

INTERPERA
2016

World Pear Congress
South Africa
16-18 November



HORTGRO
Growing Fruit IQ

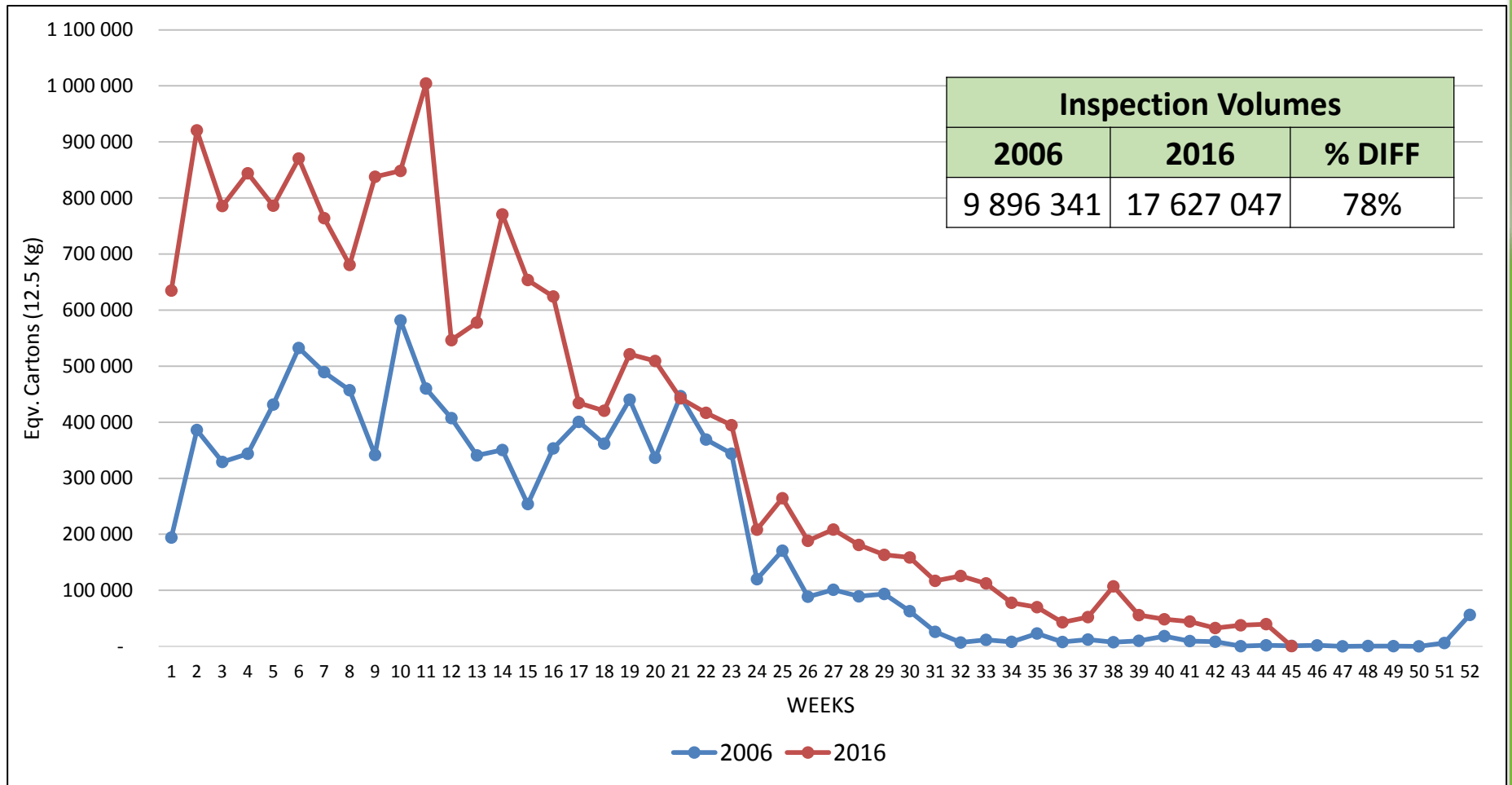


SA Forecast & Southern Hemisphere Perspectives

Jacques du Preez

General Manager: Trade & Markets

SA Pear Inspection Curve

