

**DIE KALKOONDE | 18 OCTOBER 2024**

# **POMASA**

## **Industry Overview**

**Nina Viljoen & Tineil Hurter**



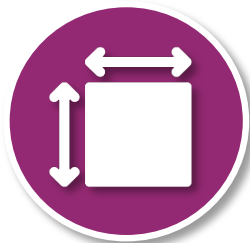
# PRODUCTION REGIONS

Total area planted = 1 167 HA

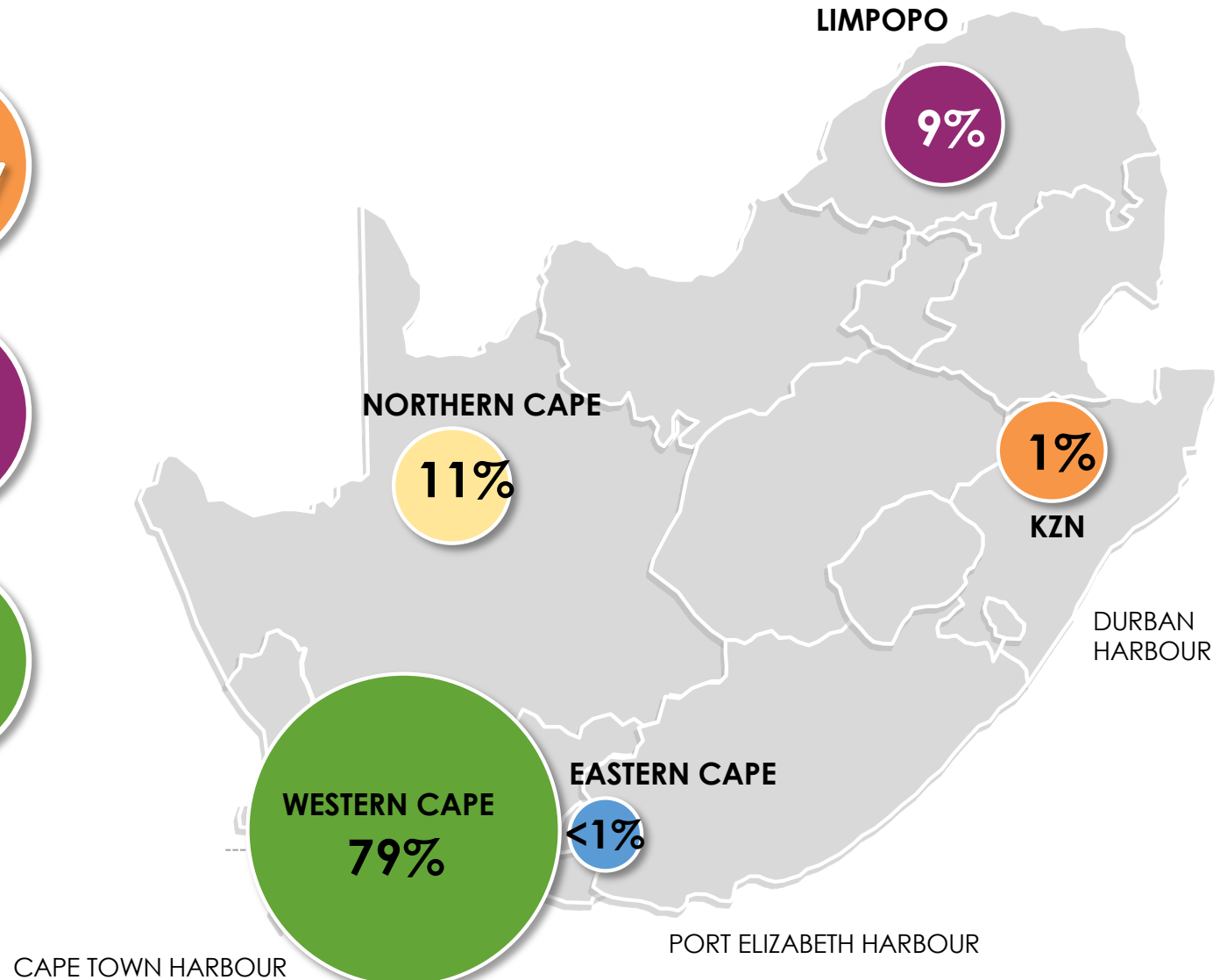
66 growers  
69 farming units



17 ha  
average  
farm size

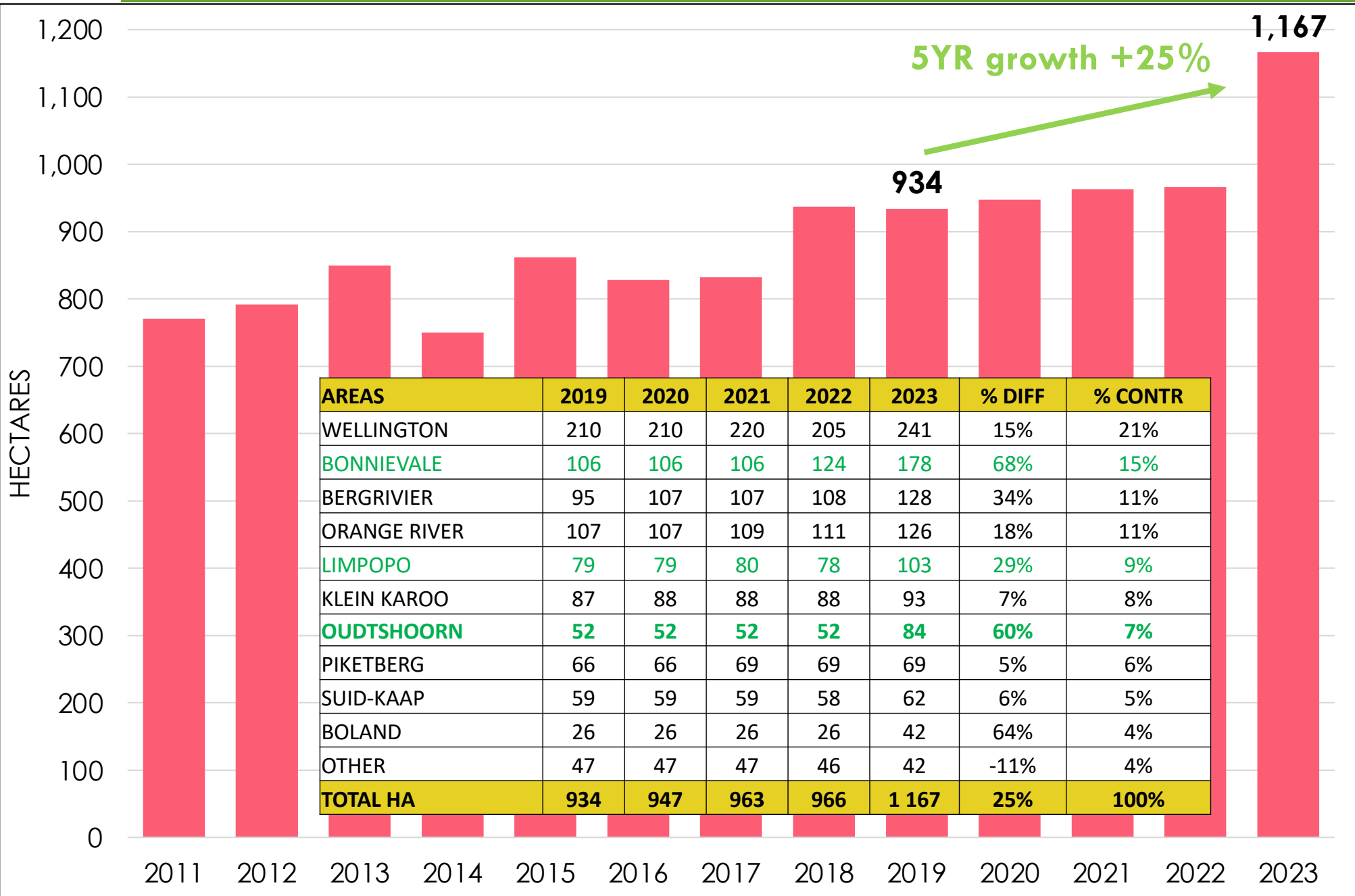


11  
varieties  
planted



