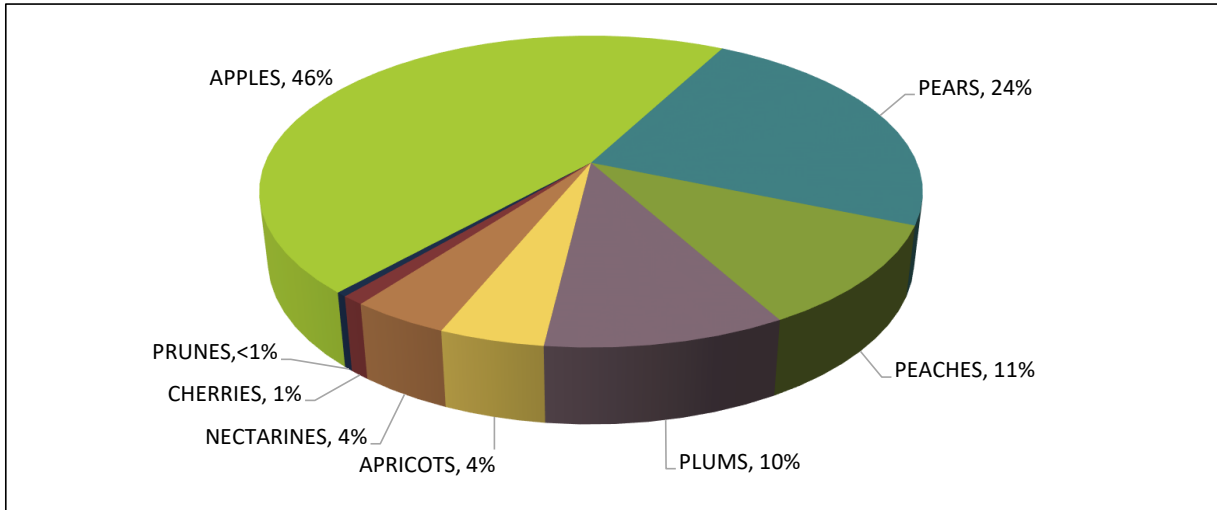


## TOTAL AREA PLANTED

FRUIT	2016	2017	2018	2019	2020
APPLES	24 212	24 156	24 176	24 930	25 272
PEARS	12 279	12 265	12 319	12 674	12 913
PEACHES	7 338	6 974	6 586	6 050	5 821
PLUMS	5 093	5 248	5 486	5 319	5 451
APRICOTS	2 838	2 808	2 737	2 448	2 371
NECTARINES	2 131	2 092	2 100	2 121	2 228
CHERRIES	262	299	388	469	520
PRUNES	264	258	260	243	243
<b>TOTAL HECTARES</b>	<b>54 417</b>	<b>54 100</b>	<b>54 052</b>	<b>54 254</b>	<b>54 819</b>

SOURCE: HORTGRO TREE CENSUS, 2020



## ON-FARM EMPLOYMENT

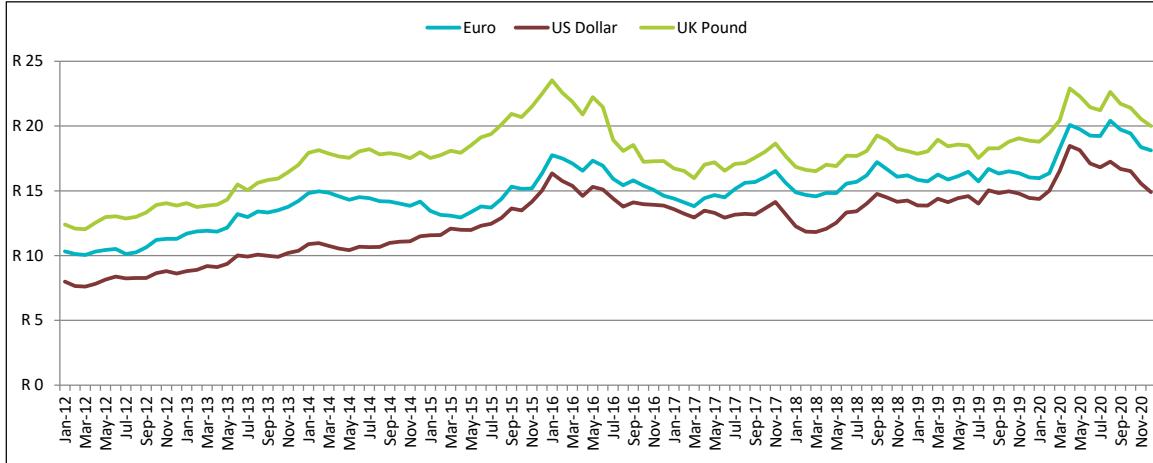
Fruit	Labourers*	Dependents
APPLES	28 810	115 239
PEARS	13 946	55 784
PEACHES	7 160	28 641
PLUMS	6 051	24 204
APRICOTS	2 466	9 863
NECTARINES	2 740	10 961
CHERRIES	987	3 948
<b>TOTAL</b>	<b>62 160</b>	<b>248 639</b>

