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LANVOKON AGROCON '84

AGRICULTURAL OUTLOOK CONFERENCE 1984

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AGROCON 1984

THE SOUTH AFRICAN DECIDUOUS FRUIT INDUSTRY (FRESH CONSUMPTION)

1 DEFINITION OF PRODUCTION SEASON

In this submission production season refers to the period from 1 November to 31 October, both days inclusive.

2 OUTLOOK FOR 1983 COMPARED WITH ACTUAL EVENTS

The forecast made at the 1983 Agrocon was that in 1983 production would be lower than the record quantities of 1982.

With the exception of apples, with a very disappointing production, crops were in general satisfactory. Exports of plums as well as grapes exceeded all previous records. Total production of all fruit-kinds, however, dropped from 554 088 tons in 1982 to 495 385 tons (a decline of 10,6%). Market prospects overseas were forecast to be less favourable than in 1982. On account of substantially heavier supplies of competitive apples, pears and grapes, price levels in general were considerably lower than in 1982. Prices were also adversely affected by quality problems in pears and plums. The result of the lower prices, combined with substantial increases in production and export costs, was that producer earnings were the lowest in many years.

3 PRODUCTION

Schedule 1 shows the production by fruit-kind for export and the domestic market (for fresh consumption) from 1973 to 1983. A provisional estimate of the 1984 production is also given.

The production (metric tons) by fruit-kind for the present season (1983) compares as follows with the past season (1982).

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	1983	1984	% DIFFERENCE
Apples	303 896	372 545	- 18,4
Pears	78 562	73 341	+ 7,1
Grapes	58 643	57 727	+ 1,6
Plums	15 439	13 161	+ 17,3
Peaches	35 413	33 885	+ 4,5
Apricots	3 432	3 429	+ 0,1
TOTAL	495 385	554 088	- 10,6

The cause of the decline in the production of apples was the extra-ordinary heavy crop of the previous season which had exhausted the nutrient reserves of the trees necessary for development of the next season's crop.

The fairly big increases in plums and pears are attributable to new plantings which came into production as well as favourable weather conditions. Production for exports dropped from 312 831 tons in 1982 to 250 148 tons in 1983 and production for the domestic market increased from 241 250 tons to 245 237 tons. The division of total production (for fresh consumption) between export and domestic disposal for the present season and the past season is as follows:

		1983 %	1982 %
Apples:	Exports	47,4	59,6
	Domestic	52,6	40,4
Pears:	Exports	69,4	62,2
	Domestic	30,6	37,8
Grapes:	Exports	70,2	64,6
	Domestic	29,8	35,4
Peaches:	Exports	0,8	1,5
	Domestic	99,2	98,5
Apricots:	Exports	6,8	6,7
	Domestic	93,2	93,3

The reasons for the decline in the percentage of exports of apples and peaches in 1983 compared with 1982 are twofold:

Firstly the quality of the fruit was of a lower standard, in consequence of which a smaller percentage of the crop complied with export standards. Secondly price expectation for sales on the domestic market was better than for export. Producers accordingly retained exportable fruit for disposal on the domestic market.

Although it is too early to forecast the crop of the coming season (1984) the crop is expected to be considerably better than that of 1983 - the estimate in accordance with Schedule 1 is that it will increase from 495 385 to 542 564 tons (10%). The biggest increase will probably be in apples, production of which is expected to exceed the disappointing crop of 1983 by 14%.

Winter climatic conditions in all production areas were conduesive to fruit production and irrigation water is in plentiful supply.

4 GROSS VALUE OF PRODUCTION

Schedule 2 shows the gross value of exports as well as of the local market from 1973 to 1983 and an estimate for 1984. The gross value of exports represents producer payments and in respect of the domestic market it represents gross prices (prices realised on the market).

The gross value of exports dropped from R186 403 000 in 1982 to R120 713 000 for the past season, which amounts to a decline of 35%.

The main reasons for the decline is the smaller volume of exports in 1983 (20% less than in 1982) and heavier volumes of competitive products on the market (apples, pears and grapes), which resulted in lower prices. Earnings of, in particular, the fruit-kinds marketed later in the season were also adversely affected by the exchange rate (rand versus the European currencies). In respect of grapes, pears and apples, the firmer level of the rand reduced gross proceeds by 4,8 and 10% respectively compared with 1982.

The 1983 gross value of exports per ton of the respective fruit-kinds compares as follows with that of 1982.