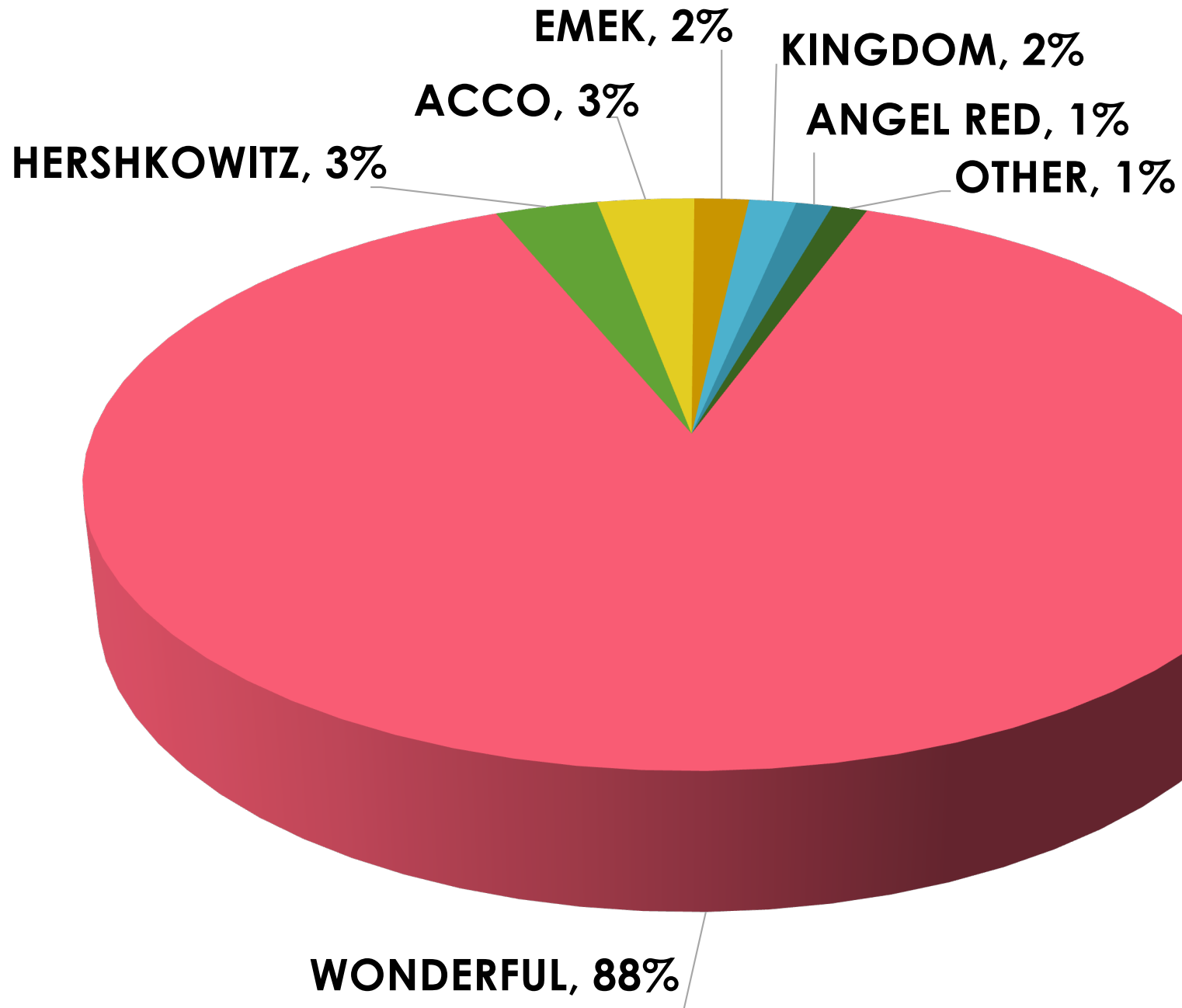


# TOTAL AREA PLANTED (HA)





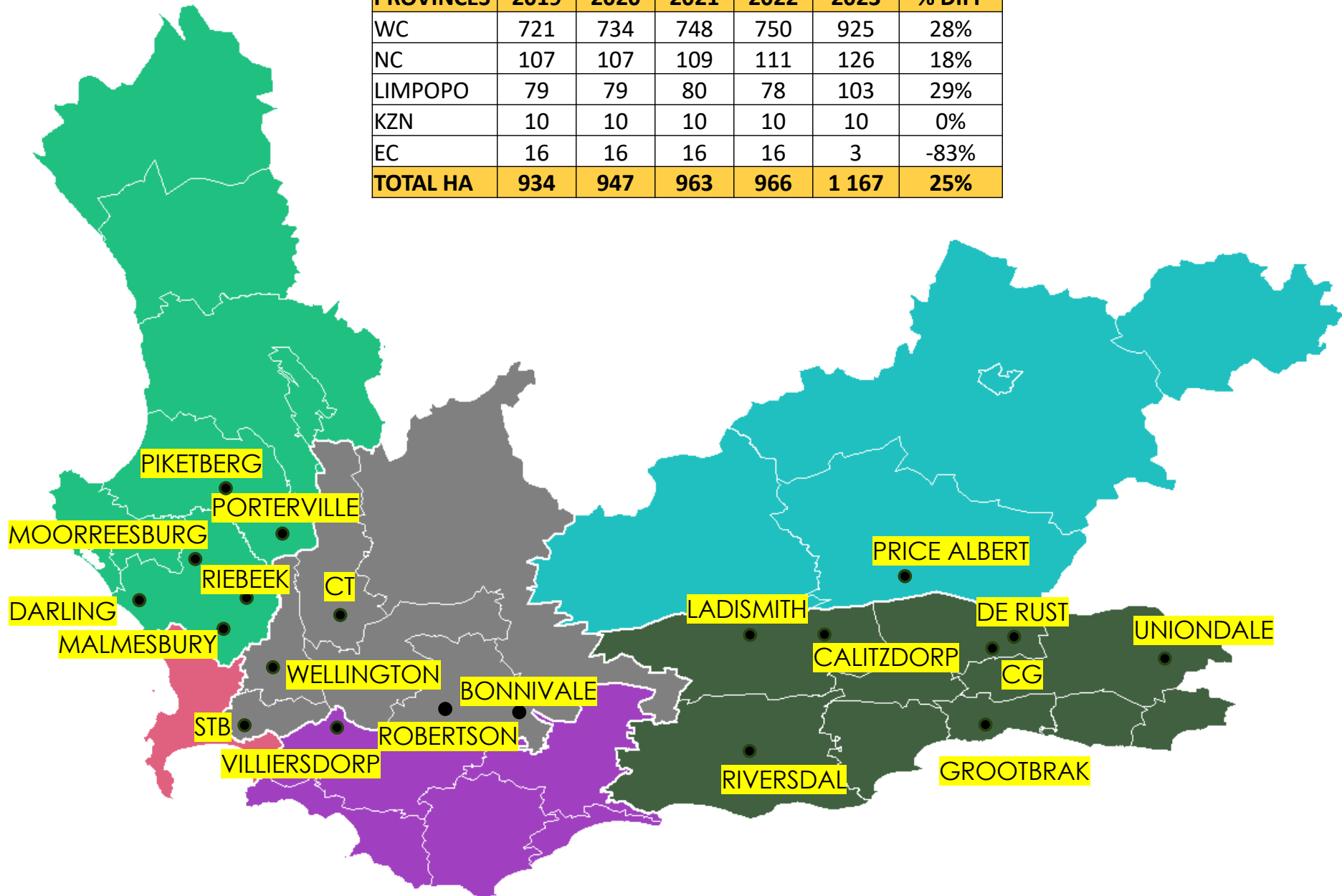
# CULTIVAR DISTRIBUTION





# WESTERN CAPE AREA

PROVINCES	2019	2020	2021	2022	2023	% DIFF
WC	721	734	748	750	925	28%
NC	107	107	109	111	126	18%
LIMPOPO	79	79	80	78	103	29%
KZN	10	10	10	10	10	0%
EC	16	16	16	16	3	-83%
<b>TOTAL HA</b>	<b>934</b>	<b>947</b>	<b>963</b>	<b>966</b>	<b>1 167</b>	<b>25%</b>