\*Permanent equivalent

Casual labour converted to permanent equivalents

SOURCE: HORTGRO, 2020

**ECONOMIC INDICATORS, 2020**  
**EXCHANGE RATE TRENDS, 2012 - 2020**



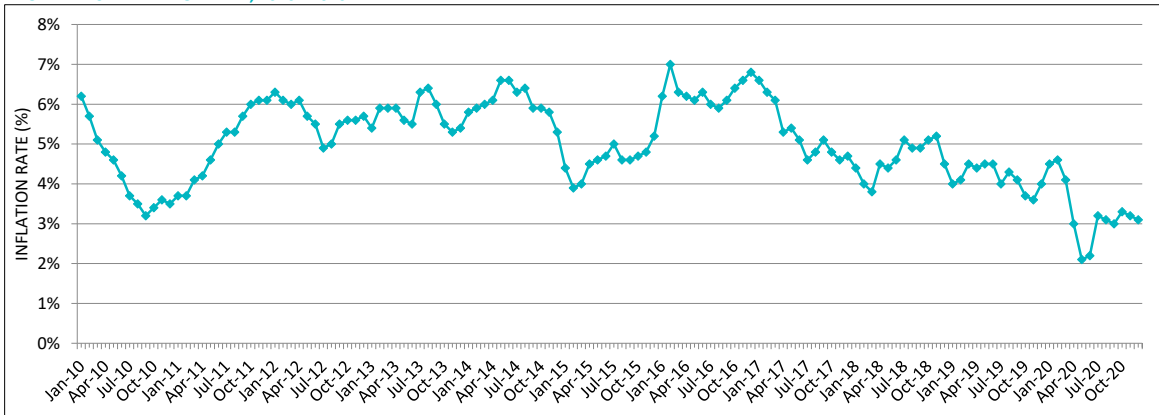
SOURCE: Past Exchange Rate.com, 2021

**EXCHANGE RATE TRENDS (RAND VS MAJOR CURRENCIES): 2004 - 2020**

Year	AVERAGE EXCHANGE RATE PER YEAR		
	EURO	US DOLLAR	UK POUND
2004	7,99	6,43	11,78
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	14,41	10,85	17,86
2015	14,17	12,78	19,53
2016	16,29	14,72	20,00
2017	15,04	13,31	17,16
2018	15,61	13,24	17,64
2019	16,16	14,42	18,43
2020	18,76	16,46	21,09

