



Industry Overview

2023

Simone Sell

Raisins SA vision and mission



VISION:

To grow a sustainable and competitive South African raisin industry



MISSION:

To generate value for our members and stakeholders

This will be achieved through:

1.



Improve industry's productivity and profitability.

2.



Promote Raisins SA as a premium quality brand.

3.



Share information and knowledge among value chain members, to reduce risk.

4.



Represent industry with a unified voice.

Industry Overview

SA raisins in global context



SA in Context

Impact on Gross Domestic Product (GDP)

Direct Impact: **R1 787 million**

+

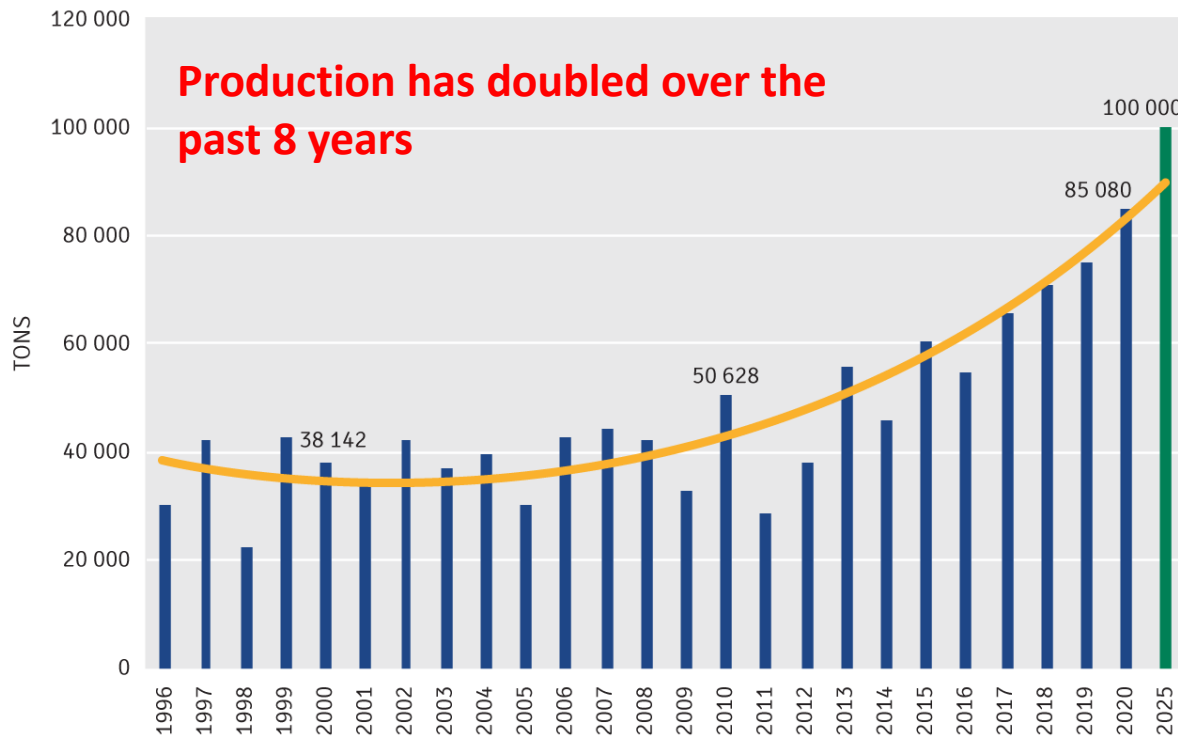
Indirect Impact: **R622 million**

+

World production
roughly **1.3** million ton

South African
production **85 000** ton

Most
important
export markets:
