

Industry Perspectives & ECONOMIC INDICATORS

1 128

**POME AND STONE
FRUIT PRODUCERS**

R22,28 BN

**TOTAL POME AND
STONE TURNOVER**

1,23 / HA

**PERMANENT JOBS
PROVIDED BY THE
INDUSTRY**

46%

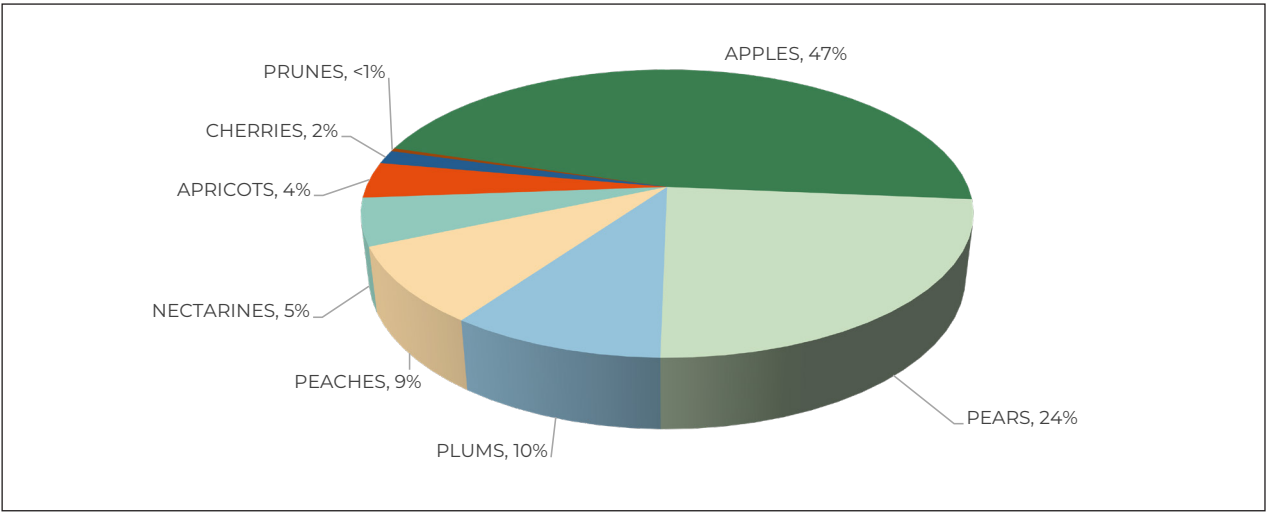
**OF TOTAL PRODUCTION
IS EXPORTED**



TOTAL AREA PLANTED

FRUIT	2017	2018	2019	2020	2021	2022	2023	2024
APPLES	24 156	24 176	24 930	25 272	25 209	25 438	25 114	25 080
PEARS	12 265	12 319	12 674	12 913	12 848	12 950	12 892	12 850
PLUMS	5 248	5 486	5 319	5 451	5 523	5 465	5 430	5 139
PEACHES	6 974	6 586	6 050	5 821	5 495	5 281	4 848	4 636
NECTARINES	2 092	2 100	2 121	2 228	2 314	2 776	2 834	2 851
APRICOTS	2 808	2 737	2 448	2 371	2 240	2 241	2 223	2 177
CHERRIES	299	388	469	520	621	678	723	819
PRUNES	258	260	243	243	226	250	206	196
TOTAL HECTARES	54 101	54 052	54 254	54 819	54 477	55 081	54 271	53 748
YEAR-ON-YEAR		0%	0%	1%	-1%	1%	-1%	-1%

