Fresh Produce Industry: Africa focus

3 April 2017
IFAJ Congress
Kievitskroon, Pretoria
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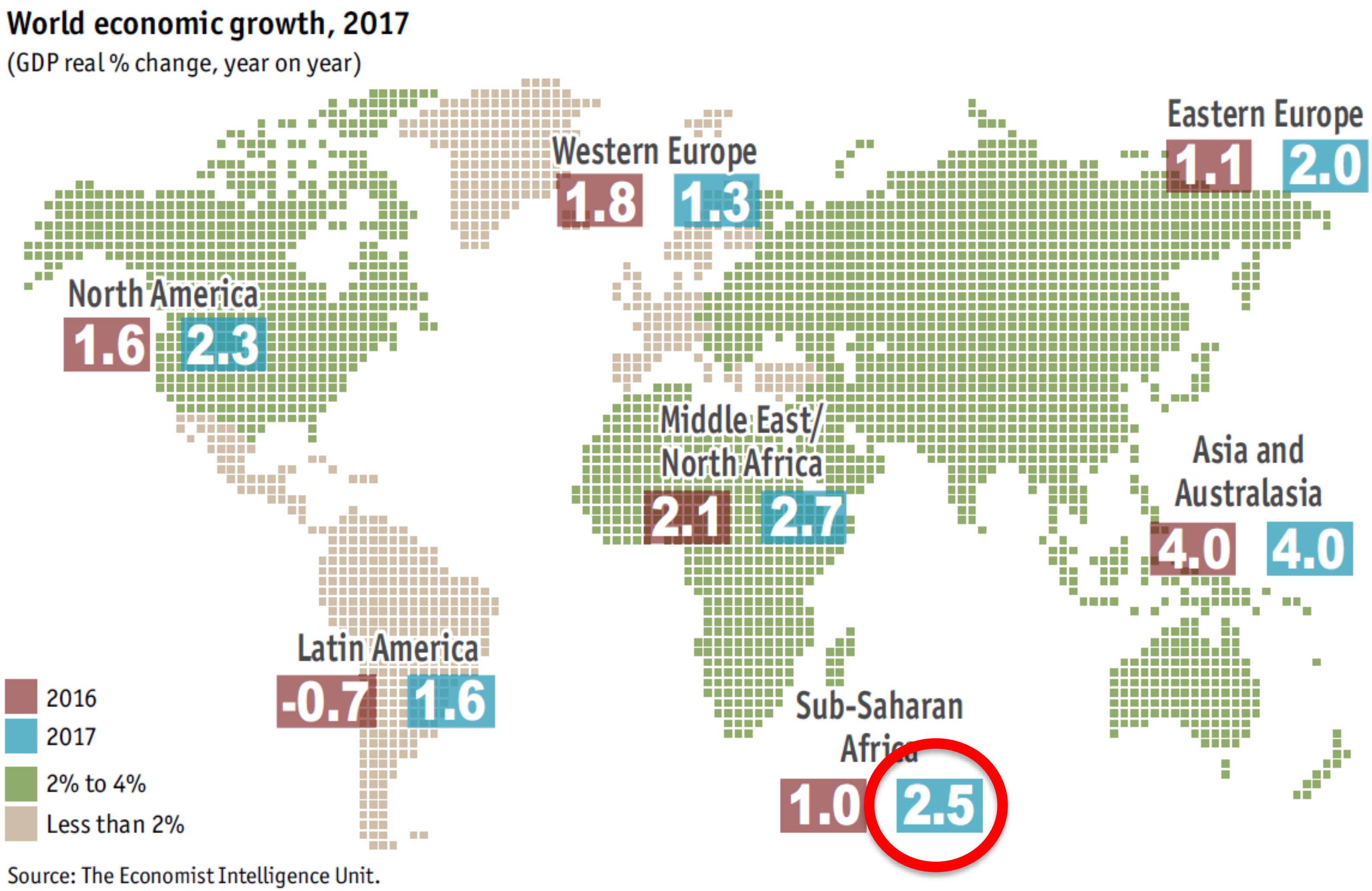
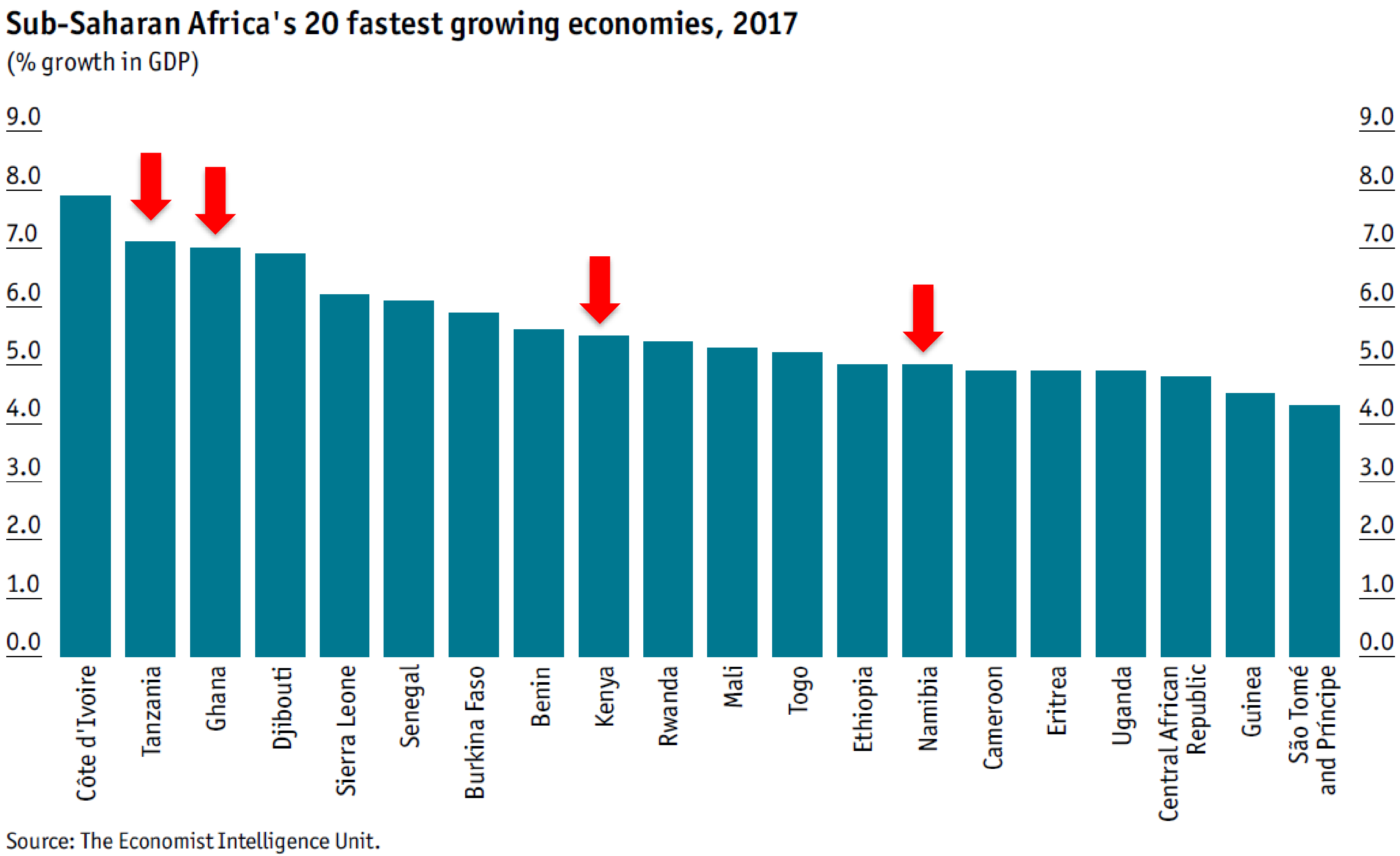
