

HORTGRO
Growing Fruit IQ



CHERRY INDUSTRY OVERVIEW

27 JULIE 2022
NINA VILJOEN



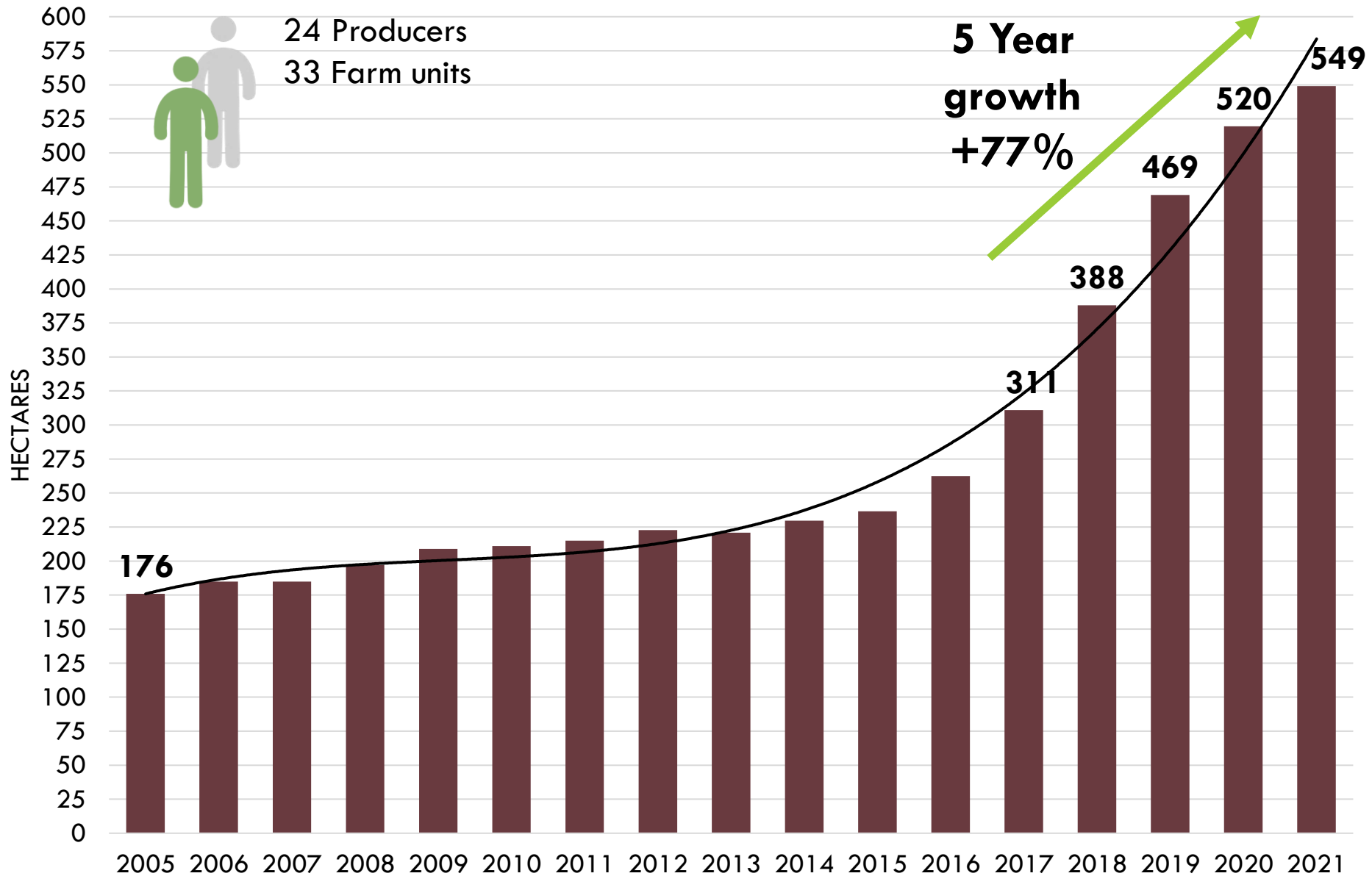
CHERRY AREA TREND (HA)



24 Producers

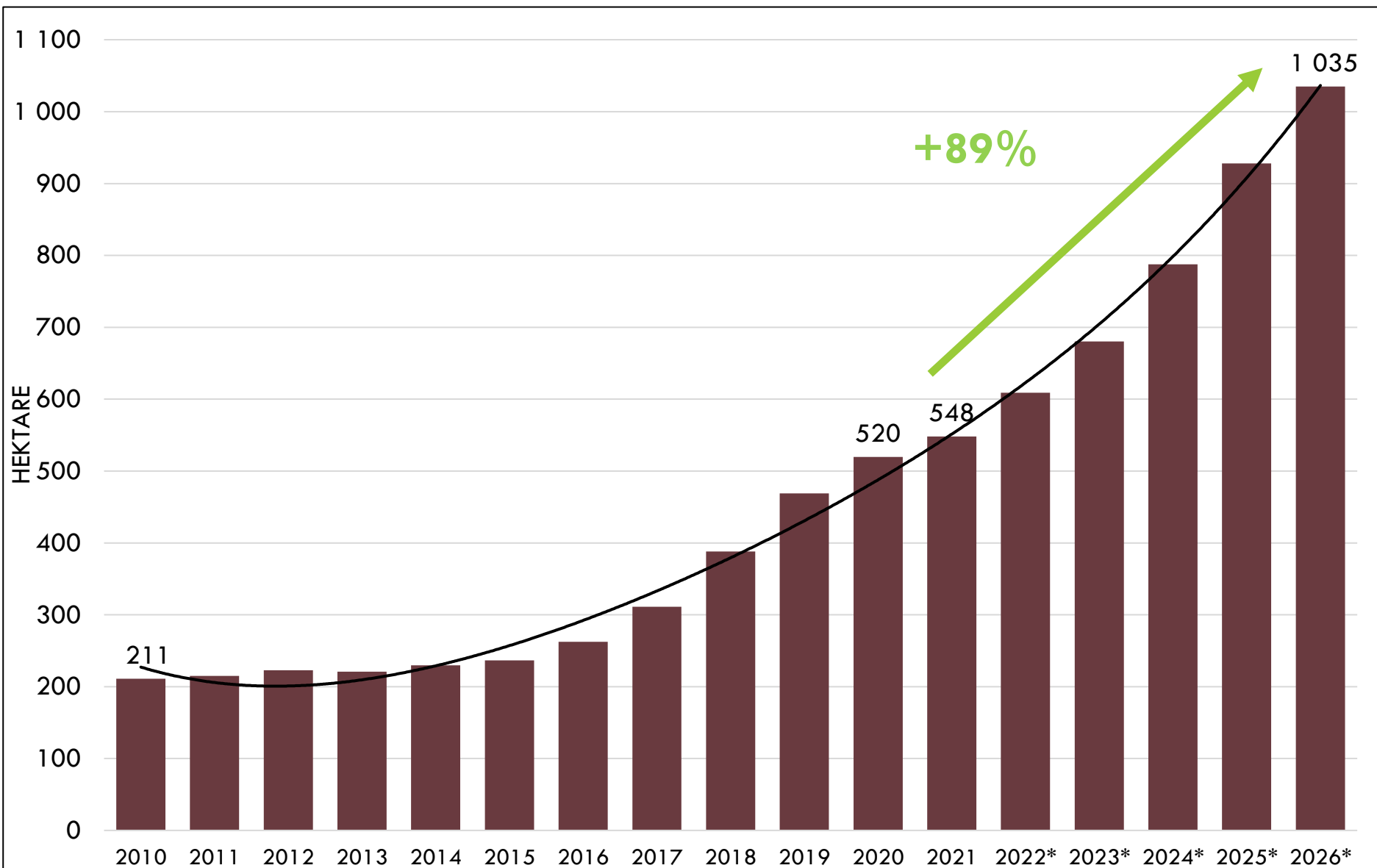
33 Farm units

**5 Year
growth
+77%**





FUTURE CHERRY AREA TREND (HA)



