

# Cape Flora AGM

## SA Exports and Estimates

5 August 2015





# Estimate methodology

Export estimate (theoretical):

- number of hectares planted per cultivar
- age distribution linked to production curve
- previous season exports
- informed adjustments made (producers, exporters, consultants)

# Fynbos: Total area planted (ha)

<b>Group</b>	<b>2012</b>	<b>2013</b>	<b>2014</b>	<b>2014 vs 2013</b>
Protea	661	601	595	-1%
Leucospermum	200	206	201	-2%
Leucadendron	132	143	134	-6%
Greens	54	59	67	+14%
<b>Total</b>	<b>1 047</b>	<b>1 009</b>	<b>996</b>	<b>-1%</b>

# Age Distribution

<b>Protea</b>	<b>0-2 years</b>	<b>3-5 years</b>	<b>6-17 years</b>	<b>18-25 years</b>	<b>25+ years</b>	<b>Total</b>
Hectares	84	121	283	83	24	595
Distribution	14%	20%	48%	14%	4%	
<b>Leucospermum</b>	<b>Non-bearing</b>	<b>2-4 years</b>	<b>5-12 years</b>	<b>12+ years</b>	<b>Total</b>	
Hectares	15	72	112	3	201	
Distribution	7%	36%	56%	2%		
<b>Leucadendron</b>	<b>Non-bearing</b>	<b>2-4 years</b>	<b>5-12 years</b>	<b>12+ years</b>	<b>Total</b>	
Hectares	13	44	61	16	134	
Distribution	10%	33%	45%	12%		



# Participating Exporters:

AFG

Agriver SA

Anzet Flora

Bergflora

Cape Mountain Flora

De Mooij

FHSA

Fresh Cap Marketing

Fynbloem/Bloemenkraal

Intaba Flowers

OZ Flora

Proteus Logistics

Snyman Flora

# Estimate Comparison 2014/2015

	<b>2014/2015 Est Exports</b>	<b>2014/2015 Act Exports</b>	<b>2014/2015 Estimate vs 2014/2015 Actuals</b>	
<b>Protea</b>	3 418 177	3 169 055	249 122	8%
<b>Leucadendron</b>	7 966 056	6 610 872	1 355 184	20%
<b>Leucospermum</b>	9 596 423	9 282 094	314 329	3%
<b>Total</b>	<b>20 979 656</b>	<b>19 062 021</b>	<b>1 917 635</b>	<b>10%</b>