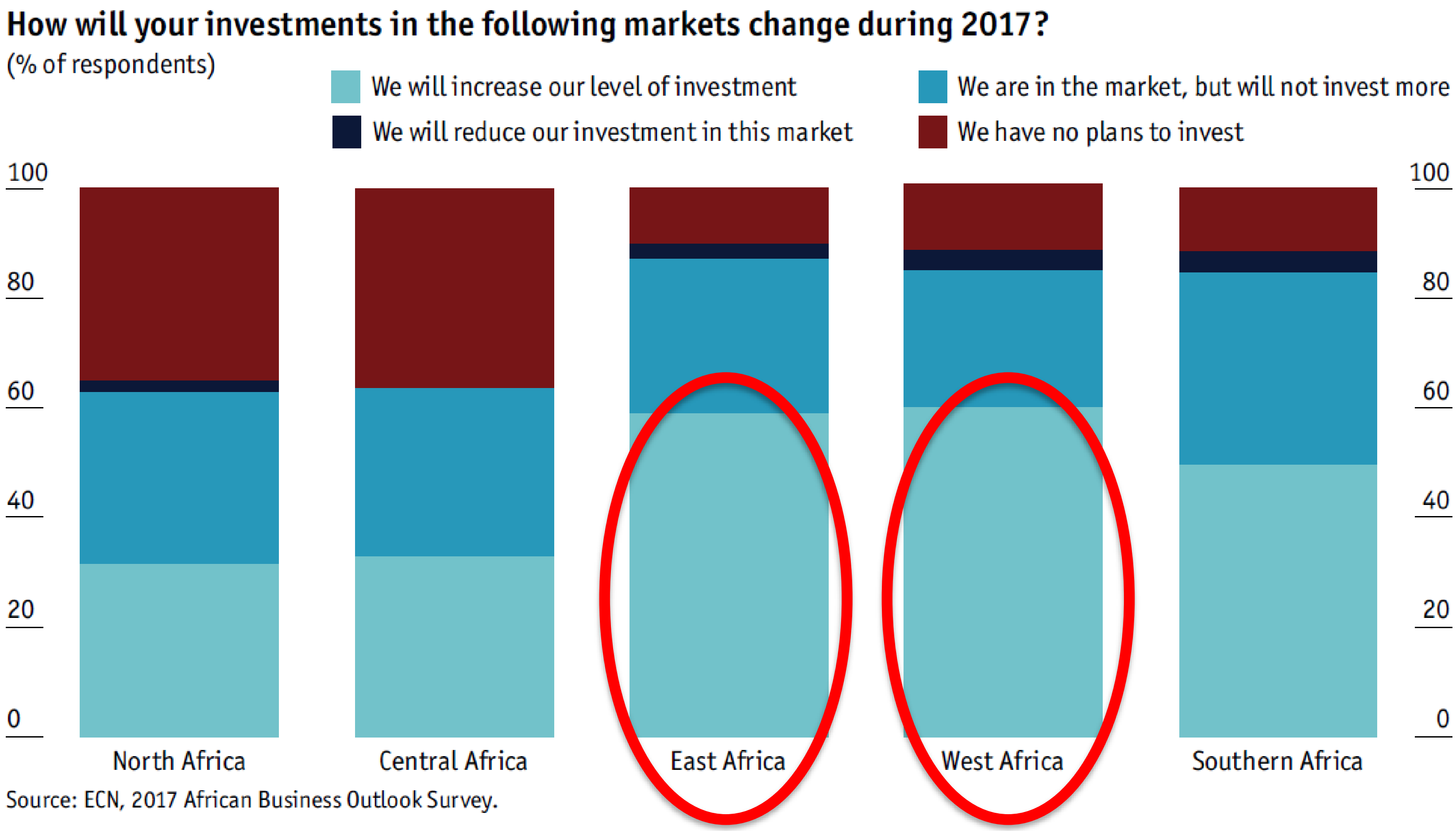
Sub-Saharan Africa growth projections