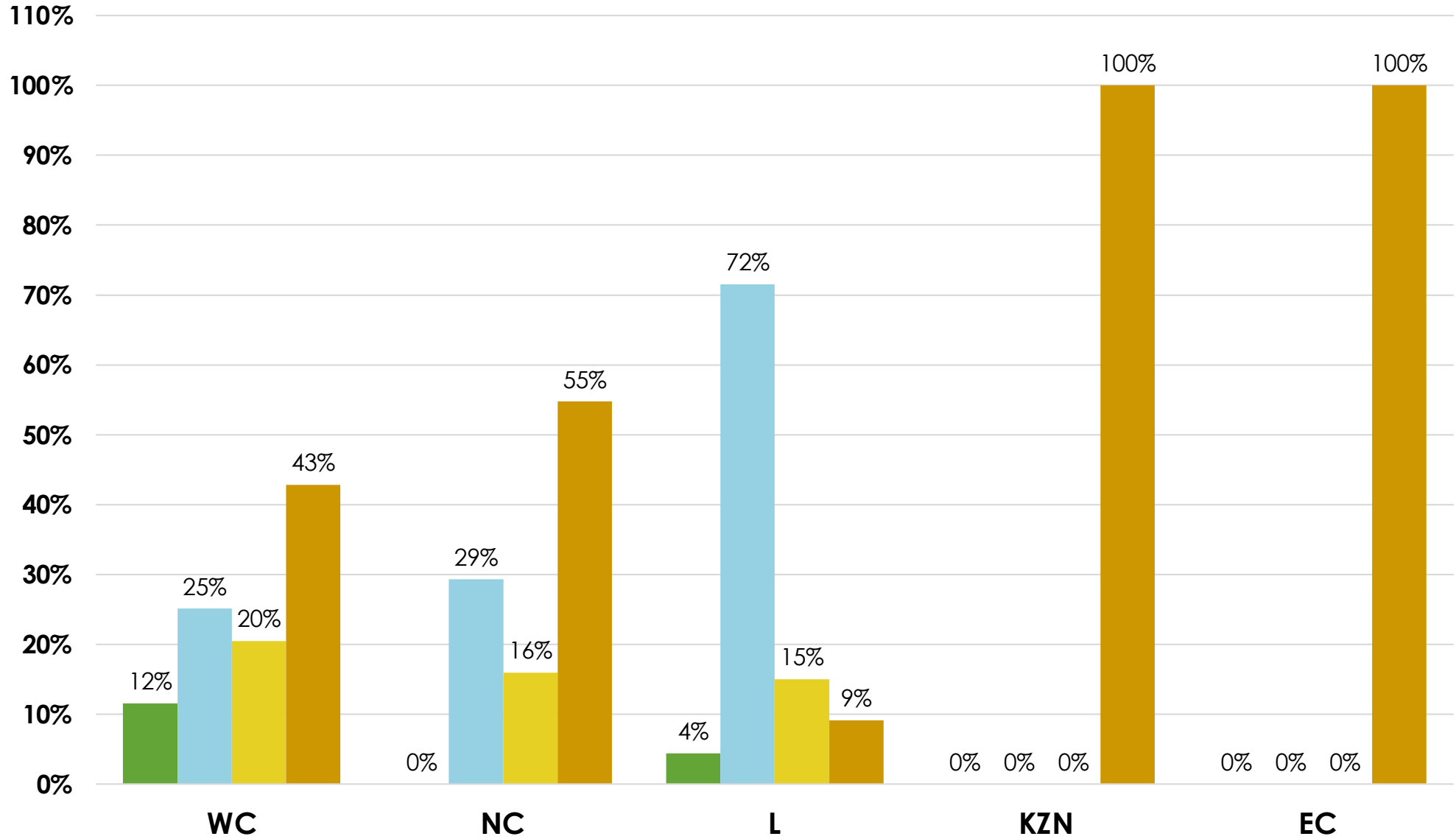




# ORCHARD AGE DISTRIBUTION

## PROVINCE AGE DISTRIBUTION

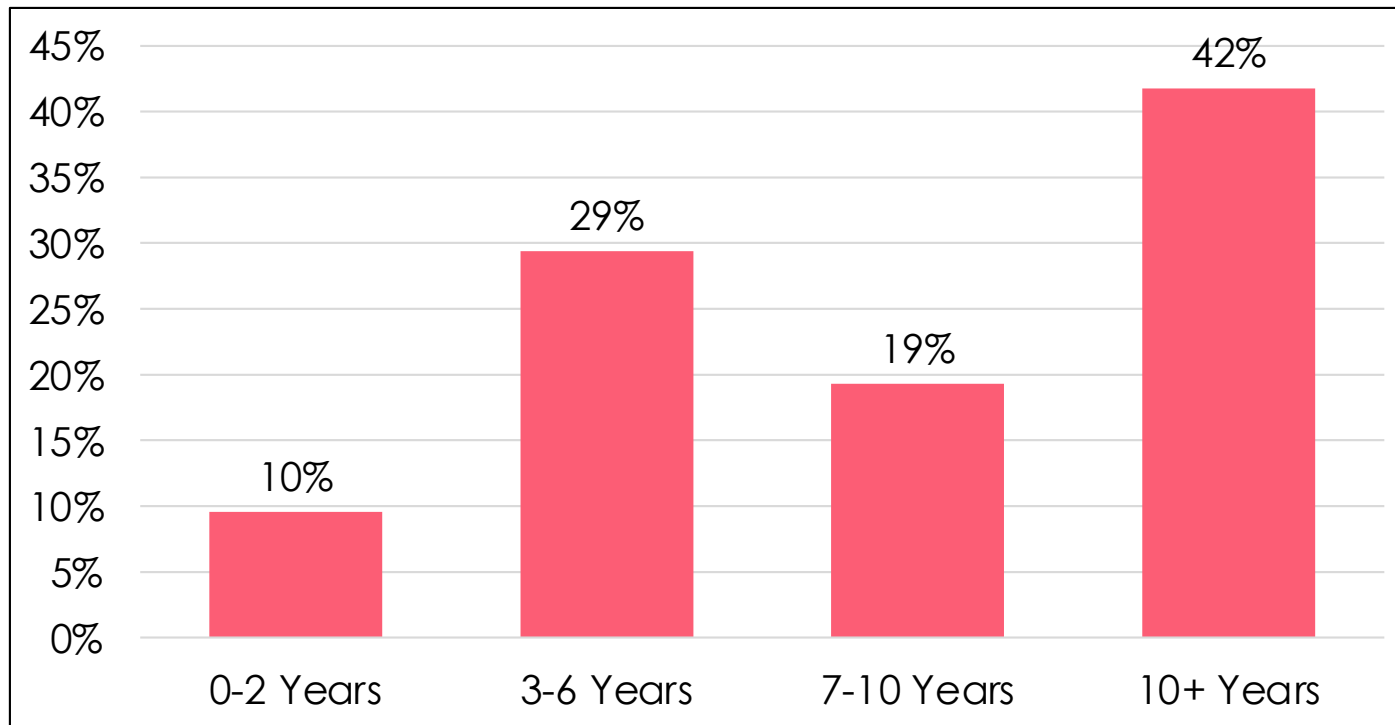
0-2 Years    3-6 Years    7-10 Years    10+ Years





# ORCHARD AGE DISTRIBUTION

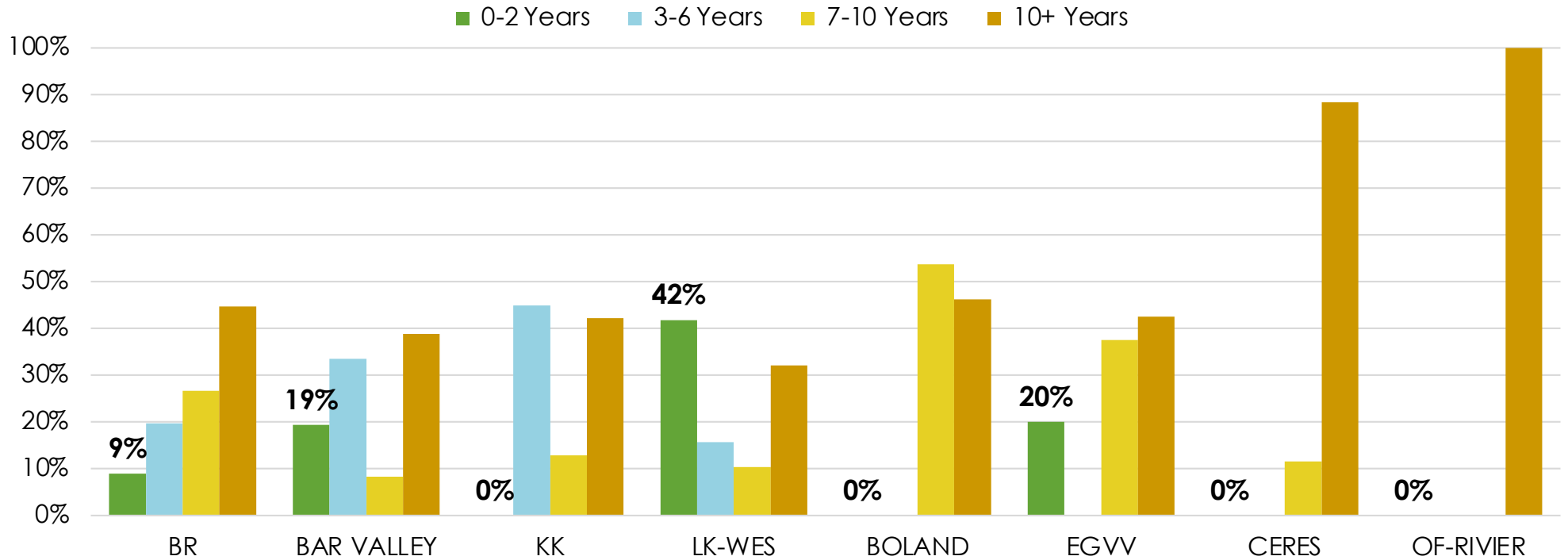
CULTIVAR	0-2 Years	3-6 Years	7-10 Years	10+ Years	TOTAL
WONDERFUL	9%	30%	20%	41%	1 029
HERSHKOWITZ	0%	0%	0%	100%	38
ACCO	0%	24%	15%	60%	36
EMEK	28%	54%	17%	0%	20
KINGDOM	71%	29%	0%	0%	17
ANGEL RED	0%	69%	31%	0%	13
OTHER	0%	12%	23%	65%	13
<b>TOTAL</b>	<b>10%</b>	<b>29%</b>	<b>19%</b>	<b>42%</b>	<b>1 167</b>





