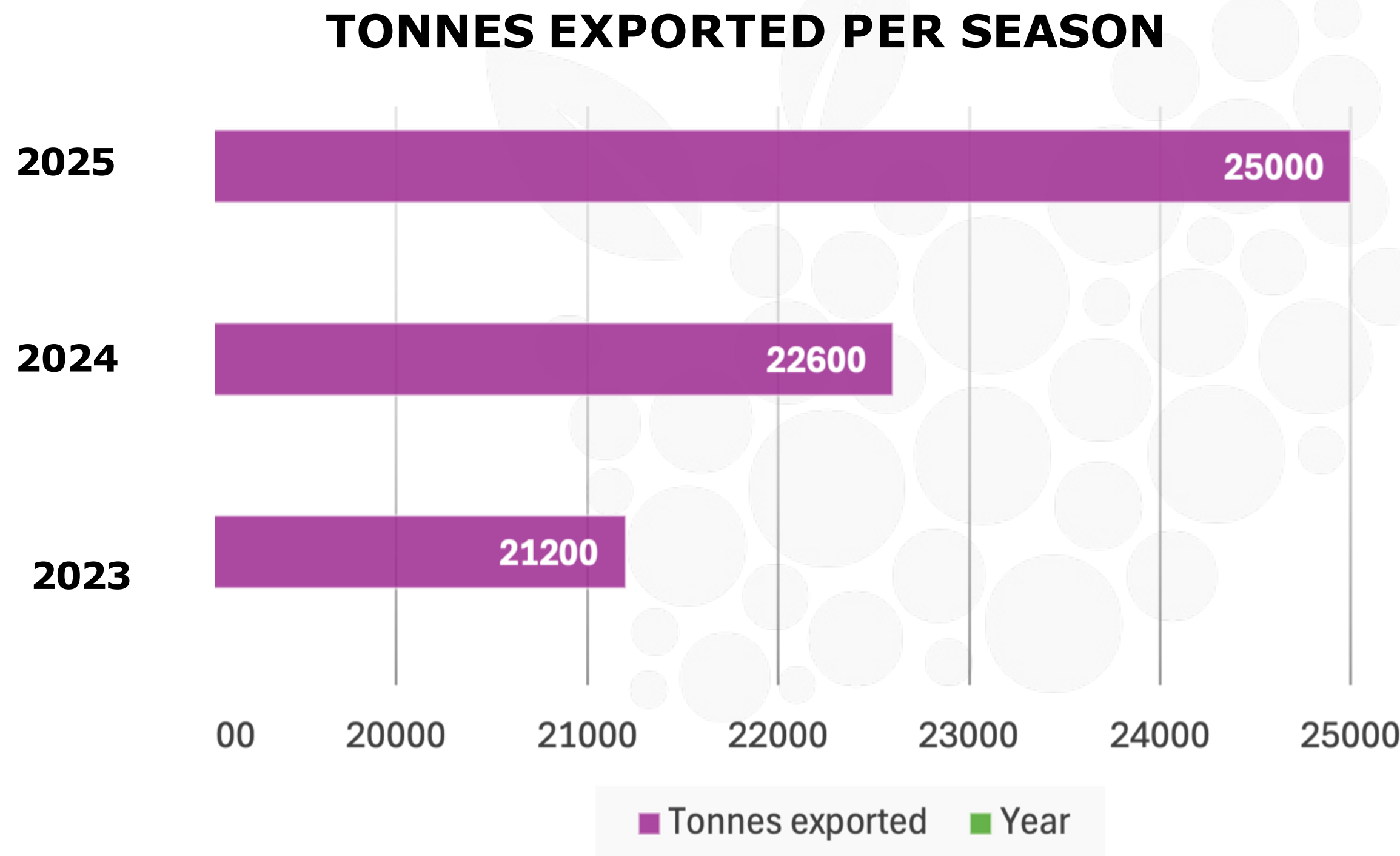


INSIGHTS INTO THE SOUTH AFRICAN BLUEBERRY INDUSTRY

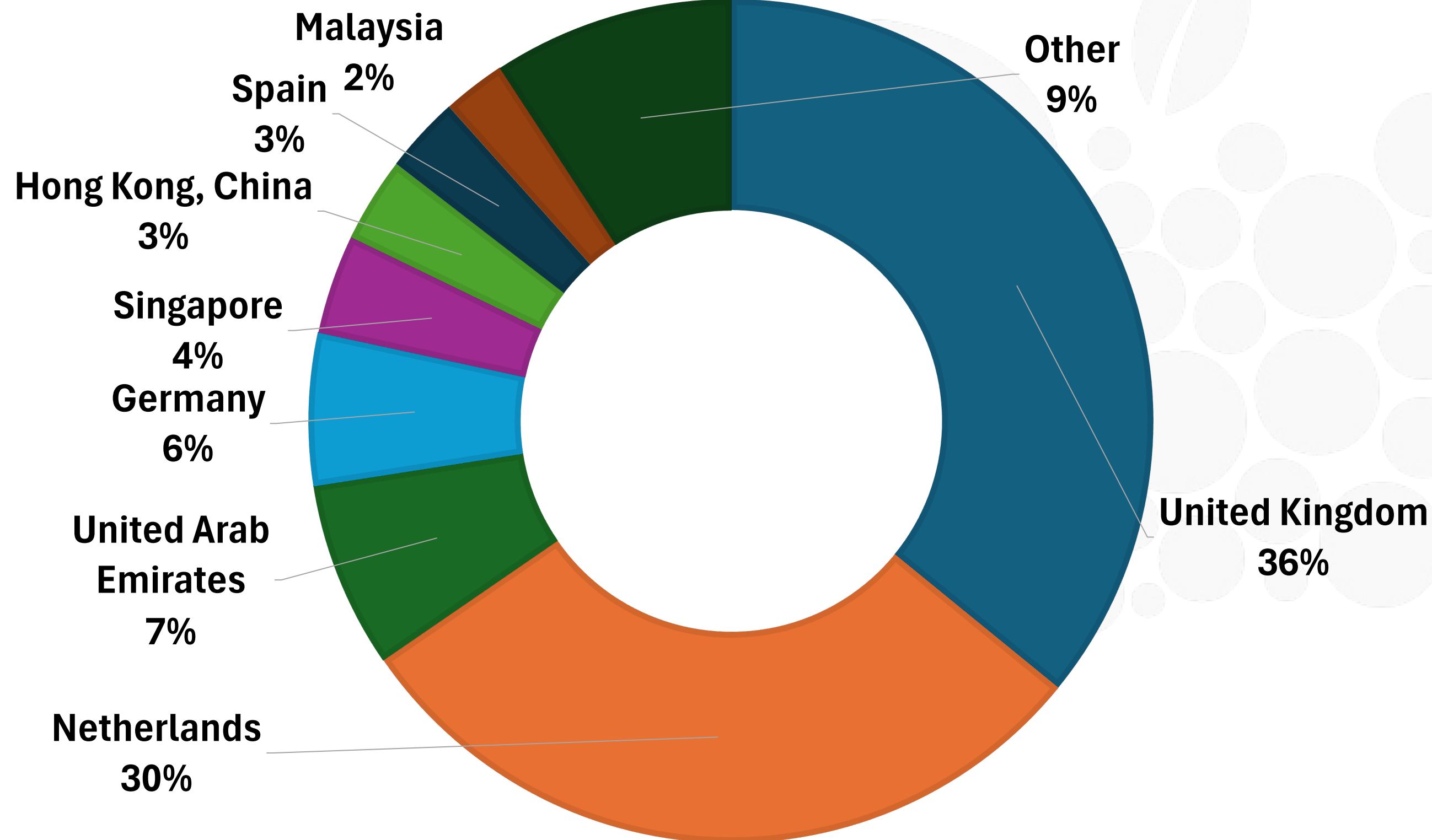


Current Production Data

- We exported 22600 tonnes (60/40 sea air freight) in the 2024 season (compared to 21200 tonnes in 2023), with just under 25000 tonnes (24374 to be exact) estimated for this season.