SOURCE: HORTGRO TREE CENSUS, 2024

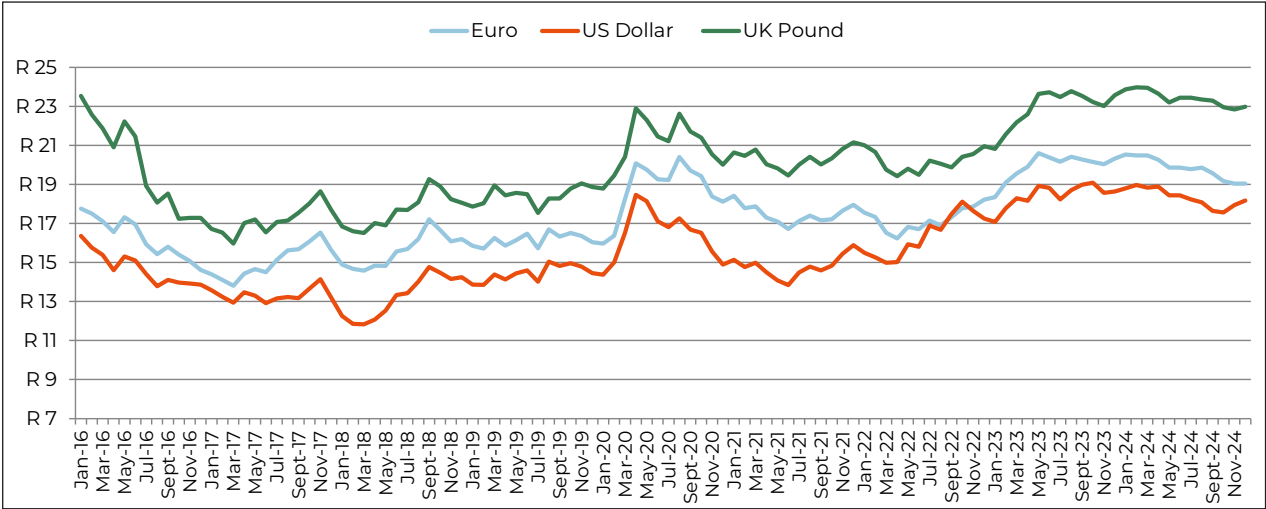


ON-FARM EMPLOYMENT

FRUIT	LABOURERS*	DEPENDENTS
APPLES	31 351	125 402
PEARS	12 850	51 398
PLUMS	6 886	27 543
PEACHES	5 749	22 995
NECTARINES	3 792	15 169
APRICOTS	1 894	7 577
CHERRIES	1 311	5 245
TOTAL	63 832	255 329

*Permanent equivalent
Casual labour converted to permanent equivalents
SOURCE: HORTGRO, 2024

