celebrating talent within the agricultural community and enhancing their role in their respective workplaces.

AGT continues to promote pride, unity, and empowerment among agricultural workers, while creating opportunities for them to flourish.

Jenedine Jantjies, from Patensie, was crowned the overall winner of 2025 after a week of intensive training, which included voice and stage training, media coaching, conflict management, communication skills development, and life skills training.

Agri's Got Talent is a beacon of hope that continues to inspire and motivate agri-workers to share and develop their talents.

AGT is a joint venture between Hortgro, SA Wine, the South African Table Grape Industry Association, the Citrus Growers' Association, and the Western Cape Department of Agriculture.



2025 AGT top ten: Mervin Williams, Jenedine Jantjies, Marco Jacobs, Heinrich Fortuin, Felicia Ngomane, Janine Galant, Clayton Mentoer, Sandeline Mouers, Jayson Pondt and Boo! Swarts



SAPO PLANT (PTY) LTD

Jacques Jordaan | Acting CEO



Following SAPO's restructuring in 2024, the current financial year has brought further significant consolidation, adjustment and developments for the organisation. On 1 March 2025, SAPO Trust officially began operating as SAPO Plant (Pty) Ltd, marking a key milestone in the company's transformation journey.

This structural change is designed to ensure greater financial stability, strengthen long-term sustainability, and enhance the organisation's ability to serve the industry and effectively manage and mitigate future risks.

Despite the unavoidable challenges that come with such a transition, SAPO Plant has maintained a strong and stable financial position throughout the year. The organisation successfully achieved its target income for the financial year ahead of schedule, reflecting sound financial planning and focused strategic execution. Management continues to prioritise financial discipline, effective cash flow management, and the optimal utilisation of resources under the new corporate framework. The smooth and successful transition from operating in a trust to SAPO Plant (Pty) Ltd, therefore, provides a solid foundation for ongoing growth and future initiatives.

Elevating industry standards - To elevate the industry's plant material standards, SAPO Plant continues to follow the philosophy of "start clean to end clean" as contained in the industry's Plant Improvement Plan (PIP). This principle emphasises

that the quality of final plant material relies entirely on beginning with the cleanest and healthiest sources possible.

As part of this commitment, the Deciduous Fruit Plant Certification Scheme (DPA) increased its testing standard in 2024 to the more sensitive PCR testing method, ensuring greater accuracy in confirming the health status of plant material. However, raising industry standards is not a short-term task. It requires significant investment in time, funding, and skilled human resources. SAPO has fully committed itself to this process, with a vision to achieve plant material standards that surpass the current scheme's requirements.

We anticipate that this commitment will lead to further initiatives, including eliminating infected sources, expanding research programmes, refining testing methods, and increasing the multiplication and importation of clean plant material. Future progress might also involve the development of improved virus elimination facilities and, possibly, the consolidation of plant material into dedicated "bud parks" to simplify quality management.

Production and plant material

sales - The 2025 season has seen promising growth in plant material sales. Pome fruit budwood sales surpassed expectations, with particularly strong demand for RYB Select™, Gorgeous Gala, and Fuji Royal varieties. Although demand for pear budwood has been somewhat lower, the season is still ongoing, and positive results are expected. Overall, pome fruit plant material increased by 16% compared to the previous season. Looking ahead, SAPO expects even higher demand in 2026,

though the availability of certified rootstocks may pose a challenge; however, TC-rootstocks, if ordered timeously, could alleviate pressure.

Following the closure of the Tygerhoek premises, new replacement budwood blocks were successfully established in the Klein Karoo near Montagu.

SAPO continues to renew and develop new blocks to ensure the highest quality budwood, with all blocks fully certified.

Additionally, all plum sources for budwood have been tested and confirmed to be free of plum marbling.

The fruit inspection and tree selection process started in January 2025, covering both pome and stone fruit. These inspections verified that all contracted varieties managed by SAPO were true to type. This year, a particular focus was on selecting superior trees in varieties such as Royal Beaut and Early Red One, especially those showing improved colour traits. SAPO also successfully upgraded Royal Beaut to RYB Select™, following close collaboration with key industry stakeholders. The propagating material for this selection will be issued exclusively by SAPO.

Comprehensive inspections were also conducted at all contracted nurseries to ensure full compliance with the PlantSA certification scheme requirements. The winter inspections, completed in August 2025, confirmed that all bud park blocks met the necessary phytosanitary standards. Stone fruit flower inspections began in August, followed by pome fruit inspections in October, ensuring that all foundation and mother blocks are true to flower and variety.

SAPO also partnered with IP owners to host several field days during 2025. These well-attended events brought together producers, marketing companies, technical advisers, and nurseries to discuss progress in plant material and variety development. SAPO continues to work

closely with Provar (Pty) Ltd on rootstock evaluation and advanced screening trials. Looking ahead to 2026, SAPO plans to introduce the Cultiva™ evaluation application, which will improve professional feedback to IP owners and strengthen evaluation reporting.

Intellectual property and variety

development - SAPO maintains regular contact with its IP owners, scheduling routine meetings to provide updates on variety performance, evaluation results, and development progress for the material under SAPO management. This consistent communication builds trust and supports long-term partnerships built on transparency and shared success. SAPO continues to import new stone fruit varieties and supports existing breeding programmes. The company is also importing three new Geneva rootstock varieties through tissue culture and re-importing established Geneva lines to restart the programme with clean material.

Internationally, SAPO's participation at Fruit Attraction proved to be both productive and insightful. Meetings with international clients and IP owners highlighted the importance of regular on-site visits and walking the fields together to stay informed about global breeding developments. As a result, SAPO plans to establish a two- to three-year visitation cycle with its international partners.

SAPO provides comprehensive and customised services to IP owners, managing processes from importation and trademark registration to nucleus facilities, plant material production, and royalty collection. The company also renewed its focus on marketing and visibility in 2025. Through consistent social media activity, including weekly updates on LinkedIn, SAPO has enhanced its communication with IP owners and industry stakeholders. Posts featuring field days, new varieties, and certification updates have received overwhelmingly positive feedback, further strengthening SAPO's industry reputation.