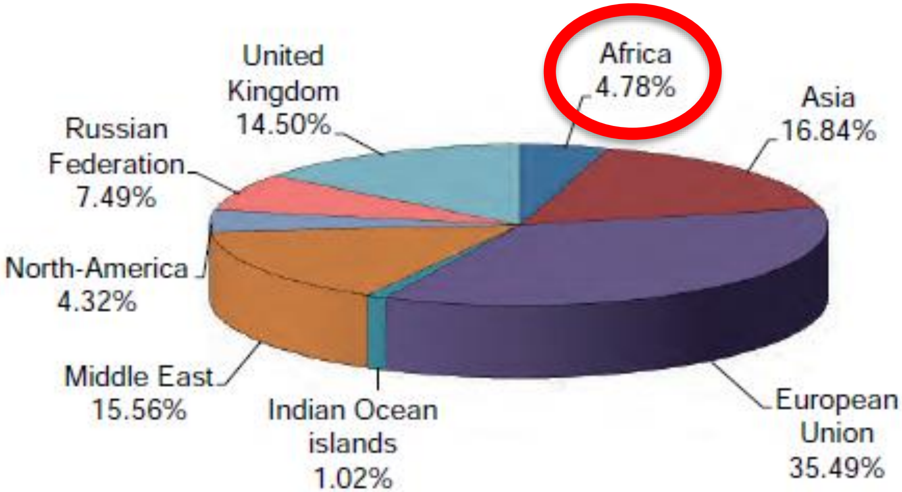
20 Fastest growing economies in Africa



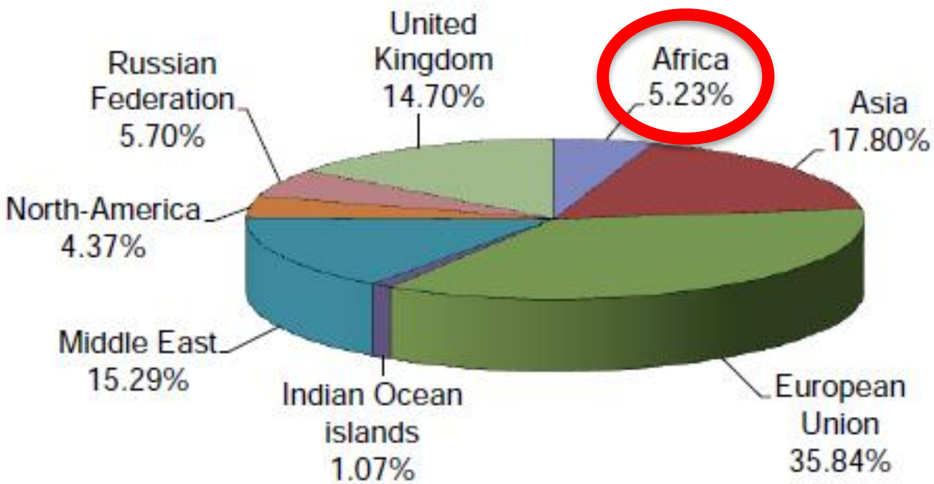
Investment expectations



Fruit export trends (source: Food trade SA 2017)



ALL FRESH FRUIT : PAST 5 SEASONS - MAJOR DESTINATIONS



ALL FRESH FRUIT : 2015/16 SEASON - MAJOR DESTINATIONS

Rank (in past volumes):

1. EU
2. Asia
3. Middle East
4. UK
5. Russia & Africa

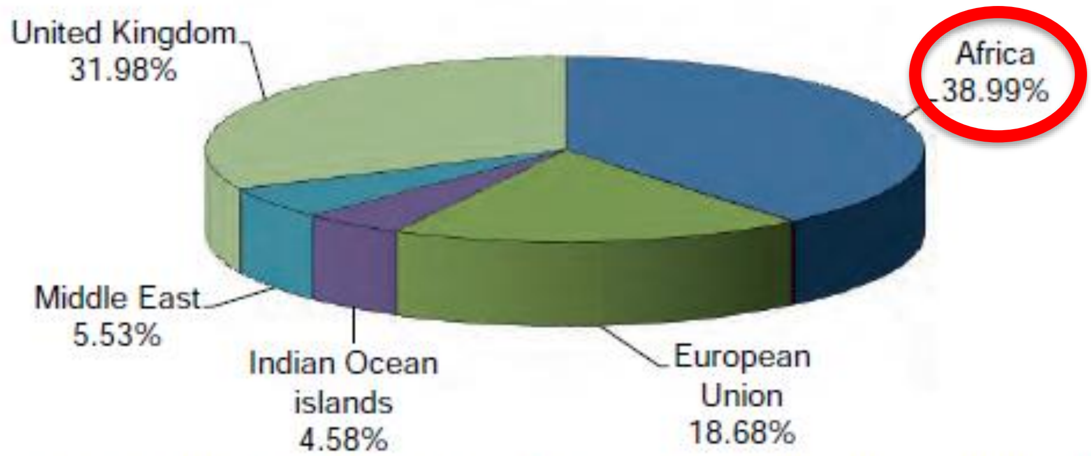
FRUIT: DEST PAST SEASON MAJOR DESTINATIONS