ECONOMIC INDICATORS, 2024
EXCHANGE RATE TRENDS, 2016 - 2024



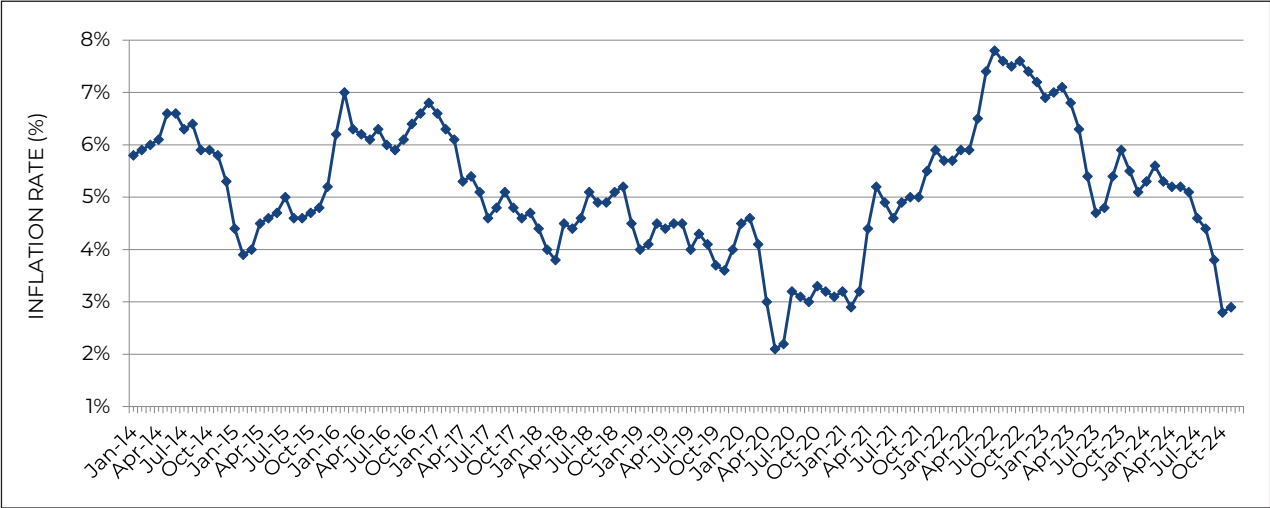
SOURCE: Past Exchange Rate.com, 2024

EXCHANGE RATE TREND
(RAND VS MAJOR CURRENCIES): 2005 - 2024

YEAR	AVERAGE EXCHANGE RATE PER YEAR		
	EURO	US DOLLAR	UK POUND
2005	7,91	6,37	11,58
2006	8,51	6,75	12,50
2007	9,66	7,05	14,11
2008	12,06	8,25	15,13
2009	11,67	8,42	13,10
2010	9,69	7,32	11,30
2011	10,09	7,26	11,62
2012	10,55	8,21	13,01
2013	12,83	9,66	15,11
2014	14,40	10,85	17,87
2015	14,17	12,78	19,53
2016	16,28	14,71	20,00
2017	15,04	13,32	17,15
2018	15,61	13,24	17,64
2019	16,17	14,45	18,43
2020	18,76	16,46	21,08
2021	17,47	14,78	20,33
2022	17,20	16,37	20,18
2023	19,95	18,45	22,95
2024	19,84	18,33	23,42