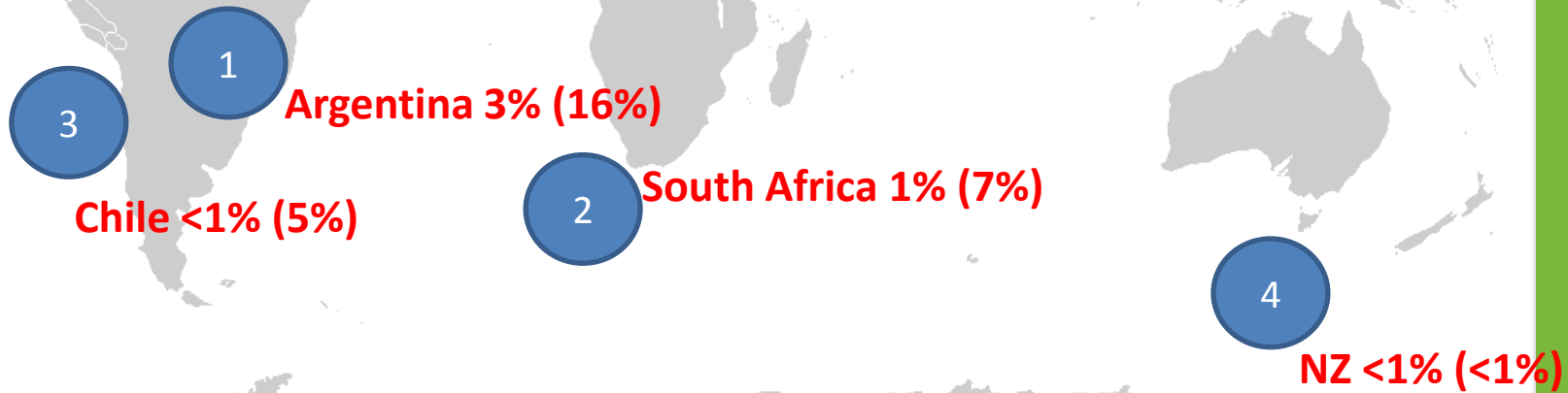


Southern Hemisphere Pear Production vs World



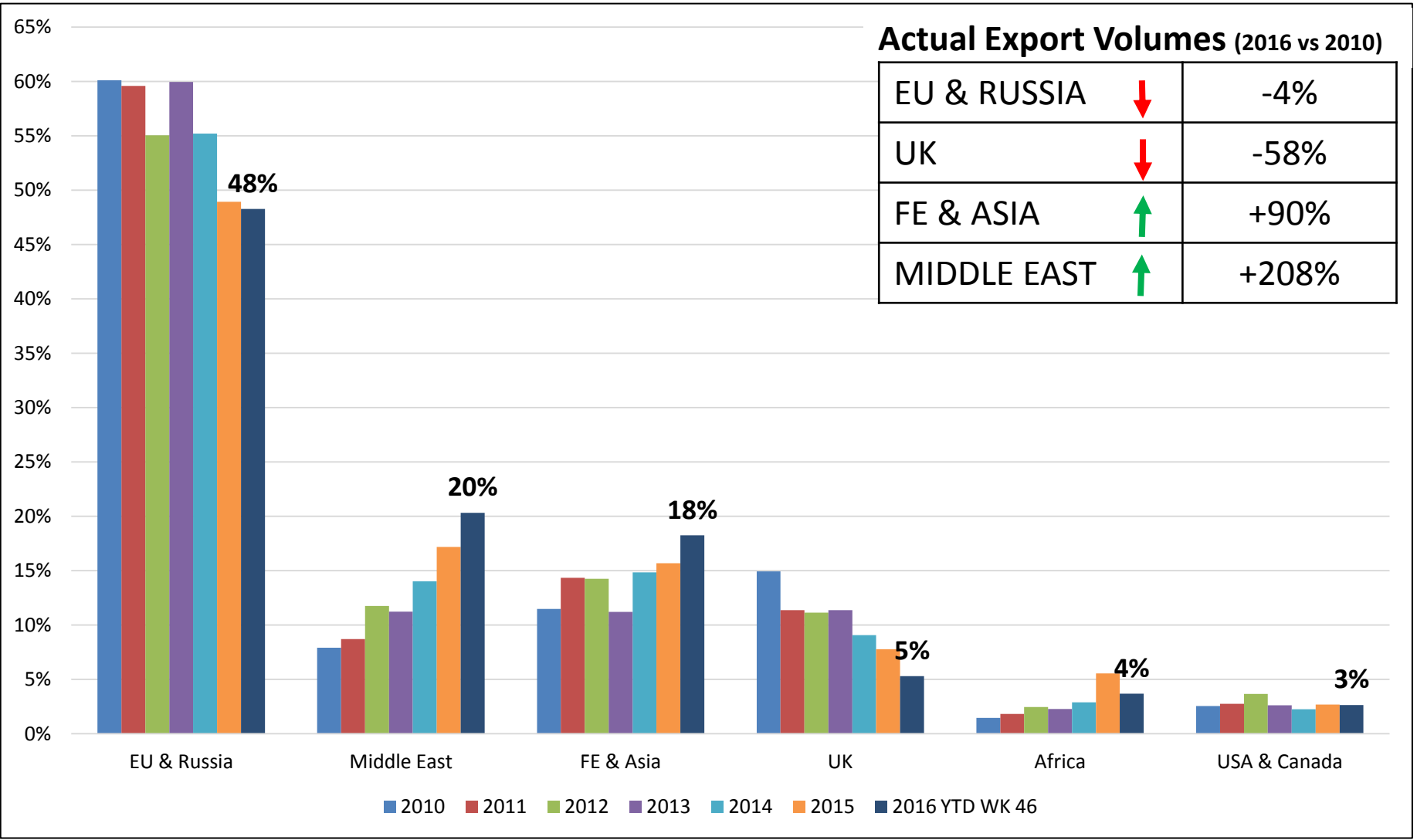
% of production (% of exports)

Rank	PEARS
1	China
2	United States of America
3	Italy
4	Argentina
5	Turkey
6	Spain
7	South Africa
8	India
9	Netherlands
10	Belgium