# WESTERN ORCHARD AGE DISTRIBUTION

## WESTERN CAPE

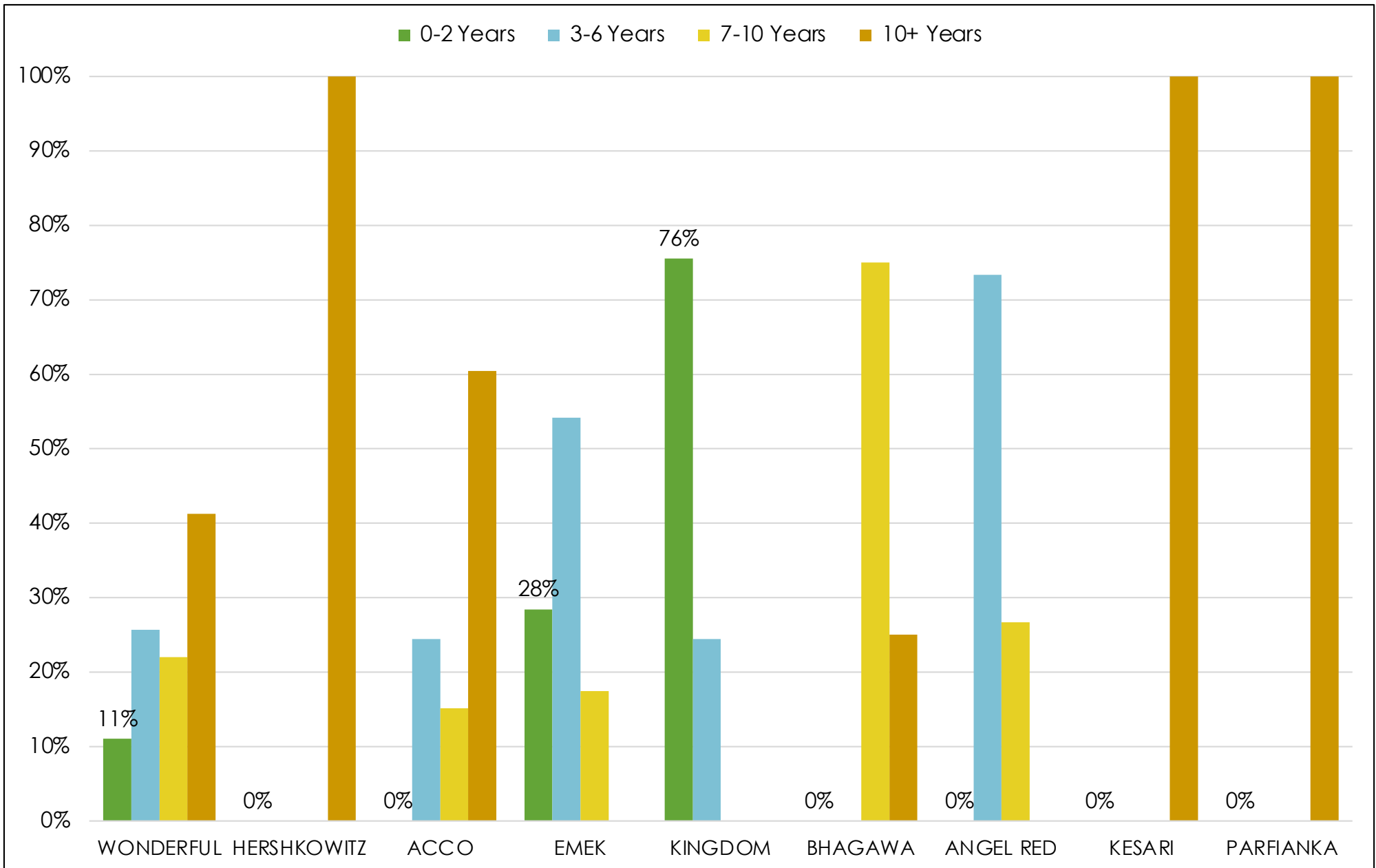


WESTERN CAPE	0-2 Years	3-6 Years	7-10 Years	10+ Years	TOTAL HA
BERG RIVER	39	86	117	196	437
BAR VALLEY	39	67	17	77	199
KLEIN KAROO	-	70	20	66	155
LANGKLOOF WEST	26	10	6	20	62
BOLAND	-	-	23	20	42
EGVV	3	-	6	7	16
CERES	-	-	2	11	13
OLIFANTS RIVER	-	-	-	0	0
ORANGE RIVER	-	37	20	69	126