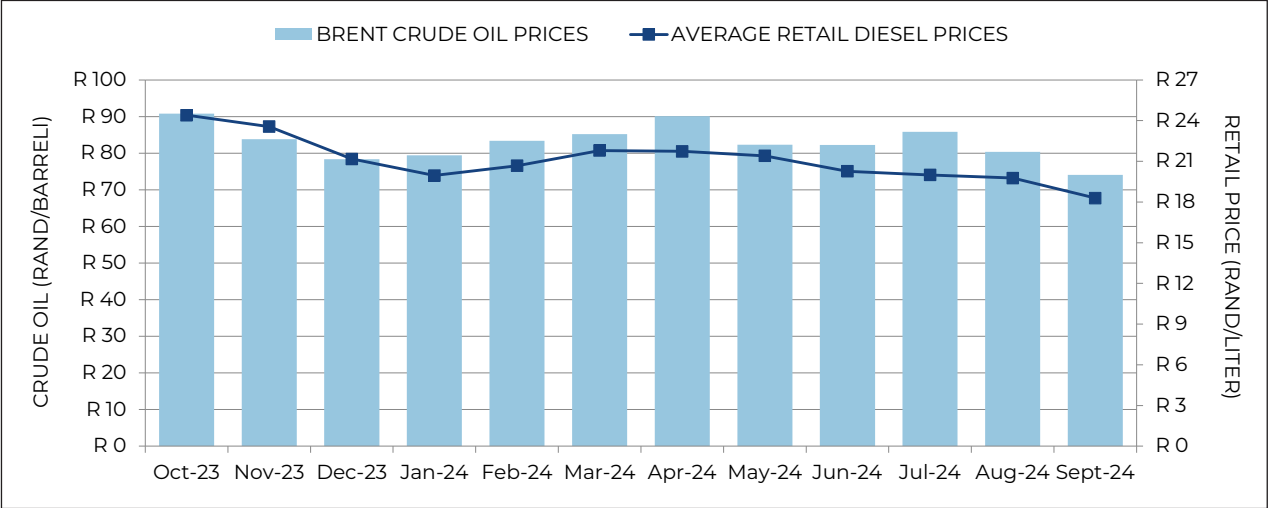
SOURCE: Past Exchange Rate.com, 2025

MONTHLY CPI INFLATION RATE, 2014 - 2024



SOURCE: STATISTICS SOUTH AFRICA, 2024

AVERAGE FUEL PRICE: 2023/2024 SEASON



SOURCE: South African Petroleum Industry Association, 2024

MINIMUM WAGES FOR FARM WORKERS, 2010-2025

YEAR	RAND/HOUR	RAND/MONTH	% INCREASE Y-O-Y
1/03/2010	R 6,74	R 1 316,69	-
1/03/2011	R 7,04	R 1 375,94	4%
1/03/2012	R 7,71	R 1 503,90	9%
1/03/2013	R 11,66	R 2 274,82	51%
1/03/2014	R 12,41	R 2 420,41	6%
1/03/2015	R 13,37	R 2 606,78	8%
1/03/2016	R 14,25	R 2 778,83	7%
1/03/2017	R 15,39	R 3 001,13	8%
1/03/2018	R 16,25	R 3 169,19	6%
1/03/2019	R 18,00	R 3 564,00	12%
1/03/2020	R 18,68	R 3 698,64	4%
1/03/2021	R 21,69	R 4 294,62	16%
1/03/2022	R 23,19	R 4 590,95	7%
1/03/2023	R 25,42	R 4 953,09	8%
1/03/2024	R 27,58	R 5 377,29	9%
1/03/2025	R 28,79	R 5 613,62	4%

2024 EXPORT PERSPECTIVES

	APPLES		PEARS		APRICOTS		PEACHES		NECTAR- INES		PLUMS	
	RAND	%	RAND	%	RAND	%	RAND	%	RAND	%	Rand	%
SALES PRICE	R460,73	100%	R485,34	100%	R337,64	100%	R189,11	100%	R147,71	100%	R290,02	100%
RETAIL MARGIN	R126,87	27,5%	R133,64	27,5%	R86,66	25,7%	R52,07	27,5%	R40,67	27,5%	R81,25	28,0%
DELIVERY PRICE RECEIVER	R333,86	72,5%	R351,69	72,5%	R250,99	74,3%	R137,04	72,5%	R107,03	72,5%	R208,77	72,0%
IMPORTER COMMISSION	R22,70	4,9%	R24,10	5,0%	R18,52	5,5%	R9,34	4,9%	R7,34	5,0%	R14,53	5,0%
OVERSEAS HANDLING COSTS	R27,45	6,0%	R26,39	5,4%	R43,33	12,8%	R10,95	5,8%	R8,00	5,4%	R17,61	6,1%
CARRIAGE INSURANCE FREIGHT (CIF)	R283,72	61,6%	R301,21	62,1%	R189,14	56,0%	R116,75	61,7%	R91,69	62,1%	R176,63	60,9%
SHIPPING AND ASSOCIATED COSTS	R67,83	14,7%	R77,74	16,0%	R28,08	8,3%	R20,27	10,7%	R21,41	14,5%	R33,77	11,6%
EXPORTERS COMMISSION	R12,22	2,7%	R12,65	2,6%	R11,91	3,5%	R5,46	2,9%	R3,98	2,7%	R8,37	2,9%
FREE ON BOARD (FOB)	R203,67	44,2%	R210,82	43,4%	R149,14	44,2%	R91,01	48,1%	R66,31	44,9%	R134,49	46,4%
LANDSIDE COSTS	R9,63	2,1%	R9,07	1,9%	R3,21	0,9%	R2,53	1,3%	R2,56	1,7%	R3,88	1,3%
DELIVERED IN PORT (DIP)	R194,04	42,1%	R201,76	41,6%	R145,93	43,2%	R88,48	46,8%	R63,75	43,2%	R130,61	45,0%
TRANSPORT & COLDSTORAGE	R15,95	3,5%	R15,97	3,3%	R7,18	2,1%	R5,16	2,7%	R5,24	3,5%	R7,56	2,6%
EX PACK HOUSE (EXW)	R178,09	38,7%	R185,79	38,3%	R138,76	41,1%	R83,33	44,1%	R58,50	39,6%	R123,05	42,4%
PPECB INSPECTION LEVY	R0,91	0,2%	R0,91	0,2%	R0,85	0,3%	R0,85	0,4%	R0,85	0,6%	R0,85	0,3%
HORTGRO LEVIES	R1,02	0,2%	R1,02	0,2%	R1,63	0,5%	R0,95	0,5%	R0,95	0,6%	R1,57	0,5%
PACKING COSTS	R64,88	14,1%	R61,04	12,6%	R35,90	10,6%	R16,36	8,7%	R17,18	11,6%	R32,87	11,3%
FARM GATE	R111,28	24,2%	R122,82	25,3%	R100,38	29,7%	R65,17	34,5%	R39,52	26,8%	R87,76	30,3%
PRODUCTION COSTS	R40,45	8,8%	R48,32	10,0%	R68,37	20,2%	R32,04	16,9%	R28,59	19,4%	R55,89	19,3%
NET FARM INCOME	R70,83	15,4%	R74,50	15,3%	R32,01	9,5%	R33,13	17,5%	R10,93	7,4%	R31,87	11,0%