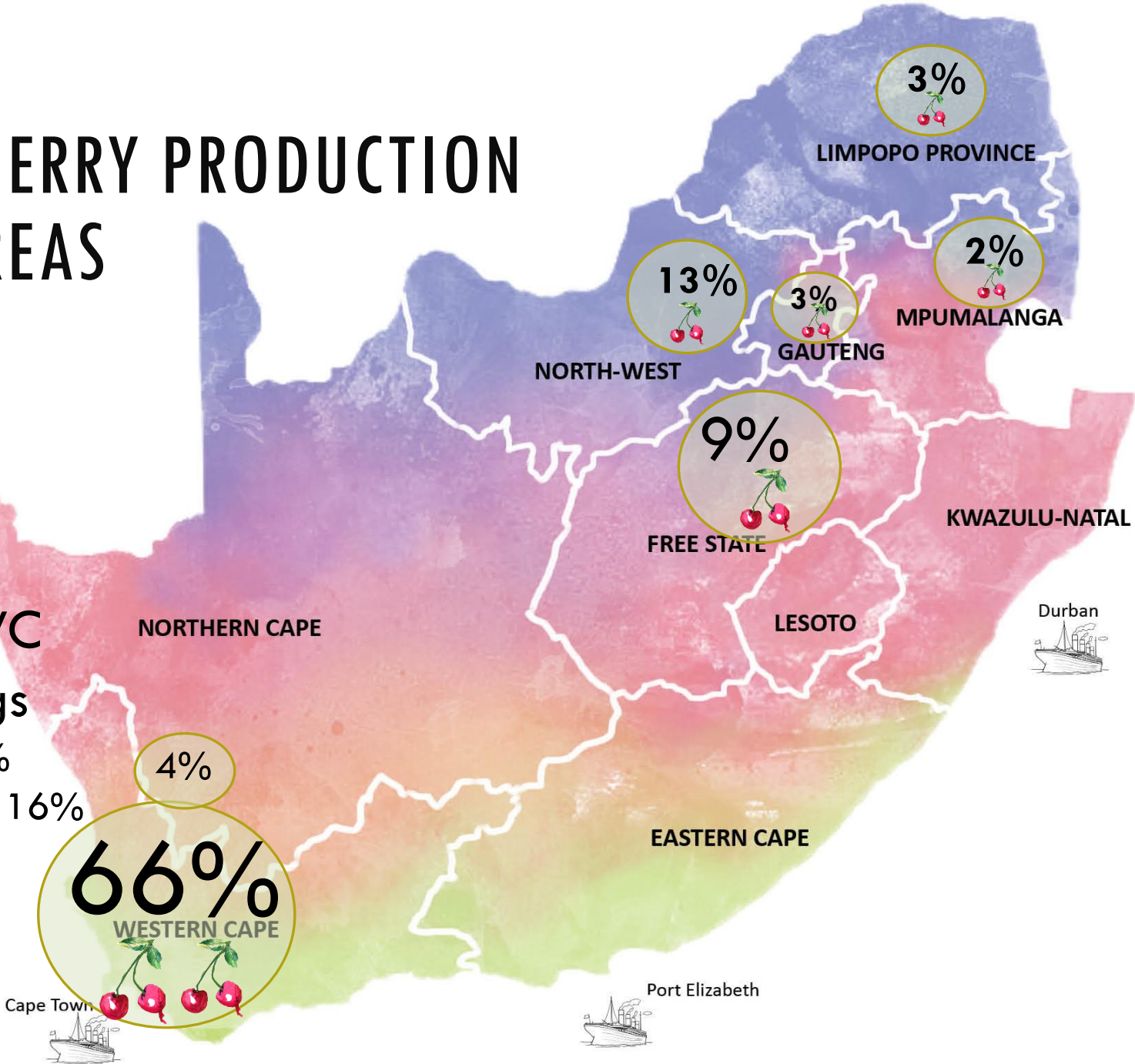


CHERRY PRODUCTION AREAS

Total WC
Plantings

Ceres 84%

Worcester 16%



Cape Town



Port Elizabeth

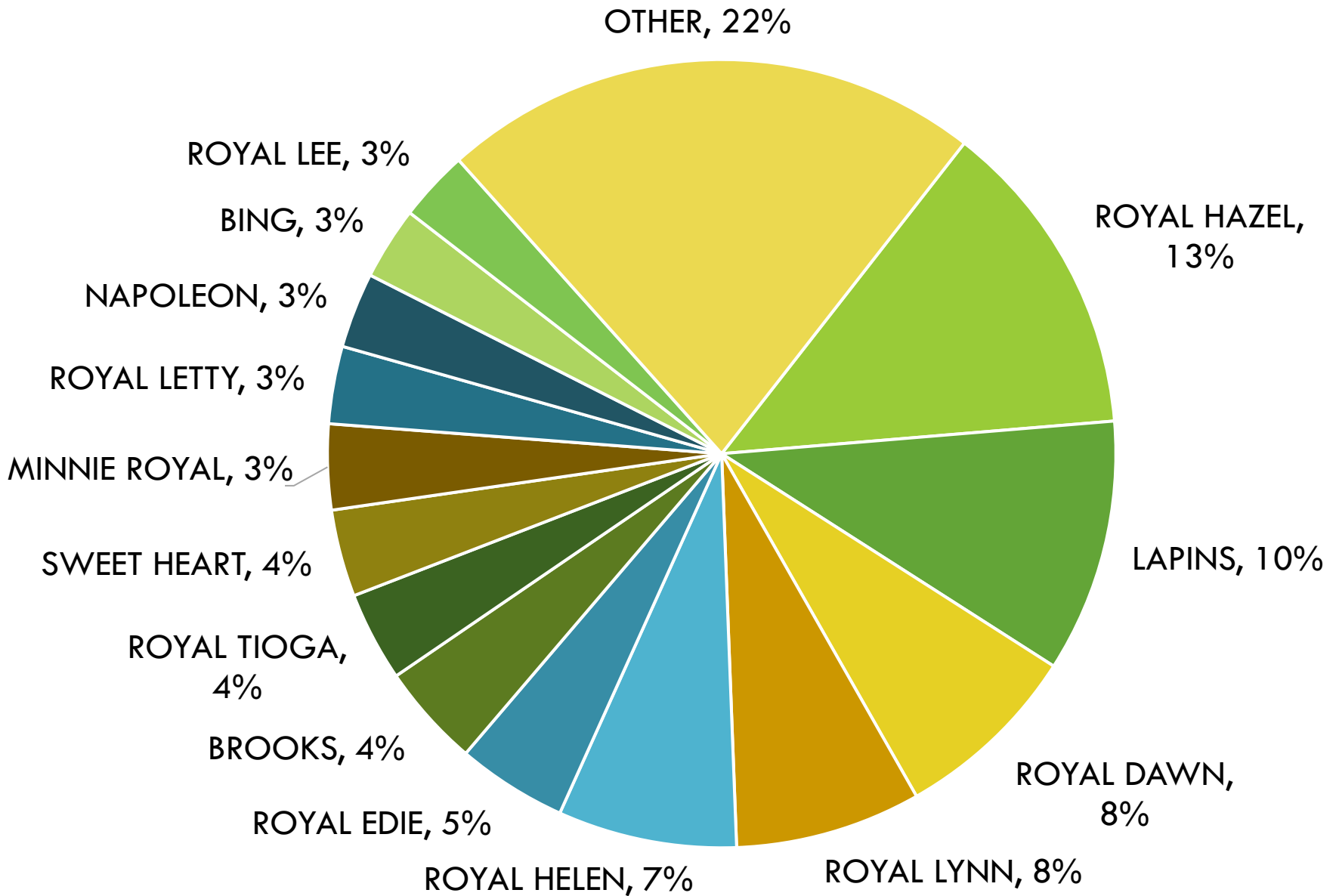


Durban



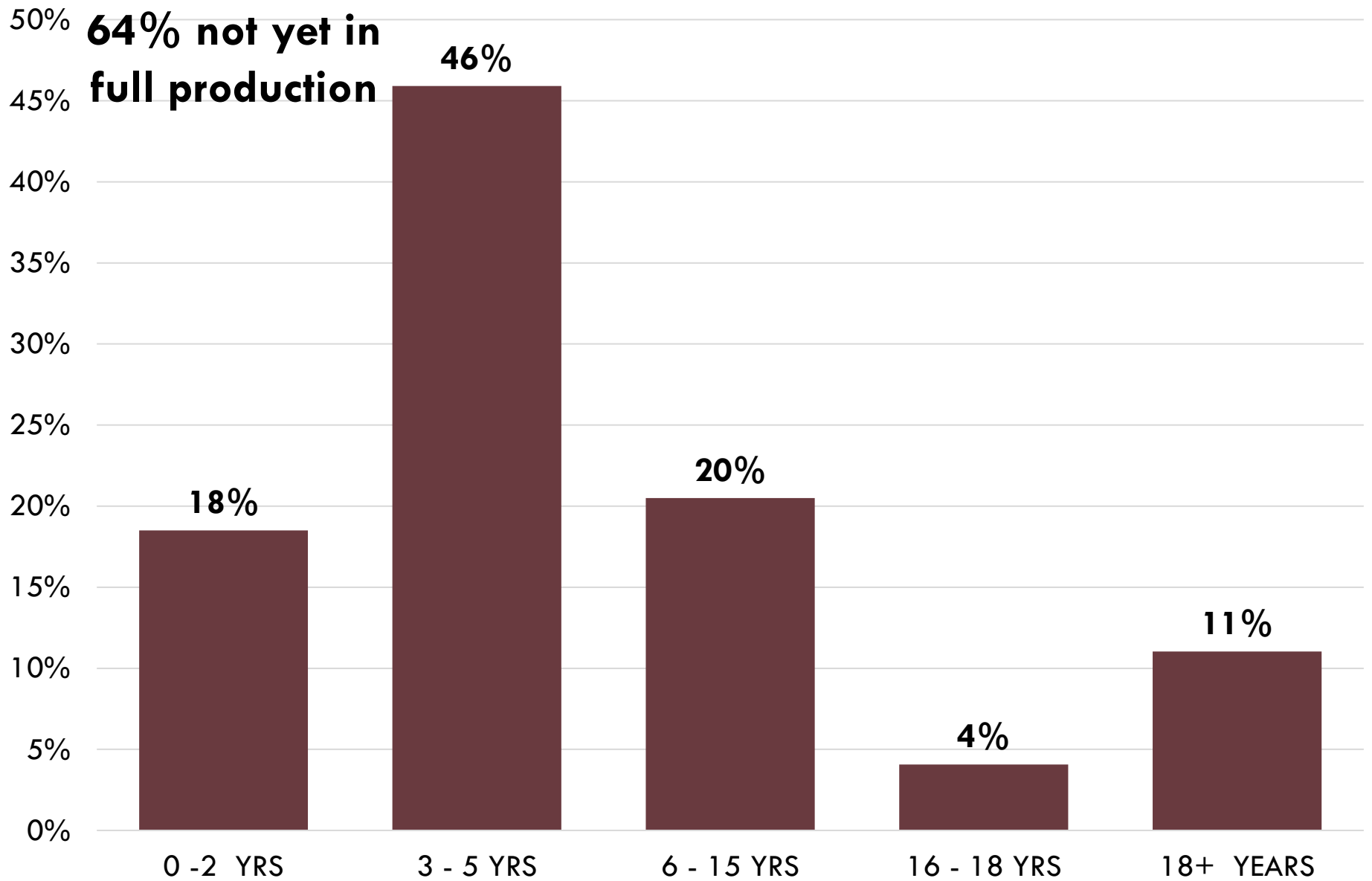


CHERRY CULTIVAR DISTRIBUTION



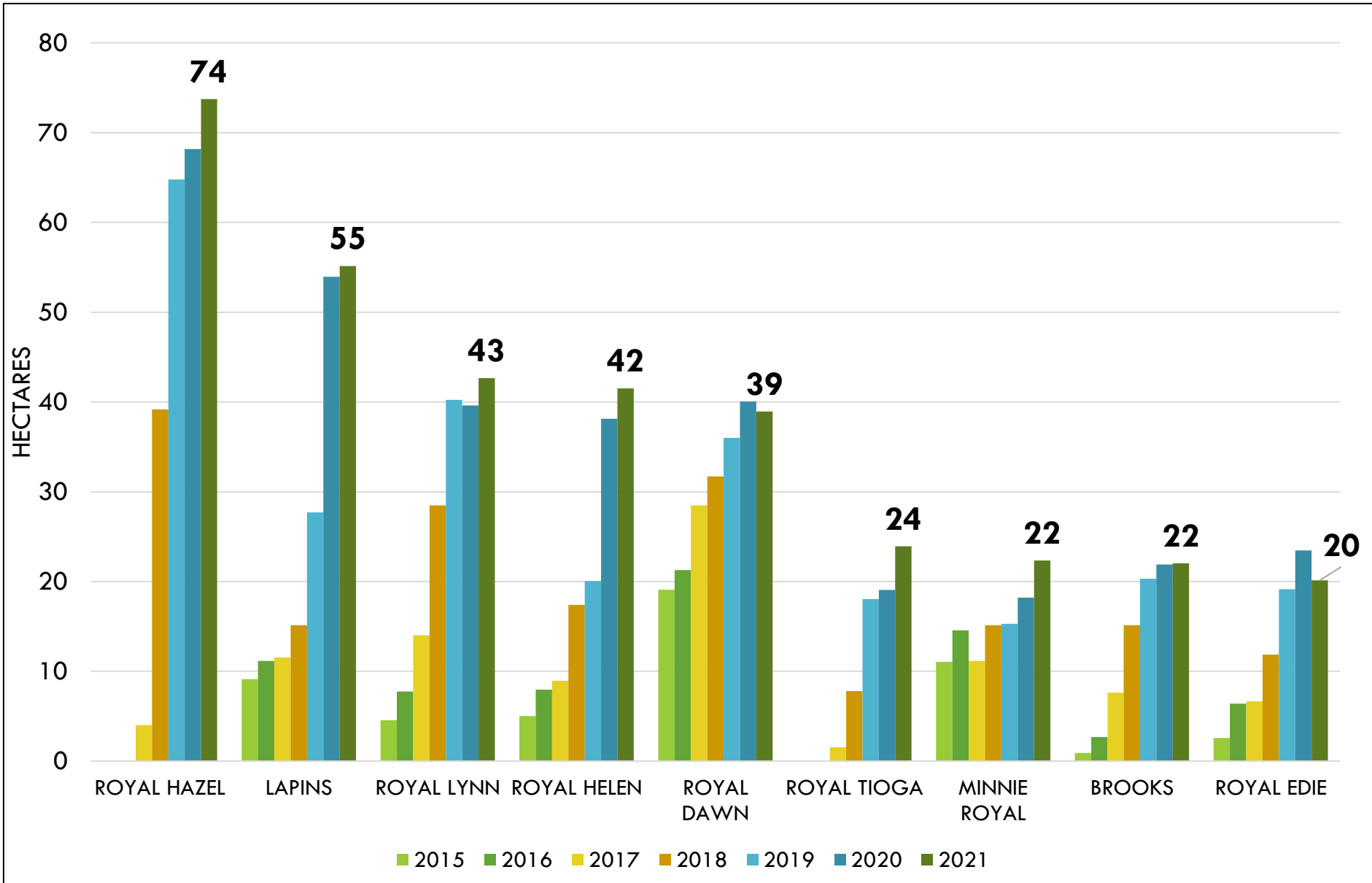


ORCHARD AGE DISTRIBUTION





CHERRY CULTIVARS ++



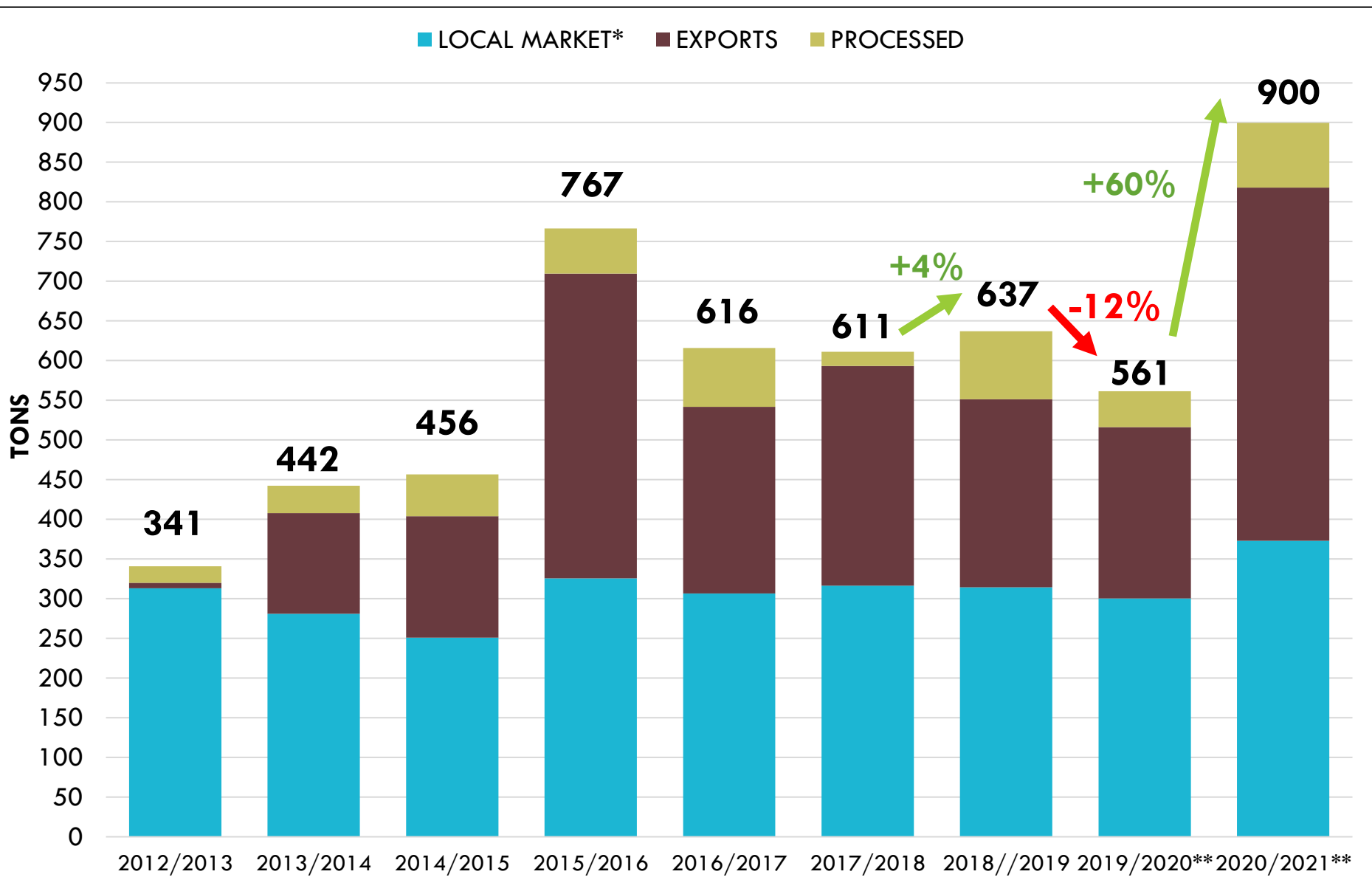


ORCHARD AGE DISTRIBUTION

CULTIVAR	0 - 2 YEARS	3 - 5 YEARS	6 - 15 YEARS	16 - 18 YEARS	18+ YEARS	T HA
ROYAL HAZEL	8%	92%	0%	0%	0%	74
LAPINS	48%	33%	13%	4%	2%	55
ROYAL LYNN	11%	71%	18%	0%	0%	43
ROYAL HELEN	44%	30%	26%	0%	0%	42
ROYAL DAWN	9%	47%	36%	7%	0%	39
ROYAL TIOGA	28%	72%	0%	0%	0%	24
MINNIE ROYAL	41%	15%	44%	0%	0%	22
BROOKS	8%	82%	10%	0%	0%	22
ROYAL EDIE	21%	42%	36%	0%	0%	20
SWEET HEART	13%	38%	34%	7%	9%	18
BING	8%	0%	6%	42%	43%	17
ROYAL LEE	20%	16%	65%	0%	0%	17
ROYAL LETTY	0%	68%	32%	0%	0%	17
NAPOLEON	0%	0%	0%	0%	100%	16
SEQUOIA	28%	56%	16%	0%	0%	15
ROYAL JIM	18%	67%	15%	0%	0%	14
RAINIER	0%	12%	0%	6%	82%	9
VAN	15%	24%	6%	23%	32%	7
STELLA	15%	0%	17%	54%	14%	7
OTHER	5%	21%	34%	4%	35%	71
TOTAL	18%	46%	21%	4%	11%	549