	1983	1982	% Difference
Apples	R 386	R 512	- 25%
Pears	R 378	R 601	- 37%
Grapes	R 920	R1 037	- 11%
Plums	R 609	R 799	- 24%
Peaches	R 929	R1 121	- 17%
Apricots	R1 142	R1 148	- 1%
TOTAL	R 483	R 596	- 19%

For the domestic market the gross value of production rose from R85 420 000 for 1982 to R86 356 000 in 1983 - an increase of 1%.

The 1983 gross value of sales on the domestic market per ton of the respective fruit-kinds compares as follows with that of 1982:

	1983	1982	% Difference
Apples	R340	R335	+ 1%
Pears	R332	R327	+ 1%
Grapes	R486	R529	- 8%
Plums	R295	R374	- 21%
Peaches	R370	R359	+ 3%
Apricots	R285	R277	+ 3%
TOTAL	R352	R354	- 1%

(NOTE: The gross value of sales on the domestic market represents gross prices realised on the market and it is therefore not comparable with the gross value of exports, which represents payments to producers.)

As the increase in volume was just over 1% and the price reduction 1%, prices for fresh fruit on the domestic market did not keep pace with the inflation rate.

The estimate for 1984 is that the gross value of production for export will increase from R120 713 000 to R160 667 000 (by 33%), mainly on account of expected heavier volumes as well as better prices, in particular for apples.

The gross value of sales on the domestic market is estimated at R87 789 000 for 1984, which is only 2% more than that of 1983.

5 PRODUCTION POTENTIAL

There is considerable potential for expansion of production, especially in the Western Cape, but also in the Southwestern Cape and the Langkloof. In the established fruit-producing areas thre is still much high-potential land suitable for fruitgrowing, but now used for extensive crops. The main restrictive factors hampering planting of fruit on this land are capital, water and management.

The substantial plantings that have been taking place in recent years in areas outside the traditional fruit-regions such as Clanwilliam, Piketberg and even Swellendam, where soil and climatic factors are highly suitable for this purpose.

Although statistics of plantings in the Northwestern Cape and Transvaal are not available, considerable plantings of, in particular, grapes and peaches (mainly for domestic consumption) are taking place here.

Improved and virus-free plant material and cultural practices can contribute much to increased production although the higher quality demands of the market (in particular the competitive overseas market) are neutralising availability for fresh consumption to a great extent.

The following projection of total production ('000 cartons) in 1990 (compared with actual production in 1983) is based on tree survey information from registered export producers in the Western and the Eastern Cape.

	1983	1990	% CHANGE/YEAR
APPLES	20 975	25 619	+ 3
PEARS	7 929	11 885	+ 6
GRAPES	13 133	15 609	+ 2
PLUMS	2 647	4 663	+ 16
PEACHES AND NECTARINES	807	4 307	+ 54
APRICOTS	96	360	+ 34
TOTAL	45 587	62 443	+ 5

The average annual increase in production of all fruit-kinds is 5%, the greatest increase (54%) being expected in the nectarines, mainly yellow-fleshed types.

6 MARKET POTENTIAL

6.1 The export market

Deciduous fruit for export is disposed of in accordance with the single-channel marketing system in terms of which the Deciduous Fruit Board is the sole exporter. Strict quality standards, standardised packs and use of the Cape brand contribute to a strong preference for South African fruit on the part of the overseas trade and consumers.

Fierce competition is encountered from other Southern Hemisphere suppliers (New Zealand, Argentina, Australia and Chile), particularly in the case of apples, pears and grapes, although substantial premiums are consistently paid for Cape products, particularly in the main market (Europe).

The favourable price levels of the past decade increased competition from, in particular, Chile and according to statistics of plantings of grapes, apples and pears, competition is expected to be still fiercer in the near future.

The Board's strategy is to meet the growing demand for fresh fruit to the extent it can and to expand its market share in order to oust potential competitors from its traditional outlets.

6.2 The domestic market

The potential of the domestic market for fresh deciduous fruit is reflected by the following trends:

	1973		1983	
		Index		Index
Production	123 360 tons	100	245 237 tons	199
Gross value	R15 819 000	100	R86 357 000	546

It appears that supply (production) on the domestic market doubled over the past 10 years, and that gross value increased more then five-fold.

The gross value per ton of the respective fruit-kinds was as follows over the same period:

FRUIT-KIND	1973	1983	AVERAGE % INCREASE PER ANNUM
Apples	R123	R340	17,6
Pears	124	332	16,8
Grapes	167	486	19,1
Plums	134	295	12,0
Peaches	126	370	19,4
Apricots	136	266	6,5
TOTAL ALL FRUITS	R128	R352	17,5

It is evident from these two tables that notwithstanding a doubling in the supply of all fruit from 1973 to 1983, the gross prices per ton rose considerably more than the average annual inflation rate.