northern
hemisphere



% of world
production

market share

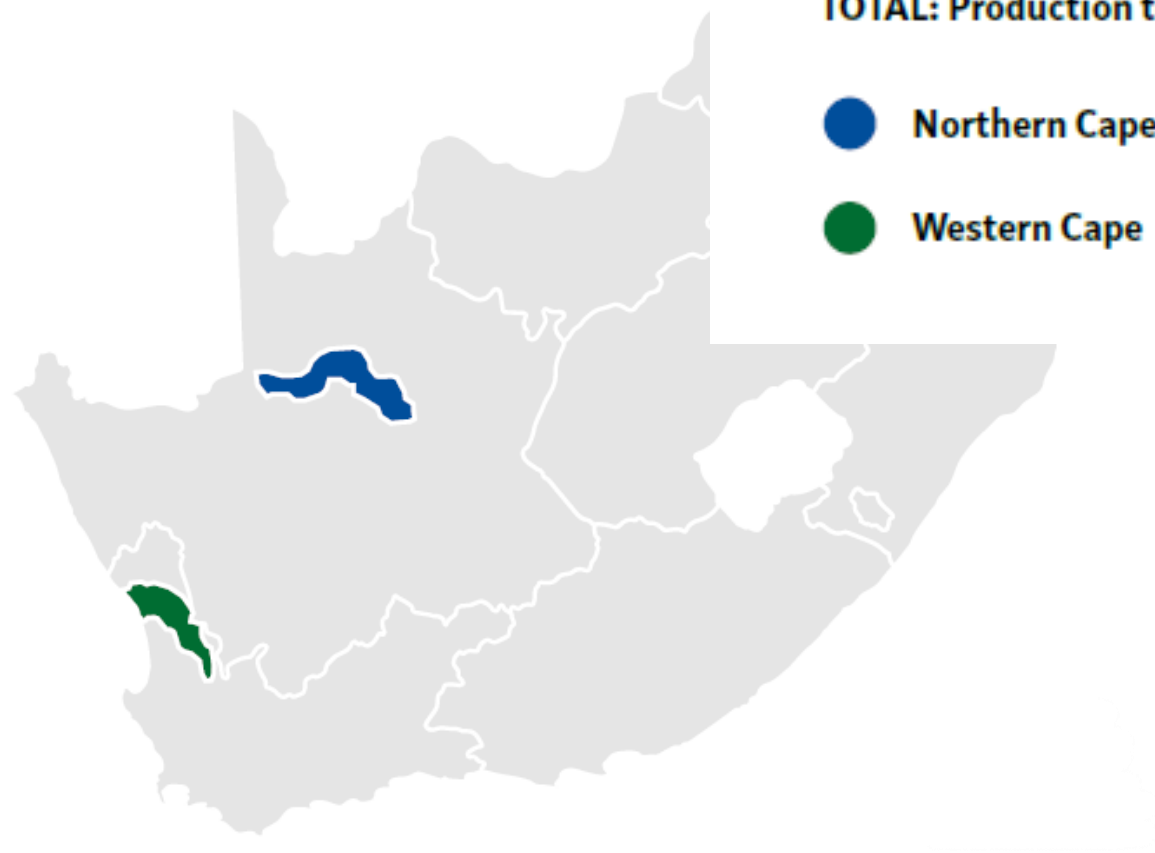
ns +- | Thompson +-
15.4%

duction
2019

5th

largest
producer
world-wide

since deregulation in 1996

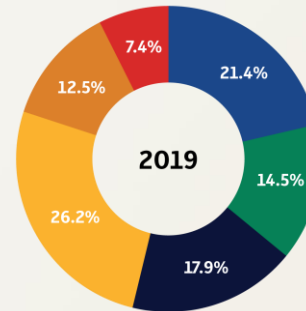


TOTAL: Raisin hectares		16 035,97 (ha)
TOTAL: Production tonnes		78 710 (ton)
● Northern Cape	- Hectares	13 853,95 (ha)
	- Production tonnes	64 692 (ton)
● Western Cape	- Hectares	2 182,02 (ha)
	- Production tonnes	14 018 (ton)

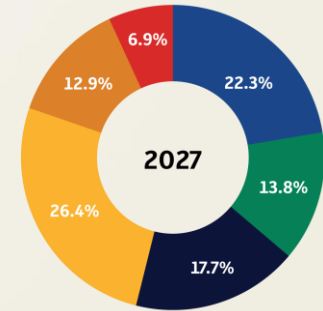
Product Categories & International Market Share (%)

World Product by Category

South Africa by Dried Product Category (& market share%)



- Natural Seedless
- Golden Seedless
- Black Current
- Sultana
- Muscat
- Monukka

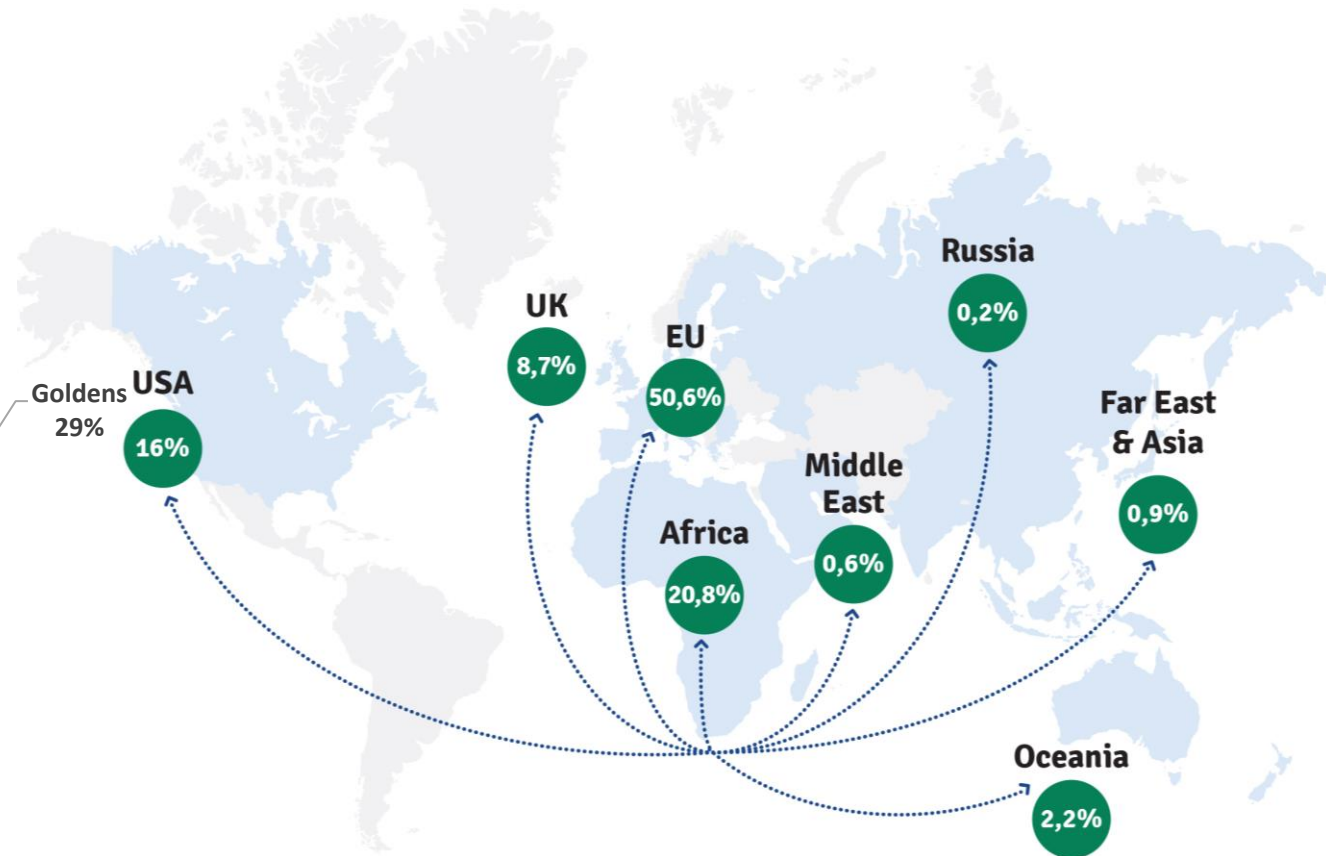
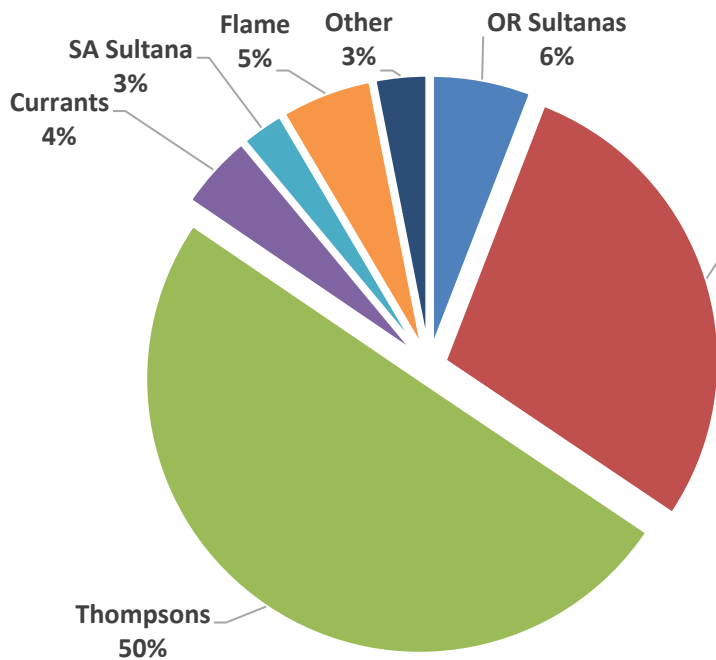