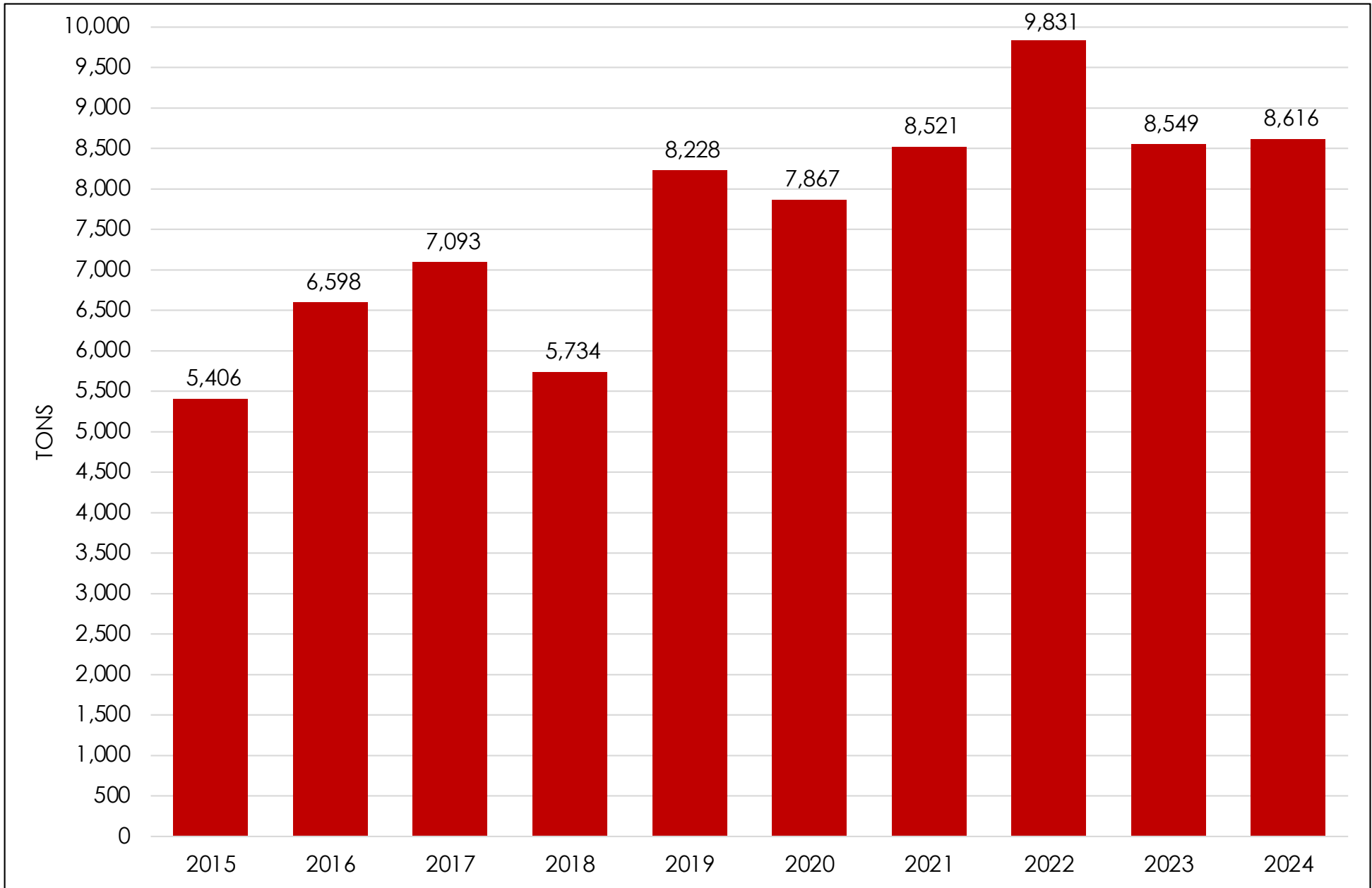


# WESTERN CAPE CULTIVAR AGE





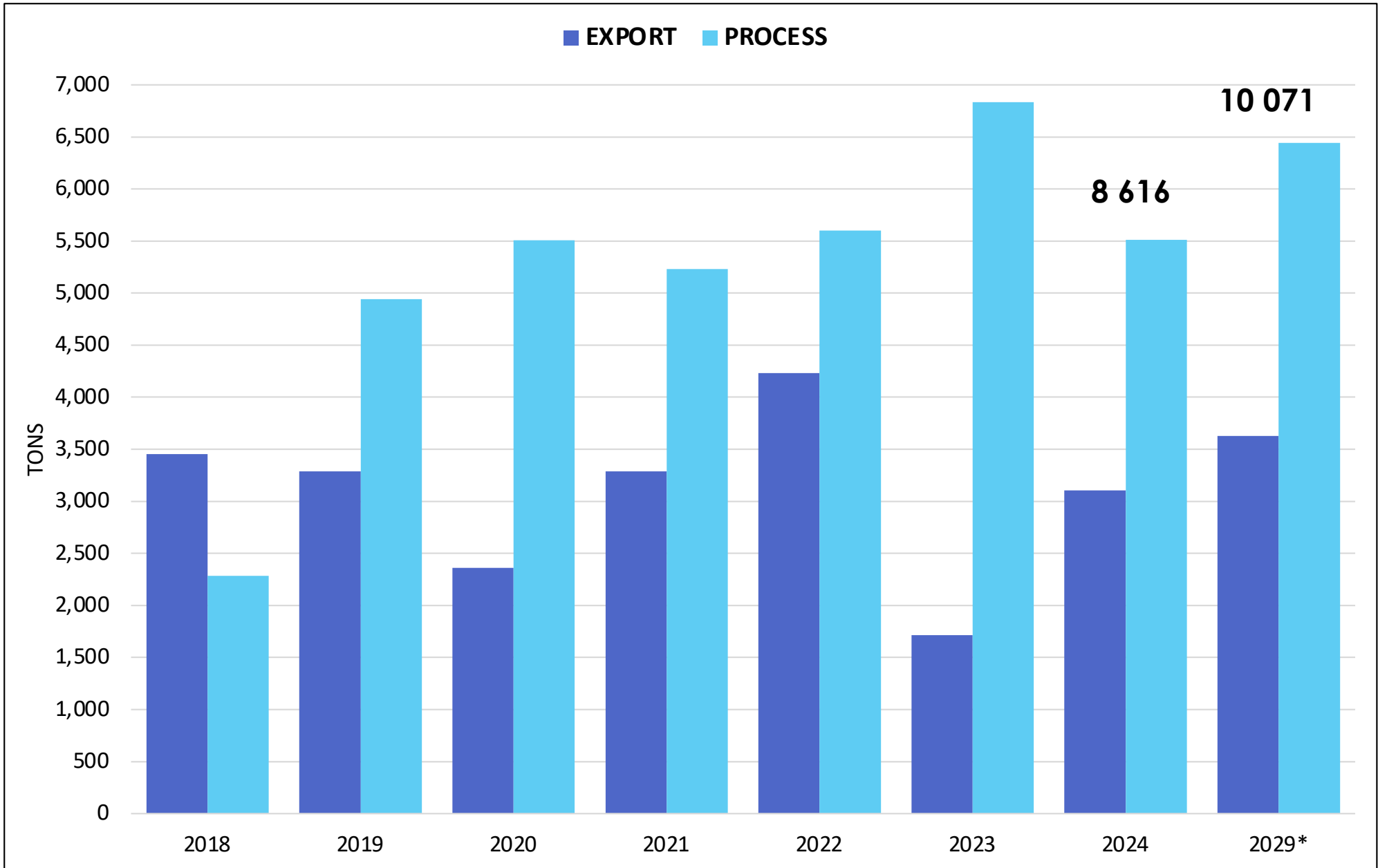
# TOTAL SA EXPORTS - TONS



Source: PPECB/SURVEY



# MID TERM PROJECTION



**SPLIT 2029\*: 36% = EXPORT; 64% = PROCESS**

**Source: PPECB/SURVEY**

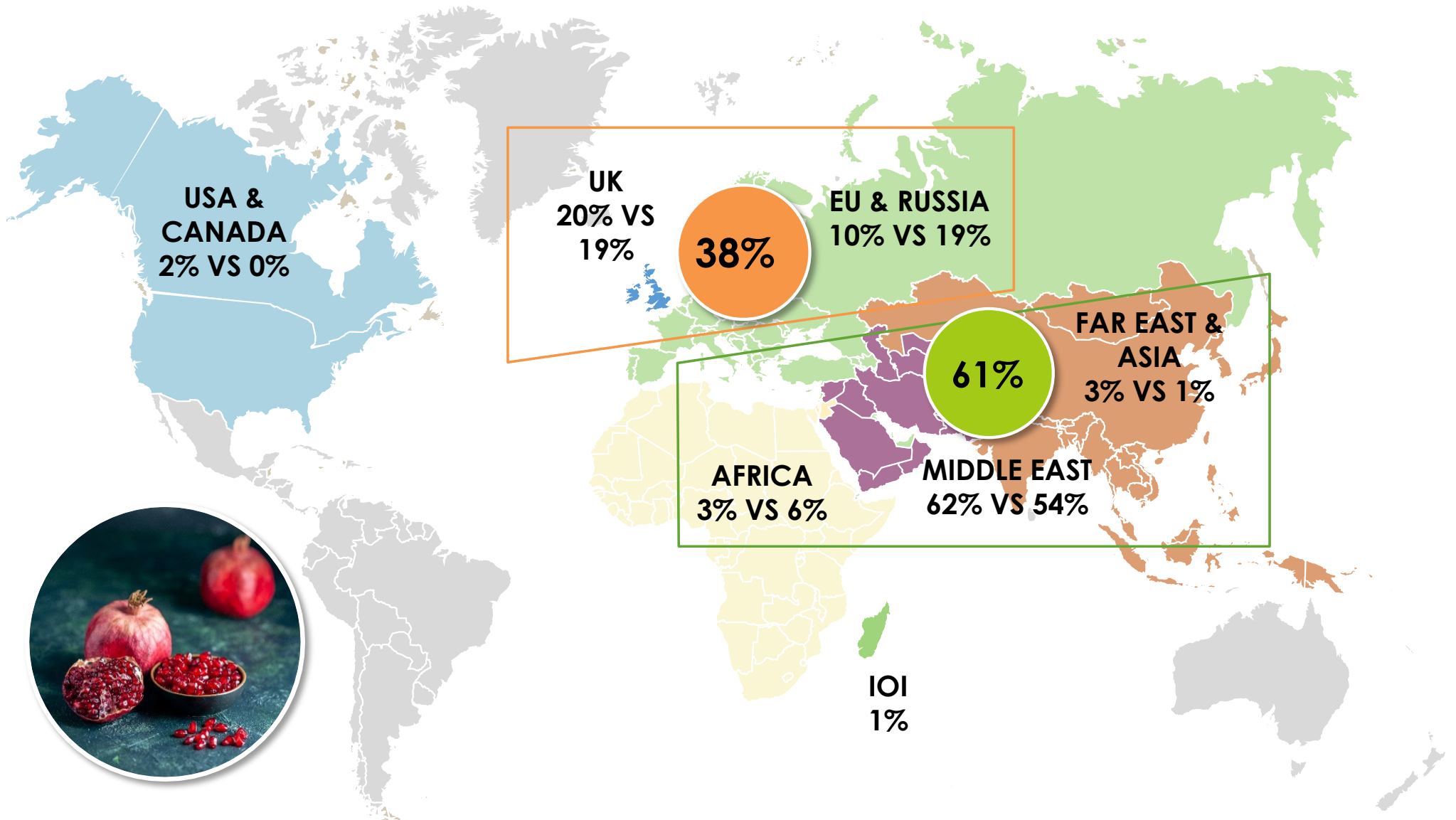


# EXPORTS PER CULTIVAR: 2022 - 2024

CULTIVAR	2022	2023	2024
Wonderful	7 566	7 824	7 646
HersHKovitz	1 085	157	327
Acco	964	301	329
Kessari / Baghwa	36	8	2
EMEK	119	81	93
Other	61	178	219
<b>TOTAL TONNES</b>	<b>9 831</b>	<b>8 549</b>	<b>8 616</b>
Y-O-Y		-13%	1%