Increasing expendable income of the lower-income groups is expected to increase per capita consumption considerably. The health aspect of fresh fruit, strongly emphasised lately, combined with concerted merchandising, should also make a substantial contribution to the growing potential of the domestic market.

7 PRODUCER PAYMENTS

Schedule 3 reflects the trend of overseas prices, producer payments and net farm income per carton per fruit-kind for the period 1971/72 to 1982/83.

The disappointing results of the 1983 season, especially when compared with 1982, for all fruit-kinds are noticeable. In the case of apples, for example, a net income of R4,10 per carton was realised compared with only R1,03 during the past season.

The effect of cost rises on net income is clear. In the case of plums, for example, the overseas price of 1981 was more or less the same than that of 1983 (R6,64 and R6,52 respectively) but cost increases resulted in reducing net income from R1,44 in 1981 to R0,28 in 1983.

Similar information relating to the domestic market is not available as the Board does not control domestic disposal of apples, pears and apricots, and only a relatively small percentage of the domestic disposal of the other fruit-kinds.

8 SUBSTITUTION

On account of health-consciousness of consumers all over the world, the trend is that fresh fruit is preferred to processed products. In consequence there is a gradual switch-over in favour of the fresh product.

9 OUTLOOK FOR THE FUTURE AND RELATIVE IMPORTANCE OF THE INDUSTRY

It is evident from Schedule 3 that, although big fluctuations in the net income per unit occur from one season to another, all fruit-kinds, with the exception of apples in 1981 and plums in 1983, could consistently recover costs and realise a positive net income.

If, however, the net farm income per carton is expressed in real terms, which means that when the South African inflation rate is taken into account, it appears that the profitability of all fruit-kinds reflect a fast diminishing trend, particularly since 1981.

The real NFI/carton is as follows (basis year 1978):

	APPLES	PEARS	GRAPES	PLUMS	PEACHES	APRICOTS
1978	R2,31	R4,29	R2,67	R2,14	R1,20	R1,25
1979	0,44	3,05	1,80	1,99	1,54	1,69
1980	1,96	3,24	1,90	1,99	1,28	1,35
1981	-1,40	1,48	0,48	0,83	0,48	0,81
1982	1,70	2,13	0,78	0,51	0,39	1,09
1983	0,30	0,31	0,22	-0,96	0,04	0,60

The main reasons for diminishing profitablilty are, firstly, the high inflation rate in South Africa, which results in an increase of about 15% per annum in all costs in production and exporting, compared with an inflation rate of only 4 to 6% per annum in our marketing countries, where price increases are accordingly confined to this level.

Secondly the favourable price levels of Cape fruit, mainly in Europe, stimulated the production of grapes, apples and pears in particular in competitive Southern hemisphere countries, and this constitutes a threat to South Africa's market share. The heavier overall supply naturally also has an adverse effect on selling prices.

To avert Cape's forfeiting its market share to competitors, it is important that growth be effected in exports. Producers are accordingly encouraged to plant more of the fruit-kinds for which there is a favourable demand. On account of the diminishing trend of profit margins in recent times and the big capital amounts required for planting, growth is sluggish even at this stage. Should profit margins drop further, stagnation in production may set in, with serious consequences to the industry.

The economy of the Western and the Eastern Cape (Langkloof) is to a great extend dependant on the deciduous fruit industry. At production level alone about 1 500 producers of fruit for fresh consumption provide employment to about 10 000 Whites and 140 000 Non-Whites. If the other agencies economically dependent on the deciduous fruit industry are taken into account, it is estimated that over 500 000 persons livelihood depends on the production of deciduous fruit in the Western and the Eastern Cape.

The capital invested in about 32 000 hectares of intensively-cultivated land under fruit is estimated at over R600 million. Service industries have been established around the deciduous fruit industry and are to a great extent dependant on it. For exports, for example, about R100 million is spent annually on plant material, fertilisers/fertilisation, herbicides, pest control materials, fuel and oil, water, packing material and electricity.

Deciduous fruit exports are also an important earner of foreign currency. Gross earnings from exports in 1983 amounted to R260 million, of which R170 million may be regarded as net currency earnings.

10 SYNOPSIS

In contrast to the record season of 1982 the 1983 season was characterised by disappointments and pleasant surprises.

Total production of deciduous fruit for fresh consumption dropped from 554 088 tons in 1982 to 495 385 tons in 1983 (by 10,6%). This production is still the second-highest in history.