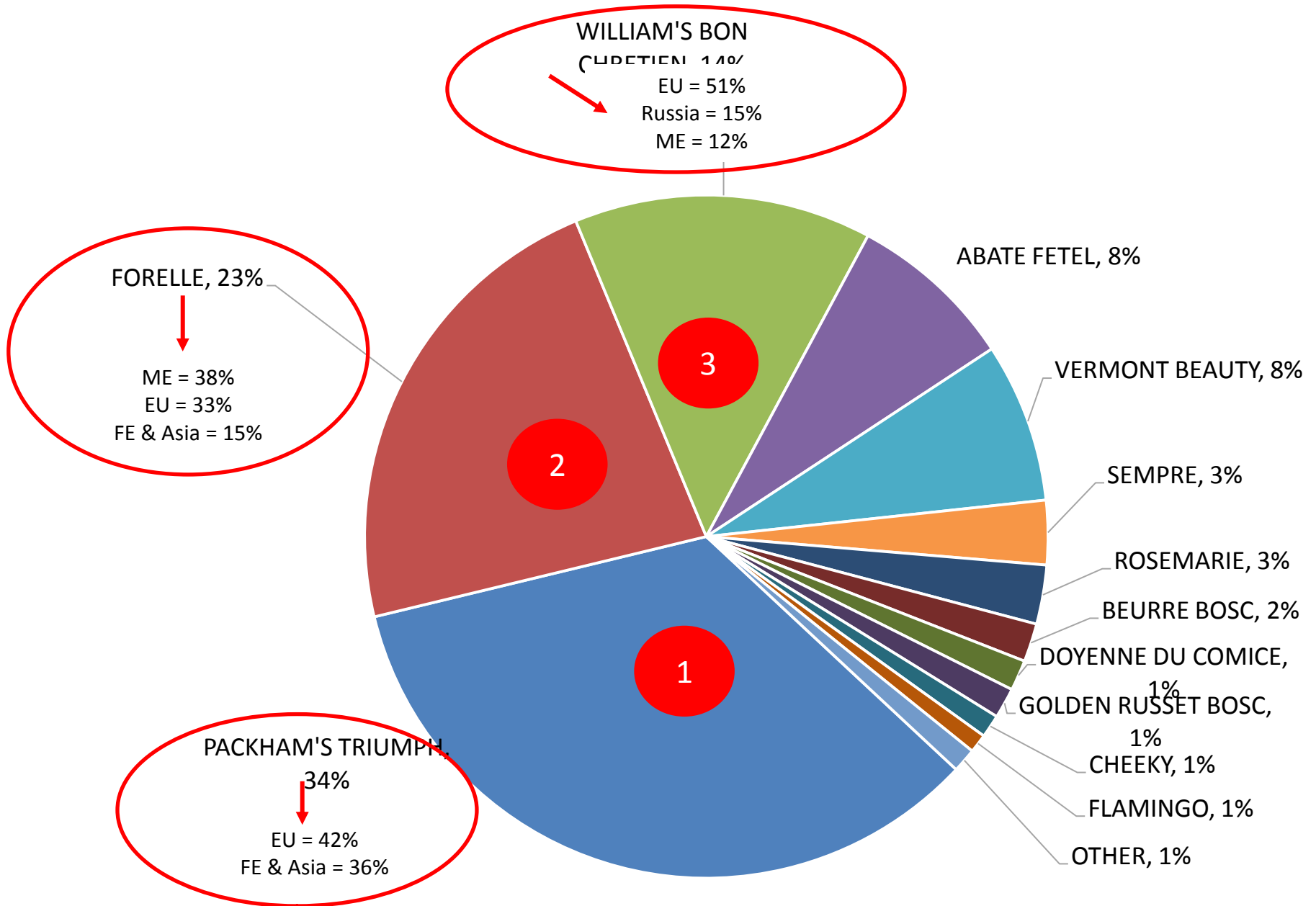


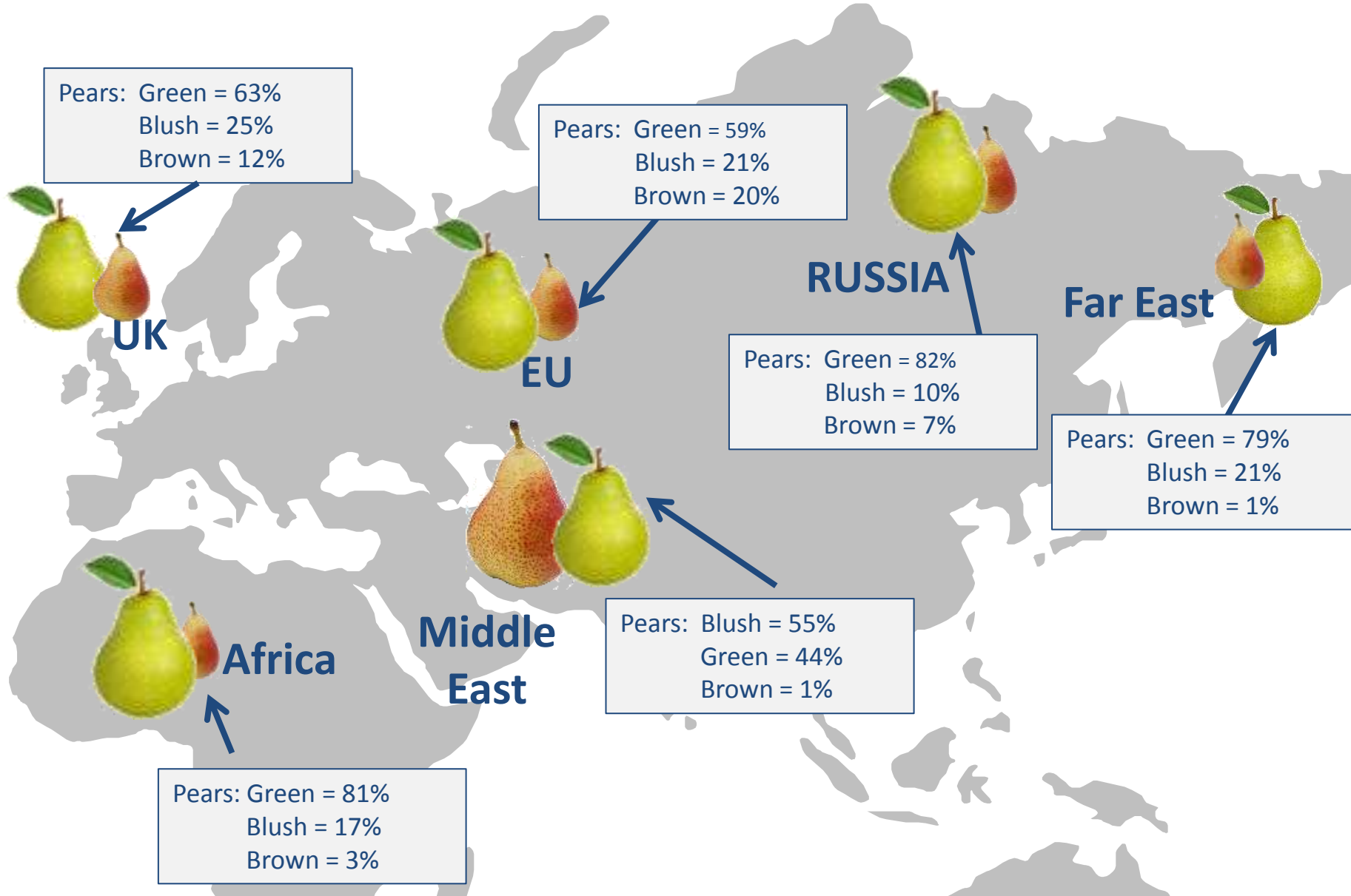


SA Pear Export Market Distribution per Season



2016 SA Pear Exports

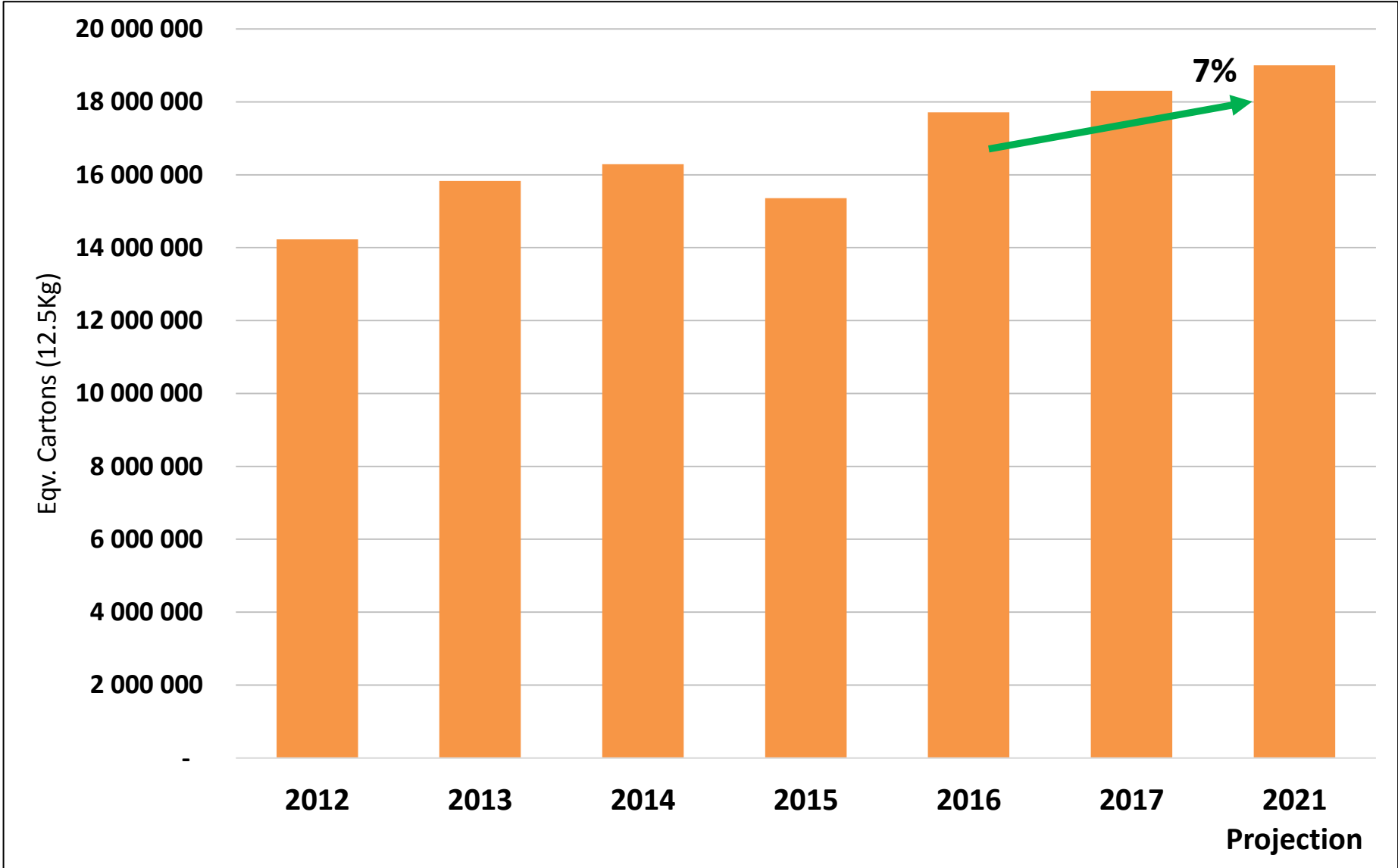