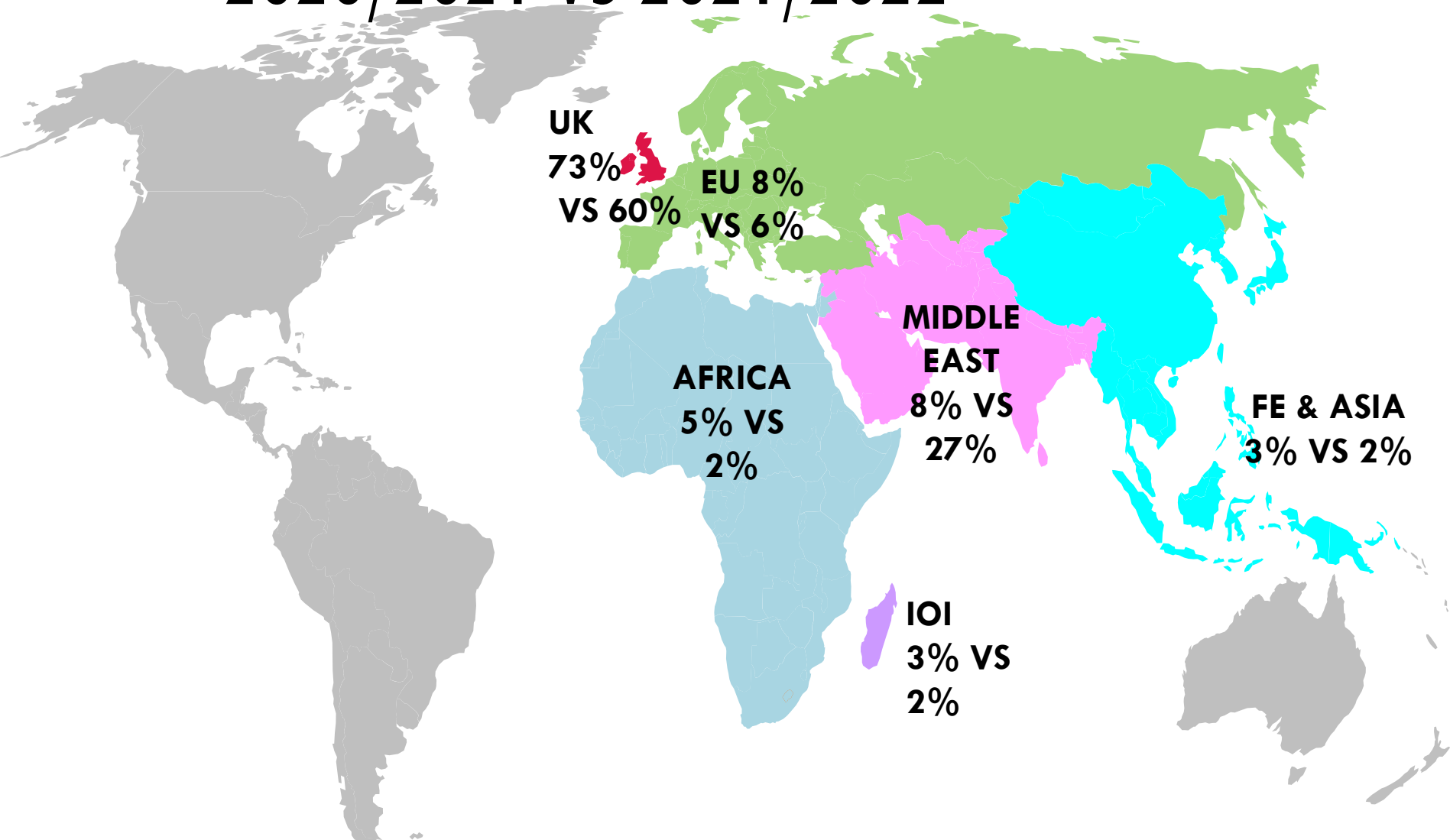
CHERRY PRODUCTION





MAIN SA EXPORT REGIONS

2020/2021 VS 2021/2022

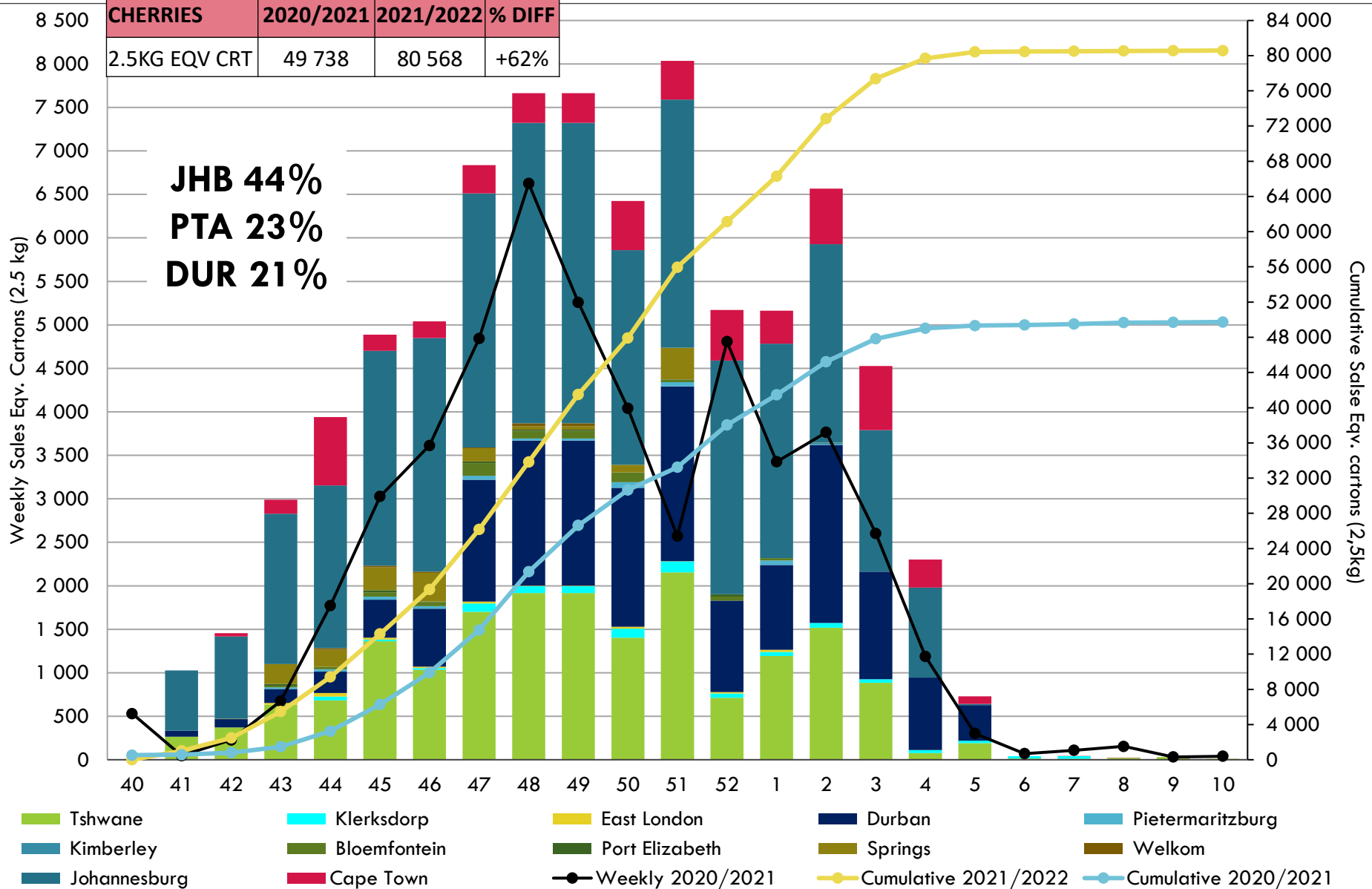




SA CHERRY SALES 2021/2022

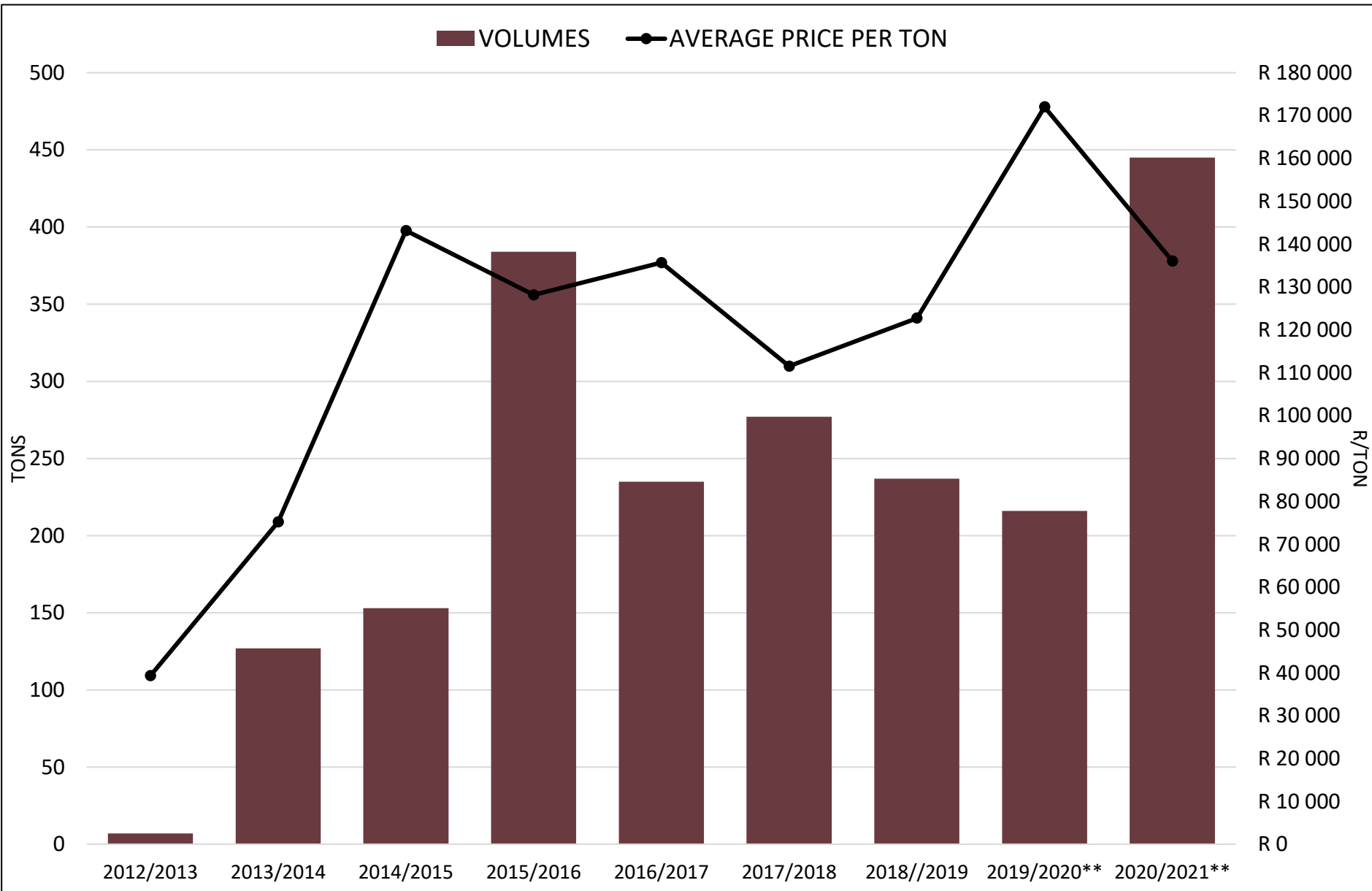
CHERRIES	2020/2021	2021/2022	% DIFF
2.5KG EQV CRT	49 738	80 568	+62%