>80% of Total
SA Production



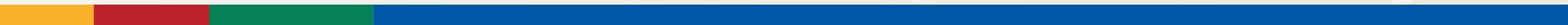
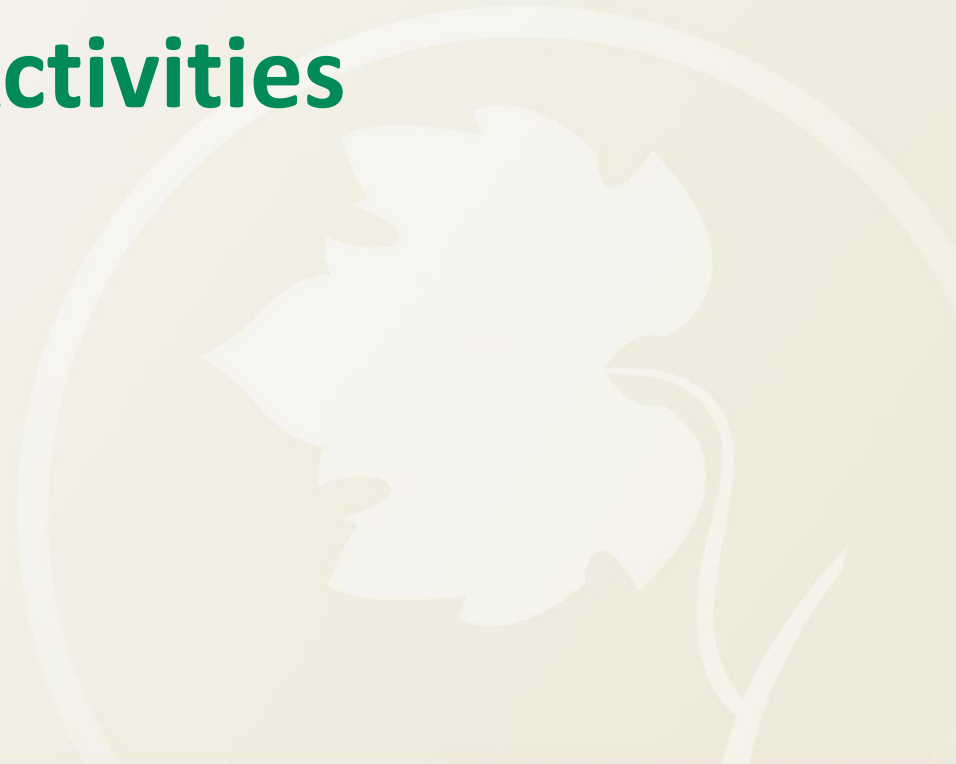
SOUTH AFRICAN RAISINS:

by Product Category & Market Destination

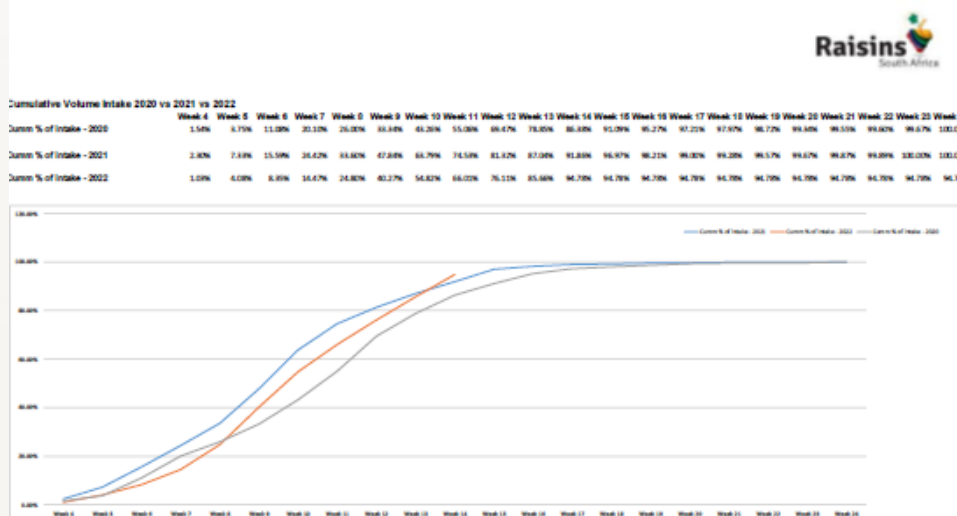
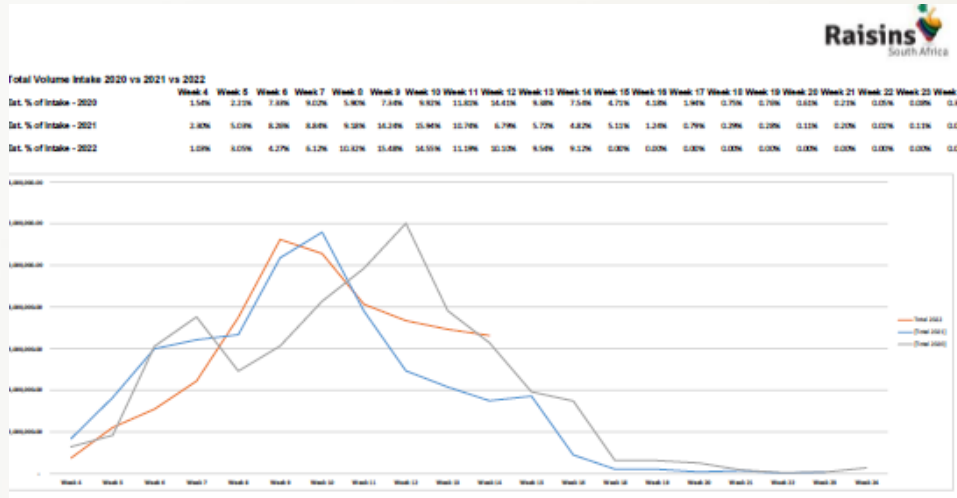