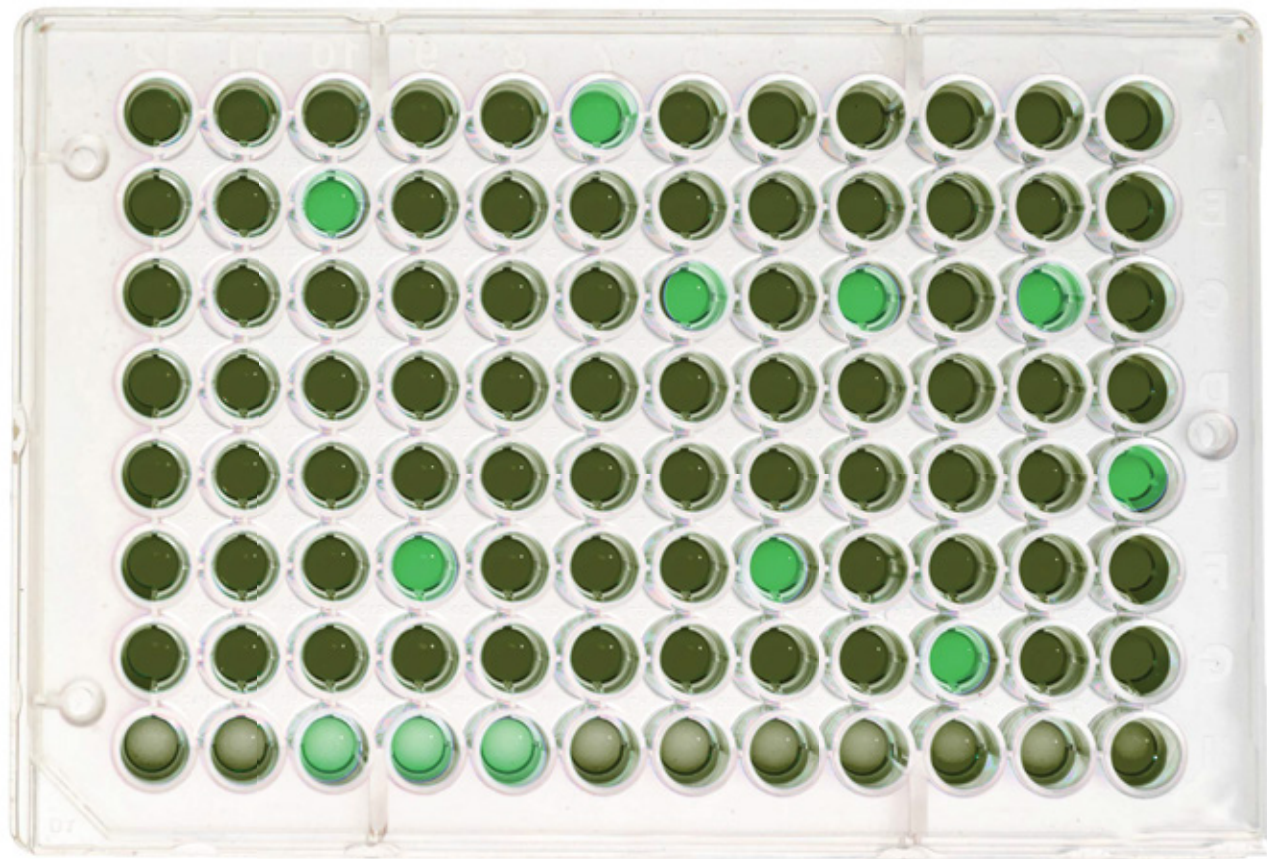
Sapo plant laboratory - The SAPO Plant Laboratory started the 2025 season by testing for Grapevine Leafroll-Associated Virus 3 (glrav-3) from March to June. Over 18 500 tests were performed, with more than 80% of samples representing varieties managed by SAPO.

During winter, the laboratory conducted an endpoint PCR trial to determine whether the primary DPA scheme viruses for pome fruit (ACLSV, APMV, ASGV, and ASPV) could be detected in dormant cane material. Results verified the method's effectiveness. In September 2025, the laboratory took part in the official DPA interlaboratory ring test, achieving 100% conformity and confirming SAPO's competence in precise testing. The team is now screening all pome and stone fruit nucleus material for scheme viruses using PCR, while also analysing Grapevine fanleaf virus through ELISA.

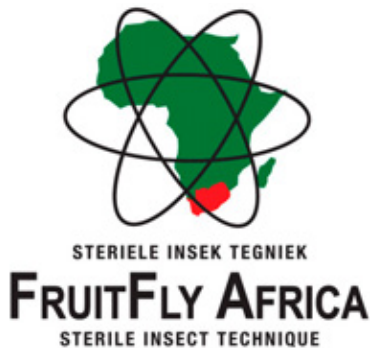
While testing remains a primary focus, SAPO is also investigating ways to improve its virus elimination procedures for both pome and stone fruit.

SAPO and TCF are working with local and international experts to increase success rates, including practical training at an overseas virus elimination facility.

Looking ahead - SAPO Plant (Pty) Ltd remains committed to maintaining its visibility, credibility, and relevance to IP owners and industry partners. Through ongoing collaboration, innovation, and dedication to producing clean plant material, SAPO will continue to strengthen its position as a trusted leader in the South African fruit industry — building on solid relationships and driving ongoing improvement for years to come.



ELISA test



FruitFly Africa (Pty) Ltd

Ghian du Toit | Manager

Kennerse stem saam dat veranderende klimaatstoestand nuwe uitdagings skep, asook peste en plaë se gedrag beïnvloed. FruitFly Africa help om hierdie biorisiko te bestuur.

Sterile Medfly production - One might think that producing a few flies is simple – how difficult can it be? But, in reality, it is a true "art" to follow all the scientific protocols precisely enough to produce around 65 million sterile Medflies each week consistently. The production from the previous season met the targeted volume and quality standards, which is a testament to the dedication and hard work of our team – well done, Team!

SIT remains a vital international best practice, as evident from the International Atomic Energy Agency's investment in a new SIT production facility in Agadir, Morocco, which cost \$5.9 million to build. Amy Collop (from the Monitoring Centre of Excellence) and I had the privilege of visiting this facility in April 2025 for a three-day workshop, which included a delegation from 17 African countries, Spain, and Austria.

The message was very clear: South Africa is very fortunate to have access to SIT technology via the continued partnership between the industry and the Department of Agriculture; something other countries can only dream of.

Pest monitoring - A customised application from Biosyntrix is used to record monitoring data, including coordinates, pest species, and date and time. Each monitor scans the QR code sticker on the trap housing to capture the linked data, enhancing data traceability.

For Medflies, the highest Flies Per Trap Per Day (FTD) values in the past 12 months were as follows:



Warm Bokkeveld (FTD= 0.07, week 20);
Wolseley (FTD= 0.34, week 19);
Tulbagh (FTD= 1.3, week 17);
Elgin-Grabouw (FTD= 0.7, week 14);
Vyeboom (FTD= 1.0, week 21) and
Langkloof (FTD= 16.9, week 21).



In March 2025, one *Bactrocera dorsalis* (Oriental fruit fly) was intercepted in the Langkloof, leading the FFA to implement the National Department of Agriculture's *B. dorsalis* Action Plan. This involved monitoring a 49 km² focused trapping area over 12 weeks. Fortunately, no further *B. dorsalis* flies were captured.



The Monitoring Centre of Excellence has continued its surveillance monitoring on Polyphagous Shot Hole Borer (PSHB) and Spotted Wing Drosophila (SWD), as an industry-funded early warning strategy. Overview of PSHB interceptions in the 2024/25 season:

Grabouw = multiple;

Stellenbosch = multiple;

Langkloof = 1;

Ceres = 0.