# Fynbos Estimate 2015/2016

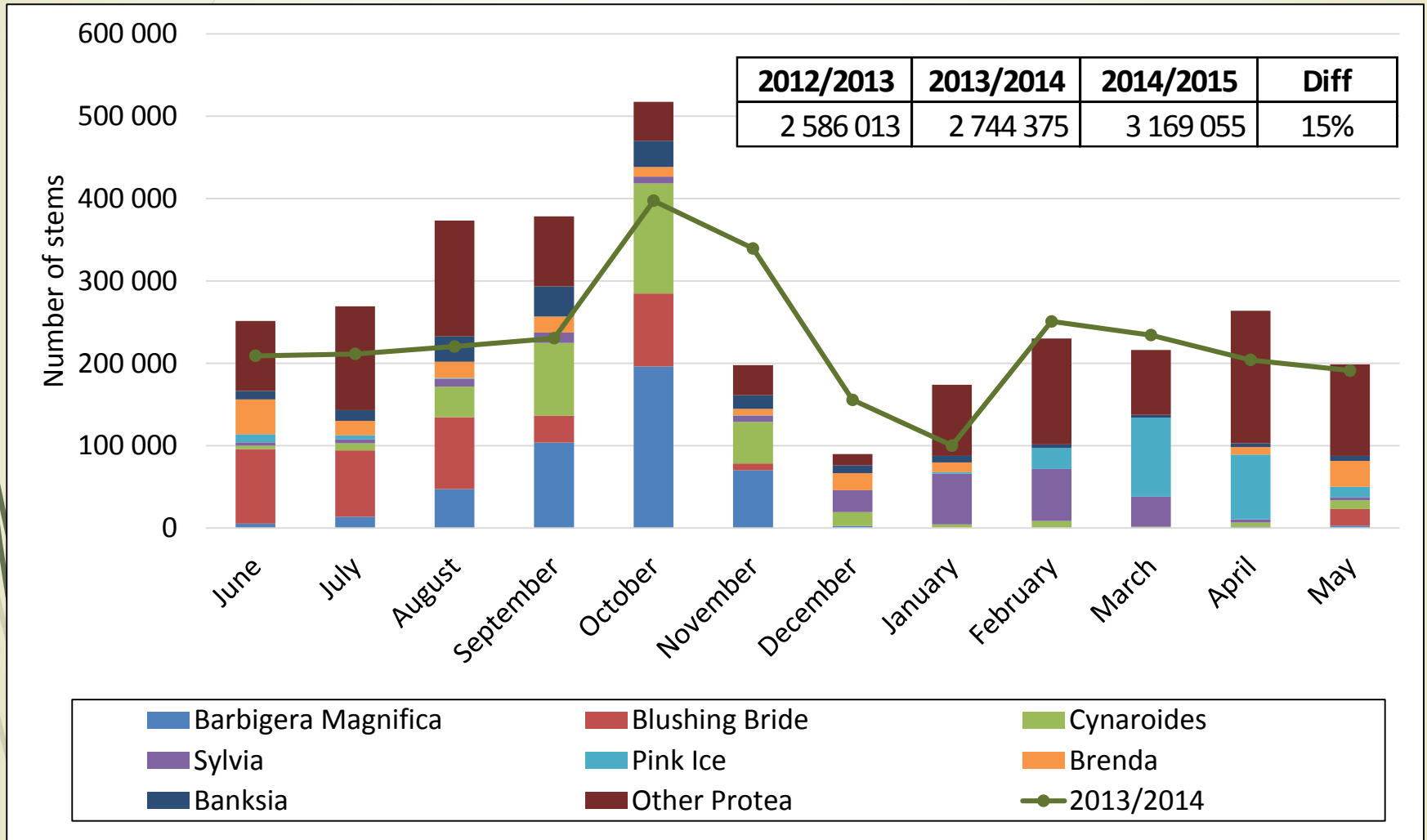
	2012/2013	2013/2014	2014/2015	3 yr Average	2015/2016 Est	2015/2016 Estimate vs 2014/2015 Actuals	
Protea	2 586 013	2 744 375	3 169 055	2 833 148	<b>3 569 201</b>	<b>400 146</b>	<b>13%</b>
Leucadendron	6 173 211	6 684 673	6 610 872	6 489 585	<b>6 812 859</b>	<b>201 987</b>	<b>3%</b>
Leucospermum	6 163 366	7 677 705	9 282 094	7 707 722	<b>9 890 601</b>	<b>608 507</b>	<b>7%</b>
<b>Total</b>	<b>14 922 590</b>	<b>17 106 753</b>	<b>19 062 021</b>	<b>17 030 455</b>	<b>20 272 661</b>	<b>1 210 640</b>	<b>6%</b>