2023/02/15

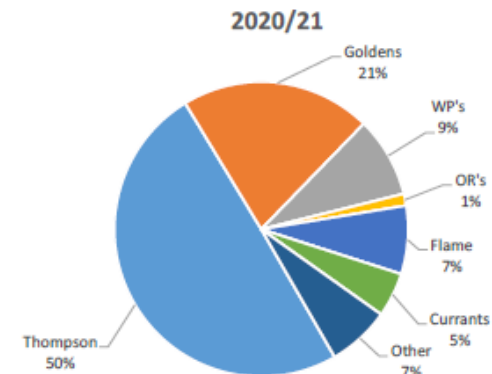
Examples of Industry Projects / Activities



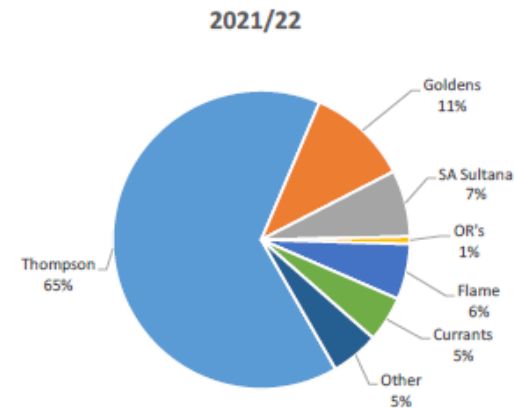
1. Crop Forecast Model



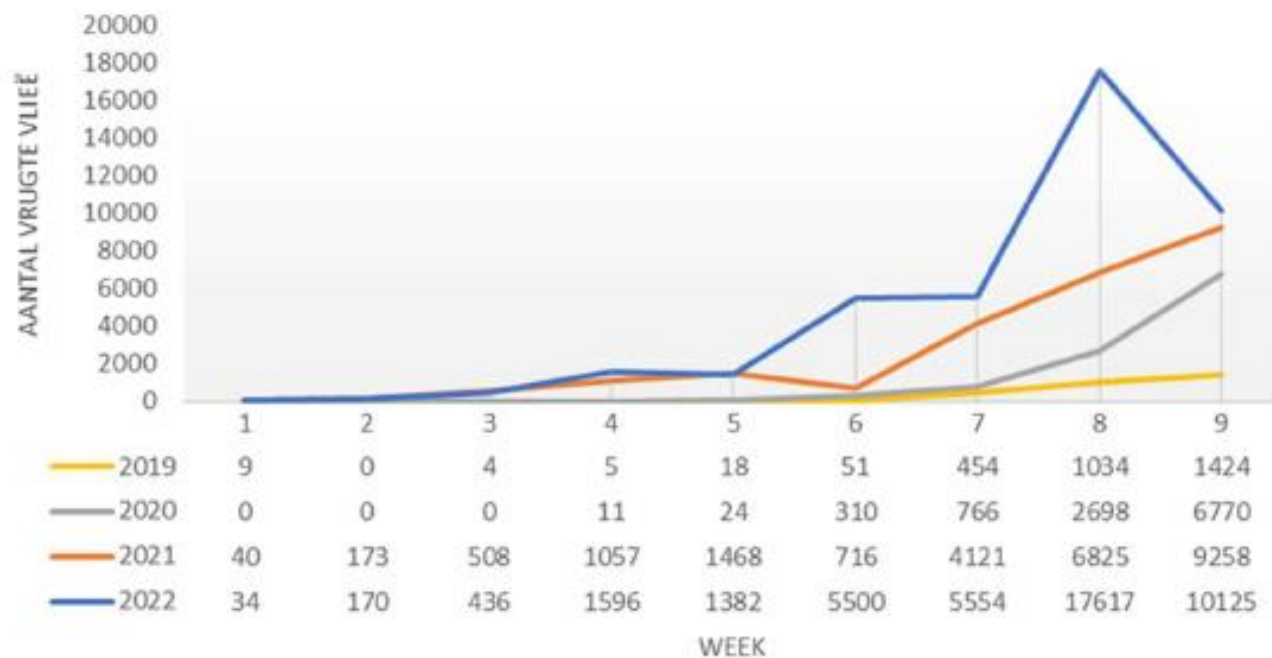
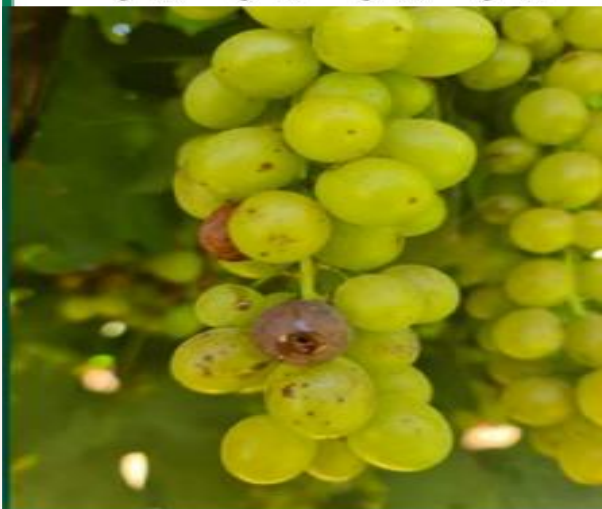
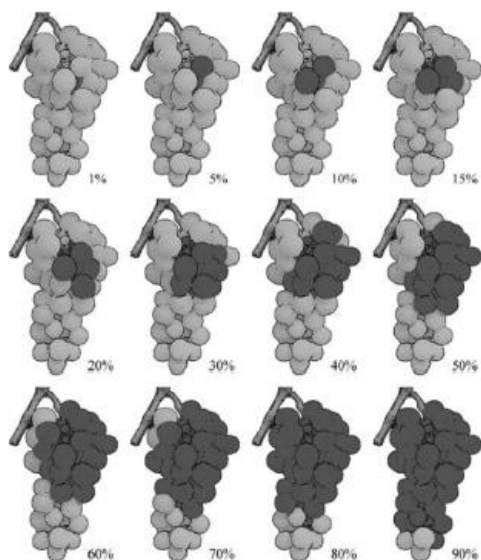
Dried Product summary by Type (% of total crop)