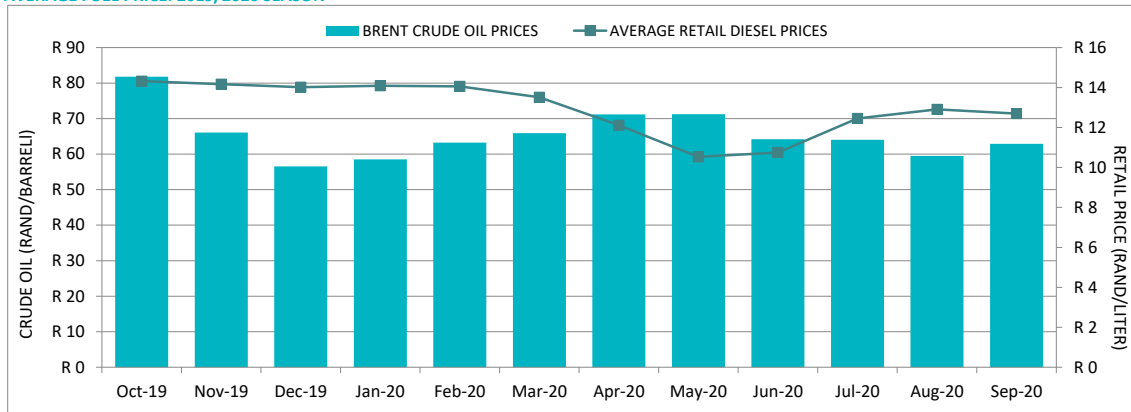
SOURCE: Past Exchange Rate.Com, 2021

**MONTHLY CPI INFLATION RATE, 2010 - 2020**



SOURCE: STATISTICS SOUTH AFRICA, 2021

### AVERAGE FUEL PRICE: 2019/2020 SEASON



SOURCE: South African Petroleum Industry Association, 2021

### MINIMUM WAGES FOR FARM WORKERS, 2009-2020

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%

**2020 EXPORT PERSPECTIVES**

	APPLES		PEARS		PLUMS		PEACHES		NECTARINES		APRICOTS	
	Rand	%	Rand	%	Rand	%	Rand	%	Rand	%	Rand	%
<b>Sales Price</b>	<b>293,56</b>	<b>100,0%</b>	<b>296,68</b>	<b>100,0%</b>	<b>184,64</b>	<b>100,0%</b>	<b>117,95</b>	<b>100,0%</b>	<b>137,23</b>	<b>100,0%</b>	<b>274,04</b>	<b>100,0%</b>
Receiver Cost	46,05	15,7%	46,54	15,7%	28,95	15,7%	18,50	15,7%	21,52	15,7%	42,91	15,7%
Receiver Commision	17,26	5,9%	17,46	5,9%	10,91	5,9%	6,93	5,9%	8,10	5,9%	16,60	6,1%
Delivery Price Receiver	230,25	78,4%	232,69	78,4%	144,77	78,4%	92,51	78,4%	107,61	78,4%	214,53	78,3%
Delivery Cost	14,47	4,9%	14,47	4,9%	8,41	4,6%	5,91	5,0%	6,33	4,6%	7,01	2,6%
<b>CIF</b>	<b>215,78</b>	<b>73,5%</b>	<b>218,22</b>	<b>73,6%</b>	<b>136,36</b>	<b>73,9%</b>	<b>86,60</b>	<b>73,4%</b>	<b>101,28</b>	<b>73,8%</b>	<b>207,52</b>	<b>75,7%</b>
Shipping Cost	45,24	15,4%	45,24	15,2%	20,11	10,9%	13,40	11,4%	13,40	9,8%	18,10	6,6%
<b>FOB</b>	<b>170,54</b>	<b>58,1%</b>	<b>172,98</b>	<b>58,3%</b>	<b>116,26</b>	<b>63,0%</b>	<b>73,20</b>	<b>62,1%</b>	<b>87,87</b>	<b>64,0%</b>	<b>189,43</b>	<b>69,1%</b>
Exporter Commision in Rand	13,55	4,6%	13,95	4,7%	7,94	4,3%	5,60	4,7%	6,02	4,4%	9,56	3,5%
Local Cost	7,28	2,5%	7,28	2,5%	3,08	1,7%	5,09	4,3%	5,09	3,7%	3,78	1,4%
<b>DIP</b>	<b>149,71</b>	<b>51,0%</b>	<b>151,75</b>	<b>51,1%</b>	<b>105,23</b>	<b>57,0%</b>	<b>62,51</b>	<b>53,0%</b>	<b>76,77</b>	<b>55,9%</b>	<b>176,08</b>	<b>64,3%</b>
PPECB Inspection levy	0,75	0,3%	0,75	0,3%	0,71	0,4%	0,71	0,6%	0,71	0,5%	0,71	0,3%
HORTGRO Levies	0,79	0,3%	0,79	0,3%	1,48	0,8%	0,89	0,8%	0,89	0,6%	1,52	0,6%
<b>HORTGRO Levies as % of DIP Value (First point of Sale)</b>	<b>1%</b>		<b>1%</b>		<b>1%</b>		<b>1%</b>		<b>1%</b>		<b>1%</b>	
<b>Carton Size</b>	<b>12,5</b>		<b>12,5</b>		<b>5,25</b>		<b>2,5</b>		<b>2,5</b>		<b>4,75</b>	
<b>Cartons/ton</b>	<b>80</b>		<b>80</b>		<b>190</b>		<b>400</b>		<b>400</b>		<b>211</b>	