CROP BUDGETS: POME FRUIT

	APPLES			PEARS		
	ESTABLISH- MENT	NON- BEARING	BEARING	ESTABLISH- MENT	NON- BEARING	BEARING
	RAND	RAND	RAND	RAND	RAND	RAND
YIELD (TON/HA)			65			55
NUMBER OF TREES PER HA	1 667	1 667	1 667	1 667	1 667	1 667
PRE-HARVEST COSTS	532 462	65 219	149 880	510 156	78 344	114 209
PLANT MATERIAL	170 603	3 412	0	148 313	2 966	0
LAND CLEARING, SOIL MAPPING AND FUMIGATION	61 704	0	0	61 704	0	0
LAND PREPARATION & RIDGING	73 849	0	0	73 849	0	0
IRRIGATION (DESIGN & MATERIAL)	64 623	0	0	64 623	0	0
DRAINAGE	46 253	0	0	46 253	0	0
TRELLISING	66 755	0	0	66 755	0	0
FERTILIZER	12 025	28 144	31 406	12 025	14 943	19 497
HERBICIDES	3 267	3 267	3 267	3 267	3 267	3 267
PESTICIDES	490	5 296	20 789	651	8 696	13 526
FUNGICIDES	1 320	2 279	12 659	811	13 905	3 409
REST BREAKING AGENTS/ GROWTH REGULATORS	0	241	1 602	0	12 481	880
CONSULTANTS	1 681	1 681	1 681	1 681	1 681	1 681
SEASONAL LABOUR	17 541	4 850	35 747	17 541	4 850	35 529
FUEL (DIESEL)	2 941	3 650	13 022	3 103	4 259	8 365
REPAIRS AND MAINTENANCE	3 096	3 843	13 710	3 267	2 742	8 807
ELECTRICITY	4 067	8 133	12 325	4 067	8 133	12 325
GENERAL	2 247	422	422	2 247	422	422
POLLINATION	0	0	3 250	0	0	6 500
HARVEST & POST-HARVEST	0	0	377 164	0	0	276 724
TRANSPORT RENTAL	0	0	37 499	0	0	29 947
PACKAGING	0	0	300 990	0	0	214 386
SEASONAL LABOUR	0	0	35 854	0	0	30 338
FUEL (DIESEL)	0	0	1 961	0	0	1 426
REPAIRS AND MAINTENANCE	0	0	861	0	0	626
OVERHEAD COSTS	132 987	106 120	132 675	130 589	105 760	123 733
FIXED LABOUR	32 269	32 269	32 269	32 269	32 269	32 269
WATER COSTS	2 192	2 192	2 192	2 192	2 192	2 192
OTHER OVERHEADS	41 287	41 287	41 287	41 287	41 287	41 287
INTEREST ON LOANS	30 617	3 750	30 305	29 334	4 505	22 479
DEPRECIATION ON ORCHARD	26 623	26 623	26 623	25 508	25 508	25 508
TOTAL COST	665 448	171 340	659 719	640 744	184 104	514 666

* These budgets are only a guideline and should be adapted to your own specific situation

* Other overheads = admin, bank charges, general repairs, local taxes, postage, phone, auditing, secretarial, etc.