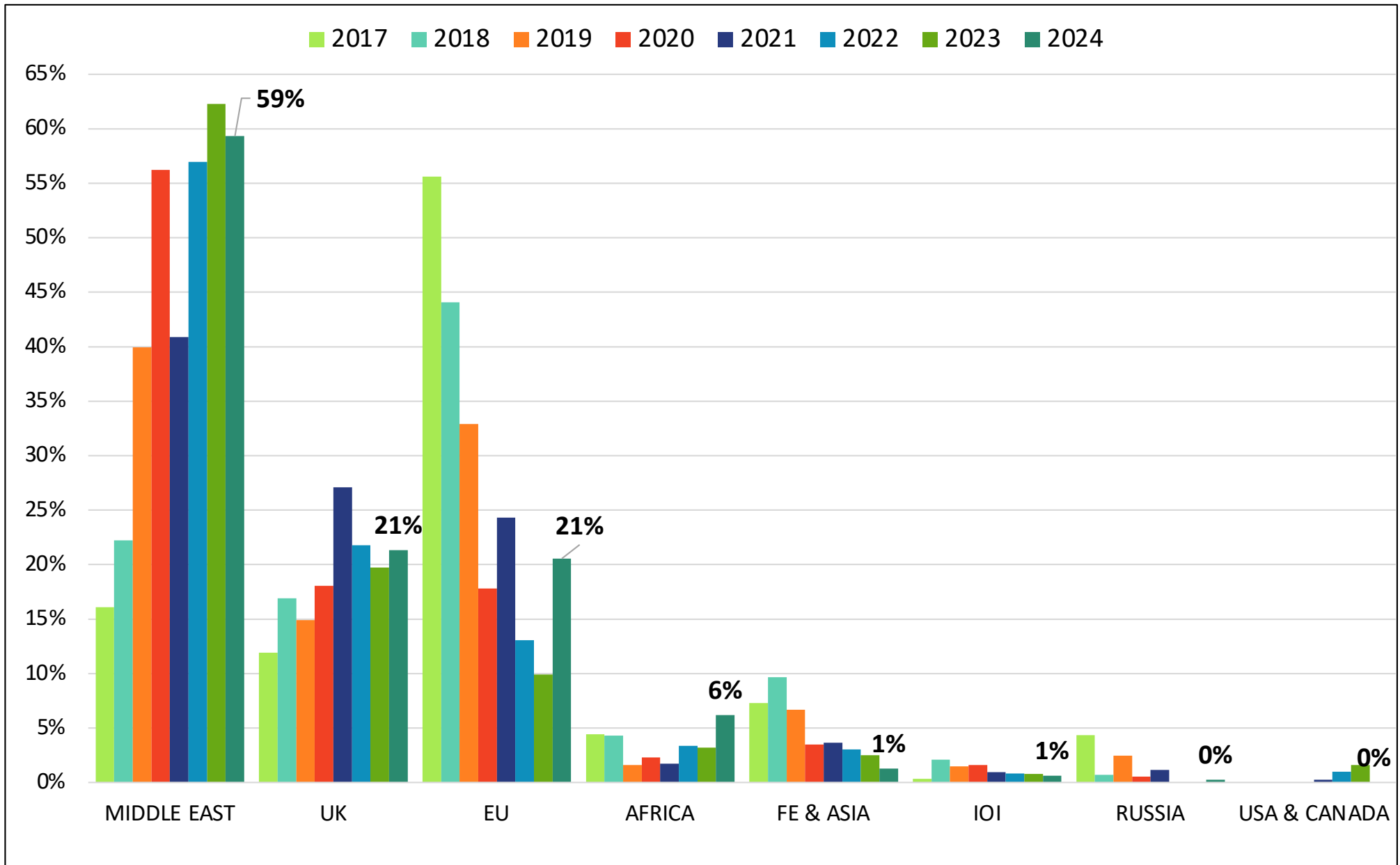
# EXPORT MARKET DESTINATION 2023 VS 2024



Source: PPECB



# EXPORT MARKET TREND



Source: PPECB



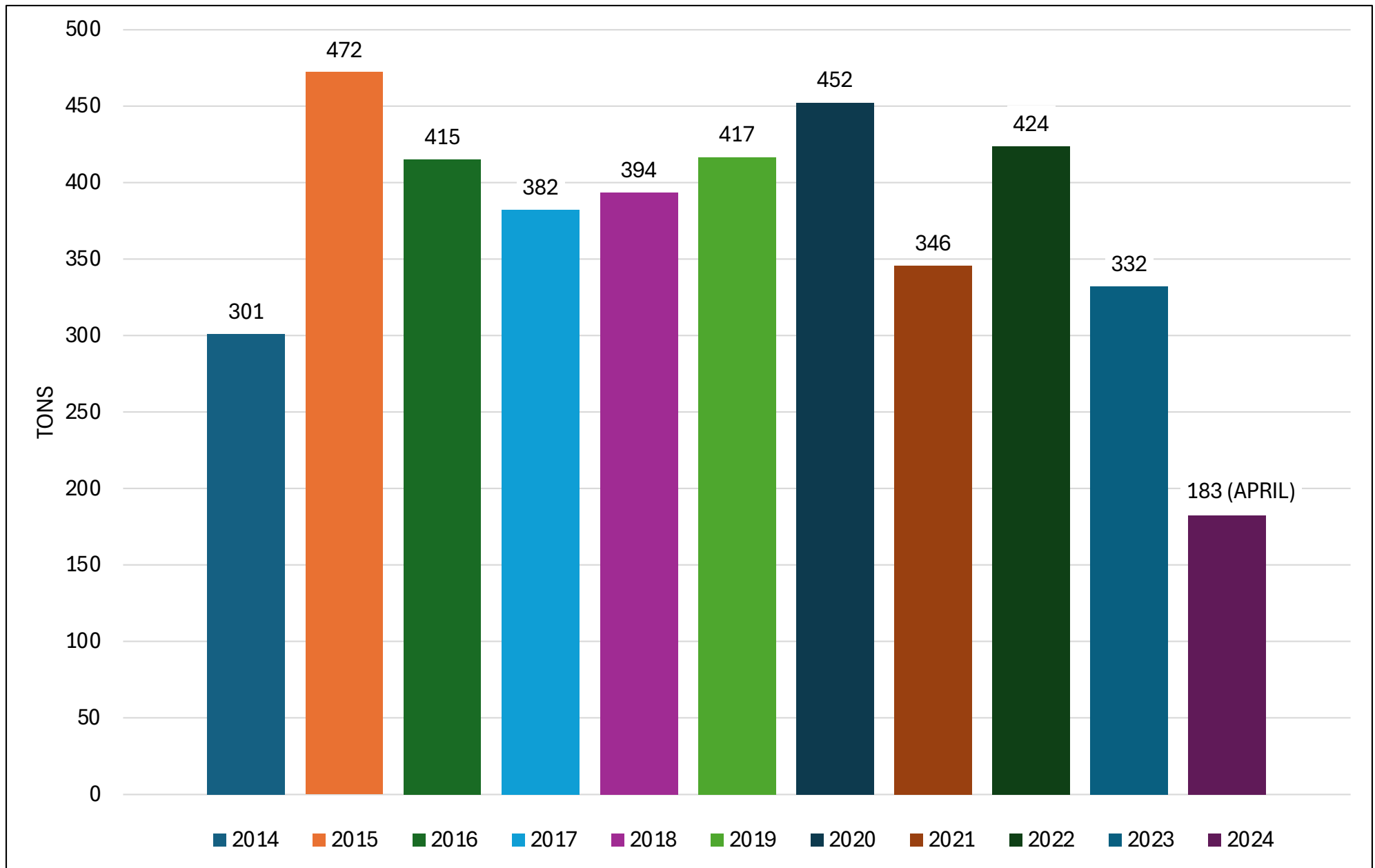
# PACK-OUT % @ PACKHOUSE

Cultivar	EXPORTS		LOCAL		% JUICE	% WASTE
	% FRESH Exports	% PROCESSED Exports	% FRESH Local	% PROCESSED Local		
Wonderful	0%	0%	58%	26%	0%	17%
Hershkowitz	13%	54%	10%	0%	18%	4%
Acco	13%	52%	0%	21%	11%	3%
Emek	21%	46%	19%	0%	10%	3%
Angle Red	9%	63%	2%	0%	14%	11%
<b>Grand Total</b>	<b>16%</b>	<b>46%</b>	<b>1%</b>	<b>27%</b>	<b>6%</b>	<b>4%</b>