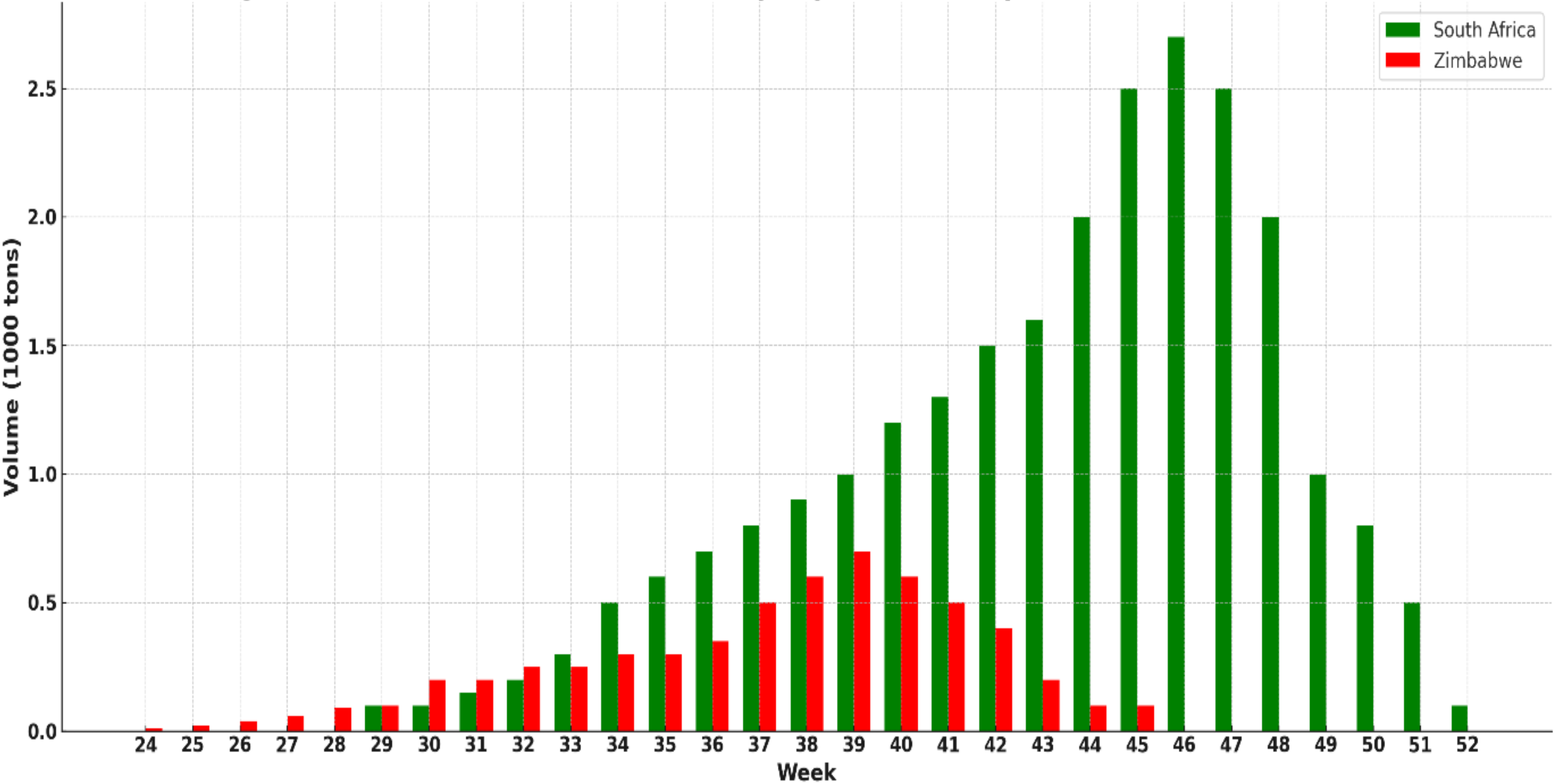


South Africa Export Destinations 2024



Southern Africa Production Weeks

Average South Africa & Zimbabwe Blueberry Export Volumes per Week (1000 tons) 2023-2025