* The fumigation figures included are based on in-row fumigation

*Plant material excludes windbreaks

*Cost may vary according to farm size and area

CROP BUDGETS: STONE FRUIT

	APRICOTS			NECTARINES/PEACHES			PLUMS		
	ESTABLISH- MENT	NON- BEARING	BEARING	ESTABLISH- MENT	NON- BEARING	BEARING	ESTABLISH- MENT	NON- BEARING	BEARING
	RAND	RAND	RAND	RAND	RAND	RAND	RAND	RAND	RAND
YIELD (TON/HA)			20			25			30
NUMBER OF TREES PER HA	1 250	1 250	1 250	1 250	1 250	1 250	1 524	1 524	1 524
PRE-HARVEST COSTS	348 859	49 732	113 248	389 444	46 475	114 985	477 088	55 309	140 646
PLANT MATERIAL	74 913	1 498	0	69 913	1 398	0	109 105	2 182	0
LAND CLEARING, SOIL MAPPING AND FUMIGATION	61 704	0	0	61 704	0	0	61 704	0	0
LAND PREPARATION & RIDGING	73 849	0	0	73 849	0	0	73 849	0	0
IRRIGATION (DESIGN & MATERIAL)	64 623	0	0	64 623	0	0	64 623	0	0
DRAINAGE	46 253	0	0	46 253	0	0	46 253	0	0
TRELLISING	0	0	0	45 442	0	0	92 788	0	0
FERTILIZER	11 096	14 359	19 002	11 096	19 559	27 636	11 698	20 336	26 865
HERBICIDES	3 267	3 267	3 267	3 267	3 267	3 267	3 267	3 267	3 267
PESTICIDES	1 038	1 319	3 599	1 354	604	5 677	2 260	606	5 691
FUNGICIDES	812	4 343	7 646	254	362	8 297	254	362	8 273
REST BREAKING AGENTS/ GROWTH REGULATORS	0	4 452	7 430	0	542	0	0	543	13 111
CONSULTANTS	1 681	1 681	1 681	1 681	1 681	1 681	1 681	1 681	1 681
SEASONAL LABOUR	0	5 861	29 528	0	6 109	29 935	0	13 073	34 570
FUEL (DIESEL)	1 845	2 636	13 045	2 028	2 636	13 044	1 562	2 231	12 634
REPAIRS AND MAINTENANCE	2 046	2 923	14 463	2 248	2 923	14 461	1 731	2 473	14 007
ELECTRICITY	3 486	6 972	10 564	3 486	6 972	10 564	4 067	8 133	12 325
GENERAL	2 247	422	422	2 247	422	422	2 247	422	422
POLLINATION	0	0	2 600	0	0	0	0	0	7 800
HARVEST & POST-HARVEST	0	0	170 333	0	0	217 829	0	0	277 650
TRANSPORT RENTAL	0	0	20 288	0	0	30 906	0	0	36 015
PACKAGING	0	0	129 669	0	0	160 709	0	0	204 701
SEASONAL LABOUR	0	0	19 469	0	0	25 080	0	0	35 516
FUEL (DIESEL)	0	0	634	0	0	792	0	0	990
REPAIRS AND MAINTENANCE	0	0	273	0	0	342	0	0	427
OVERHEAD COSTS	113 730	96 530	109 976	117 728	98 007	114 471	126 789	102 537	123 409
FIXED LABOUR	32 269	32 269	32 269	32 269	32 269	32 269	32 269	32 269	32 269
WATER COSTS	2 672	2 672	2 672	2 307	2 307	2 307	1 947	1 947	1 947
OTHER OVERHEADS	41 287	41 287	41 287	41 287	41 287	41 287	41 287	41 287	41 287
INTEREST ON LOANS	20 059	2 860	16 306	22 393	2 672	19 137	27 433	3 180	24 052
DEPRECIATION ON ORCHARD	17 443	17 443	17 443	19 472	19 472	19 472	23 854	23 854	23 854
TOTAL COST	462 589	146 262	393 558	507 171	144 482	447 285	603 878	157 846	541 704

* These budgets are only a guideline and should be adapted to your own specific situation

* Other overheads = admin, bank charges, general repairs, local taxes, postage, phone, auditing, secretarial, etc.