Source: SURVEY



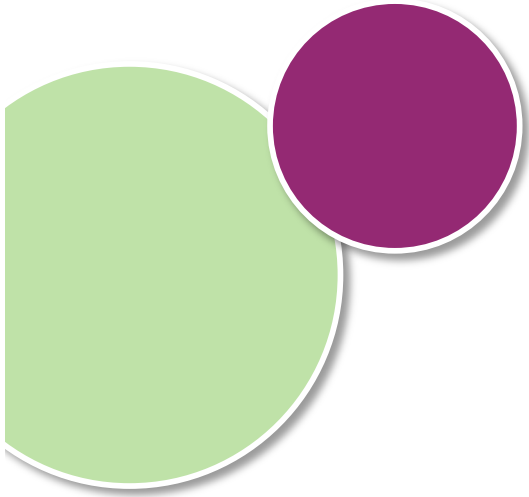
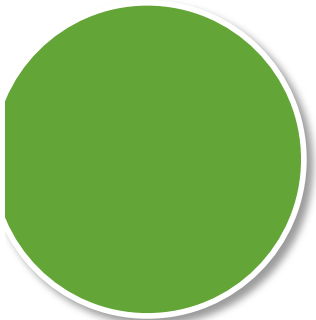
# LOCAL MUNICIPAL MARKET TRENDS