Fruit exports declined from 312 831 tons in 1982 to 250 148 tons in 1983 (by 20%). Apple exports in particular were very disappointing.

Domestic sales, however, were slightly higher than those of the past season, namely 245 237 tons in 1983 compared with 241 257 tons in 1982 - an increase of 1,6%.

The gross value of sales dropped from the record amount of R271,8 million in 1982 to R207,1 million in 1983 - a decline of 24%.

The gross value of domestic sales in 1983 was more or less the same as that of the previous season, and that of export declined from R186,4 million in 1982 to R120,7 million in 1983 - a decline of 35%.

The main reasons for this decline in export earnings were the smaller volume of exports and substantially heavier competitive supplies of apples, pears and grapes, which had an adverse effect on overseas prices. In addition substantial exchange rate losses were incurred, in particular during the latter part of the marketing season, on account of firming of the Rand against the currencies of the main marketing countries.

Net earnings to producers from export declined from R80,7 million in 1982 to only R17,6 million during the past season - a drop of 78%. The financial position of, in particular, plum producers and some grape producers is serious after the third successive season of disappointing results.

Thanks to favourable climatic conditions in all the production areas production during the coming season is expected to be considerably bigger than that of the past season. Climatic conditions from now until the harvesting stage can have a profound effect on the preliminary 1984 estimate of 542 564 tons, although it is already clear that apple crops in particular will be considerably better than in 1983.

Marketing prospects for export are affected by competition, exchange rates, economic conditions in our marketing countries and the quality of Cape fruit.

With regard to competition it is already clear that apples will be entering a better season, mainly on account of a considerably lower European crop than that of last season, which will result in low European supplies. The other factors are, however, unpredictable at this stage.

Domestic prices in 1984 are expected to at least keep pace with inflation.

With regard to the long term, the prospects for exports are fairly favourable. In general the demand for Cape fruit exceeds the supply. In recent seasons this compelled buyers to turn to our competitors' products.

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The favourable prices for Cape fruit also encouraged other Southern Hemisphere competitors to plant apples, pears and grapes at a rapid rate.

Notwithstanding expected increasing competition it is hoped that Cape is in a relatively favourable position thanks to the benefits of single-channel marketing which has created a strong preference for the South African product on the part of the trade and consumers.

South Africa's high inflation rate and the resultant rapid rise in production and export costs have, however, resulted in weakening out bargaining position compared with that of competitors, in whose case lower inflation rates apply.

In view of the growing demand for health food worldwide, it is important that sufficient Cape fruit of the required cultivars, size and quantity be produced for export. The problem, however, is that in recent seasons there was not sufficient economic encouragement for expansion. It is therefore of the utmost importance that the declining trend of profitability, which can give rise to stagnation in production, be counter-acted in view of the importance of the deciduous fruit industry in the economic and social well-being of the Western and the Eastern Cape.

The domestic market is becoming a more important factor in disposal of fresh fruit. With stricter quality requirements by overseas markets, where competition is becoming fiercer, increased consumption on the domestic market is of the utmost importance. It is also becoming increasingly important that a sounder balance between exports and domestic disposals be effected in order to spread risk. Per capita consumption of fresh fruit in the RSA compares unfavourable with that of most overseas countries. Attention should therefore be given to purposeful sales promotion.

CRvW/L/ev
1983/11/04

SAGTEVRUGTERAAD / DECIDUOUS FRUIT BOARD

BYLAE
ANNEXURE 1

PRODUKSIE VAN SAGTEVRUGTE VIR VARS VERBRUIK IN METRIEKE TON - /
PRODUCTION OF DECIDUOUS FRUIT FOR FRESH CONSUMPTION IN METRIC TONS - 1973 - 1984