# Protea Estimates

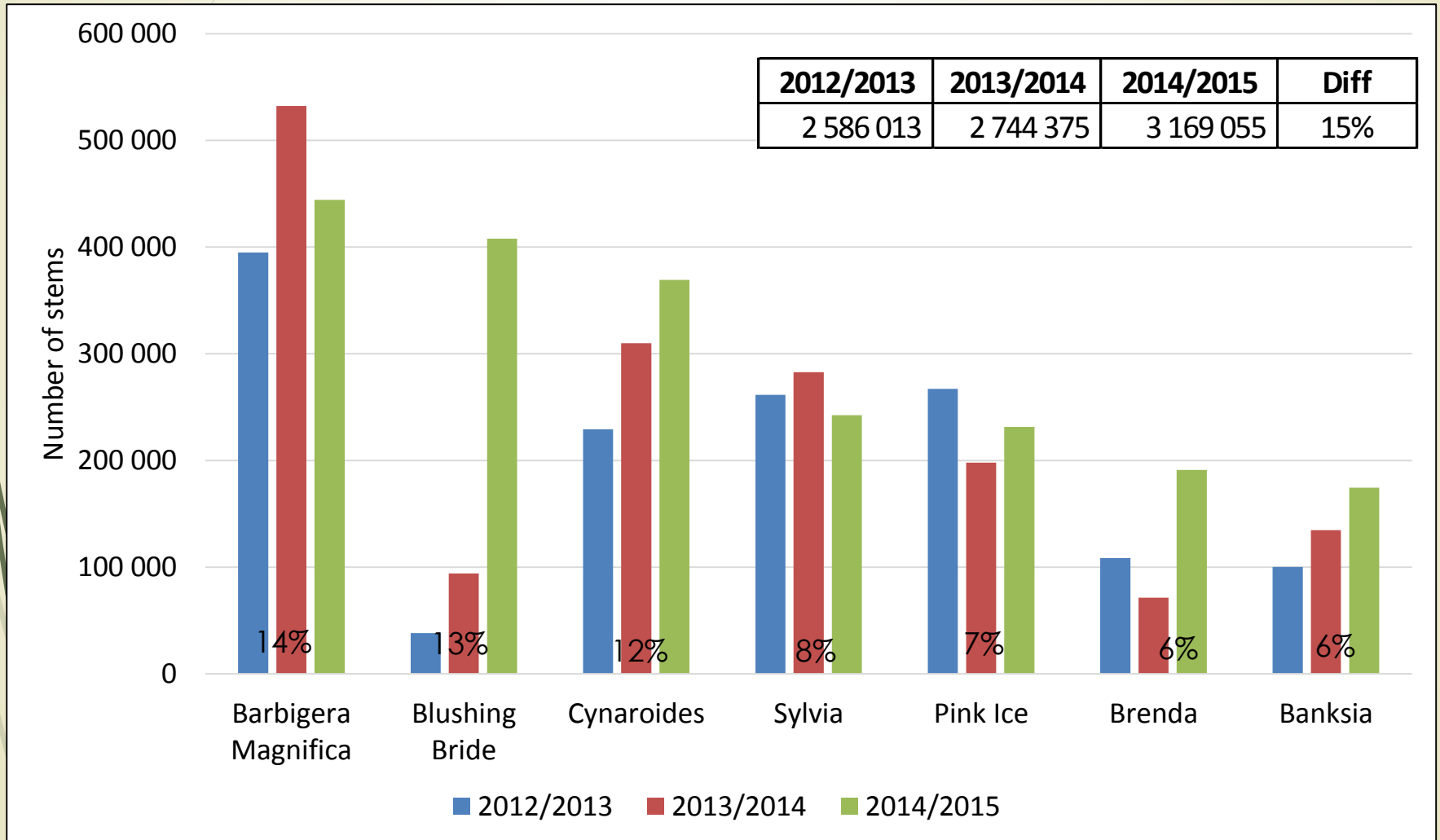
Variety	2012/2013 Exports	2013/2014 Exports	2014/2015 Exports	3 yr Average	2015/2016 Est Exports	2015/2016 Estimate vs 2014/2015 Actuals	
Blushing Bride	38 069	94 000	407 740	179 936	547 776	140 036	34%
Barbigera Magnifica	394 986	532 297	444 314	457 199	450 063	5 749	1%
Cynaroides	229 167	309 982	369 188	302 779	413 490	44 302	12%
Sylvia	261 576	282 845	242 345	262 255	277 870	35 525	15%
Pink Ice	267 036	197 937	231 423	232 132	259 194	27 771	12%
Brenda	108 640	71 425	191 149	123 738	225 536	34 387	18%
Banksia	100 217	134 687	174 466	136 457	174 466	-	0%
Venus	83 335	136 419	144 975	121 576	154 760	9 785	7%
Grandiceps	75 357	104 941	89 100	89 799	138 316	49 216	55%
Carnival	80 360	117 455	102 307	100 041	108 752	6 445	6%
Mundii	223 590	87 422	102 300	137 771	102 300	-	0%
Ivy	-	120 725	79 261	66 662	79 261	-	0%
Other/Private	723 680	554 240	590 487	622 802	637 417	46 930	8%
<b>Total Protea</b>	<b>2 586 013</b>	<b>2 744 375</b>	<b>3 169 055</b>	<b>2 833 148</b>	<b>3 569 201</b>	<b>400 146</b>	<b>13%</b>