SWD has been caught in traps in the Western Cape, Langkloof, Gauteng, Limpopo, and Northwest.



Aerial baitings - During the 2024/25 season, FFA coordinated a total of 50 (statutory and non-statutory) aerial baitings with GF-120NF™, covering more than 188 000 hectares of commercial orchards and vineyards. The aerial baiting programme is an effective strategy to significantly reduce pest populations during critical periods before and during harvesting, on an area-wide basis. Although there is strong interest in drone technology, fixed-wing aircraft and helicopters remain the preferred options for covering large regions in the shortest possible timeframe.

Goeie nuus! - In 'n wêreld waar ons gebombardeer word met slegte nuus, is 'n bietjie goeie nuus mos welkom! FFA het weer vir finansiële ondersteuning by die program van die Nasionale Departement van Landbou aansoek gedoen. Dit is goedgekeur vir 'n drie-jaar termyn (2024/25 – 2026/27). Dit help om steriele produksie- en moniteringskoste te verlaag, tot die direkte voordeel van die produsent, asook om 'n vinnige responskapasiteit, in gevalle waar kwarantyn-organismes onderskep word, in die verskillende produksiegebiede in plek te hê.

Ek het op die volgende wysheid afgekom wat my inspireer: "Great leaders don't set out to be leaders; they set out to make a difference."

Mag ons almal, waar ons geplant is, 'n positiewe verskil maak.

'n Woord van dank aan al ons produsente, bedryfsorganisasies, streekstrukture en diensverskaffers wat ons in die afgelope seisoen ondersteun het.

Culdevco

Mishkaat Anderson | General Manager

Season overview - The South African stone fruit, pome fruit, and grape sectors demonstrated remarkable adaptability, producing volumes that exceeded expectations and maintaining stable supplies for the global market.

Market performance was affected by subdued consumer spending in the northern hemisphere. Demand for stone fruit eased as the pome and grape harvests reached peak season. Apricot exports to the Middle East faced price pressure, with only one of nine commercialised cultivars—Charisma—achieving notable success. Since many apricot cultivars are now 10 to 15 years old, the need to reinvest in locally adapted and innovative genetics has become evident.

Nectarine exports remained steady, while peach performance improved, supported by stronger logistics that reduced quality concerns and increased demand for peaches.

Maintaining this momentum will require ongoing alignment between cultivar innovation and market intelligence.

In the UK, nectarine prices remained stable, while smaller plums faced oversupply in European markets. The Middle East continued to generate encouraging returns on nectarines and peaches, although plum performance was hindered by competitive grape prices. The US market, by contrast, showed strong growth and premium sales, highlighting robust cultivar adaptability and consistent quality.



In conclusion, although market volatility and environmental challenges characterised the season, the industry's capacity to export higher volumes than the previous year highlights the resilience and strategic focus of the South African fruit sector.

Strategic partnership with ARC - The ARC-Culdevco partnership, valid until March 2028, remains fundamental to our operational and strategic framework. After 2028, the ARC has signalled that it will shift to an Expression of Interest (EOI) process. This process will be outlined in terms of its framework, contractual commitments, and operational methods, which will shape the structure and nature of future collaborations. Culdevco has received initial approval for its EOI and will participate in this process.

Culdevco continues to advocate for a direct contractual relationship with the ARC rather than through the producers' associations, a structure that would preserve accountability, operational efficiency, and transparent governance. Culdevco has proposed a series of co-development workshops with ARC to define a future collaboration model that balances governance integrity with business agility. This issue remains a strategic priority as we work to secure a sustainable and mutually beneficial future.

Financial summary 2024/25 - The 2024/25 financial year demonstrates robust and disciplined financial management, backed by the implementation of a new dividend policy and a structured governance framework.

This signifies a pivotal moment in financial management, aligning shareholder value with responsible reinvestment for future growth.

Cultivar management and strategic evaluation - Effective cultivar management lies at the heart of Culdevco's mandate. Evaluation and commercialisation efforts continue to evolve strategically through our collaboration with Provar.

Of the 10 pear cultivars under evaluation, four are managed by Culdevco—one of which is actively being commercialised—while six are still under ARC's control. Two promising new pear cultivars have been identified and will be funded by Hortgro to continue with the evaluations.

Culdevco will retain access to all data, ensuring readiness should future commercialisation opportunities arise. In the raisin category, three promising selections have progressed to the advanced phase of evaluation and are showing strong potential for transition into semi-commercialisation. In parallel, rootstock trials are also well advanced, both in the Northern regions and the Western Cape, positioning us to make informed decisions for future production and scalability. Culdevco manages three new plum cultivars in the advanced stages of evaluation.

While legacy cultivars remain commercially relevant, we are implementing renewal strategies to strengthen performance and unlock future growth. Sustained cultivar stewardship remains fundamental to Culdevco's long-term value creation and strategic differentiation.

International commercialisation strategy - Culdevco's international commercialisation strategy continues to expand, reinforcing our reputation as a global leader in cultivar marketing and intellectual property management and commercialisation.

Our partnership with Viveros Orero in the EU has evolved into a diversified network of European propagation partners, enhancing production capacity, improving financial outcomes, and expanding geographic reach. We also secured eight new evaluation contracts across Europe, several of which have high potential to transition into commercial licenses—expanding our influence in key international markets. This next phase of expansion demonstrates Culdevco's ability to combine innovation with commercial agility, positioning us as a thought leader in the global cultivar value chain.

Organisational development and strategic foresight - As Culdevco prepares for the post-2028 era, organisational development remains a top priority. The introduction of ARC's EOI model requires Culdevco to proactively secure its strategic relevance, and protect revenue streams.

Culdevco continues to engage with government and industry stakeholders to ensure that the current contract is fully honoured and that any future framework continues to recognise Culdevco's role as a trusted and capable commercialisation partner.

Our commitment to transformation is reflected in the establishment of Culti-powered, our broad-based black ownership entity holding 51% of Culdevco. This strategic shift underscores our belief that inclusivity and governance excellence are foundations for long-term sustainability.

Looking forward, Culdevco must remain agile, visionary, and united with shareholders—ready to adapt to changing institutional frameworks while strengthening our strategic and operational foundations.

Acknowledgements
From the General Manager,
Mishkaat Anderson

I wish to extend my gratitude to the Chair and Board of Directors for their strategic leadership and unwavering support. A special acknowledgement goes to Willem Bestbier, whose mentorship and integrity

have shaped a culture of governance, innovation, and accountability. My appreciation also goes to our producer associations, partners, and individual growers—your collaboration remains the cornerstone of our success. Finally, sincere thanks to Culti-powered for its ongoing role in driving innovation, inclusivity, and Culdevco's future growth.

Let us continue forward—purposeful, united, and strategically aligned—in building an organisation that truly serves the future of South African agriculture.