Unique market needs



SA Pear Mid-Term Export Projections



Main South African Pear Export Regions



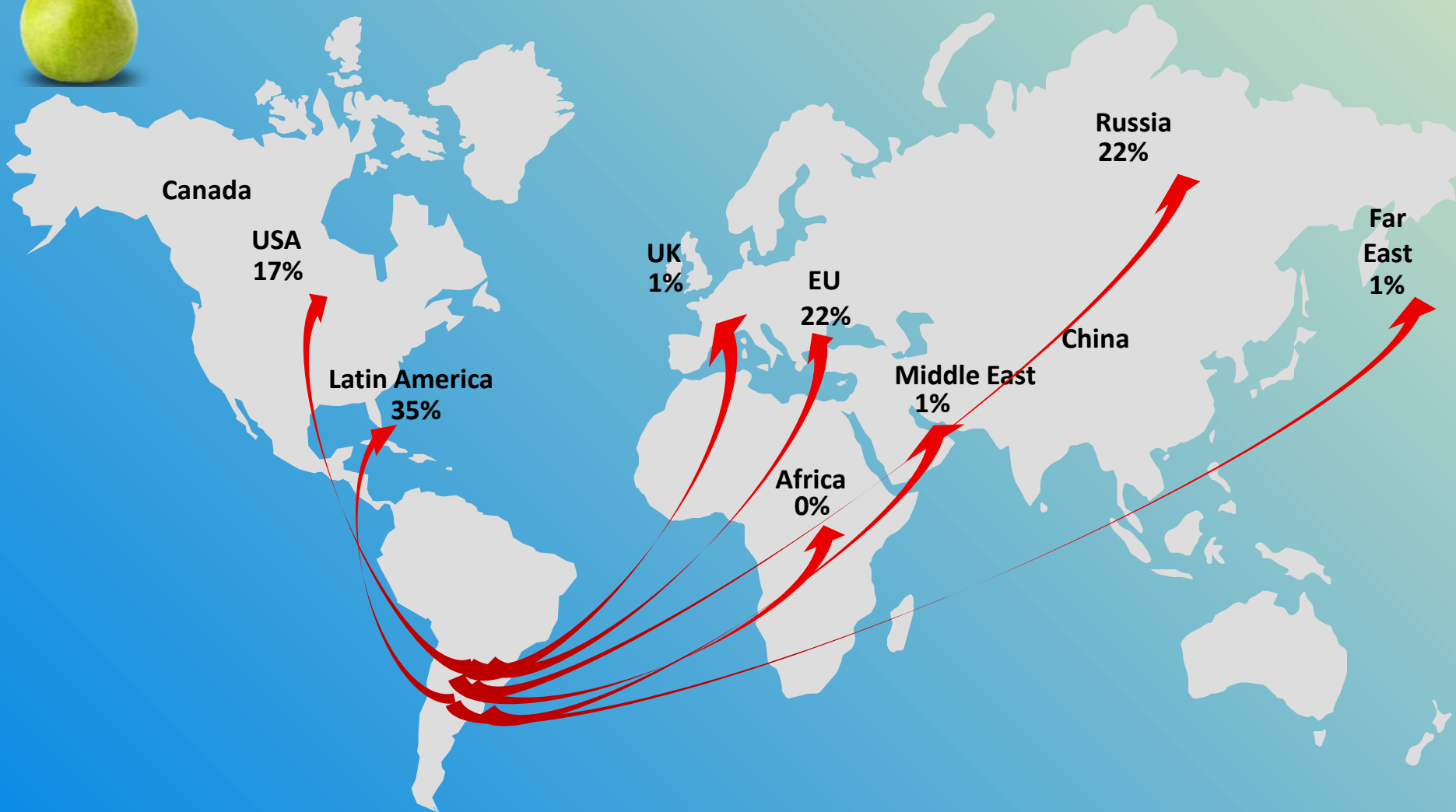
2016 YTD Week 45