Dried Product summary by Type (% of total crop)

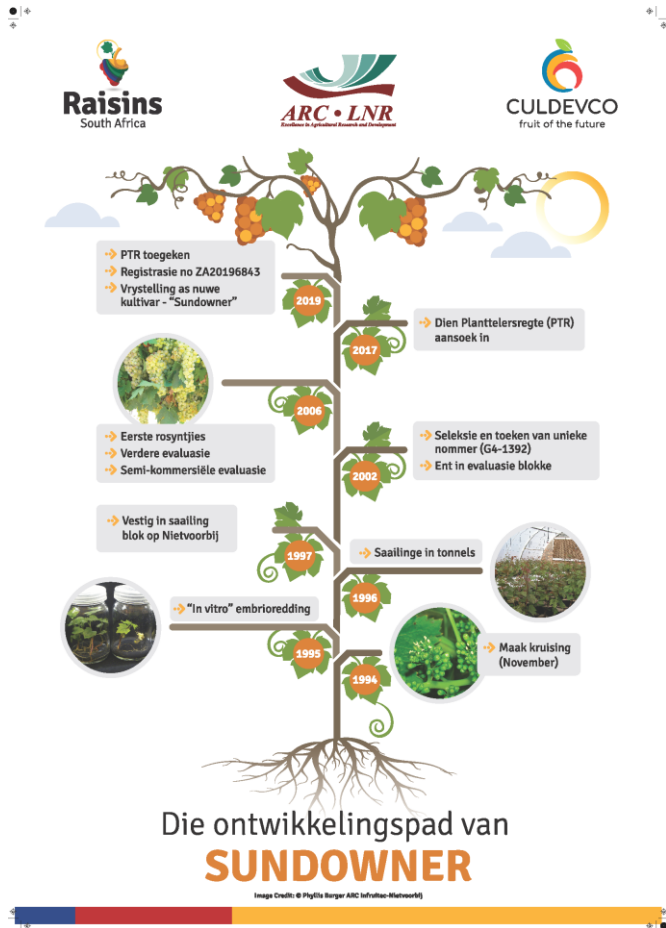


2. Production losses



3. Research & Development

Production orientated



4. Plant Improvement

A strong

start



The physical and physiological characteristics of nursery trees.
By Grethe Bestbier

How you start something often affects how you finish it, and the importance of a strong start cannot be overstated. In the same way, the physical and physiological characteristics of nursery trees play a significant role in how well the trees establish themselves. Knowing what to look for when buying young trees can mean the difference between the success and the failure of an orchard.

Why do nursery tree characteristics matter?

"The planting of an orchard is one of the largest investments a producer will make," says Prof. Wiehann Steyn, assistant general manager at Hortgro Science. "Nursery trees are costly, especially when you plant a trademarked cultivar and rootstock at a high density. It is also a long-term investment. Depending on the cultivar, an orchard is planted to last for 20 years, more or less."

If your orchard doesn't perform as it should in the first two years, there is a risk that it will never be profitable. Nursery tree quality is therefore of the utmost importance.

"If you plant a tree and manage it correctly, you expect a certain height increase, and the development of a number of shoots to fill the space in the rows, if you plant at high density," says Prof. Karen Theron, Hortgro Chair in Applied Preharvest Deciduous Fruit Research in the Department of Horticultural Science at Stellenbosch University.

"However, you will often find that a tree that grows poorly from the start, remains weak indefinitely. Even if you add extra nutrition, spray the leaves and approach consultants for advice, it could be too late. You might have to remove the trees entirely and start over."

To ensure nursery trees of good quality, it is important to understand their physical and physiological characteristics. Theron explains that physical

characteristics refer to the appearance of the trees, including size, root system and graft unions, while physiological characteristics refer to the tree's internal functions and processes.

What you see: physical quality

The physical quality of nursery trees plays a huge role in how successfully trees establish. One important physical characteristic is the ratio between shoots and roots.

"There is a correlation between what happens above ground and below ground," explains Steyn. "Hormones cross talk, so the shoots and roots are in communication about how their growth is faring. For every circumstance, the tree tries to establish a balance between shoot and root growth."

Nursery trees are typically planted densely and pushed to grow under ideal conditions, leading to more shoot than root growth. After being transplanted to an orchard, the tree will first aim to re-establish a balance in its new environment, generally favouring root growth at the expense of shoot growth.

This disproportionality between shoot volume and root volume cannot always be avoided, but nurserymen and producers can improve matters by preserving as much as possible of the root system, and ensuring correct soil preparation and irrigation. Producing trees in bags is another option for reducing transplant shock due to root disturbance.