Acknowledgements
From the Chair, Willem Bestbier

After 10 years of dedicated service on the Board, including four years as Chair, I conclude my term with deep appreciation for all that Culdevco has accomplished. During this period, we achieved significant structural reform and strengthened the organisation's strategic foundations.

It is with confidence that I hand over the leadership baton to Angelo Peterson, who succeeds me as the new Independent Chairperson of Culdevco. His appointment marks the beginning of an exciting new chapter—one that calls for fresh vision, renewed collaboration, and bold thinking to reimagine Culdevco beyond its current constraints.

I extend my sincere gratitude to every board member, shareholder, and partner who has contributed to this journey.

The path ahead will demand courage, foresight, and unity, and I remain confident that Culdevco is well-positioned to meet the opportunities and challenges that lie ahead.



CULTIPOWERED NPC

Dr Konanani Liphadzi | Chairperson

Cultipowered NPC continues to promote empowerment and transformation within South Africa's deciduous fruit industry. Our mission is to facilitate, support, and fund inclusive growth, rooted in the belief that economic empowerment is a shared responsibility. Through strategic partnerships and collaborative efforts, we increase our impact and create meaningful change across the value chain.

Enterprise development - During the reporting period, Cultipowered NPC proudly supported initiatives that bolster farm-level resilience and facilitate expansion.

Bergvallei Farm (via SATI): With funding from Cultipowered NPC and partners, a solar energy system was installed to mitigate electricity supply risks. This intervention ensured uninterrupted crop preparation for the 2024/25 harvest.

Afrikan Farms, Thobela Royale and Rem-moho Investments (via Hortgro) received partial funding to establish new pome and stone fruit orchards. Support was directed towards infrastructure and preparatory work, laying the groundwork for sustainable operations.

Skills development - In partnership with Raisins SA, Cultipowered NPC awarded bursaries to five students pursuing a National Diploma in Plant Production

(Viticulture NQF 5) at the Vine Academy and Model Farm (VAMF). This dual-stream programme combines academic study with practical experience, preparing graduates for employment and leadership roles in the vine industry.

Strategic review - In September 2024, the Board conducted a strategic review to ensure alignment with changing sector dynamics.

The updated strategy is a living document, open to stakeholder input and designed to guide our next phase of growth.

Implementation will be carried out in stages, starting with stakeholder engagement and targeted communication to foster shared ownership and momentum.

Conclusion - As we reflect on the past year, Cultipowered NPC reaffirms its commitment to inclusive growth, sector resilience, and meaningful transformation. Our collaborative efforts spanning enterprise development, skills upliftment, and strategic realignment demonstrate the power of shared responsibility in driving sustainable impact. Looking ahead, we remain focused on implementing our revised strategy with intention and agility. Together, we cultivate growth.

TCF Pty (Ltd)

Marizanne Horn | Laboratory Manager, Leander Gagiano | Nursery Manager

Tissue Culture Facility (TCF) is verbind tot die verskaffing van skoon en goeie kwaliteit onderstamme aan die Suid-Afrikaanse vrugtebedryfkwakey.

TCF, geleë in Noorder-Paarl, het in 2025 besef dat die onderstam getalle wat tans in die bedryf benodig word, nie die kommersiële druk waaronder die besigheid is, alleen kan verlig nie.

Al is TCF se hooffokus op die vrugtebedryf, is daar navrae van verskeie ander bedrywe om van TCF se dienste gebruik te maak.

Die besef van die voordele en die waarde van weefselkultuur in verskeie gewasse vat nou behoorlik pos in Suid-Afrika.

TCF het reeds nuwe nie-openbaarmakingsooreenkomste (non disclosure agreements) met drie verskillende entiteite geteken en is aktief besig met nuwe protokolontwikkeling.

Algemene werksaamhede -

Die TCF-kwarantynfasiliteit, in samewerking met die TCF-weefselkultuurlaboratorium, bly 'n groot bate. Nuwe ingevoerde pruim- en bloubessiekultivars is in 2025 vanuit die fasiliteit vrygestel.

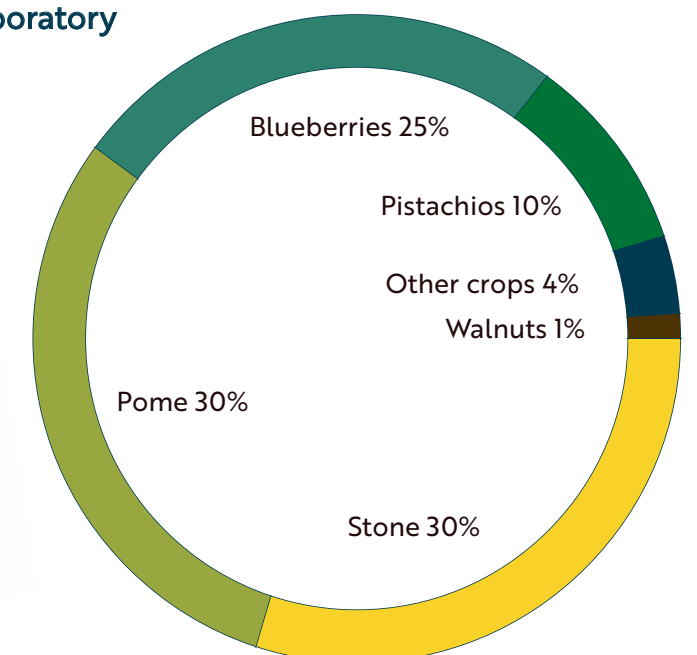
Bloubessiekultivars wat in die TCF laboratorium vermeerder is, is baie suksesvol na Chili uitgevoer.

Marizanne Horn het die Hortgro Research Showcase in Junie 2025 bygewoon. Sy en Leander Gagiano het verskeie kliënte besoek waaronder Montagu Vrugteboom Kwekery, Rosenhof Kwekery, Topfruit, Hortafrique en Cape Sweet Kwekery.

TCF het verskeie besoekers gehad, o.a. Hardus du Toit van die Suid-Afrikaanse Pekanneutprodusentevereniging (SAPPA), Groenewald Agri, ASVS Solutions en 'n Rooibostee-afvaardiging.

Laboratorium - Die laboratorium bou voort op bestaande protokolle en probeer

Percentage focus of crops in the laboratory



om 'n beter vermeerderingsfaktor en beter beworteling van weefselkultuurplantjies te bewerkstellig.

Nuwe weefselkultuurtegnologie word deurlopend ondersoek en in die kommersiële verskaffing toegepas.

Okkerneutonderstamme word baie suksesvol in vitro vermeerder, maar op produksievlak word probleme met die groei van die weefselkultuurplantjies in die groei-tonnells en boorde ondervind. Pistachios word steeds redelik suksesvol vermeerder, hoewel die vermeerderingsfaktor en beworteling 'n uitdaging bly.