Main Chilean Pear Export Regions



2016 YTD Week 45

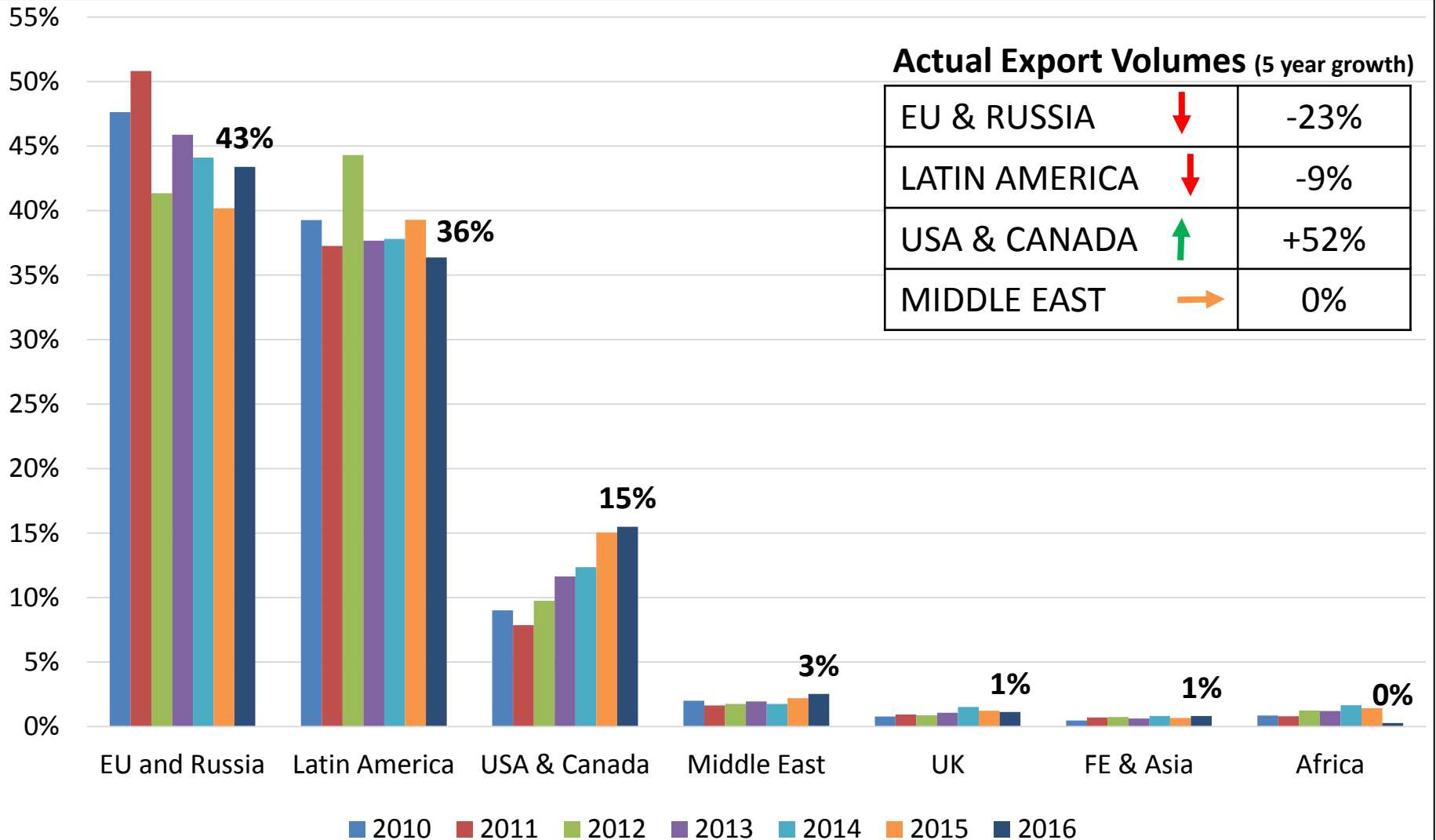
Main Argentine Pear Export Region



2016 YTD Week 45

Southern Hemisphere (excl SA)