Besides the quality of the root system, tree size also matters. Larger trees tend to display more total new shoot growth, and to fill their allotted space earlier. Unfortunately, large trees often suffer more transplant shock due to a higher shoot to root ratio and relatively greater root loss during lifting.

"Studies show that smaller trees often don't

catch up with larger trees for the entirety of their lifespan," says Steyn. "When planting, you want your trees to start carrying fruit as soon as possible. If you plant a tree that is almost fully grown, it can expand sideways and put on fruit. On the other hand, the first year after a too-small tree is planted is ultimately lost, since it first has to catch up size-wise."

Length is not the only important factor. Stone fruit grower and technical adviser, Petru du Plessis, says that he would rather plant a thick tree that's been properly hardened off than a long, thin tree with inadequate reserves.

"A tree that grows poorly from the start, remains weak indefinitely."

It is also important that the shank of the rootstock is long enough so that the grower can plant the tree at sufficient depth without running the risk of scion rooting. Grafting too low can be a problem with trees derived from tissue culture.

Hidden characteristics: tree physiology

As active shoot growth comes to an end in autumn, nursery trees enter the

paradormancy phase of development. During this initial resting phase, the tree not only develops the terminal and lateral buds, but also hardens off in preparation for winter and the entrance into endodormancy, or true dormancy.

"What this effectively means is that the tree needs a long enough period where it does not actively grow in terms of elongation visible to the eye, and where the leaves are still attached, for proper bud development and reserve build-up," explains Theron. "So, what the nurseryman does is remove some, but not too much, nitrogen and water from the tree, to strain it a little."

According to Theron, correct timing matters. For a tree to build up enough reserves and ensure good bud quality, it needs to spend between six and seven weeks in paradormancy. Trees also harden off during paradormancy to protect them from stress factors such as moisture loss during endodormancy. From paradormancy, the tree sheds its leaves and moves into endodormancy.

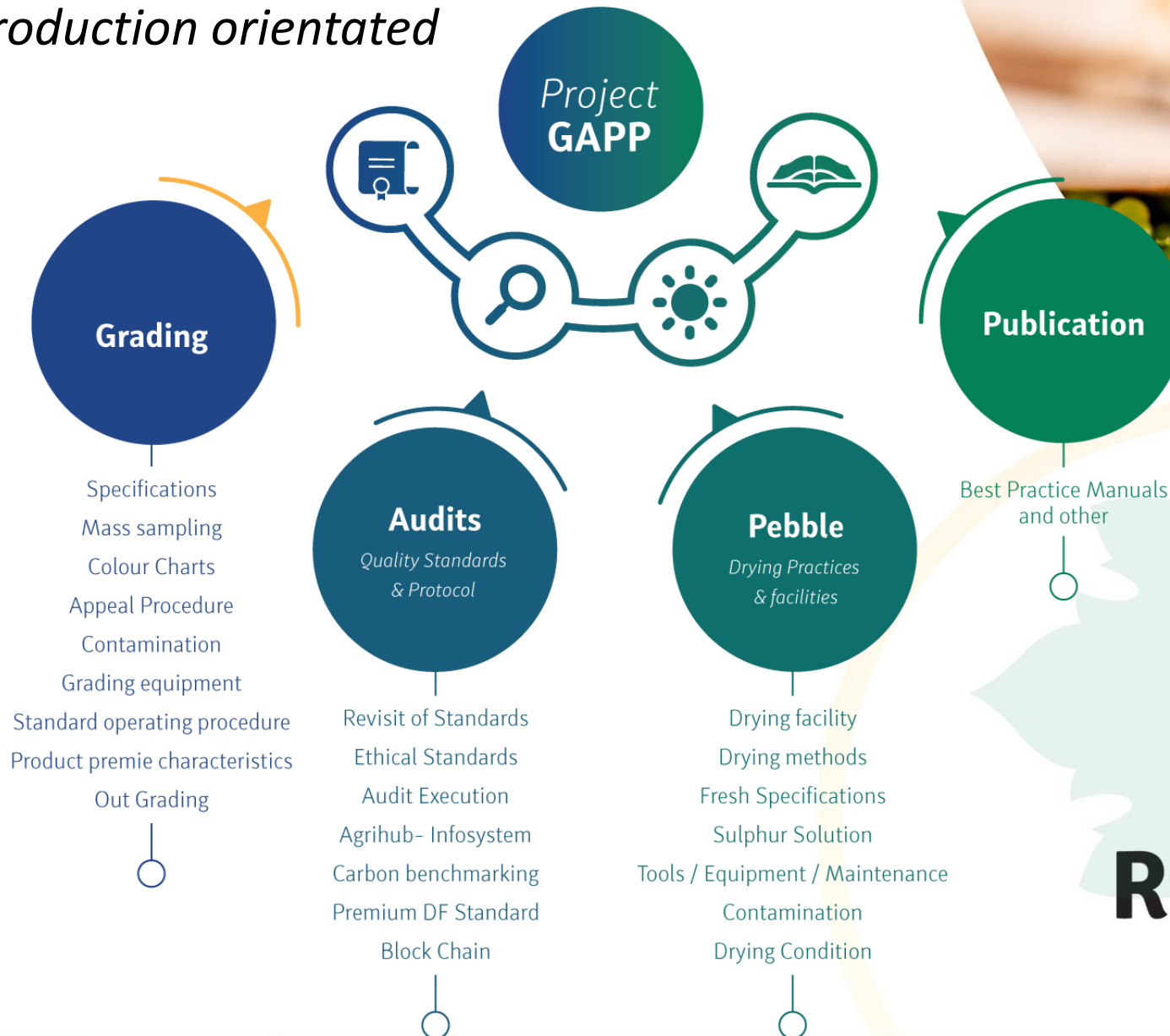
A too-short paradormancy phase caused by the tree's continued growth prevents trees from properly hardening off before they are lifted. Dormancy can also be disrupted by premature defoliation, leading to the loss of a large portion of important reserves and poorer bud break and growth after planting irrespective of the amount of chilling received.