Bloubessieproduksie gaan steeds voort, hoewel die fokus bly om kern- en steenvrugonderstamme aan die bedryf te lewer. Baie van die onderstamme wat die afgelope vyf jaar geïnisieer is, word nou weer geher-inisieer (vars materiaal word gewerf vanaf grondvesbome om die bronne van weefselkultuurmateriaal lewensvatbaar en eenvormig ("true to type") te hou.

Beworteling, groeitonnells en buite - Verskeie chemikalieë, kombinasies en konsentrasies daarvan word in die laboratorium getoets om sterker weefselkultuurplantjies met goeie beworteling uit die laboratorium na die groeitonnells oor te plaas, om sodoende die oorlewingspersentasie te verbeter. Daar word ook daadwerklik gekyk na nuwe tegnologie om die beworteling en groei van plantjies in die groeitonnells te

optimaliseer. Humiditeit, temperatuur, vog, groeimedium en ander parameters is baie belangrik om die plantjies se oorlewing te ondersteun.

Saam met sterker plantjies wat uit die laboratorium moet kom, moet hierdie parameters in die toekoms meer outomaties en presies beheer word vir groter oorlewingspersentasie van die plantjies.

Hoewel weefselkultuur 'n baie goeie hulpmiddel is vir verbeterde produksie, hoë kwaliteit en gesonde plante, moet ons realisties wees dat dit 'n tydrawende proses is en stap-vir-stap geoptimaliseer moet word.

Daarom is dit uiters belangrik dat bestellings deur kliënte 12-18 maande voor die tyd geplaas word.

Personeel - Die personeel by TCF is geherstruktureer met die aanstelling van Marizanne Horn as laboratoriumbestuurder. Leander Gagiano is steeds die kwekerybestuurder. Lusuko Siphoki (nadat hy sy-aan-sy saam met Wendy Bailey, die laboratorium beman het in die afwesigheid van 'n laboratoriumbestuurder), is bevorder tot tunnel- en laboratorium-opsigter (tunnel and laboratory supervisor) om die skakeling tussen die laboratorium en die kwekery te vergemaklik. Babalwa Mxabeli en Nonzukiso Vellum is onderskeidelik tot tonnellspaneier en laboratoriumspanleier bevorder.

Steenvrugte							Sagtevrugte							
Atlas	Barrierl	Cadaman	Flordaguard	Guardian	GF677	Marianna	Viking	BP-1	B-10	Fox 9	G202	G778	G890	M9-T337
														

Chapter 3: Industry Service Entities | 50 | Annual Review 2025



Sagtevrugteplantverbeteringsvereniging

Rachel Kriel | Manager PlantSA

This report provides a brief overview of the key activities and achievements in plant improvement during 2025, highlighting strategic growth, governance reforms, certification progress, and financial stability.

Strategic session and action plans - The DPA held a strategic meeting with representatives from throughout the plant improvement value chain. Six essential aspects were identified, each accompanied by a specific action plan.

- Three plans address various phytosanitary priorities, including confirming economically significant pathogens, identifying optimal testing methods, and exploring heat therapy to produce clean plant material.
- Certification levels will be reviewed according to phytosanitary status and propagation methods.
- A fourth plan aims to enhance Plant SA's inspection service, focusing on inspector training and establishing a long-term service agreement.
- The fifth plan emphasises communication and raising awareness of certification to ensure compliance with scheme standards.
- The final plan considers sustainable funding for the DPA, decreasing dependence on industry bodies and encouraging a user-pay approach.

Grondwet van die SPV - Die SPV-raad het 'n wysiging aan die Grondwet, ten opsigte van die lede van die Raad, goedgekeur, waarmee die beperkende bewoording, wat nie voorsiening gemaak het nie vir enige nuwe Plantverbeteringsorganisasies (PVO),

aangepas is om sodoende geleentheid te skep vir ander instansies of individue om as PVO te registreer.

Die samestelling van die SPV-raad is een van die belangrikste aspekte wat hierdie afgelope jaar aandag gekry het.

Na uitgebreide onderhandelings is die Grondwet van die SPV gewysig om voorsiening te maak vir groter en meer regverdige produsenteverteenwoordiging op die Raad. Hierdie wysigings het ook die hersiening van stemreg ingesluit om 'n gebalanseerde en billike besluitnemingsproses te verseker. Saam met die aanstelling van die addisionele raadslede, het daar ook 'n verandering in die leierskap plaasgevind.

Wiehahn Victor het as voorsitter bedank, nadat hy sedert 2017 die posisie beklee het. Hugh Campbell is deur 'n eenparige stem as die nuwe voorsitter verkies, terwyl prof. Wiehann Steyn die nuwe voorsitter van die tegniese komitee is.

Daar is op versoek van PlantSA 'n aanpassing gemaak ten opsigte van die SPV-lede wat aangewys is om as direkteure van PlantSA diens te doen. Hierdie veranderinge in die samestelling van die PlantSA-direksie is gemaak om te verseker dat die organisasie onafhanklik van die kliënte wat sertifiseringsdienste ontvang, funksioneer, wat sodoende die geloofwaardigheid en onpartydigheid van die sertifiseringsproses versterk.

Certification and inspection - In 2025, the certification rate for propagated trees increased notably, climbing from a low of 30% in 2024 to 45%. This rise was driven by the inclusion of tissue culture rootstocks in the certification scheme and a decline in propagation from non-participating breeding programmes. Additionally, PlantSA inspected 425 919 uncertified trees, confirming label accuracy for nearly 65% of available trees (up from 45% in 2024).

Phytosanitary aspects - Over time, enforcement of scheme requirements—particularly phytosanitary standards—has diminished. This has resulted in the propagation of plant material without consistently using the most suitable testing methods to verify the absence of harmful viruses. Although often well-intentioned,

these practices have introduced variability in plant health, emphasising the need to reaffirm the integrity of the certification framework.

To address this, annual ring tests have been introduced to guarantee diagnostic precision. In 2025, four laboratories participated in PCR-based testing for four key pome fruit viruses. Results confirmed that the two DPA-registered laboratories meet the required standards and function effectively. This process is crucial for restoring confidence in certified plant material and ensuring future adherence to phytosanitary standards.

Finansiële posisie - Die druk op die finansiële posisie van die SPV oor die afgelope paar jaar kan toegeskryf word aan die lae volumes gesertifiseerde plantmateriaal wat uitgereik is en die groei van teelprogramme wat nie aan die Skema deelneem nie. Daarbenewens is daar ook 'n groeiende aantal kleiner kwekerye, waar produsente registreer as kwekers om toegang te kry tot plantmateriaal binne die Skema, en dan geen opgawe indien nie, of verklaar dat alle bome vir eie gebruik is en dus nie vir inspeksie of sertifisering aangebied word nie.