	1973	IND	1974	IND	1975	IND	1976	IND	1977	IND	1978	IND
APPELS/APPLES												
Uitvoer/Export	149790	100	150835	101	178438	119	195338	130	122131	82	195467	130
Plaaslik/Local	76170	100	83695	110	96434	127	116671	153	113855	149	111603	147
Totaal Vars/ Total Fresh	225960	100	234530	104	274872	122	312011	138	235986	104	307070	136
PERE/PEARS												
Uitvoer/Export	33758	100	23638	70	30930	92	36758	109	39914	118	35913	106
Plaaslik/Local	13737	100	11492	84	13988	102	16109	117	21921	160	12897	94
Totaal Vars/ Total Fresh	47495	100	35130	74	44918	95	52867	111	61835	130	48810	103
DRUIWE/GRAPES												
Uitvoer/Export	25698	100	27755	108	28353	110	24911	97	19230	75	24719	96
Plaaslik/Local	11900	100	13368	112	12439	105	11840	99	11890	100	12623	106
Totaal Vars/ Total Fresh	37598	100	41123	109	40792	108	36751	98	31120	83	37342	99
PRUIME/PLUMS												
Uitvoer/Export	2238	100	2773	124	2994	134	4123	184	3195	[illegible]	3200	143
Plaaslik/Local	2626	100	3293	125	4547	173	4785	182	4397	167	3661	139
Totaal Vars/ Total Fresh	4864	100	6066	125	7541	155	8908	183	[illegible]	[illegible]	6861	141
PERSKES/PEACHES												
Uitvoer/Export	898	100	883	98	654	73	831	93	583	65	448	50
Plaaslik/Local	17492	100	18294	105	20469	117	[illegible]	[illegible]	[illegible]	154	22114	126
Totaal Vars/ Total Fresh	18390	100	19177	104	21123	115	[illegible]	[illegible]	[illegible]	[illegible]	22562	123
APPELKOSE/APRICOTS												
Uitvoer/Export	88	100	87	99	67	76	[illegible]	[illegible]	[illegible]	[illegible]	146	166
Plaaslik/Local	1435	100	1400	98	[illegible]	[illegible]	[illegible]	[illegible]	[illegible]	[illegible]	[illegible]	[illegible]
Totaal Vars/ Total Fresh	1523	100	1487	98	1494	98	[illegible]	[illegible]	[illegible]	[illegible]	[illegible]	[illegible]
TOTAAL/TOTAL												
Uitvoer/Export	212470	100	205971	97	241436	114	[illegible]	[illegible]	199071	[illegible]	[illegible]	[illegible]
Plaaslik/Local	123360	100	131542	107	149654	121	[illegible]	144	181484	147	165191	134
Totaal Vars/ Total Fresh	335830	100	337513	101	[illegible]	116	[illegible]	[illegible]	[illegible]	[illegible]	[illegible]	127

	1979	IND	1980	IND	1981	IND	1982	IND	1983	IND	*1984	IND
APPELS/APPLES												
Uitvoer/Export	176183	118	180230	120	167618	112	221978	148	143896	96	182500	122
Plaaslik/Local	105836	139	147799	194	165527	217	150567	198	*160000	210	164200	216
Totaal Vars/ Total Fresh	282019	125	328029	145	333145	147	372545	165	303896	134	346700	153
PERE/PEARS												
Uitvoer/Export	41885	124	41343	122	46672	138	45645	135	54562	162	52500	156
Plaaslik/Local	12066	88	15742	115	15286	111	27696	202	*24000	175	24700	180
Totaal Vars/ Total Fresh	53951	114	57085	120	61958	130	73341	154	78562	165	77200	163
DRUIWE/GRAPES												
Uitvoer/Export	37839	147	36077	140	29672	116	37278	145	41143	160	45964	179
Plaaslik/Local	13392	113	16056	135	16605	140	20449	172	*17500	147	18000	151
Totaal Vars/ Total Fresh	51231	136	52133	139	46277	123	57727	154	58643	156	63964	170
PRUIME/PLUMS												
Uitvoer/Export	4118	184	5626	251	4951	221	7206	322	10019	448	10264	459
Plaaslik/Local	4964	189	5820	222	4064	155	5955	227	* 5420	206	5553	211
Totaal Vars/ Total Fresh	9082	187	11446	235	9015	185	13161	271	15439	317	15817	325
PERSKES/PEACHES												
Uitvoer/Export	467	52	627	70	415	46	494	55	296	33	527	59
Plaaslik/Local	26071	149	32902	188	27902	160	33391	191	*35117	201	35000	200
Totaal Vars/ Total Fresh	26538	144	33529	182	28317	154	33885	184	35413	193	35527	193
APPELKOSE/APRICOTS												
Uitvoer/Export	109	124	177	201	203	231	230	261	232	264	356	405
Plaaslik/Local	2068	144	2458	171	2627	183	3199	223	*3200	223	3000	209
Totaal Vars/ Total Fresh	2177	143	2635	173	2830	186	3429	225	3432	225	3356	220
TOTAAL/TOTAL												
Uitvoer/Export	[illegible]	123	264080	124	249531	118	312831	147	250148	118	292111	137
Plaaslik/Local	164997	[illegible]	220773	179	232011	188	241257	196	*245237	199	250453	203
Totaal Vars/ Total Fresh	425098	127	484857	144	481542	143	554088	165	495385	148	542564	162

*Beraamd/Estimated (X + Aug)

Perskes sluit Nektariens in / Peaches include Nectarines

Pruime sluit Pruimedante in / Plums include Prunes

Appels en Pere Plaaslik - voor 1982 vanaf heffing bereken, vanaf 1982 op werklike [illegible] bereken /
Apples and Pears Local - before 1982 calculated from levies, as from 1982, calculated [illegible] actual weight.