AFRICA	130,006	5.23%
ASIA	442,515	17.8%
EUROPEAN UNION	890,969	35.84%
INDIAN OCEAN ISLANDS	26,599	1.07%
MIDDLE EAST	380,073	15.29%
NORTH-AMERICA	108,533	4.37%
OCEANIA	80	0%
RUSSIAN FEDERATION	141,719	5.7%
UNITED KINGDOM	365,327	14.7%

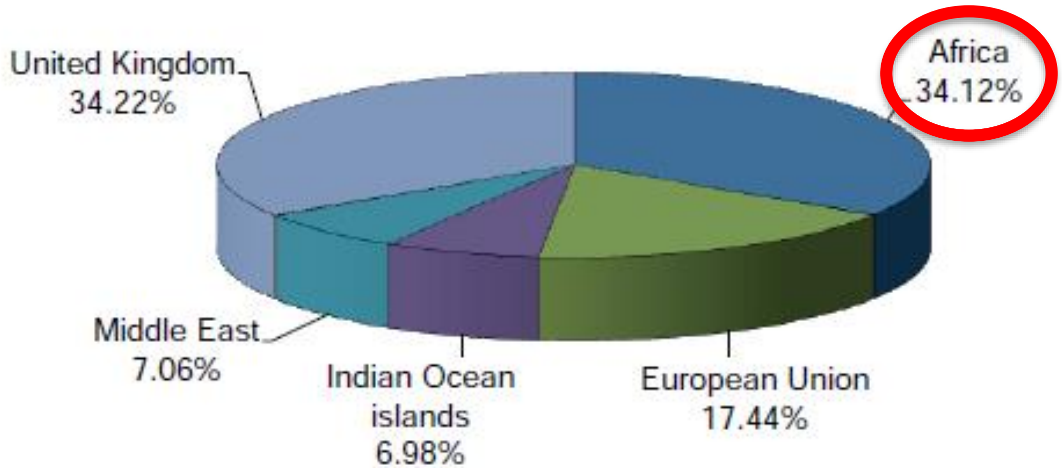
Destination Africa for fruit (2015/16 exports)

Mangoes	42%
Apples	28%
Pears	4%
Pomegranates	4%
Peaches	2%
Plums	2%
Nectarines	1%
Apricots	1%
Table grapes	1%
Blue berries	1%

Vegetables export trends (source: Food trade SA 2017)



ALL FRESH VEGETABLES : PAST 5 SEASONS - MAJOR DESTINATIONS



ALL FRESH VEGETABLES : 2015/16 SEASON - MAJOR DESTINATIONS

Rank (in past volumes):

1. UK
2. Africa
3. EU
4. Middle East
5. Indian Ocean Islands

VEGETABLES: PAST SEASON

AFRICA	9,637m	34.12%
ASIA	21,463	0.08%
EUROPEAN UNION	4,925m	17.44%
INDIAN OCEAN ISLANDS	1,972m	6.98%
MIDDLE EAST	1,995m	7.06%
NORTH-AMERICA	28,065	0.1%
UNITED KINGDOM	9,665m	34.22%

Destination Africa for veg (2015/16 exports)

Asparagus	9%
Baby veg	1.5%
Brussel sprouts	9%
Cabbage	13%
Carrots	80%
Cauliflower	37%
Cucumbers	54%
Garlic	78%
Ginger	76%
Lettuce	27%
Mushrooms	1%
Onions	71%
Potatoes	83%
Sweet corn	3%
Sweet peppers	1.5%
Tomatoes	34%

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Trading fresh produce in Africa: few considerations

1. Local production and potential

   e.g. NSF International did 1200 GlobalGAP audits in Kenya last year

2. SA retailers shifting procurement strategies more to local procurement:

   Cost, Obligation, Potential, Gov support, etc.

3. Infrastructure / cost & risk of transport
4. Difficulty and availability of foreign exchange
5. Water availability
6. Seasonal closing of borders
7. Lack of availability of functioning Fresh Produce markets (market access & price forming mechanisms)

Become part of the local PMA network

pma FRESH CONNECTIONS

SOUTHERN AFRICA
CONFERENCE & TRADESHOW

16-17 August 2017

Cape Town International
Convention Centre (CTICC)
Cape Town, South Africa

pma.com/fcsouthernafrica

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Thank you

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