JHB 44%
PTA 23%
DUR 21%





SA CHERRY EXPORT HISTORICAL SALES





2022 PRODUCER SURVEY RESULTS (Production)



2022 Cherry Survey Participation =
99% of Total Cherry Plantings

TOTAL PRODUCTION 2021/2022
=
3 111 ton
(11% Discard)

2021 Cherry Survey Participation =
100% of Total Cherry Plantings

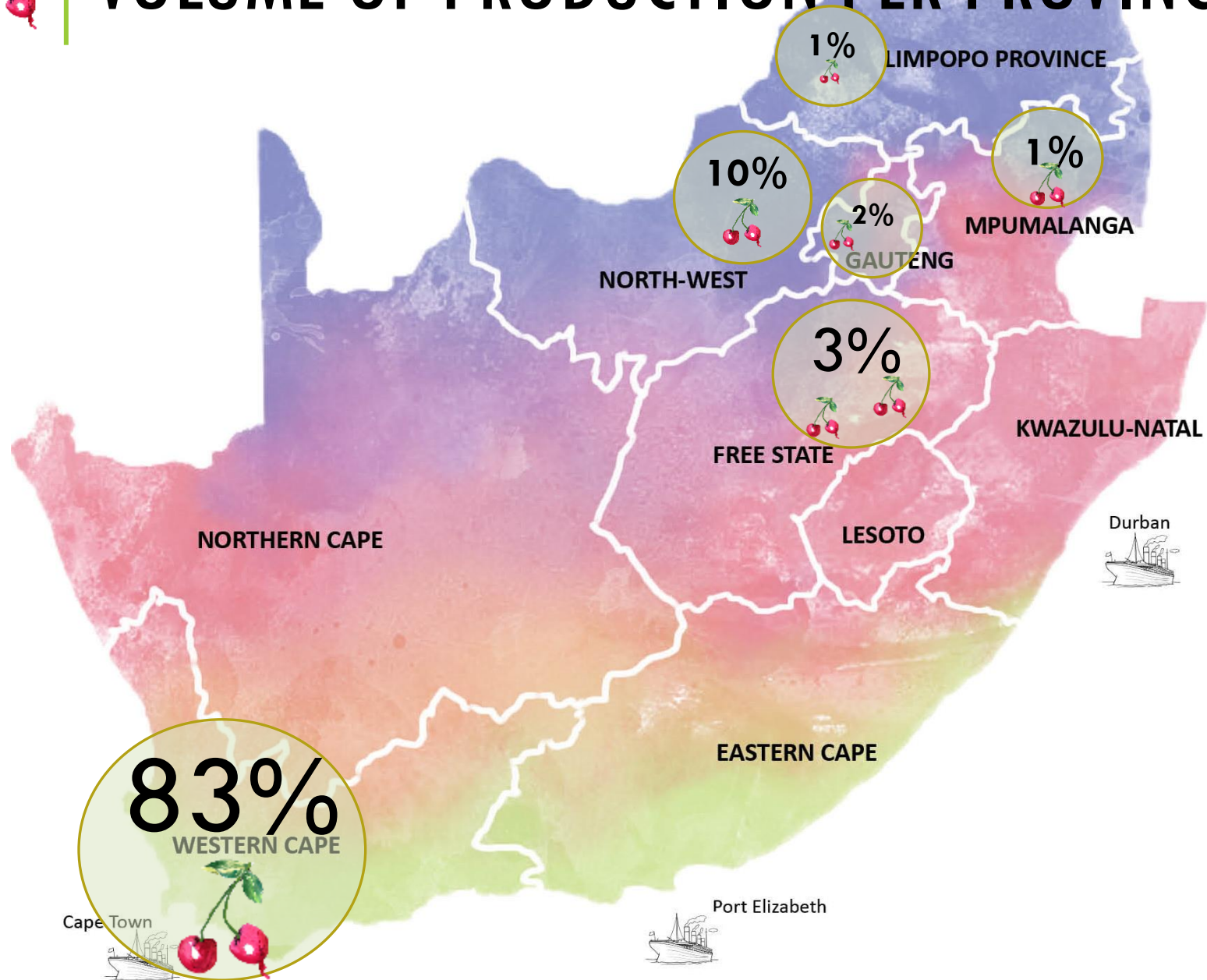
Local = 42%

Processed = 29%

Export = 19%

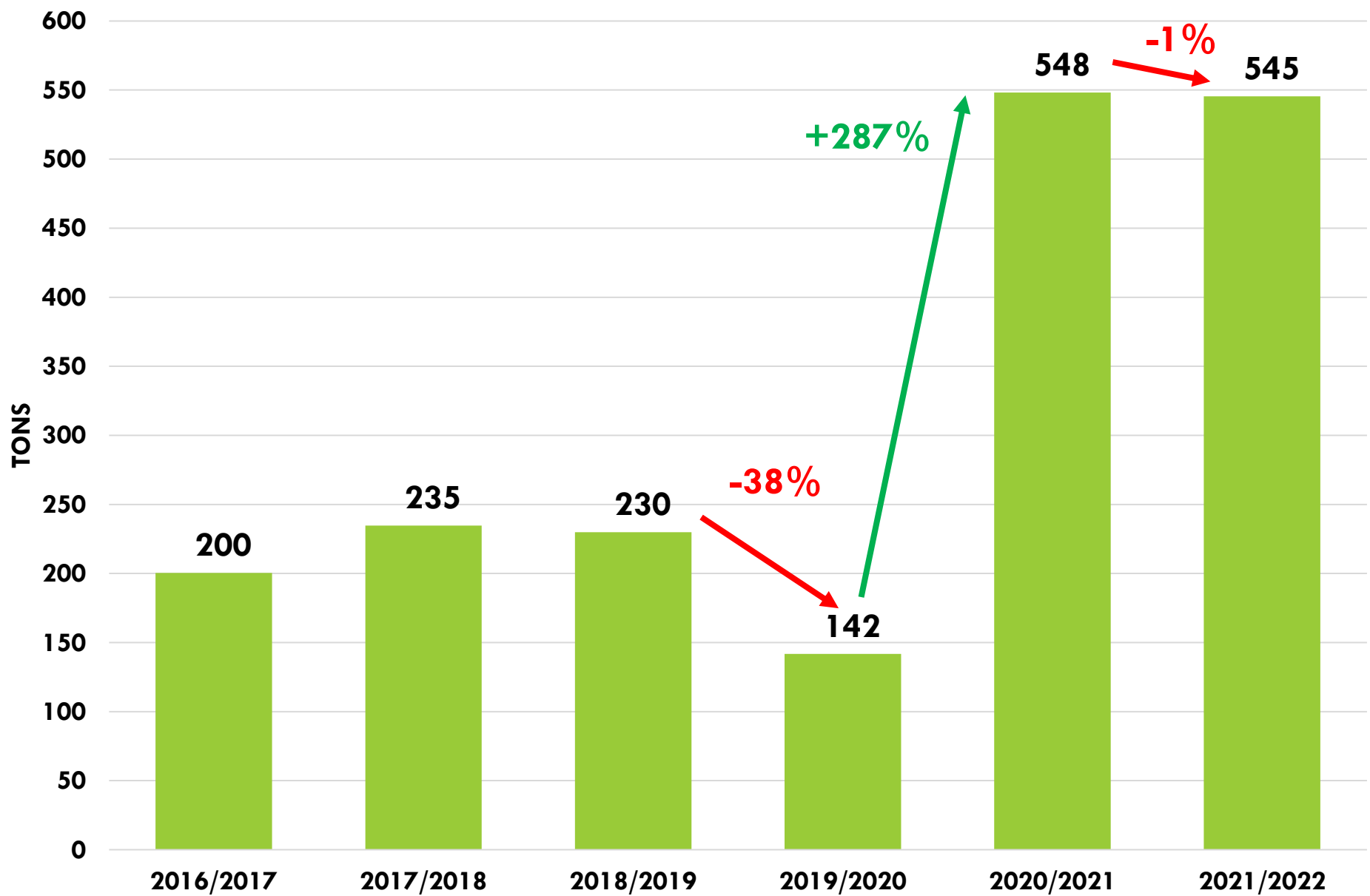


VOLUME OF PRODUCTION PER PROVINCE



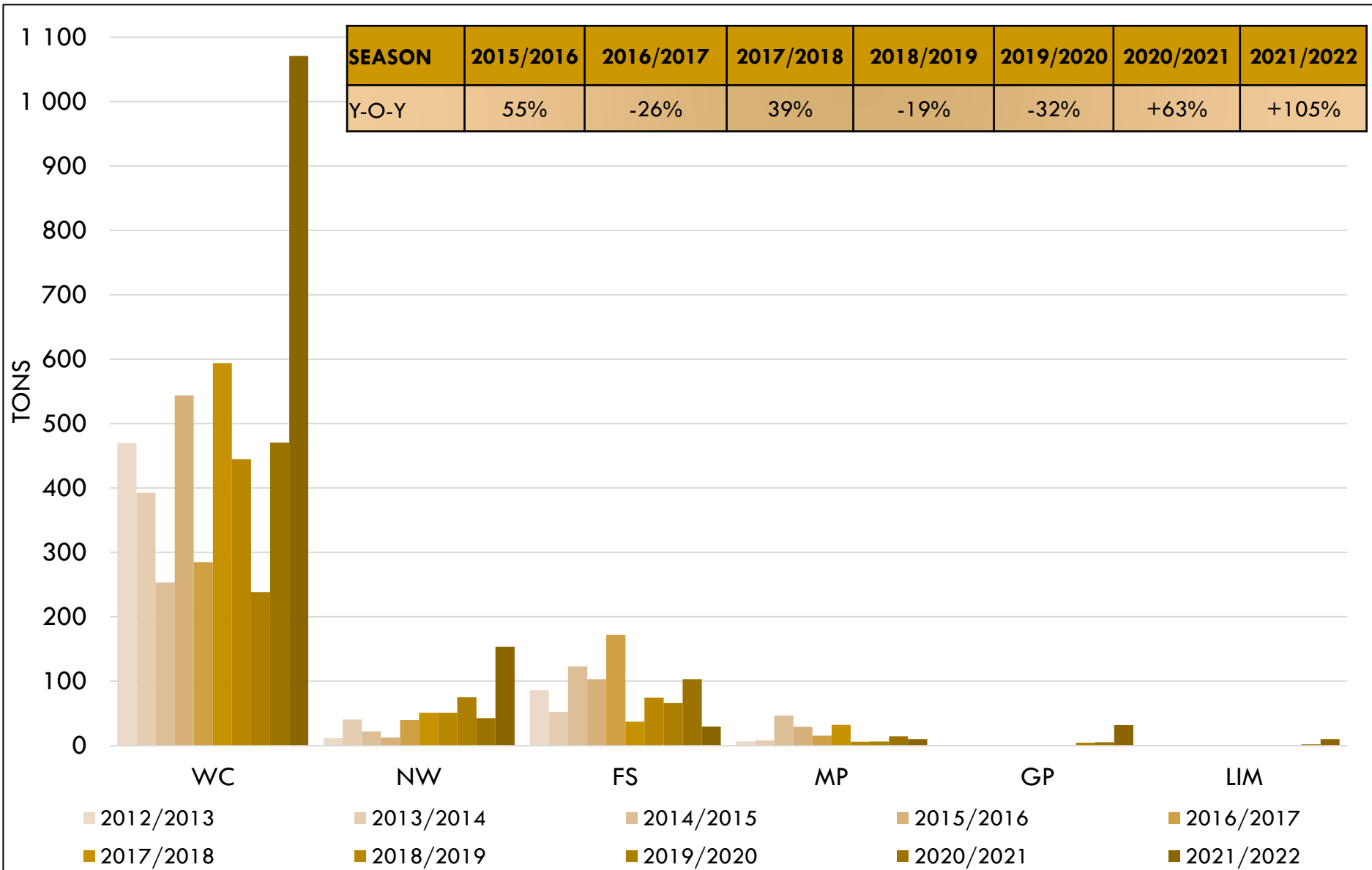


EXPORT VOLUMES (TONS)





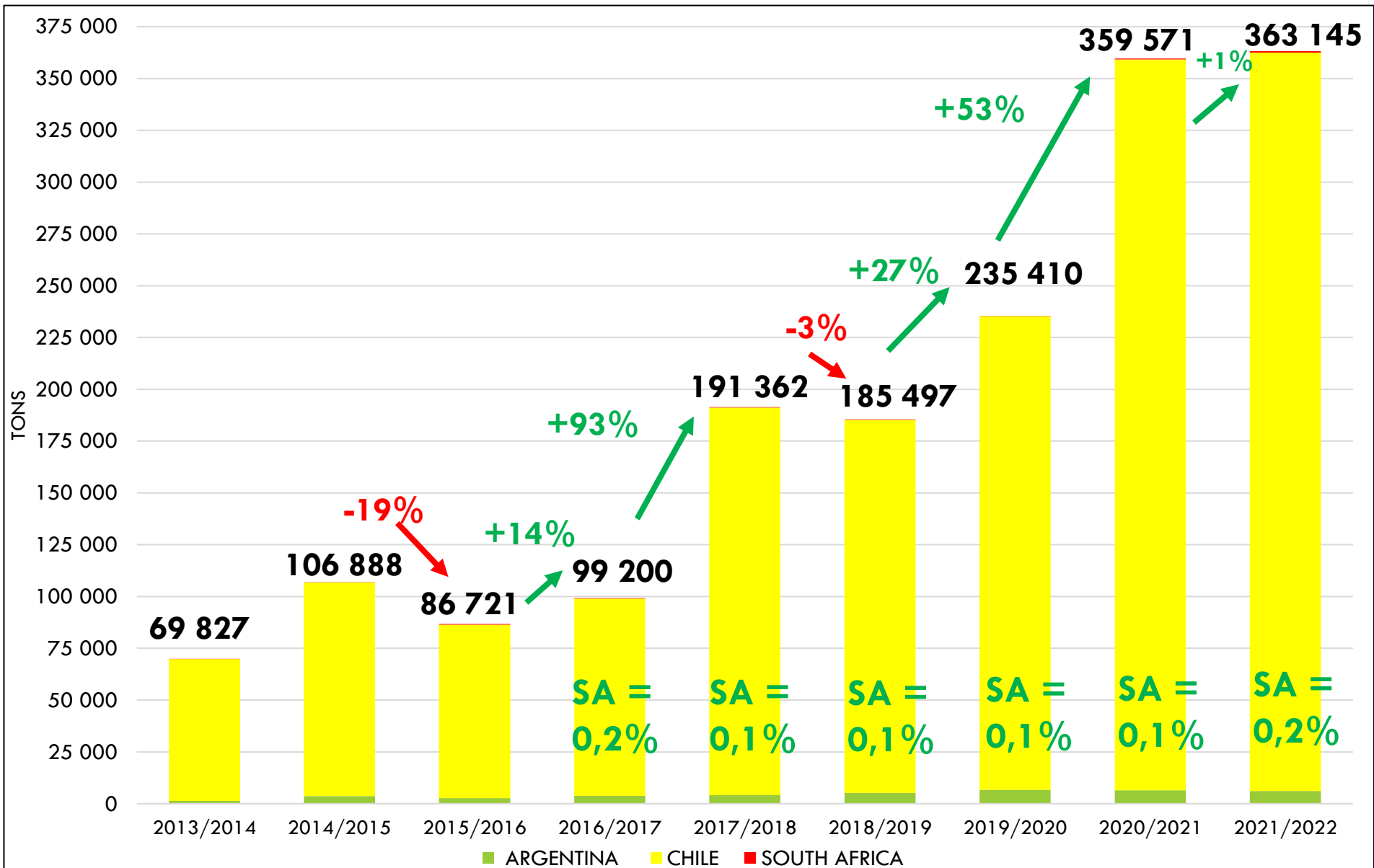
LOCAL VOLUMES (TONS)