Die SPV het ten spyte hiervan in 2025, met die finansiële ondersteuning van die bedryfsorganisasies, daarin geslaag om sy finansiële verpligting na te kom, terwyl daar ook geleentheid geskep is om die omkeerstrategie waarmee in 2024 begin is, momentum te gee. Die heropbou van 'n volhoubare reserwefonds is 'n strategiese prioriteit om toekomstige onverwagte tekortkominge te absorbeer en organisatoriese stabiliteit te verseker.

The year 2025 signified a phase of strategic recovery and institutional strengthening in the plant improvement sector. Certification rates increased, governance reforms improved representation and independence, and financial health was restored. These developments position the industry well for ongoing growth and sustainability.



Hortfin

Michael Brinkhuis | Chief Executive Officer

At the start of the 2024/25 season, several businesses were still busy finalising repairs following the damage caused by various environmental factors in the previous season, aiming to repair the most critical infrastructure and production systems in time for the upcoming season.

There was, however, a "silver lining of the clouds" because the season began with a good water supply in the main dams across most of the production regions in the province. Paired with favourable temperatures and conditions, the fruit season started with promising prospects.

2024/25 developed into a promising season, and the producers in the Hortfin programme could collectively start breathing a sigh of relief as the season was shaping up with better prospects than a few years prior.

Jobs Fund-termyn - Die Jobs Fund as finansierder vir die Hortfin-program het op 30 Junie 2024 geëindig. Alhoewel die Jobs Fund se betrokkenheid as finansierder verby is, is die Hortfin-program so ontwerp dat die Jobs Fund steeds betrokke bly tydens die moniterings- en evaluasiefase van die program en die individuele projekte.

In Februarie 2025 het Hortfin in 'n dankie-sê-funksie die belanghebbers, finansierders, aandeelhouers en kliënte erkenning gegee vir hul betrokkenheid en ondersteuning van die program. Die geleentheid was bygewoon deur al die Hortfin-kliënte, verteenwoordigers van bedryfsorganisasies, kommersiële bankvennote, medefinansierders en ander belanghebbers.

Businesses funded - Hortfin takes pride in reporting that, at the end of the Jobs Fund financing period, it has approved financing for 25 businesses in the deciduous fruit and grape industries.

These businesses span across the entire value chain of the deciduous fruit sector, a mandate Hortfin has pursued since the start of the programme. Most of the funded businesses are from the pome and stone fruit industries, followed by table grapes and then wine grapes.

Hortfin, together with its matched funders, financed businesses with more than R460 million by the end of June 2025. The matched funders included commercial banks, DFIS, industry organisations, and the government.

The Western Cape Department of Agriculture strongly supported the Hortfin programme, as well as the previous Hortgro projects that preceded the Hortfin phase.

Through the Hortfin initiative, the industry created more than 2 100 seasonal and 66 permanent jobs over the period.

Die Hortfin-inisiatief het ook redelik aandag getrek in ander vrugtetebedrywe in besonder. Verskeie navrae is ontvang van ander waarvan die navrae gewissel het van versoeke om die metodologie en implementering van die Hortfin-program te verstaan, tot versoeke vir die moontlikheid van samewerking. Terselfdertyd was daar ook talle navrae en toenaderings van nuwe finansierders en ander ontwikkelingsinstansies, terwyl die finansierders soos die kommersiële banke ook hul volgehoue betrokkenheid wou hersien en onderhandel.

New prospects -The 2024/25 season was a decent production period for most of the Hortfin-funded businesses, characterised by better-than-projected yields, improved product quality, and ultimately higher prices.

While hard work lies ahead to support the recovery of a few businesses that are not performing satisfactorily, there is, however, excitement about the prospects

of securing new investors in the Hortfin programme. These new investments will ensure continued financial support for the existing Hortfin portfolio as well as for eligible new businesses. Hortfin has established itself as a competent blended finance development programme and is eager and prepared to forge new partnerships with like-minded collaborators in the future.

Vrugtewerkersontwikkelingstrust

Wimpie Paulse | Voorsitter

Die Vrugtewerkersontwikkelingstrust (VWOT, in Engels: Fruit Workers Development Trust/FWDT) fokus op die welstand van mense in die vrugtebedryf, en meer spesifiek op die mense op grondvlak. Die mense van die vrugtebedryf bly landbou se grootste bate, en ons glo dat die trust 'n positiewe bydrae kan lewer tot die welstand van die bedryf se mense.

VWOT maak beleggings en wend dan die winsgewende opbrengste aan om begunstigdes se lewenskwaliteit te verbeter.

In 'n poging om landbouwerkers te bemagtig is daar vanjaar 'n opleidingsprogram geloods wat konflikhantering en kommunikasie aanspreek.

PROCARE, die diensverskaffer, se fokus was op verbale en nie-verbale kommunikasie en hoe om beter te luister. Daar is ook gekyk na moontlike oorsake van konflik in die werkplek en deelnemers het raad ontvang om komplekse konfliksituasies sinvol te hanteer. Die redenasie is dat iemand wat aktief luister, beter kan kommunikeer en daardeur duideliker sy of haar behoeftes uitspreek en ook beter op ander s'n reageer.

Nie net is daar na kommunikasievaardighede omgesien nie, maar die trust kon ook in hierdie jaar finansiële 'n bydrae maak deur 'n dividend aan die begunstigdes uit te betaal. In die huidige ekonomiese klimaat maak enige bydrae 'n welkome verskil.

The trustees would like to thank the administrative and investment partners, Hortgro and Agrifusion, who ensure that all processes are completed on time and in accordance with plan. As chairperson of FWDT, I would also like to express my gratitude to my fellow trustees, Anton Rabe, Dr Konanani Liphadzi, and Dora Ndaba. Your support and advice make my job much easier.

The challenge of social upliftment and improving the quality of life for our farmworkers is not easy, but FWDT is ready for the challenge. We look forward to a future where we can continue to make a meaningful difference in people's lives.



DFIDT

Nicholas Dicey | Chairperson



The Deciduous Fruit Industry Development Trust (DFIDT) was established to manage funds allocated to the industry by the Deciduous Fruit Board at the time of deregulation in 1997. Proceeds are generated from an initial capital contribution of R13.2 million and are allocated to and utilised by beneficiaries within the Deciduous Fruit Industry. Six trustees, including two industry-nominated members (Nic Dicey, Lien Visagie) and four ministerial appointees (Dr E Blancquaert, N Williams, W Petersen, J Mthombeni), are responsible for discussing and determining how the proceeds are distributed.

Previous beneficiaries included ten bursary applicants, all of whom successfully completed their studies in agriculture. From 2021 to 2022, the trust invested in a feasibility study in the Free State to assess the potential of three farms involved in pome and stone fruit production. The findings of this study allowed funders or investors to evaluate these businesses for potential investment.