Nurserymen are often under pressure to produce the largest possible tree and, as we've seen, size does matter. But nursery tree quality is about more than just size. It's also about producing a tree that is physically and physiologically prepared for life in an orchard. |||



5. Best Practices

Production orientated



Raisins
South Africa

6. Market Access – SAGAP requirements

Fundamentals to Market Access:

1. Traceability

2. Contamination

3. Hygiene

4. Chemical use

5. Ethics

Droogbaan Oudit • Weergawe 2

Week 1
Naspeurbaarheid

Wat is NASPEURBAARHEID:
Naspeurbaarheid is die vermoë om jou rosyntjies in alle stadiums van produksie, prosessering, hantering, verpakking en verspreiding op te spoor.

Het JOU plaas 'n PUC nommer?
Alle plaas moet 'n PUC en OF kode hê wat geregistreer is by DAFF. (Dit is jou eerste stap tot Naspeurbaarheid.)

FBO kodes bestaan uit 2 verskillende kodes wat jou plaas MOET hê:
1. PUC – Production Unit Code (Plaas kode)
2. DF – Drying Facility Code (Droogbaan kode)

AGRIHUB
AGRIHUB is versprei vanaf 2020/2021 in name reëls.
Dit vorm deel van SA Gap se minimum standaard.
Elke produsent kan net op die inligting op AGRIHUB sien.
Die info op Agrihub is belangrik sodat Raisins SA beter bepaling en oeskaatsing kan doen volgens akkurate inligting.
Alle inligting op Agrihub is konfidensieel.
Ons bedryf groei jaarliks, en as ons nie die totale prentjie het nie, kan ons nie beplan as dinge soos:
• Groter en meer markte,
• Groter kapasiteit by verpakkers,
• Groter binne en nie.
As ons nie beplan nie, gaan elke rosyntjie produsent daartoe lei!

Andere belangrike info om jou te help met NASPEURBAARHEID
Vol alle info in op die Naspeurbaarkode se webwerf.
• Datum ontvang en versend
• Blokkommer – soos op Agrihub geregistreer
• Kultuur inreem / Produk wat versend word
• Droogbaan nommer
• OF kode
• PUC kode
• Aantal bins per versending
• Ontvanger van produk
• Voertuig reg. nommer
Daar moet 'n persoon identifiseer wat versend word.
• Die gepositiveerde persoon na kontrole
• Oeskaatsing per bin moet aangeleen word in 'n Volume was enrigte
• Alle droogfasiliteite moet op 'n kaart aangeleë word, (indien die plaas nie 'n kaart het nie, sal Raisins SA help daarmee)

Hoekom is NASPEURBAARHEID nodig?
Daar is 2 belangrike redes waarom Naspeurbaarheid nodig is.
• Belangrik vir volledige dokumentering en boekhouding van jou produksie blokke
• Belangrik vir vinnige onttrekking uit die mark, indien jou produk 'n moontlike veselvet velle risiko inhou.

NOTA
Die afdeling oor Naspeurbaarheid is in totaal 'n MAKIER. Wat beteken jy moet 100% vir jou produksie afdeling hê om jou afdeling te beskerm!

Bekkie van Aarde: 082 558 7213 | bekkieva@raisinsa.co.za

Raisins South Africa

Doogbaan Audit • Weergawe 2

Week 3
Persoonlike Hygiëne en opleiding
Hygiëne reëls vir jou droogfasiliteit!

Die reëls is van toepassing op:
• Werkers
• Bestuur
• Besoekers
• Kontakkeurs

Was jou hande as jy:
• ...rook, snuif, spog, eet of drink tenynte met produk geveerd word nie
• ...geet het
• ...gevoel het
• ...in break geveerd het
• ...klas items by kontrolebottels mag in droog area ingeneem word nie
• ...besoekers of kontakkeurs word op droogfasiliteit toegelaat sonder 'n hêl van bestuur nie
• ...werkende reg by droogfasiliteit uitgevoer word voor alle produk uit die risiko area verwyder is nie.

NOTA
Die reëls wat betrekking het op die plaas moet 'n persoon identifiseer wat versend word.

Noodhulpkissies moet beskikbaar en toeganklik wees by die droogfasiliteit.
• Stel bestuur in kennis as enige persoon siek, near of 'n ongesonde mag het. Ook van enige aanreikende drakies.
• Alle wonde en sieke moet beskerm en aangeleë word. Dit is om kontaminasie van die produk te voorkom.

Minimum veroste vir die noodhulpkissies:
• Verbande
• Pleisters
• Watte en
• Ontsmettingsmiddel

LET WEL!
Geeftjies mag nie gebruik word om te wesk of te wesk nie. Dit is om kontaminasie van die produk te voorkom.

Toilet fasiliteite moet geskik, skoon, in goeie toestand en goed onderhou word.
• 1 toilet vir elke 15 persone.
• As jy meer as 20 mense op 'n perseel het, en daar is mense en vrouens, moet daar 1 toilet vir mense en 1 toilet vir vrouens wees.
• Kalde water gebruik word om te wesk of te wesk nie.
• Skoonheid en goeie water vir hande moet beskikbaar wees.
• Afvalpapier moet voorskyn wees.
• Houding moet goeie onderhou wees, om veilig en boordik van nie ontlaas te raak onder enige risiko aan produkte, mense of dier.

Minimum juweliersware word toegelaat wat met produk geveerd word.
• Vingerreëls moet kort en skerp gehou word.
• Alle vande materiaal moet gepu, pols, pols, glas ens. moet dadelik oopgetel en in vashouers gepu word.

Bekkie van Aarde: 082 558 7213 | bekkieva@raisinsa.co.za

Raisins South Africa

Doogbaan Audit • Weergawe 2

Week 2
Risiko Analises en Droogbaantipes

Risiko Analise 1
Onthouding van die Droogfasiliteit

Ekstrem
Droogfasiliteit moet toegesien wees. Die minimum veroste vir die draad is 2.1m hoog en met 1.8m draad.