SOUTHERN HEMISPHERE 

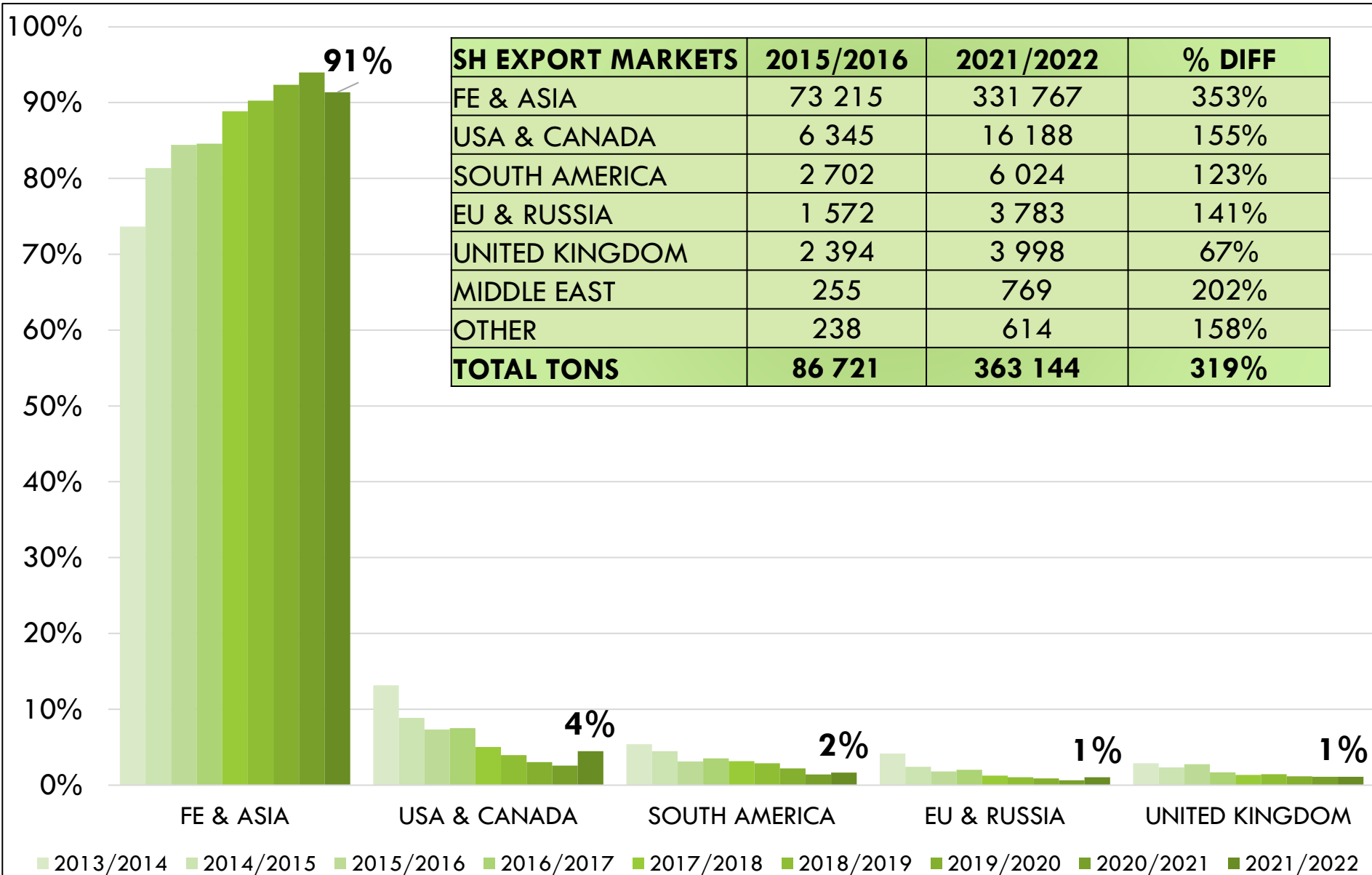


SOUTHERN HEMISPHERE TRENDS



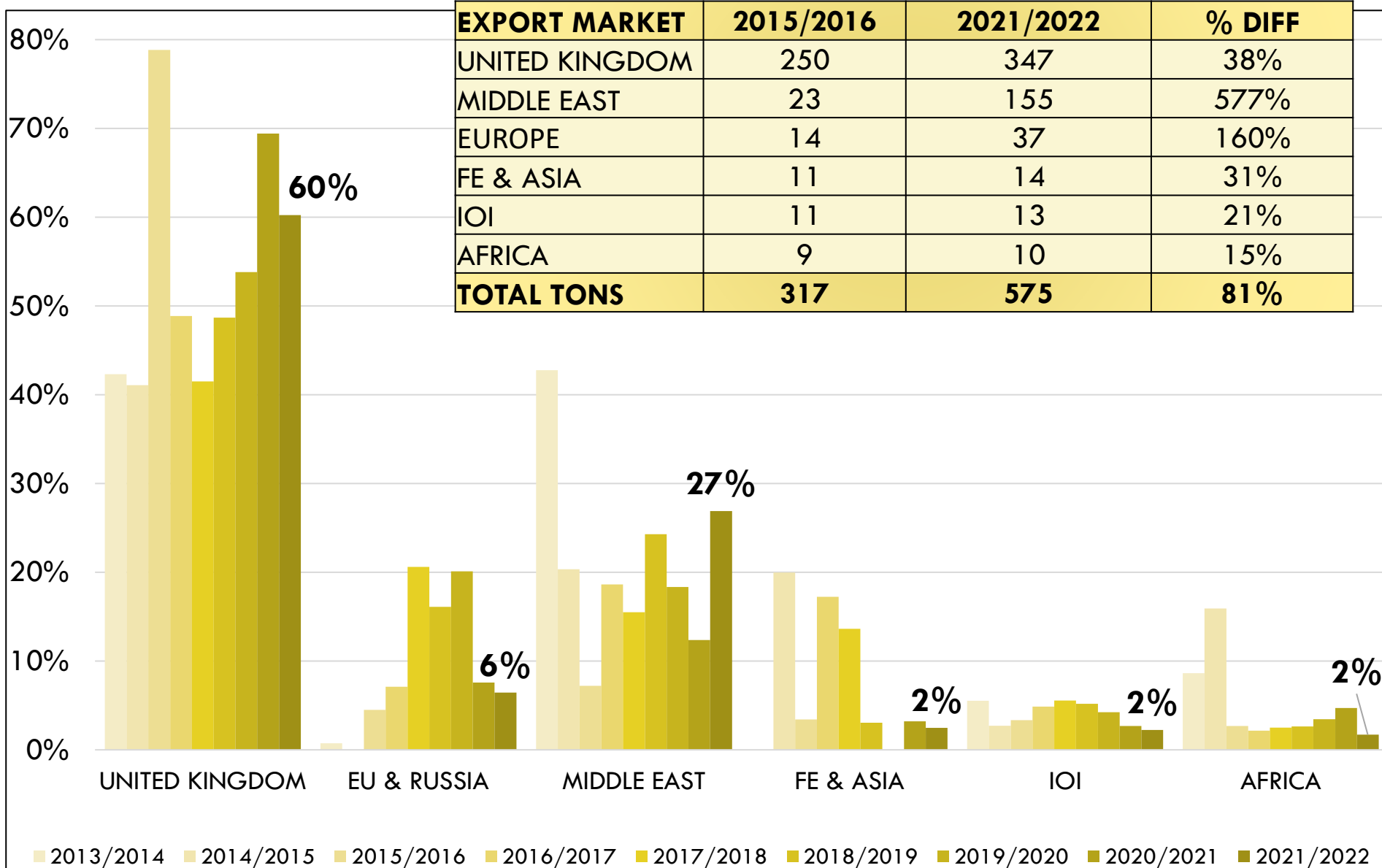


SH EXPORT MARKET SHARE TRENDS

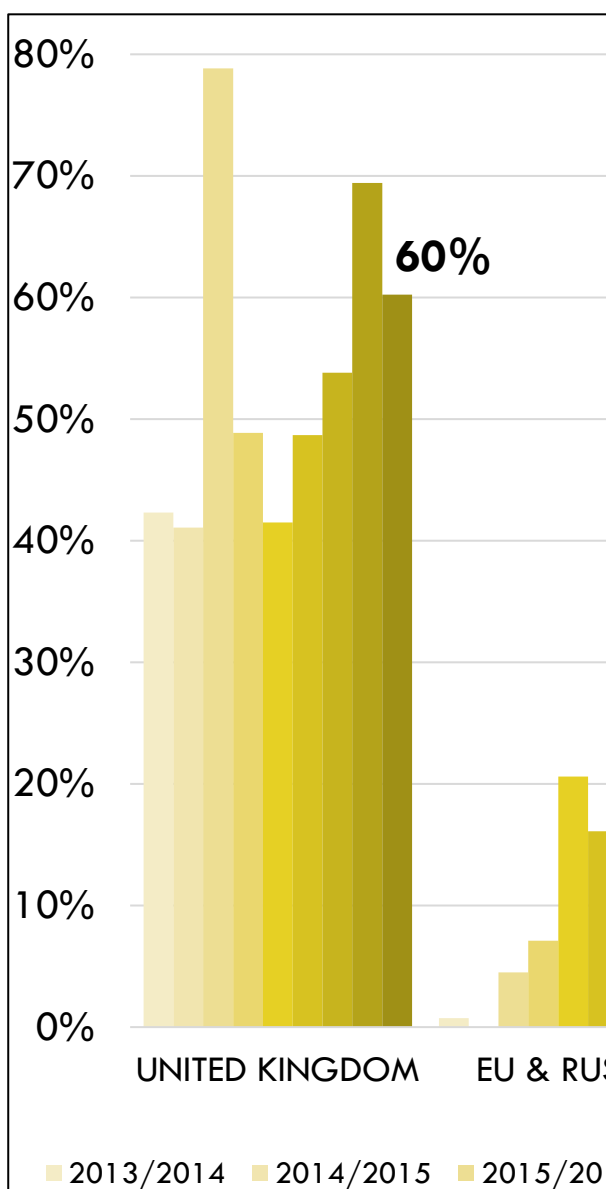




SOUTH AFRICA EXPORT MARKET SHARE TRENDS



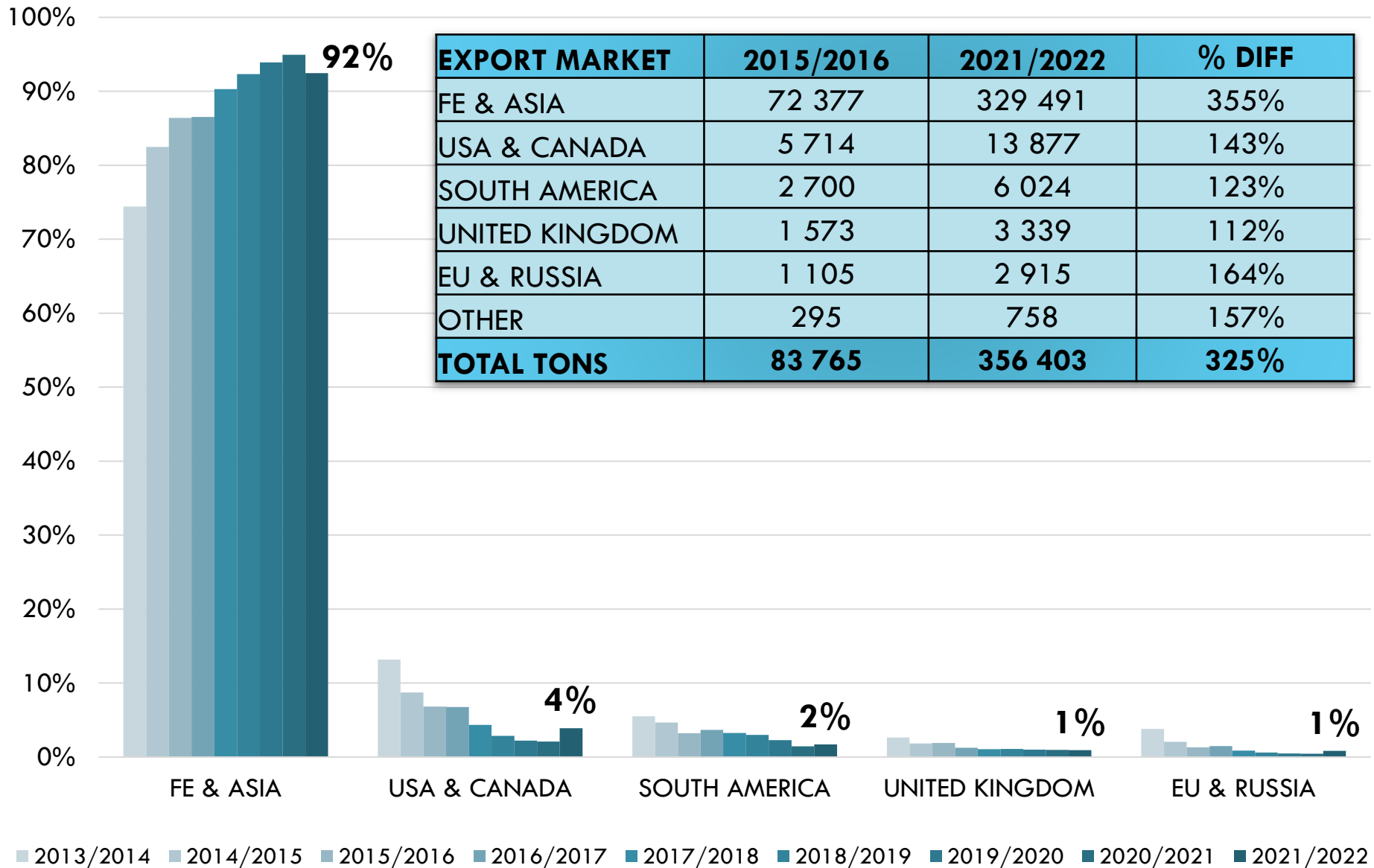
EXPORT MARKET	2015/2016	2021/2022	% DIFF
UNITED KINGDOM	250	347	38%
MIDDLE EAST	23	155	577%
EUROPE	14	37	160%
FE & ASIA	11	14	31%
IOI	11	13	21%
AFRICA	9	10	15%
TOTAL TONS	317	575	81%