Source: DOA

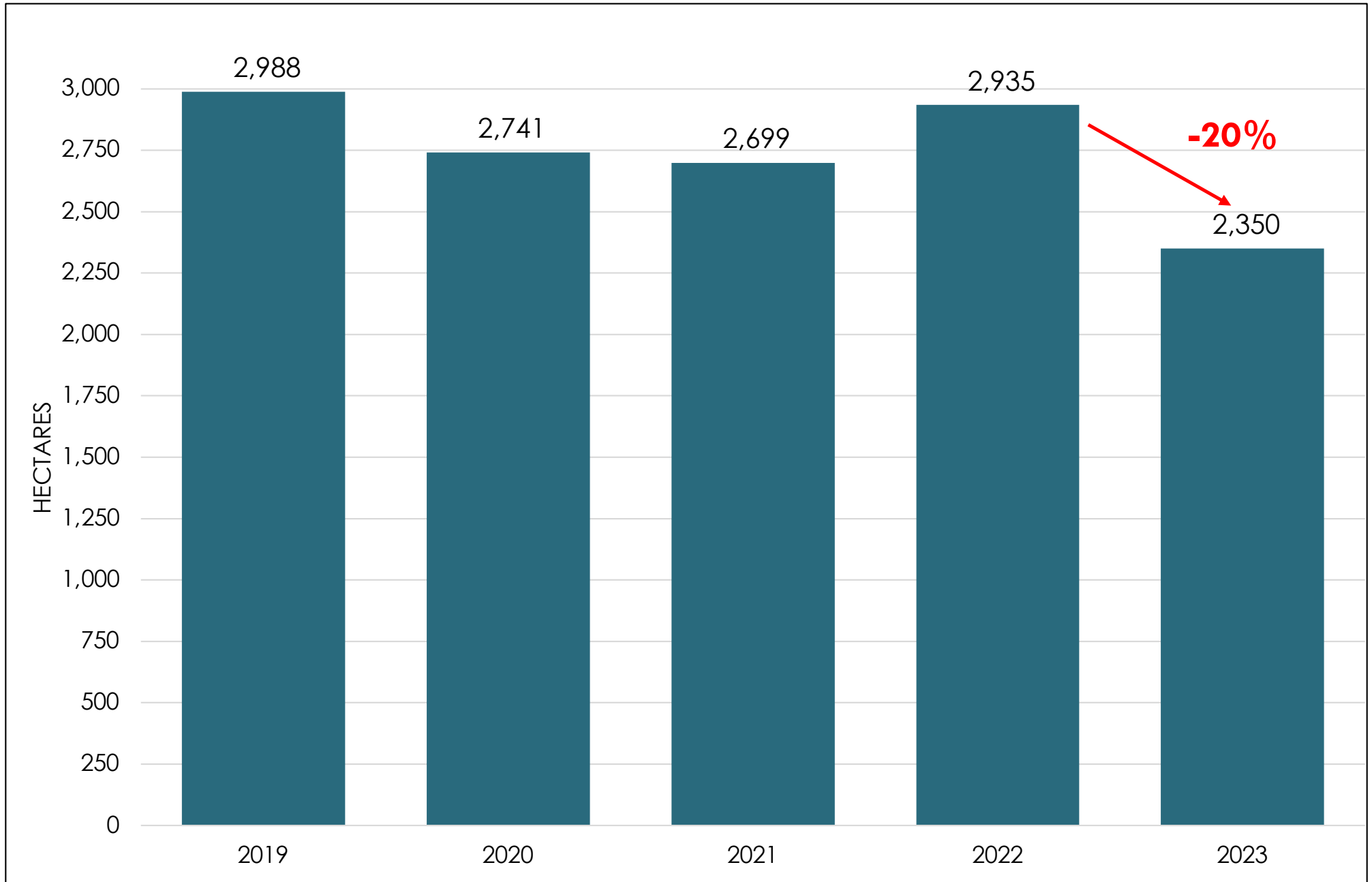


# SOUTHERN HEMISPHERE



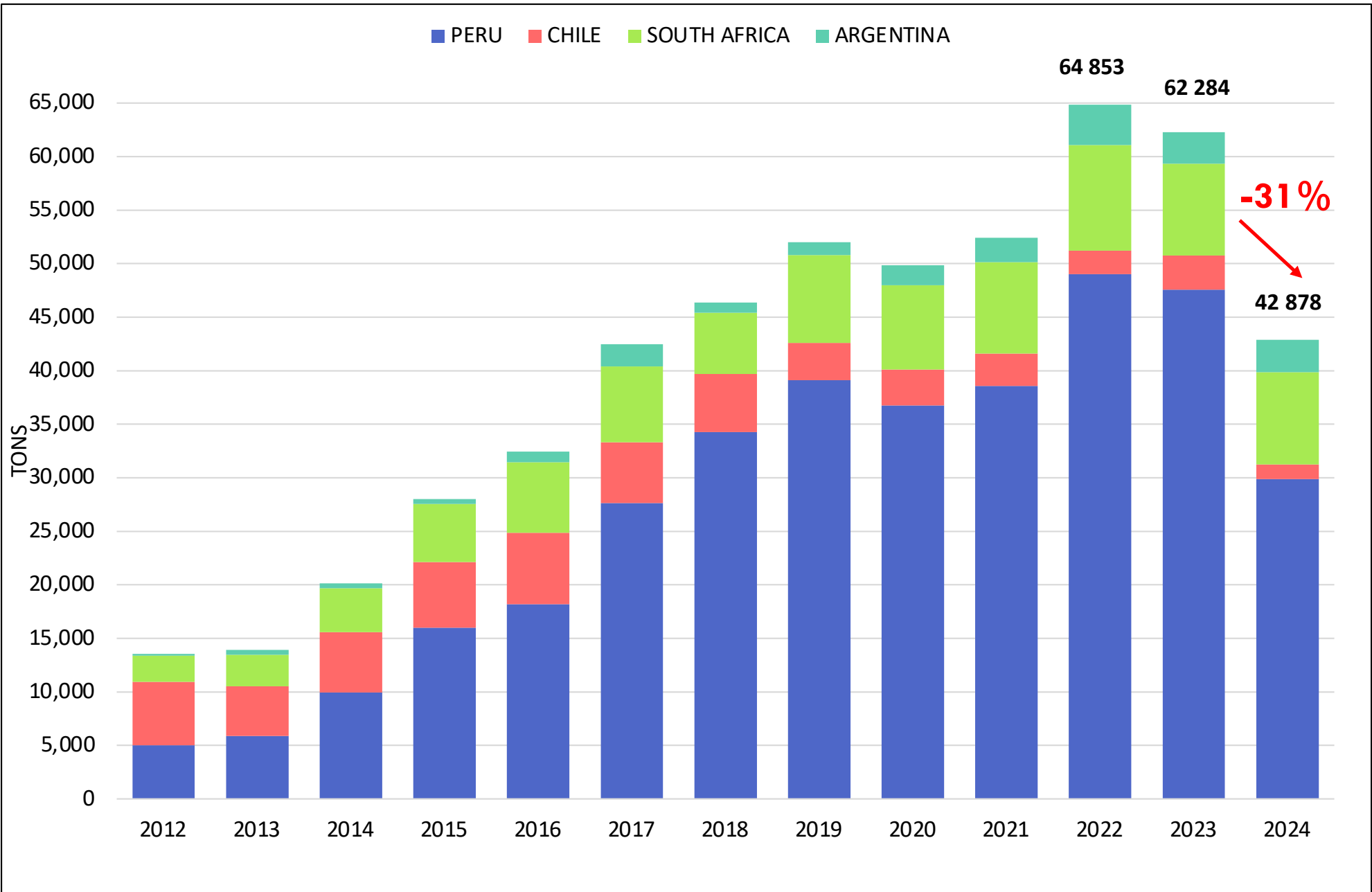


# PERU HECTARES PLANTED



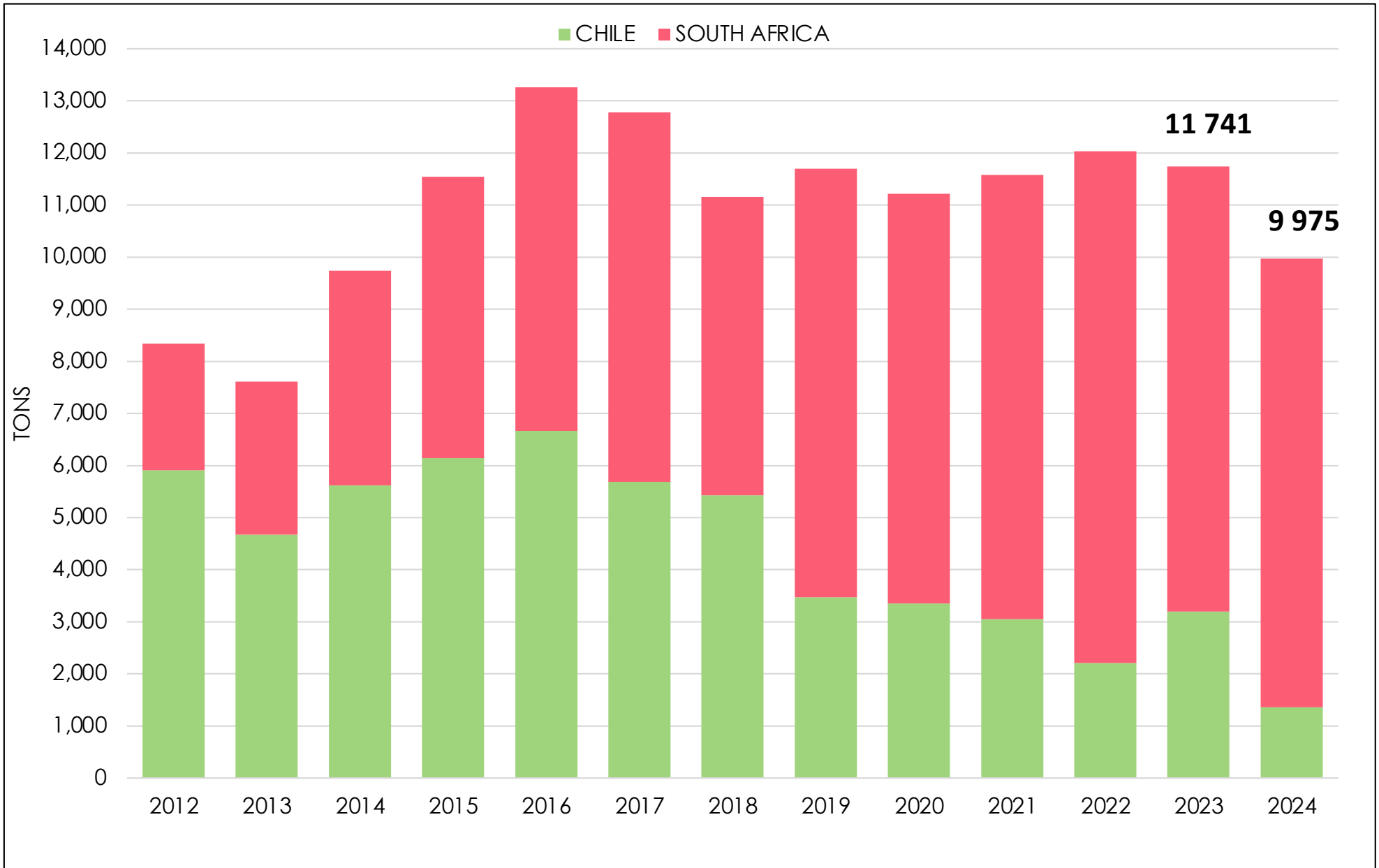


# TOTAL SA, PERU, CHILE & ARG EXPORTS - TONS



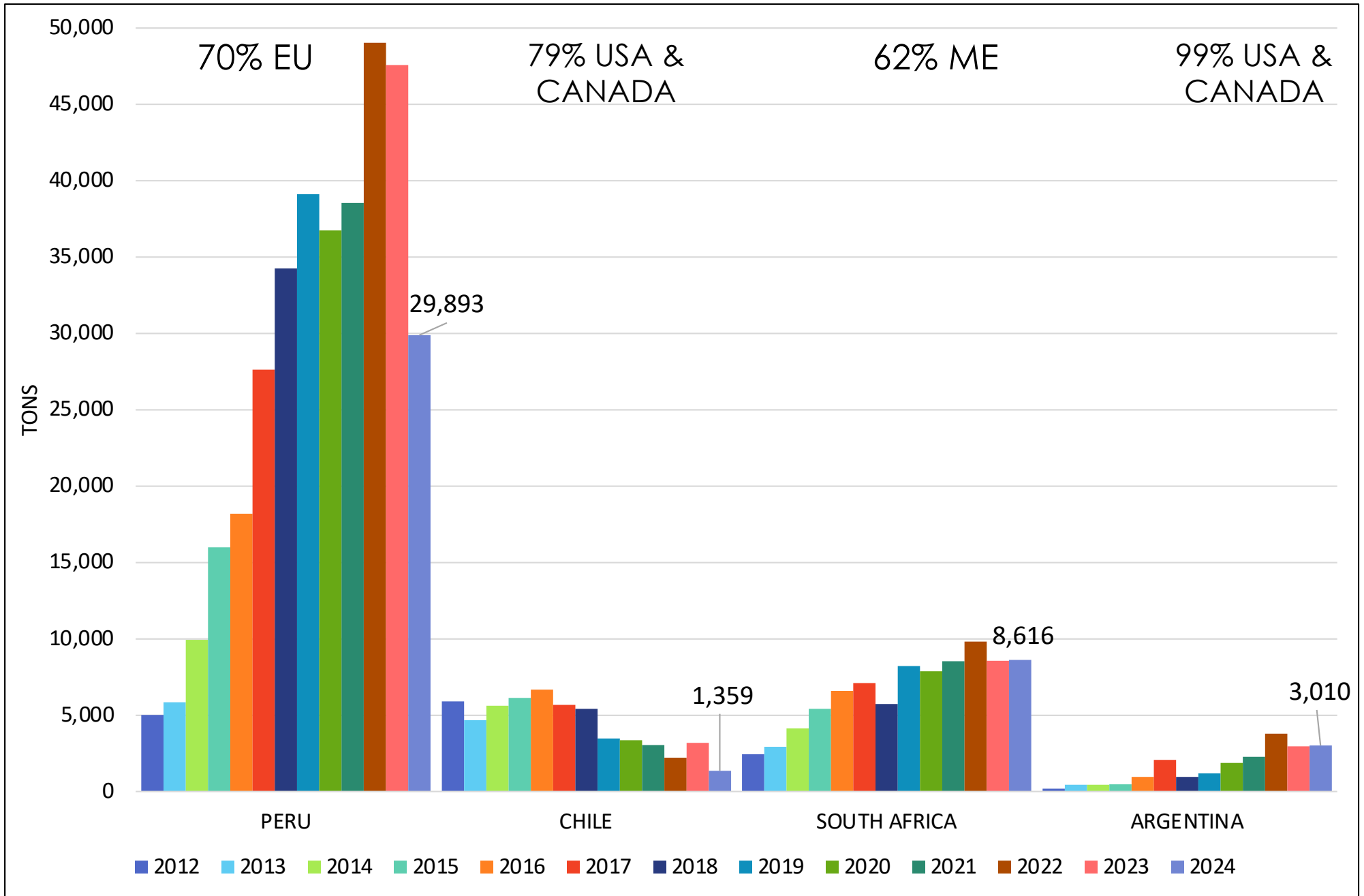


# TOTAL SA & CHILE EXPORTS - TONS





# SOUTHERN HEMISPHERE COUNTRY VOLUMES





**THANK YOU**