29/09/1983
KG [illegible]

SAGTEVRUGTERAAD DECIDUOUS FRUIT BOARD

BRUTO WAARDE VAN SAGTEVRUGTE VIR VARSVERBRUIK (R'000)
GROSS VALUE OF DECIDUOUS FRUIT FOR FRESH CONSUMPTION (R'000) 1973 - 19[illegible]

Seisoen/Season	Appels/ Apples	Indeks/ Index	Pere/ Pears	Indeks/ Index	Druiwe/ Grapes	Indeks/ Index	Perskes/ Peaches	Indeks/ Index	Pruime/ Plums	Indeks/ Index	Appelkose/ Apricots	Indeks/ Index	Totaal/ Total	Indeks/ Index
1973														
*Uitvoer/Export	33 555	100	7 458	100	12 113	100	406	100	1 183	100	40	100	54 792	100
**Plaaslik/Local	9 369	100	1 703	100	1 992	100	2 209	100	351	100	195	100	15 819	100
TOTAAL/TOTAL	42 924	100	9 161	100	14 105	100	2 615	100	1 534	100	235	100	70 611	100
1974														
*Uitvoer/Export	22 141	66	5 754	77	13 553	112	367	90	1 345	114	44	110	43 205	79
**Plaaslik/Local	12 136	130	1 770	104	2 799	141	2 608	118	515	147	228	117	20 055	127
TOTAAL/TOTAL	34 277	80	7 524	82	16 352	116	2 975	114	1 860	121	272	116	63 260	90
1975														
*Uitvoer/Export	39 253	117	7 800	104	15 035	124	438	108	1 651	140	44	110	64 222	117
**Plaaslik/Local	15 183	162	2 346	138	2 858	143	3 697	167	866	247	286	147	25 234	160
TOTAAL/TOTAL	54 436	127	10 146	110	17 893	127	4 135	158	2 517	164	330	140	89 456	127
1976														
*Uitvoer/Export	31 233	93	9 861	132	17 268	143	402	99	2 133	180	43	108	60 940	111
**Plaaslik/Local	17 851	191	2 545	149	3 468	174	4 462	202	969	276	358	184	29 653	187
TOTAAL/TOTAL	49 084	114	12 406	135	20 736	147	4 864	186	3 102	202	401	171	90 593	128
1977														
*Uitvoer/Export	40 048	119	12 254	163	13 766	114	337	83	1 941	164	66	165	68 412	125
**Plaaslik/Local	24 251	259	3 223	189	3 813	191	5 103	231	1 016	289	393	202	37 799	239
TOTAAL/TOTAL	64 299	150	15 477	168	17 579	125	5 440	208	2 957	193	459	195	106 211	150
1978														
*Uitvoer/Export	61 799	184	16 117	215	23 266	192	402	99	2 311	195	102	255	103 997	190
**Plaaslik/Local	23 995	256	2 644	151	4 541	228	4 972	225	917	261	456	234	37 525	237
TOTAAL/TOTAL	85 794	200	18 761	204	27 807	197	5 374	206	3 228	210	558	237	141 522	200
1979														
*Uitvoer/Export	40 891	122	17 606	235	32 191	266	550	135	3 326	281	99	248	94 664	173
**Plaaslik/Local	27 113	289	3 967	233	5 792	291	5 985	271	1 324	377	472	242	44 653	282
TOTAAL/TOTAL	68 004	158	21 573	235	37 983	269	6 535	250	4 650	303	571	243	139 317	197