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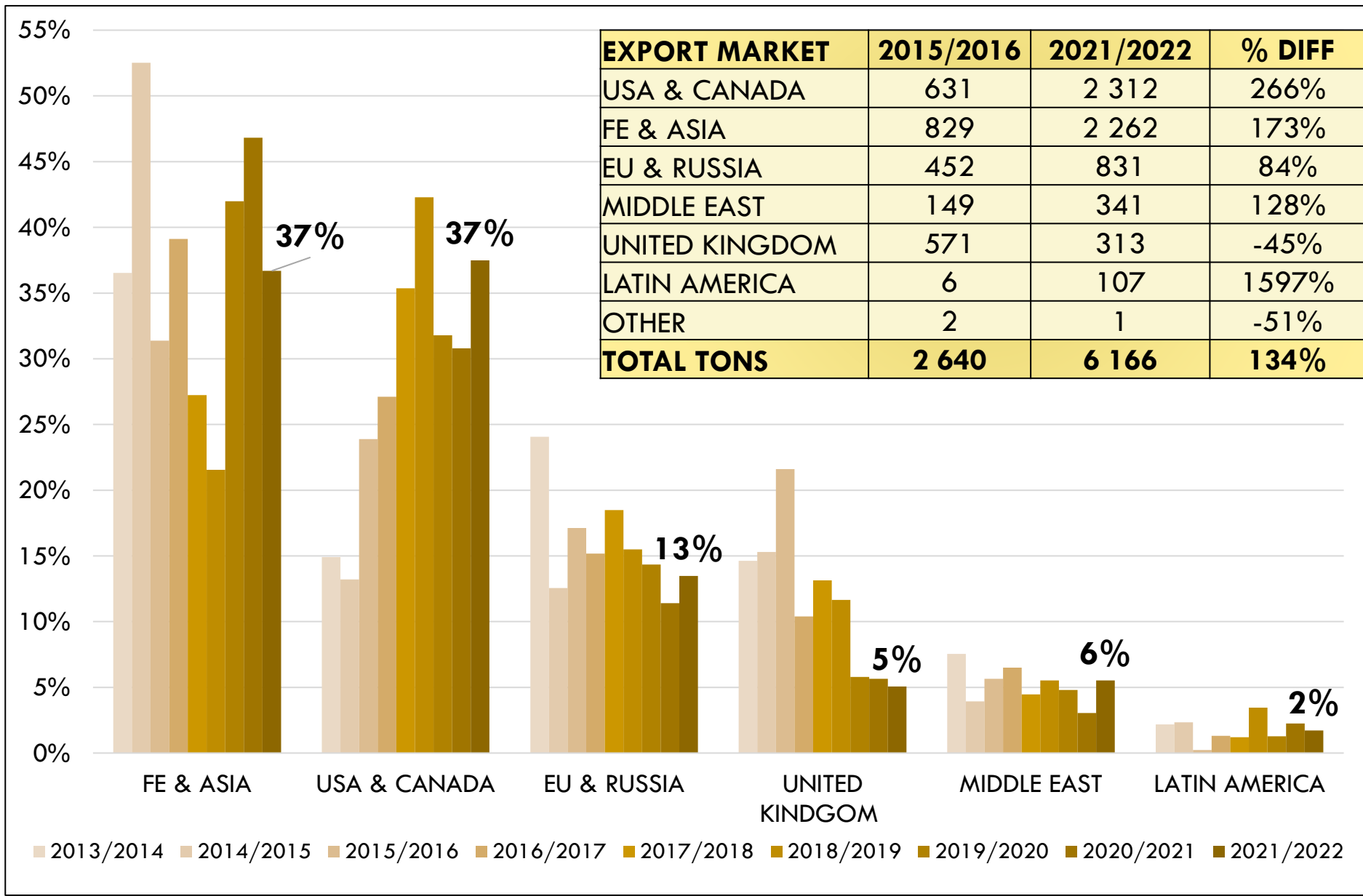


CHILE EXPORT MARKET SHARE TRENDS



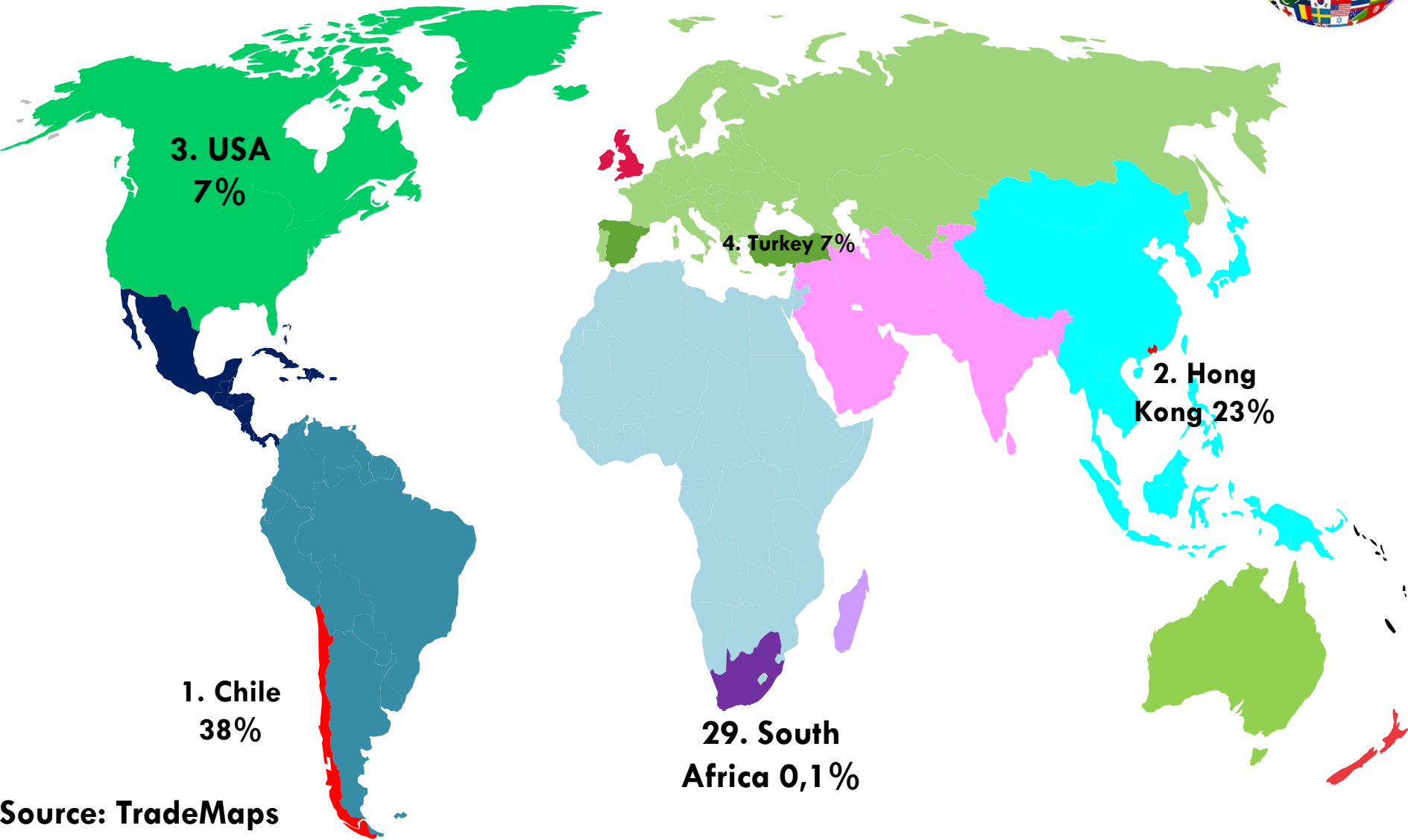


ARGENTINA EXPORT MARKET SHARE TRENDS





MAIN 2021 CHERRY EXPORTERS OF THE WORLD



Source: TradeMaps