Pear Export Markets



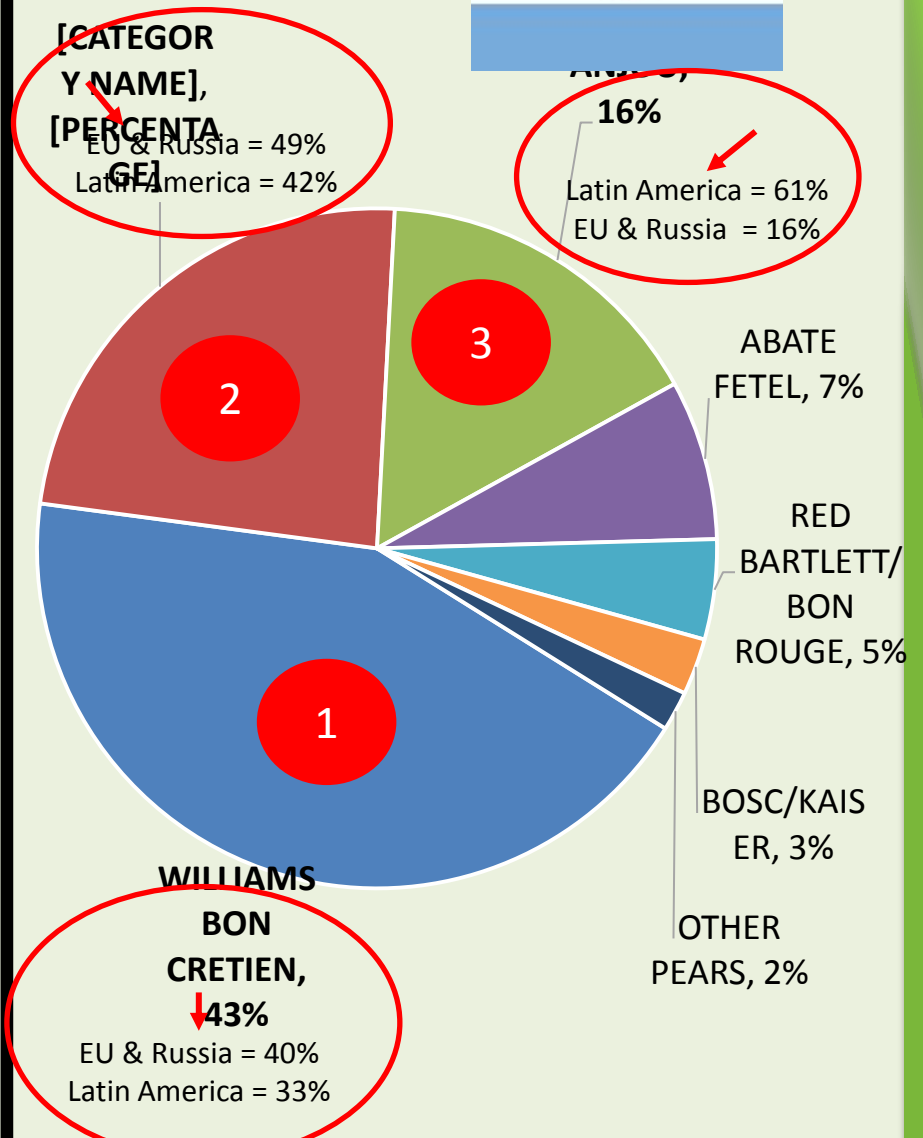
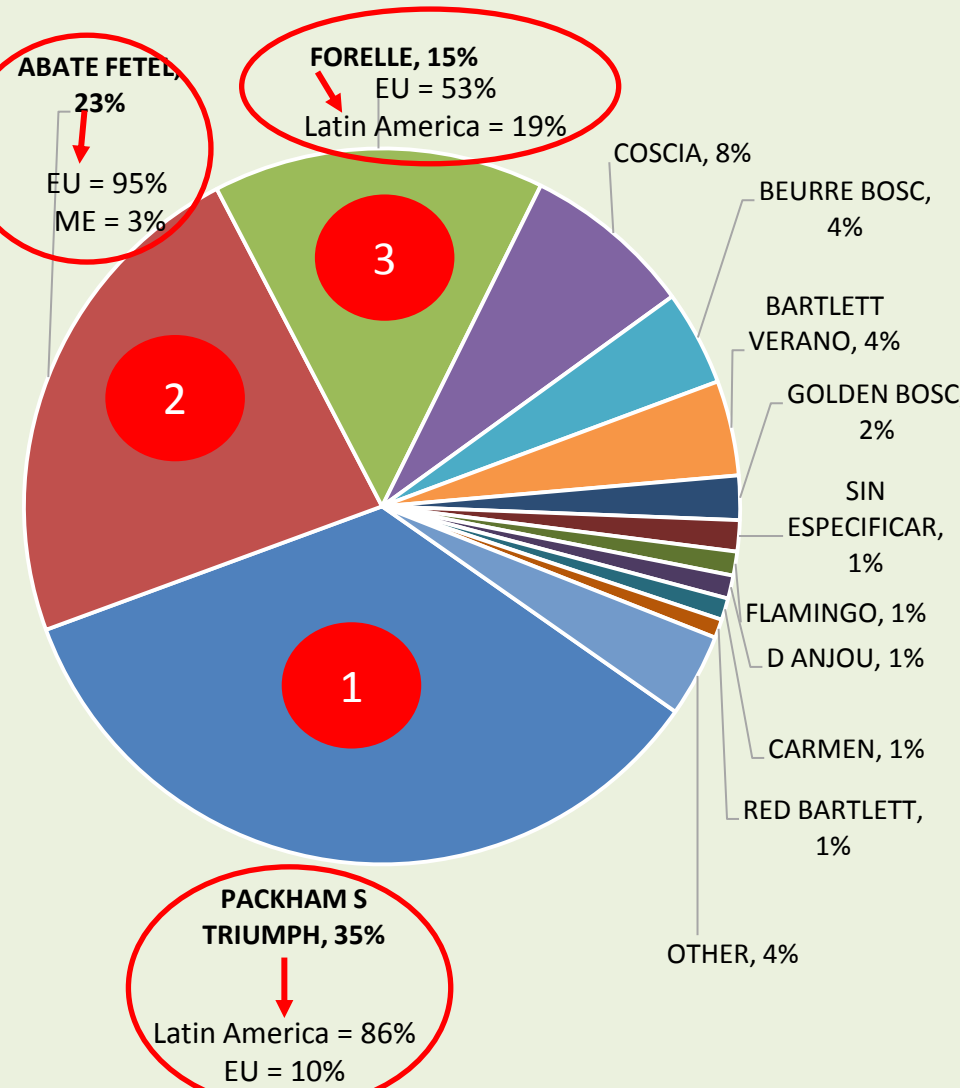
SH Pear Cultivar Distribution