Hoog
Droogfasiliteit moet toegesien wees. Die minimum veroste vir die draad is 1.8m hoog 'nakkas proof' wees.

Matig
Droogfasiliteit moet toegesien wees. Die minimum veroste vir die draad is 1.2m hoog en 'n 'nakkas proof' draad.

Laag
Geen heining is nodig.

NOTA
'Embedded stones' is ons grootste probleem in die mark. Ons sal moet onderskei tussen Grus en Padgrus en kyk hoe dit aangeleg kan word. (Ons kyk na meer duidelike riglyne en sal gekommunikeer word sodra ons duidelike antwoorde het.)

Risiko Analise 2
• Chemiese
• Fisiese
• Mikrobiologiese
• Gebate
• Allergiese

NOTA
Dokumenteer RAZ, Voorskrifte

Droogbaan tipes
Sementbane
• Alle sement droogbane MOET 'n net oor hê (Kontak jou verpakker vir hulp met die % net wat vir jou baie voldoende sal wees.)
• Sement droogbane moet 'n voldoende heiling hê wat die afloop van water sal verseker.

Organiese materiaal
• Organiese droogfasiliteite sal visueel getoets word.
• Indien jy van organiese materiaal gebruik maak as buffer, sal jy outomaties jaarliks geveerd moet word as gevolg van die risiko.

OR Matte
• Permanente dakke moet in 'n goeie toestand wees met genoegsame oorgang aan alle kante.
• OR Rakkies moet skoon en in 'n goeie toestand wees.
• Die vloer moet sement wees.

Grus Droogfasiliteite
• Alle grus droogfasiliteite MOET 'n net oor hê
• Die grus MOET GEKOMPAKTEER wees.

Bekkie van Aarde: 082 558 7213 | bekkieva@raisinsa.co.za

Raisins South Africa

Doogbaan Audit • Weergawe 2

Week 4
Chemie / Skoonmaakmiddels

Stoor van Chemie en Skoonmaakmiddels
• Die Stookkamer moet ten alle tye toegesluit wees.
• Geen ongemagtigde persone toegelaat in stookkamer.
• Stookkamer moet goeie ventilasie hê.
• Sleep Chemie mag in die Chemiebestuur gebre word, dit verhoed dat toxis kontaminasie plaasvind.

Chemiese Onkruidbeheer
• Chemiee onkruidbeheer MOET VOOR die seisoen geveerd word.
• Onthoudingsperiodes moet op etiket aangeleë, moet binne goeie bestuur word.
• Alle Chemieesmiddels wat gebruik word vir onkruidbeheer MOET aangeleë word.
• Die belangrik om seker te maak dat die produk wat gebruik word, nie in SA geskiedte is. (Sien die etiket)

Definisie van 'Onthoudingsperiode'
• 'n Onthoudingsperiode is die tydperk wat dit neem vir 'n CHEMIESE PRODUK om af te breek. Met ander woorde, hoe lank nadat jy die produk gebruik het, die ring of toepassing geen risiko van die Chemiee produk meer op sal hê nie.

Wat moet ek Aanteek as ek Chemie Toedien?
• Datum waarop Chemie toegeleë word.
• Chemieesmiddel wat gebruik is se HANDELSNAAM.
• Die Chemieesmiddel wat gebruik word se aktiewe bestanddele (Dit sal jy op die etiket kry).
• Konsentrasie wat gebruik word.
• Tegnieke magtiging (wie het aanbeveel dat dit gebruik moet word).

NOTA
MOET 'n Safety Data Sheet (SDS) hê by jou Chemiee verskaffer aangeleë word.

GEEN LEE CHEMIESE HOERS NAG OP DIE DROOGBAAN GEBRUIK WORD NIE

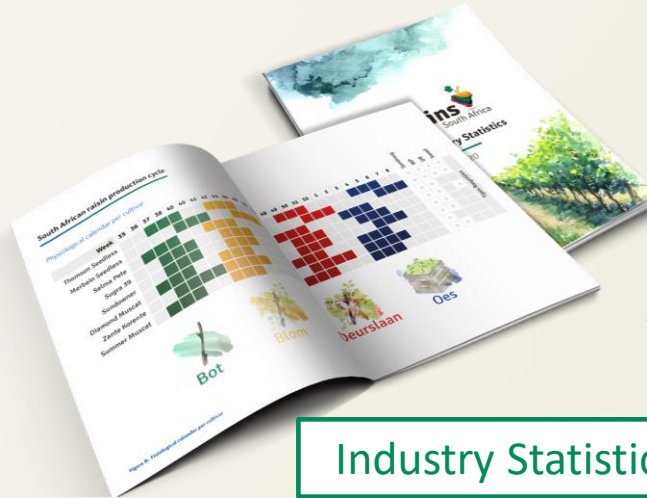
Bekkie van Aarde: 082 558 7213 | bekkieva@raisinsa.co.za

Raisins South Africa

7. Market Intelligence



Cost Guide 2022



Industry Statistics 2022



Market Reports 2022

8. Industry Benchmarking

Margin Analysis (2019)



Disclaimer: The views expressed in this document reflect those of Raisins South Africa NPC and do not constitute any specific advice as to decisions or actions that should be taken. Whilst every care has been taken in preparing this document, no representation, warranty, or undertaking (expressed or implied) is given and no responsibility or liability is accepted by Raisins South Africa NPC as to the accuracy or completeness of the information contained herein. In addition, Raisins South Africa NPC accepts no responsibility or liability for any damages/benefits of whatsoever nature which any person may suffer as a result of any decision or action taken on the basis of the information contained herein. All opinions and estimates contained in this report may be changed after publication at any time without notice.

Notes:

Calculations are based on the following assumptions:

- 1 Production ton/ha
- 2 Processing ton/hour
- 3 Exchange rate
- 4 US\$ market price

The associated risks and capital outlay is not calculated.



Northern Cape
Department of Education

SAAM MAAK
ONS LANDBOU
GROOT!



Hoërskool
Martin Oosthuizen



Raisins
South Africa

Thank you.