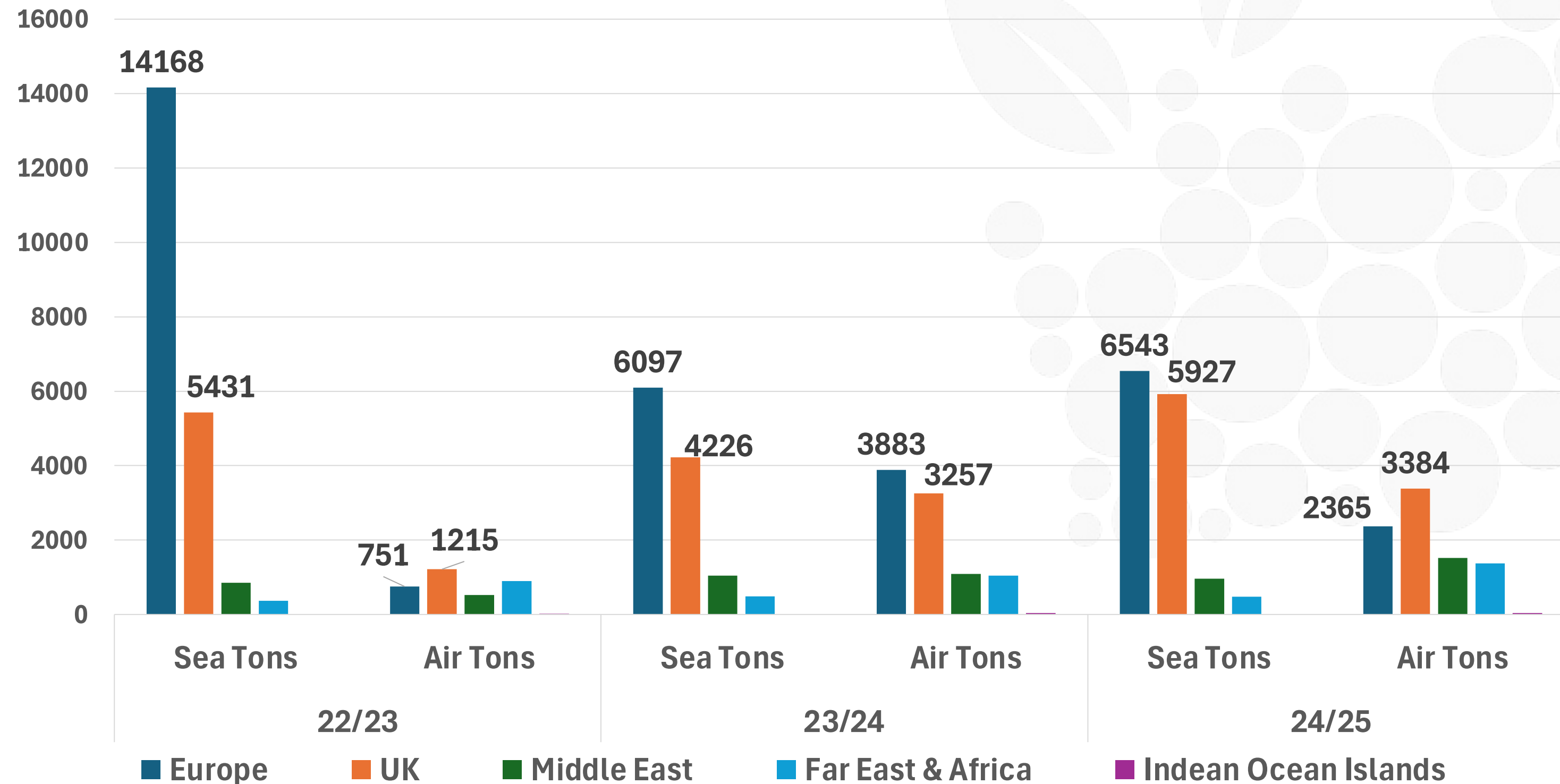


International Leaders in Cultivar Management

Export Volumes Southern Africa

Airfreight vs Seafreight

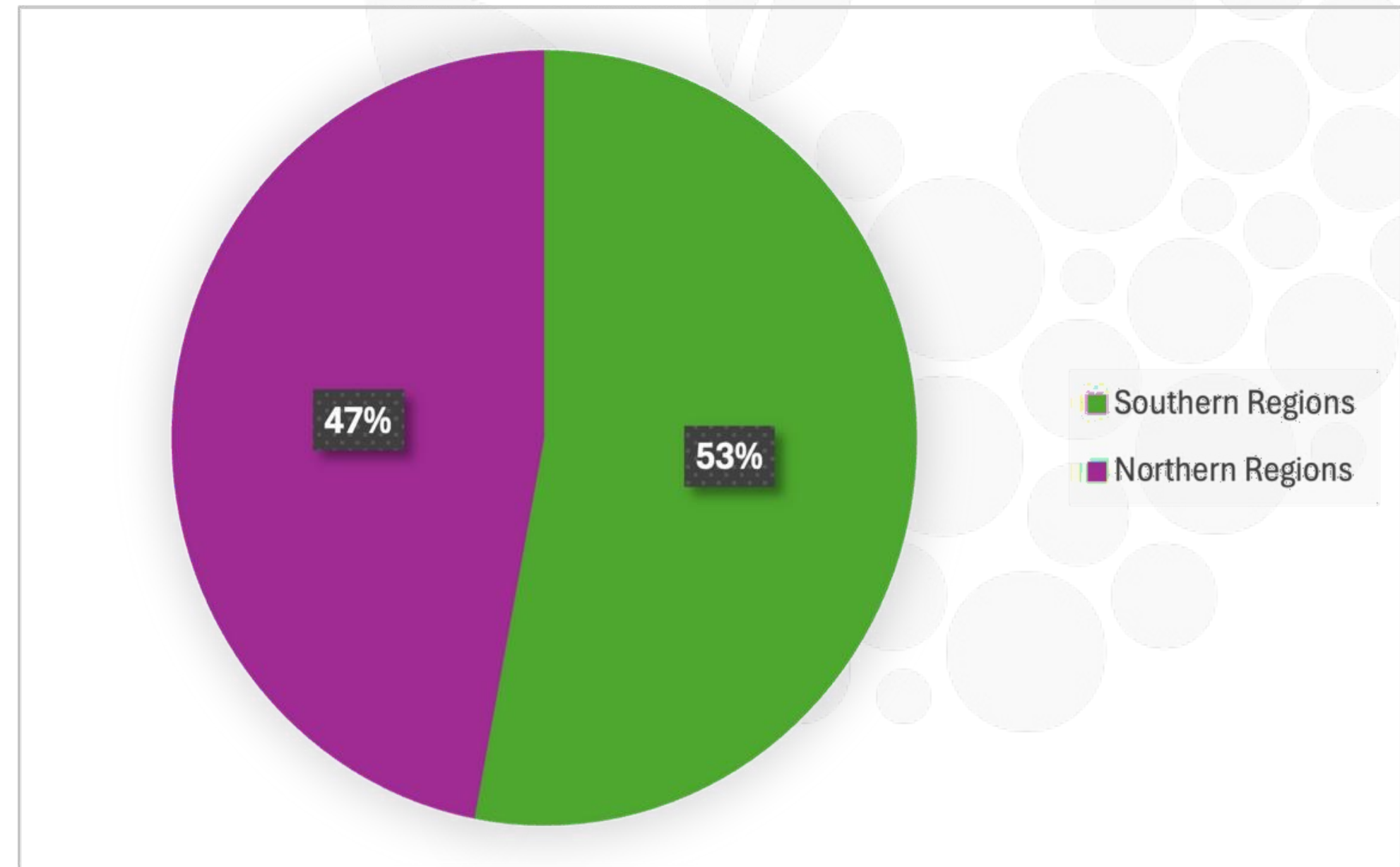
Blueberry Exports from South Africa by Sea/Air



Southern Africa Growing Regions

- South Africa has **2610** ha's (53%/47% South/North) planted, and we see a renewed uptake from growers with the latest genetics being available.
- Zimbabwe **800** ha's

REGIONAL BLUEBERRY PLANTATIONS



Breeding Programs Active in Southern Africa

Active Breeding Programs

- BerryWorld (Mostly MBO Varieties from Australia)
- OzBlu (Jointly owned by United Exports)
- Fall Creek (Fall Creek & Sekoya varieties)
- TopFruit (U.G., IQB & New Zealand P&F varieties)
- Driscoll's (Driscoll's & Costa varieties)
- Planasa (Spain)

Variety Trends in Southern Africa

Whats New!

Market Demand

- Shelf life, Firmer, Crunchy, Sweeter, Big Size (market depending)

Grower Priorities

- Firmness, storage ability, fruit quality, ease of picking, Production!

New Genetics

- Early production, fruit quality & size, shelf life, consumer preference

Variety Traits

- a distinguishing quality or characteristic, especially one belonging to a variety

Plant Traits

- Early production, primocane type, evergreen/no chill, adaptability

Branding Sells

Planting Trends in Southern Africa

General Trends

Planting Trends:

- Majority plantings in containers with substrate - mostly pots 25/45L
- Substrate mostly coir with perlite
- Plantation cover – mostly net and pole structures
- Plant spacing 2.5mx0.75m on average depending on growth habit
- New Genetics from propriety varieties with shipping ability
- Average tonnage per hectare – 20-23/ha

Typical Planting in Southern Africa



Current Trends

1. SA Berry industry a stable industry with fair profit margins
2. Resetting current plantings with new genetics
3. Slow increase in total hectares planted
4. Projected to reach 3000ha in 2030
5. Focus on earlier varieties and branded varieties
6. Focus to avoid the Peruvian peak production of Oct/Nov
7. Bigger % of developments in Northern SA and Zimbabwe
8. Western Cape (wet winters, late production) shrinking industry
9. Variety trends: Sekoya Pop, MegaEarly (IQBerries), Early MBO varieties
10. Market expansion: India & China
11. Very little interest in Rubus production