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Seisoen/Season	Appels/ Apples	Indeks/ Index	Pere/ Pears	Indeks/ Index	Druiwe/ Grapes	Indeks/ Index	Perskes/ Peaches	Indeks/ Index	Pruime/ Plums	Indeks/ Index	Appelkose/ Apricots	Indeks/ Index	Totaal/ Total	Indeks/ Index
1980														
*Uitvoer/Export	67 152	200	20 770	222	35 478	243	751	197	5 492	464	152	380	129 804	237
**Plaaslik/Local	38 576	412	4 124	241	6 174	416	8 297	375	1 556	443	632	324	59 349	375
TOTAAL/TOTAL	105 728	256	24 894	271	41 651	[illegible]	9 048	346	7 048	459	784	344	189 153	268
1981														
*Uitvoer/Export	35 269	105	19 119	255	25 577	211	418	103	3 876	328	174	415	84 433	154
**Plaaslik/Local	48 665	519	4 586	269	7 755	889	8 359	378	1 525	454	707	363	71 597	454
TOTAAL/TOTAL	83 934	196	23 705	258	33 332	236	8 777	336	5 401	352	881	375	156 030	221
1982														
*Uitvoer/Export	113 722	339	27 432	366	38 674	319	554	136	5 757	487	264	660	186 403	340
**Plaaslik/Local	50 440	538	9 057	531	10 810	543	11 997	543	2 230	635	896	454	85 420	540
TOTAAL/TOTAL	164 162	382	36 489	397	49 484	351	12 551	480	7 987	521	1 150	489	271 823	395
1983***														
*Uitvoer/Export	55 588	166	20 630	275	37 855	313	275	68	6 100	516	265	663	120 713	226
**Plaaslik/Local	54 400	581	7 968	468	8 500	427	12 976	587	1 600	456	912	468	86 356	546
TOTAAL/TOTAL	109 988	256	28 598	311	46 355	329	13 251	507	7 700	502	1 177	501	207 069	293
1984***														
*Uitvoer/Export	84 500	252	25 250	337	42 900	354	570	140	7 038	595	409	1 022	160 667	293
**Plaaslik/Local	55 418	591	8 200	482	8 743	439	12 933	585	1 640	467	855	438	87 789	555
TOTAAL/TOTAL	139 918	326	33 450	364	51 643	366	13 503	516	8 678	566	1 264	538	248 456	352

*Uitvoer - Uitbetaling aan produsente / Export - Payment to producers.
**Plaaslik - Appels, Pere en Appelkose - Bruto prys behaal op 14 Nasionale Markte toegepas op totale verkope / Local - Apples, Pears and Apricots - Gross price realised on 14 National Markets applied on total sales.

Perskes, Pruime en Druiwe - Bruto prys behaal op 14 Nasionale Markte plus SVR gemiddelde prys toegepas op balans van verkope / Peaches, Plums and Grapes - Gross price realised on 14 National Markets plus DFB average price applied on balance of sales.

***1983 - Voorlopige beraming / Preliminary estimate.
1984 - Uitvoer - Voorlopige uitvoerskatting X Beraamde Betalings / Export - Preliminary export estimates X estimated payments.
Plaaslik - Gebaseer op 1983 bruto waarde en oesskatting / Local - Based on 1983 gross value and crop estimate.

KAAPSTAD/CAPE TOWN
29/09/83

KMG/rr

Bylae
Annexure 3

SAGTEVRUGTERAAD/DECIDUOUS FRUIT BOARD

INKOMSTE EN KOSTETENDENSE VAN DIE VRUGTE-UITVOERBEDRYF PER KARTON/ INCOME AND COST TRENDS OF THE FRUIT EXPORT INDUSTRY PER CARTON

(1971/72 tot/to 1982/83)