* The fumigation figures included are based on in-row fumigation

*If using Retain as a growth regulator with Peaches and Nectarines, add about R13 000 per hectare

*Plum Trellising = V-System

*Cost may vary according to farm size and area

CROP BUDGETS: CHERRIES

	CHERRIES			
	ESTABLISHMENT		NON-BEARING	BEARING
	ONTBOS - MET NET	ONTBOS - GEEN NET		
	RAND	RAND	RAND	RAND
YIELD (TON/HA)				12
NUMBER OF TREES PER HA	1 667	1 667	1 667	1 667
PRE-HARVEST COSTS	1 051 597	613 159	111 501	121 247
PLANT MATERIAL	251 333	251 333	5 027	0
LAND CLEARING, SOIL MAPPING AND FUMIGATION	21 809	21 809	0	0
LAND PREPARATION & RIDGING	73 849	73 849	0	0
IRRIGATION (DESIGN & MATERIAL)	69 144	69 144	0	0
DRAINAGE	55 996	55 996	0	0
TRELLISING	506 875	68 437	0	0
FERTILIZER	17 031	17 031	30 612	24 475
HERBICIDES	3 229	3 229	3 907	4 220
PESTICIDES	201	201	731	4 824
FUNGICIDES	290	290	494	2 258
REST BREAKING AGENTS/GROWTH REGULATORS	0	0	3 962	1 378
CONSULTANTS	1 681	1 681	1 681	1 681
SEASONAL LABOUR	34 020	34 020	46 653	50 385
FUEL (DIESEL)	2 880	2 880	3 245	3 042
REPAIRS AND MAINTENANCE	3 032	3 032	3 343	3 372
ELECTRICITY	8 133	8 133	11 426	14 790
GENERAL	2 094	2 094	422	422
POLLINATION	0	0	0	10 400
HARVEST & POST-HARVEST	0	0	0	194 464
TRANSPORT RENTAL	0	0	0	14 538
PACKAGING	0	0	0	140 032
SEASONAL LABOUR	0	0	0	38 484
FUEL (DIESEL)	0	0	0	990
REPAIRS AND MAINTENANCE	0	0	0	419
OVERHEAD COSTS	188 794	141 662	112 816	124 558
FIXED LABOUR	32 269	32 269	32 269	32 269
WATER COSTS	2 192	2 192	2 192	2 192
OTHER OVERHEADS	41 287	41 287	41 287	41 287
INTEREST ON LOANS	60 467	35 257	6 411	18 153
DEPRECIATION ON ORCHARD	52 580	30 658	30 658	30 658
TOTAL COST	1 240 391	754 821	224 318	440 269

* These budgets are only a guideline and should be adapted to your own specific situation

* Other overheads = admin, bank charges, general repairs, local taxes, postage, phone, auditing, secretarial, etc.

* The fumigation figures included are based on in-row fumigation

*If using Retain as a growth regulator with Peaches and Nectarines, add about R13 000 per hectare

*Plum Trellising = V-System

*Cost may vary according to farm size and area

TRELLIS SYSTEMS FOR DECIDUOUS FRUIT

	V-TRELLIS	PALMET	SUPPORT TRELLIS
BLOCK SPECS	1 ha = 133m x 75m	1 ha = 133m x 75m	1 ha = 133m x 75m
STRANDS ON TRELLIS	18	11	3
NO. ROWS	39	39	34
ROW LENGTH IN METERS	75	75	75
ANCHOR POLES (TREATED & SABS STD)	3.6m (100:125mm)CL4	3.6m (100:125mm)CL4	4.2m (100:125mm)CL4
NO. ANCHOR POLES/HA	78	78	68
POLE PRICE	R322,02	R322,02	R392,27
COST OF ANCHOR POLES (EXCL VAT)	R25 118	R25 118	R26 674
IN-ROW POLES (TREATED & SABS STD)	3.2m (50:75mm)CL2	3.2m (50:75mm)CL2	3.6m (80:100mm)CL3
NO. IN-ROW POLES/HA	156	195	170
IN-ROW POLE PRICE	R118,78	R118,78	R196,37
COST OF IN-ROW POLES (EXCL VAT)	R18 529	R23 219	R33 383
IN-ROW POLE SPACING	19	15	15
POLES PER ROW	4	5	5
STRAND WIRE - 2MM HIGH TENSIAL FULL GALV	52 650	32 256	7 650
COST OF HT 2MM WIRE	R34 636	R21 219	R5 033
ANCHOR WIRE - 4MM MILD STEAL FULL GALV	1560	1560	544
COST OF MS 4MM WIRE	R4 329	R4 329	R1 510
LENGTH OF ANCHOR WIRE IN METERS	20	20	8
ANCHORS/HA- CONCRETE BLOCK, 600X600X600MM	156	156	136
U' NAILS - 25MM (256 NAILS/1KG)	4 212	3 008	714
NO. KG'S U' NAILS - 25MM (256 NAILS/1KG)	16	12	3
COST OF U'NAILS	R912,01	R651,40	R154,60
TOP TRELLIS POLE	"3.6m(1.8m) split pole or 12mm rod"		
COST OF TOP TRELLIS POLE	R9 264,58		
TOTAL TRELLISING COST:	R92 788	R74 537	R66 755