Chile



Argentina

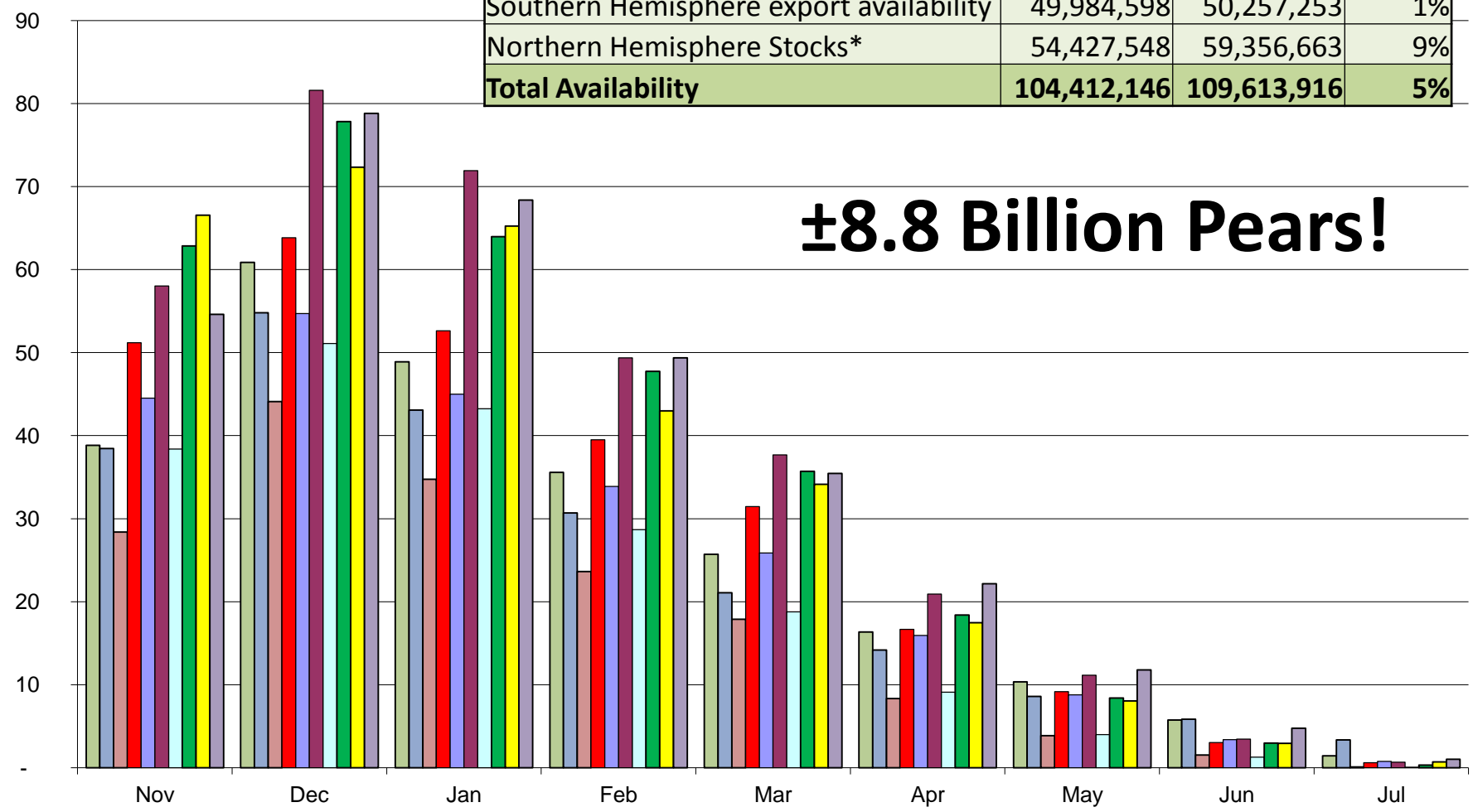




EU Pear Stocks Trends

Pears (12.5kg cartons)	Feb-15	Feb-16	Change
Southern Hemisphere export availability	49,984,598	50,257,253	1%
Northern Hemisphere Stocks*	54,427,548	59,356,663	9%
Total Availability	104,412,146	109,613,916	5%

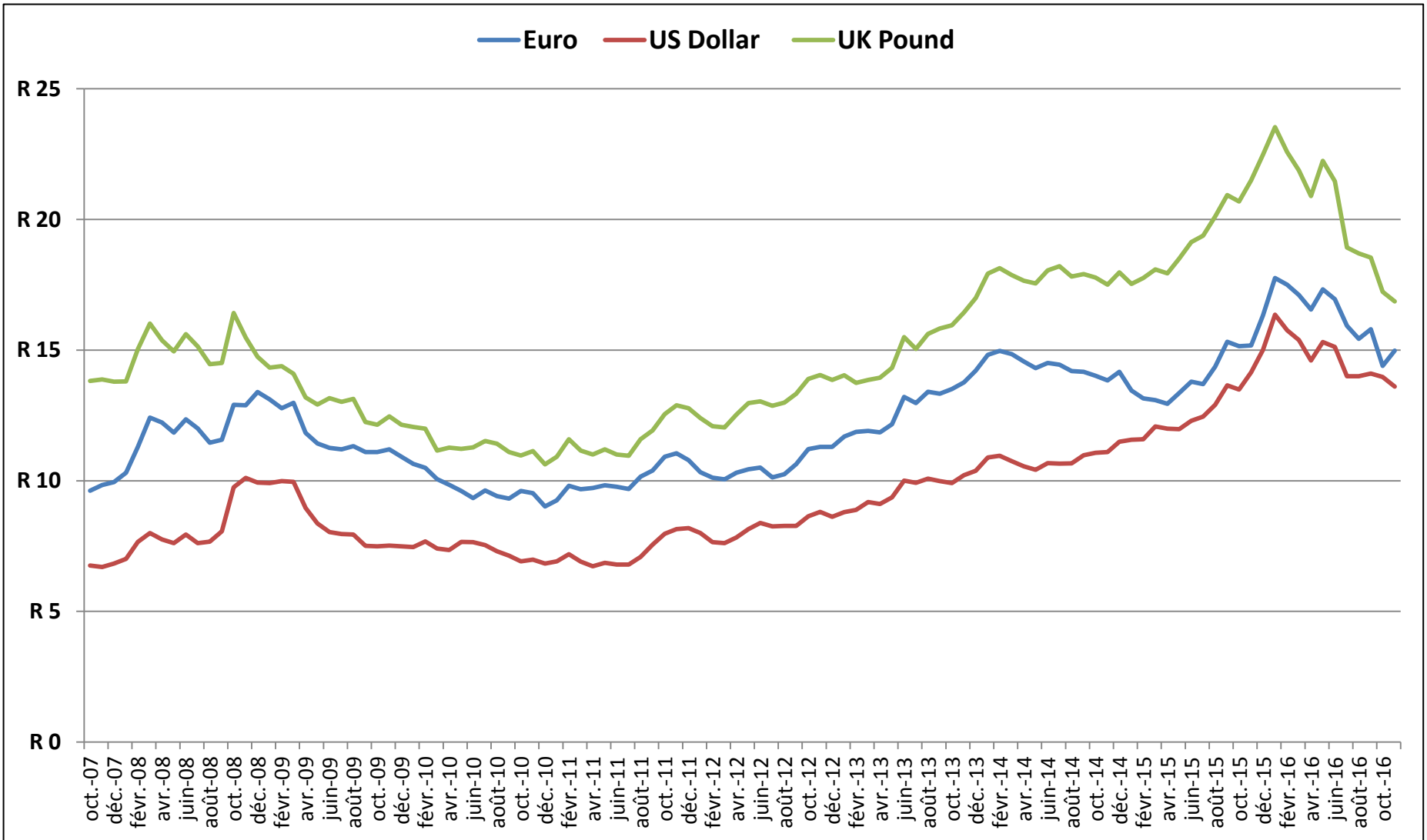
±8.8 Billion Pears!