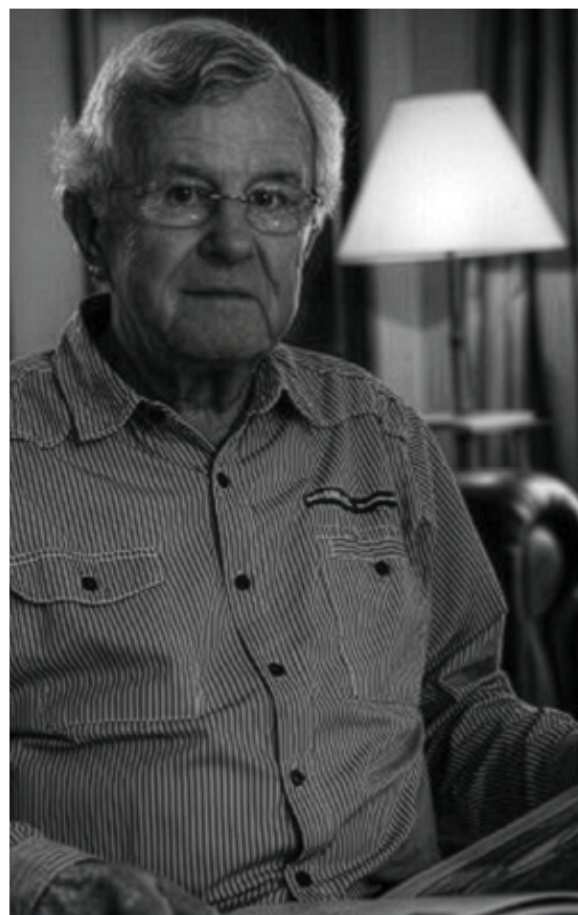
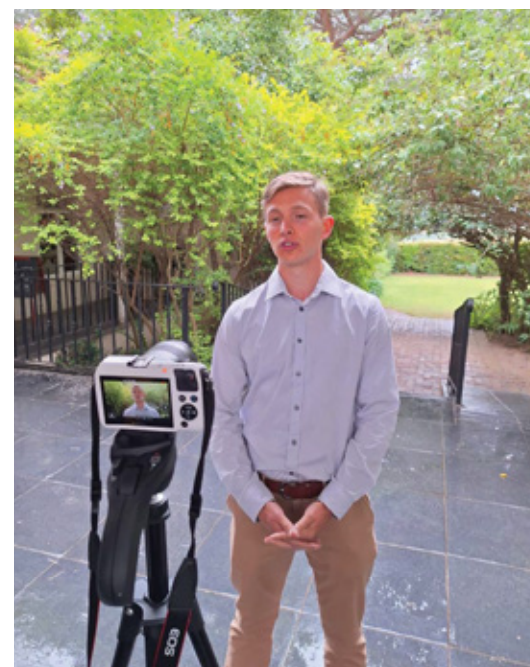
Aan die einde van 2023 het die trustees 'n behoefte aan die ontwikkeling van besigheidsvaardighede vir entrepreneurs geïdentifiseer. Twee diensverskaffers is aangestel en die 18-24 maande projekte het nou al goeie vordering gemaak. Verskeie opleidingsessies het al plaasgevind en 'n totaal van 38 entiteite neem deel aan die program. Die meerderheid van die huidige entiteite is in die Wes-Kaap, maar die deur is oop vir enige sagtevrugte-entiteit in SA wat aan die vereistes voldoen, om deel te neem. Die trustees sien baie uit na die spreekwoordelike vrugte wat hierdie belegging gaan afwerp en die impak wat dit op die bedryf sal hê.

Because of declining bursary funds at other institutions, the trust is considering dedicating some resources to bursaries specifically for agricultural students. The demand for bursaries far exceeds the available funds, so any assistance, no matter how large or small, will help the youth receive training and will bring skills to the sector.

Die trustees sien uit na baie suksesstories en volhoubare vrugtetransaksies in die toekoms, en ons bedank die trustees vir hul tyd in hierdie verdienstelike saak.

4 | Hortgro in Pictures

1. The best fourth-year student in horticulture in 2023, Jean-Pierre Claassen, received the Karen Theron and Hortgro Award for outstanding academic achievement
2. At the Hortgro Science Thank-You Breakfast: Dr Mariana Jooste, Willie Kotze and Dr Minette Karsten
3. Januarie 2025 het sleg begin met die afsterwe van prof. Eckart Kassier
4. Followed by the passing of entomology trailblazer, Dr Ken Pringle



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5. At a Hortgro Director's lunch: Nicholas Dicey, Prof. Danie Brink, Stephen Rabe and André Smit
6. Hortfin Thank-You Function: At the back, Ronald Ramabulana (Hortfin), Robin Johnson (producer), Werner du Toit (FNB), Desry Lesele (Nedbank) and in front, Michael Brinkhuis (Hortfin), Najwah Allie-Edries (Jobs Fund), and Anton Rabe (Hortgro)
7. Transnet vergader met rolspe-
lers oor logistieke uitdagings:
Van links, Mandla Nkomfe,
Werner van Rooyen, Fhumulani
Ritshatanga, Boitshoko
Ntshabele, Minister Barbara
Creecy, Jacques du Preez,
Mecia Petersen, Brent Walsh, en
Mthabatha Mokonyama
8. Appels vir Afrika

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9. Trade relations: In April, a South African delegation visited the Ministry of Commerce and Industry, Government of India
10. What is not to like about our Western Cape MEC for agriculture, Dr Ivan Meyer
11. Western Cape Premier Alan Winde sharing his love for apples
12. 'n Mylpaal vir Landbou-opleiding: Die suksesvolle Tulbagh QCTO-loodsprojek is in September 2022 vir landbou-opleiding van stapel gestuur, toe die eerste beroepsgerigte kwalifikasie spesifiek vir die vrugtebedryf geloods is

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13. The industry "legends" (from the DFPT/early Hortgro days) recently met to celebrate the industry achievements over more than 20 years. The "legends" consist of former chairpersons of various key industry structures and senior managers who have played a significant role in the initial years following deregulation. From left to right are Hugh Campbell, Peter Dall, Louis van Zyl, Dappie Smit, Chris Faure, Nigel Mudge and Anton Rabe. Pieter de Necker was unfortunately absent.

14. A delegation from the Department of Science, Technology, and Innovation, along with the FPEF/PHI Programme, visited our PHYLA laboratory on the Welgevallen Experimental Farm in Stellenbosch. From left to right: Sunita Kalan, Buliswa Omodona, Renate Smit, Minette Karsten, Deputy Director-General: Dr Mmboneni Muofhe, Shelley Johnson, Anton Kruger and Desiree Thompson.

15. Mentoring for success! Thato Madihlaba, Lona Odendaal, Michelle Mungoi, and Miso Mbongo. All three interns are cum laude CPUT graduates working at Provar in Paarl.

16. Hortgro Bursary Function 2025

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17. The annual Deciduous Fruit Coordinating Meeting was held between the Department of Agriculture, Hortgro, SATI, FPEF, and PPECB at our Paarl office. Seeing stakeholders engaging and fostering strong relations to grow our agri sector is excellent.