* Per hectare

* Palmet structure: 11 strand on trellis and in-row pole every 15 meters

DRAPE NET COST PER HECTARE

ITEMS	POME FRUIT	APRICOTS & NECTARINES	PLUMS	CHERRIES	PRUNE
PLANT SPACING	4M X 1,5M	4M X 2M	3,28M X 2M	4M X 1,5M	4,5M X 2,5M
NUMBER OF TREES PER HECTARE	1667	1250	1524	1667	889
METER SQUARE	6	8	6,56	6	11,25
NUMBER OF ROWS PER 1HA (100M/4M ROW TO ROW LENGTH)	25	25	30,5	25	22
COST OF NET PER ROW	R3 388	R4 518	R4 518	R4 518	R5 647
COST OF NET PER 1HA	R84 708	R112 944	R137 737	R112 944	R125 493
LABOUR COST	R8 897	R8 897	R8 897	R8 897	R8 897
TOTAL COSTS PER HECTARE	R93 605	R121 841	R146 634	R121 841	R134 391

ADDITIONAL INFO

**Prices excluding VAT

**Use white nets for red and bi-colour apples

**Black nets for green apples

**Natural nets for plums, peaches and pears

**Contractor fees is R6200/ha to erect, take down and repair nets

**With proper care each net should last 10 to 15 years

**Standard length of each net is 100 meters

NETTING COSTS ON A PER HA BASIS

ASSUMPTIONS	UNIT	OPEN-CLOSE SYSTEM	FLAT ANTI-HALL
TOTAL SURFACE	m ²	10 000	10 000
DISTANCE BETWEEN ROWS	Meter	4	4
NUMBER OF ROWS	no	10	10
TOTAL ROW LENGTH	Meter	2500	2 500
NUMBER OF CROSS CONNECTIONS	No	4	4
TOTAL CROSS CONNECTION LENGTH	No	897	897
FRONT SIDES TOTAL LENGTH	No	75	75
NET WIDTH	Meter	4.4	4.4
DISTANCE BETWEEN TOP CLIPS	Meter	0.75	-
DISTANCE BETWEEN OPEN-CLOSE CLIPS	Meter	1.3	-
DISTANCE BETWEEN POSTS ALONG ROW	Meter	10.5	-
NET STRUCTURE		OPEN-CLOSE SYSTEM	FLAT ANTI-HAIL SYSTEM
SUPPORT MATERIAL		RAND/HA	RAND/HA
POLE COSTS	Per Ha	R84 534	R84 534
ANCHORAGE COSTS	Per Ha	R13 769	R13 769
STRUCTURAL WIRE COSTS	Per Ha	R22 568	R22 568
NET AND ACCESSORY COSTS	Per Ha	R135 217	R106 226
INSTALLATION FEE	Per Ha	R116 015	R104 517
TOTAL COST		R372 104	R331 614

Notes:

*Note that prices are influenced by block size, block shape, row width, soil conditions, pole type and spacing

*Open-Close system would require platform for opening and closing and require additional capital layout

*All prices exclude VAT except for poles

*Transport costs excluded