		OORSESE PRYS/ OVERSEAS PRICE	UITVOERKOSTE/ EXPORT COSTS	BETALING/ PAYMENT	PRODUKSIE- EN VERPAKKINGSKOSTE/PRODUCTION AND PACKING COST	*NBI/NFI
		R	R	R	R	R
APPELS/APPLES						
1971/72	(18,14kg)	5,11	2,66	2,45	1,70	0,75
1972/73	"	7,24	2,97	4,27	1,85	2,42
1973/74	"	6,16	3,41	2,75	2,05	0,70
1974/75	"	7,96	3,86	4,10	2,25	1,85
1975/76	"	7,75	4,81	2,94	2,55	0,39
1976/77	(18,2 kg)	11,74	5,65	6,09	3,11	2,98
1977/78	"	12,32	6,51	5,81	3,50	2,31
1978/79	"	11,20	6,94	4,26	3,75	0,51
1979/80	(18,25kg)	14,00	7,16	6,84	4,15	2,69
1980/81	"	11,75	7,91	3,84	4,65	-0,81
1981/82	"	19,11	9,76	9,35	5,25	4,10
1982/83	"	17,40	10,37	7,03	6,00	1,03
PERE/PEARS						
1971/72	(15 kg)	4,16	1,89	2,27	1,06	1,21
1972/73	"	5,49	1,94	3,55	1,18	2,37
1973/74	"	6,13	2,26	3,87	1,31	2,56
1974/75	"	6,90	2,95	3,95	1,45	2,50
1975/76	"	7,89	3,72	4,17	1,70	2,47
1976/77	"	8,96	4,27	4,69	2,22	2,47
1977/78	"	11,71	4,92	6,79	2,50	4,29
1978/79	"	11,58	5,26	6,32	2,80	3,52
1979/80	"	12,89	5,35	7,54	3,10	4,44
1980/81	"	11,66	5,54	6,12	3,55	2,57
1981/82	"	15,51	6,52	8,99	4,00	4,99
1982/83	"	12,86	7,30	5,56	4,50	1,06
DRUIWE/GRAPES						
1971/72	(4,5 kg)	2,77	1,13	1,64	0,94	0,70
1972/73	"	3,34	1,15	2,19	1,04	1,15
1973/74	"	3,71	1,51	2,20	1,15	1,05
1974/75	"	4,23	1,84	2,39	1,28	1,11
1975/76	"	5,51	2,37	3,14	1,50	1,64
1976/77	"	6,29	3,03	3,26	1,78	1,48
1977/78	(5,0 kg)	8,35	3,63	4,72	2,05	2,67
1978/79	"	8,13	3,75	4,38	2,30	2,08
1979/80	"	9,05	3,90	5,15	2,55	2,60
1980/81	"	8,36	4,05	4,31	2,86	1,45
1981/82	"	9,75	4,56	5,19	3,35	1,84
1982/83	"	9,75	4,95	4,80	3,85	0,95
[illegible]/PLUMS						
1971/72	(6,55 kg)	3,44	0,91	2,53	1,31	1,22
1972/73	"	4,48	1,00	3,48	1,45	2,03
1973/74	"	4,26	1,14	3,12	1,61	1,51
1974/75	"	5,09	1,53	3,56	1,79	1,77
1975/76	"	5,21	1,88	3,33	2,10	1,23
1976/77	"	6,55	2,49	4,06	2,42	1,64
1977/78	"	7,17	2,53	4,64	2,50	2,14
1978/79	"	8,11	3,02	5,09	2,80	2,29
1979/80	(6,25 kg)	7,61	2,51	5,10	2,37	2,73
1980/81	"	6,64	2,53	4,11	2,67	1,44
1981/82	"	7,19	3,00	4,19	3,00	1,19
1982/83	"	[illegible]	3,35	3,26	3,45	-0,19
PERSKES/PEACHES						
1971/72	(2,3 kg)	1,72	0,79	0,93	0,60	0,33
1972/73	"	2,05	0,79	1,26	0,66	0,60
1973/74	"	1,93	0,85	1,08	0,73	0,35
1974/75	"	2,91	1,29	1,62	0,81	0,81
1975/76	"	2,84	1,65	1,19	0,95	0,24
1976/77	"	3,43	1,94	1,49	1,09	0,40
1977/78	"	4,97	2,57	2,40	1,20	1,20
1978/79	"	5,54	2,42	3,12	1,34	1,78
1979/80	(2,5 kg)	5,67	2,43	3,24	1,49	1,75
1980/81	"	5,11	2,59	2,52	1,68	0,84
1981/82	"	5,97	3,16	2,81	1,90	0,91
1982/83	"	[illegible]	[illegible]	2,24	2,18	0,06

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APPELKOSE (P/L)/ APRICOTS (P/L)	OORSESE PRYS/ OVERSEAS PRICE	UITVOERKOSTE/ EXPORT COSTS	BETALING/ PAYMENT	PRODUKSIE- EN VERPAKKINGSKOSTE/PRODUCTION AND PACKING COST	*/ *NBI/NFI
	R	R	R	R	R
1971/72 (5,2 kg)	3,09	0,98	2,11	1,31	0,80
1972/73 "	3,63	0,95	2,68	1,45	1,23
1973/74 "	4,00	1,19	2,81	1,61	1,20
1974/75 "	5,11	1,66	3,45	1,79	1,66
1975/76 "	6,50	2,67	3,83	2,10	1,73
1976/77 "	6,24	2,96	3,28	2,42	0,86
1977/78 "	6,94	3,19	3,75	2,50	1,25
1978/79 "	8,86	4,11	4,75	2,80	1,95
1979/80 (4,75 kg)	7,81	3,61	4,20	2,35	1,85
1980/81 "	7,73	3,67	4,06	2,65	1,41
1981/82 "	9,47	4,01	5,46	2,90	2,56
1982/83 "	[illegible]	4,13	5,52	3,35	2,17

*NBI = Netto Boerdery-inkomste
NFI = Net Farm Income

[illegible] SEPTEMBER 1983
KAAPSTAD
KG/ldl