18. In attendance at the International Controlled Atmosphere Conference in the USA. The SA delegation. Back: Braam Mouton from Dutoit, Anel Botes from ARC, Elke Crouch (SU), Mariana Jooste (Hortgro), Jaco Moelich (Fruitways), Adriaan Theron (CFG). Front Kenias Chigwaya (Fruitways), Daniela Ramos (SU) and Renate Smit (Hortgro).

19. Womens Day 2025 Self-defence workshop: Anita van Staden mastering pepper spray technique

20. Research: Polyphagous shot-hole borers are wood-boring beetles that establish and cultivate fungal gardens in their host plants. The beetles feed on the fungi, which in turn feed on the plant, causing it to deteriorate and die.

21. The Hortgro Research Showcase 2025 was a huge success and keeps growing in attendance



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22. Hortgro Postharvest Symposium 2025: Pieter Verboven, Bart Dequeker, Alex Tsige, Chris Watkins and Elke Crouch
23. Consumers are spoilt for choice
24. Hortgro Women's Day 2025
25. Inga Dlumane, Production Manager at Nooitgedacht Farm

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26. Mark Boerlage from Sparrenburg and current intern, Ruan September
27. Celebrating Women's Month: Amoré Viljoen – Leading with passion, precision, and perseverance at Lakeview Farm
28. Recognition for outstanding work: WCDa HOD Dr Mogale Sebopetsa, Deputy Minister of Small Business Development Jane Sithole, Mariette Kotze, Wendy Petersen and WC Minister of Agriculture, Dr Ivan Meyer
29. Die Koue Bokkeveld Opleidingsentrum (KBOS) het weereens 'n waardevolle bydrae tot gemeenskaps-ontwikkeling in die Witzenberg-streek gelewer deur die aanbieding van praktiese nutsman/vrou- opleiding
30. All the winners at the Hortgro Awards 2025. At the back, from left: Marius van der Westhuizen, Raymond and Mary Koopstad, Johan du Plessis, Georgie Hewitt, Peter Wolfaardt, Louis van Zyl and Johan Strydom. In front, Hugh Campbell, Michelle van der Spuy and Dr Ilse Trautmann.

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31. Amy Collop and Ghian du Toit from FruitFly Africa (FFA) represented South Africa at the launch of Morocco's new sterile insect technique (SIT) facility
32. Apple producer Andre Cloete taught Vice President Paul Mashatile the fine art of pruning
33. China opens its doors for SA stone fruit. The National Minister of Agriculture, John Steenhuisen, and his counterpart, Minister Sun Meijun of China's General Administration of Customs (GACC), signed the historic stone fruit trade protocol in Shanghai, China, on 15 October 2025.
34. The Hortgro Market Access team during the China GACC onsite orchard inspection visit on December 5, 2024. The protocol was signed in 2025. From left: Julia Meitz-Hopkins, Marelize de Villiers, Shelley Johnson, Lindi Benić and Jacques du Preez.

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35. Reframing the narrative of agriculture. All the speakers at the Agbiz Media Day. At the back: Petru du Plessis, Michael Esmeraldo, Kobus Hartman, Dr Boitshoko Ntshabele, Temba Msiza. In front: Media Petersen, Annelize Crosby, Dr Ilze Trautmann, Fhumulani Ratshitanga, Paula Bester, Roleen le Grange and Wolfe Braude.
36. Agri's Got Talent 2025: Winners Mervin Williams, Jenedine Jantjies and Clayton Mentoor
37. Canning Fruit Producers' Association AGM: Jacques Jordaan (CFPA CEO), Nicky Weimar (Nedbank Chief Economist) and Anthony Dicey (CFPA Chairperson)
38. Marius van der Westhuizen O.S.H. Reinecke, bedryfsleiertoeëning 2025

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- 39. Farm workers from Northridge Farm took part in an industry training initiative sponsored by the Fruit Workers Development Trust
- 40. André Kritzinger (28), owner and general manager of Tulpieskraal Boerdery in the Langkloof, has been awarded the Eastern Cape Young Farmer of the Year for 2025
- 41. Johan Strydom logistieke steunpilaar
- 42. Steyn and Niël Joubert standing next to one of the weather stations in the Klein Karoo

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Contacts

Anton Rabe
anton@hortgro.co.za
Hortgro Uitvoerende Direkteur

Nicholas Dicey |
nidicey@laplaisant.co.za
Hortgro Pome | DFIDT | Voorsitter

André Smit |
andre@fruitecsa.co.za
Hortgro Stone Voorsitter

Ben Kotze |
ben@longacre1.co.za
Dried Tree Fruit Chairperson

Piet Bosman |
pietb@dutoit.com
Hortgro CherriesZA Voorsitter

Dirk Crafford |
dirk@hortgro.co.za
Hortgro Financial Manager

Astrid Arendse |
astrid@hortgro.co.za
Hortgro Manager Human Resources |
Learning and Development

Elise-Marie Steenkamp |
elise-marie@hortgro.co.za
Hortgro Group Manager: Communications

Wiehann Steyn |
wiehann@hortgro.co.za
Hortgro Science General Manager | PMM
Manager

Nitasha Baijnath-Pilay |
nitasha@hortgro.co.za
Hortgro RMS Manager

Jacques du Preez |
jacques@hortgro.co.za
Hortgro General Manager:
Trade and Markets

Mariette Kotzé |
mariette@hortgro.co.za
Hortgro General Manager
Industry Support Services

Cynthia Mahlati |
cynthia@hortgro.co.za
Hortgro Economic Development Manager

Jacques Jordaan |
jacques@cfpa.co.za
SAPO PLANT (PTY) LTD | Acting CEO

Ghian du Toit |
ghian@fruitfly.co.za
FruitFly Africa (Pty) Ltd. Manager

Mishkaat Anderson |
mish@culdevco.co.za
Culdevco General Manager

Dr Konanani Liphadzi |
liphadzik@gmail.com
CULTIPOWERED NPC Chairperson

Marizanne Horn |
marizanne@tissue-culture.co.za
TCF Pty (Ltd) | Laboratory Manager

Leander Gagiano |
leander@tissue-culture.co.za
TCF Pty (Ltd) | Nursery Manager

Rachel Kriel |
rachel@plantsa.co.za
PlantSA | Manager

Hortfin
info@hortfin.com

Wimpie Paulse |
wimpie@graaff-fruit.com
Vrugtewerkersontwikkelingstrust |
Voorsitter

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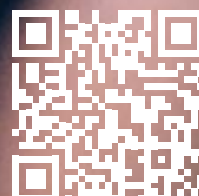
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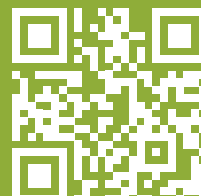


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258 Main Road, Paarl, 7646

+27 (0)21 870 2900