SOURCE: HORTGRO PRICE MODEL

\* Weighted estimated averages: UK & European Markets

\* Subtract HORTGRO & PPECB Levies, Transport to port and Production & Packaging to calculate NFI (Net Farm Income)

**2020 VALUE OF THE INDUSTRY**

	APPLES		PEARS		PLUMS		PEACHES		NECTARINES		APRICOTS	
	R million	%	R million	%	R million	%	R million	%	R million	%	R million	%
Sales Price	<b>10 777,6</b>	<b>100,0%</b>	<b>4 990,5</b>	<b>100,0%</b>	<b>1 642,0</b>	<b>100,0%</b>	<b>237,1</b>	<b>100,0%</b>	<b>695,2</b>	<b>100,0%</b>	<b>97,2</b>	<b>100,0%</b>
Receiver Cost	1 690,6	15,7%	782,8	15,7%	257,5	15,7%	37,2	15,7%	109,0	15,7%	15,2	15,7%
Receiver Commision	633,8	5,9%	293,7	5,9%	97,0	5,9%	13,9	5,9%	41,0	5,9%	5,9	6,1%
Delivery Price Receiver	8 453,2	78,4%	3 914,0	78,4%	1 287,5	78,4%	186,0	78,4%	545,1	78,4%	76,1	78,3%
Delivery Cost	531,2	4,9%	243,4	4,9%	74,8	4,6%	11,9	5,0%	32,1	4,6%	2,5	2,6%
<b>CIF</b>	<b>7 922,0</b>	<b>73,5%</b>	<b>3 670,6</b>	<b>73,6%</b>	<b>1 212,7</b>	<b>73,9%</b>	<b>174,1</b>	<b>73,4%</b>	<b>513,0</b>	<b>73,8%</b>	<b>73,6</b>	<b>75,7%</b>
Shipping Cost	1 660,8	15,4%	760,9	15,2%	178,8	10,9%	26,9	11,4%	67,9	9,8%	6,4	6,6%
<b>FOB</b>	<b>6 261,2</b>	<b>58,1%</b>	<b>2 909,7</b>	<b>58,3%</b>	<b>1 033,9</b>	<b>63,0%</b>	<b>147,2</b>	<b>62,1%</b>	<b>445,1</b>	<b>64,0%</b>	<b>67,2</b>	<b>69,1%</b>
Exporter Commision in Rand	497,5	4,6%	234,7	4,7%	70,6	4,3%	11,3	4,7%	30,5	4,4%	3,4	3,5%
Local Cost	267,2	2,5%	122,4	2,5%	27,4	1,7%	10,2	4,3%	25,8	3,7%	1,3	1,4%
<b>DIP</b>	<b>5 496,5</b>	<b>51,0%</b>	<b>2 552,6</b>	<b>51,1%</b>	<b>935,8</b>	<b>57,0%</b>	<b>125,7</b>	<b>53,0%</b>	<b>388,9</b>	<b>55,9%</b>	<b>62,5</b>	<b>64,3%</b>
DFPT Levies	28,9	0,3%	13,2	0,3%	13,1	0,8%	1,8	0,8%	4,5	0,6%	0,5	0,6%
PPECB	27,7	0,3%	12,6	0,3%	6,3	0,4%	1,4	0,6%	3,6	0,5%	0,3	0,3%
Export Volume (ton)	458 920		210 264		46 688		5 026		12 664		1 685	
Sales price per ton (Rand)	23 485	100%	23 734	100%	35 169	100%	47 178	100%	54 892	100%	57 693	100%
CIF per ton (Rand)	17 262	74%	17 457	74%	25 974	74%	34 641	73%	40 510	74%	43 689	76%
FOB per ton (Rand)	13 643	58%	13 838	58%	22 144	63%	29 280	62%	35 149	64%	39 879	69%
DIP per ton (Rand)	11 977	51%	12 140	51%	20 044	57%	25 005	53%	30 706	56%	37 070	64%