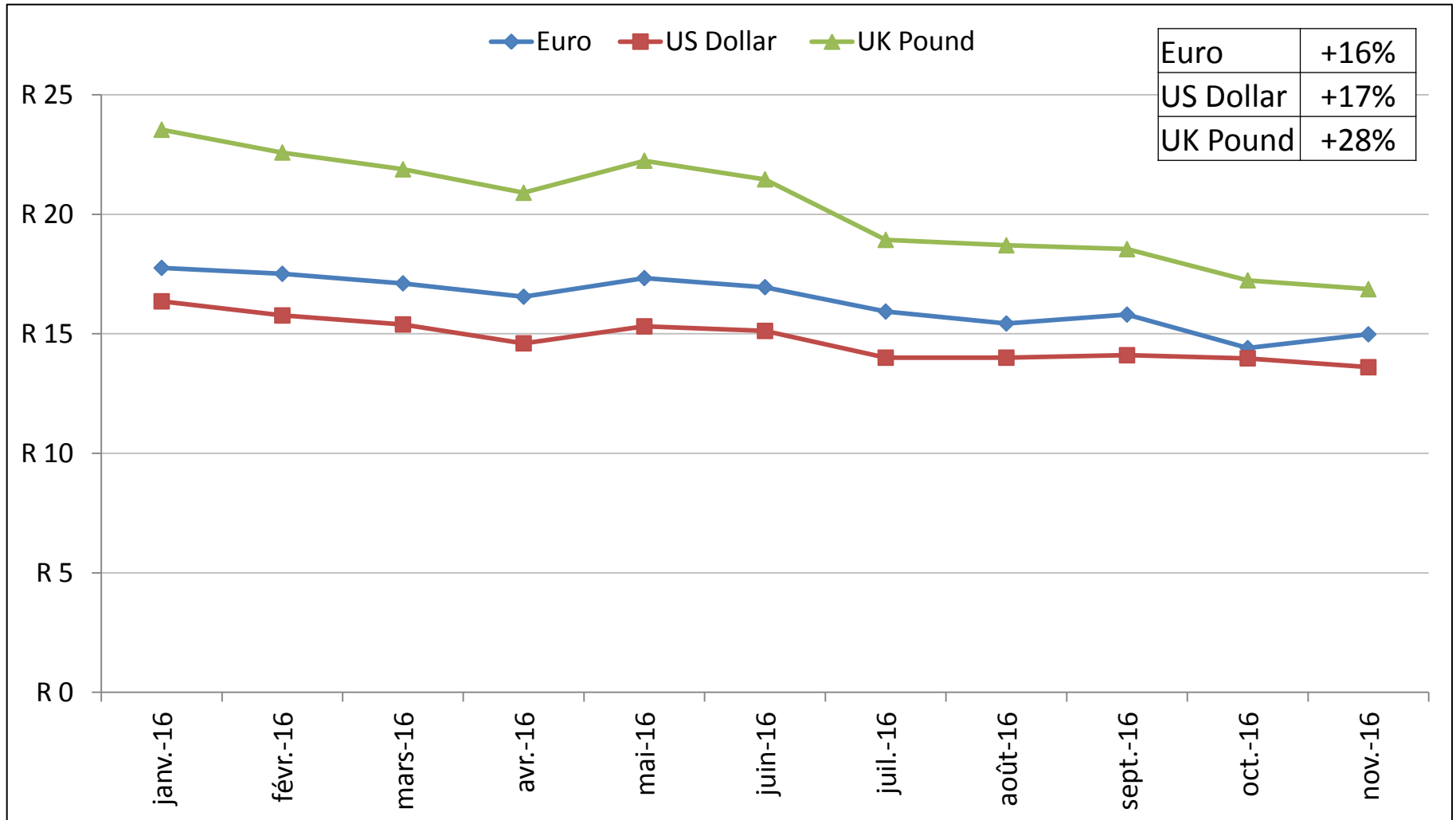
■ 2006/2007
 ■ 2007/2008
 ■ 2008/2009
 ■ 2009/2010
 ■ 2010/2011
 ■ 2011/2012
 ■ 2012/2013
 ■ 2013/2014
 ■ 2014/2015
 ■ 2015/2016



Long Term Exchange Rate



2016 Exchange Rate





Thank you