# Protea Monthly Exports 2014/2015



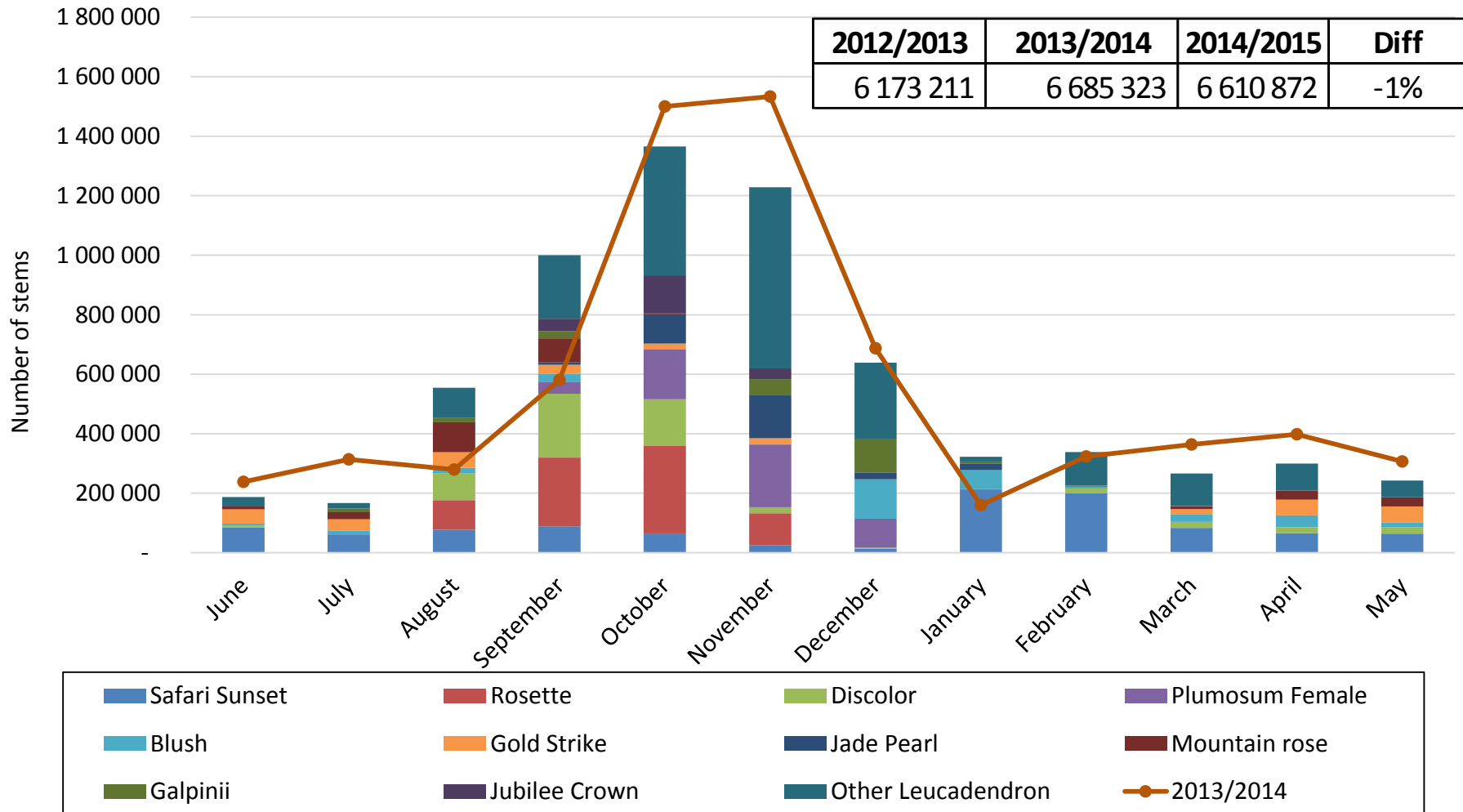
# Protea Exports: 3 year comparison



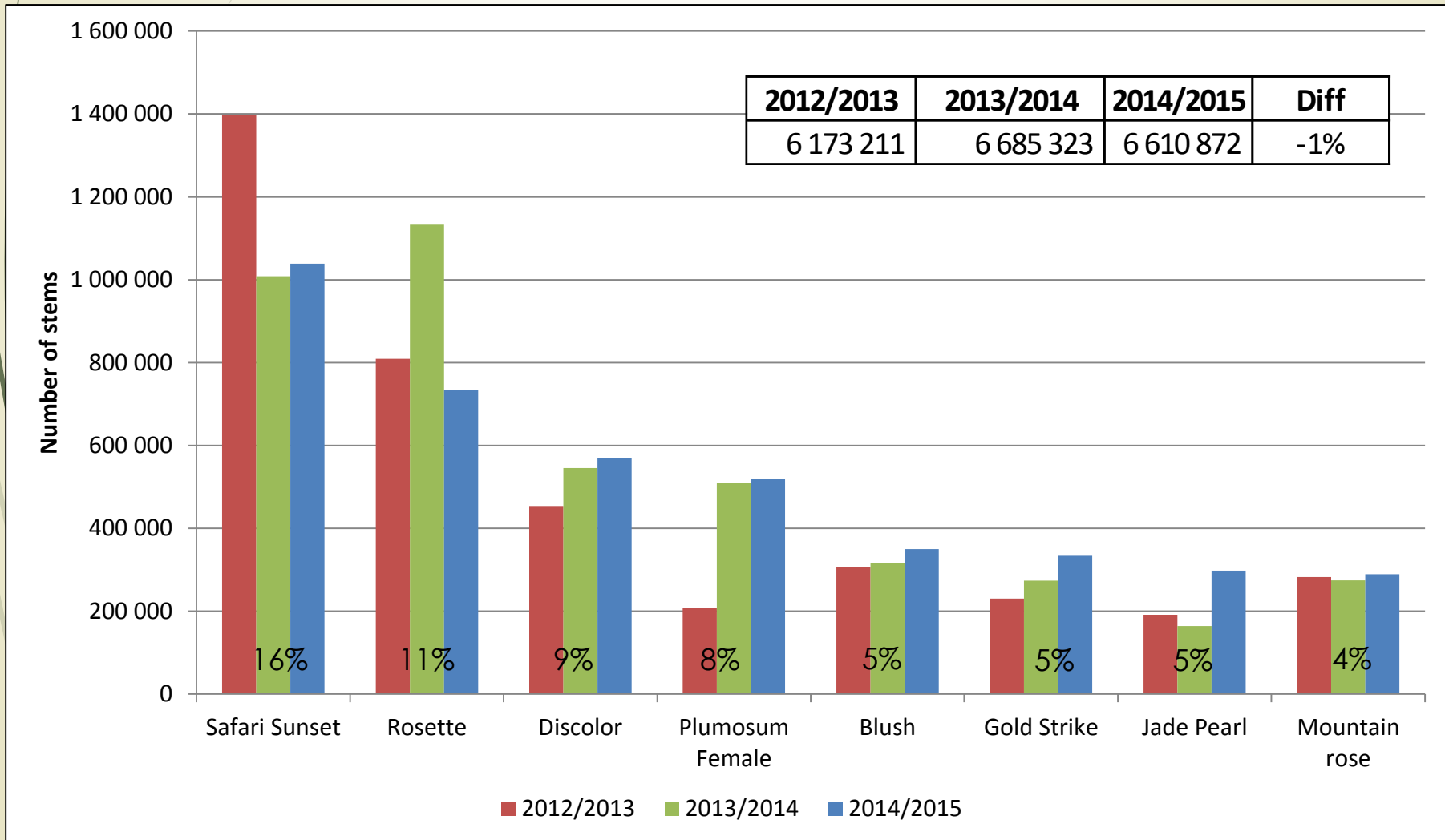
# Leucadendron Estimates

Variety	2012/2013 Exports	2013/2014 Exports	2014/2015 Exports	3 yr Average	2015/2016 Estimate	2015/2016 Estimate vs 2014/2015 Actuals	
Safari Sunset	1 397 932	1 008 310	1 038 516	1 148 253	1 088 442	49 926	5%
Rosette	808 816	1 132 819	734 223	891 953	768 066	33 843	5%
Discolor	453 592	545 136	568 729	522 486	568 729	-	0%
Plumosum Female	208 770	508 816	518 653	412 080	518 653	-	0%
Blush	305 716	317 090	349 511	324 106	350 175	664	0%
Gold Strike	229 913	273 253	333 620	278 929	360 656	27 036	8%
Jade Pearl	190 940	164 032	297 601	217 524	297 601	-	0%
Mountain rose	281 934	274 399	288 950	281 761	288 950	-	0%
Galpinii	110 473	180 226	228 444	173 048	228 444	-	0%
Jubilee Crown	260 310	198 180	206 875	221 788	220 874	13 999	7%
Chameleon	256 620	312 390	191 480	253 497	191 480	-	0%
Other/Private	1 668 195	1 770 022	1 854 270	1 764 162	1 930 790	76 520	4%
<b>Total Leucadendron</b>	<b>6 173 211</b>	<b>6 685 323</b>	<b>6 610 872</b>	<b>6 489 585</b>	<b>6 812 859</b>	<b>201 987</b>	<b>3%</b>

# Leucadendron Monthly Exports 2014/2015



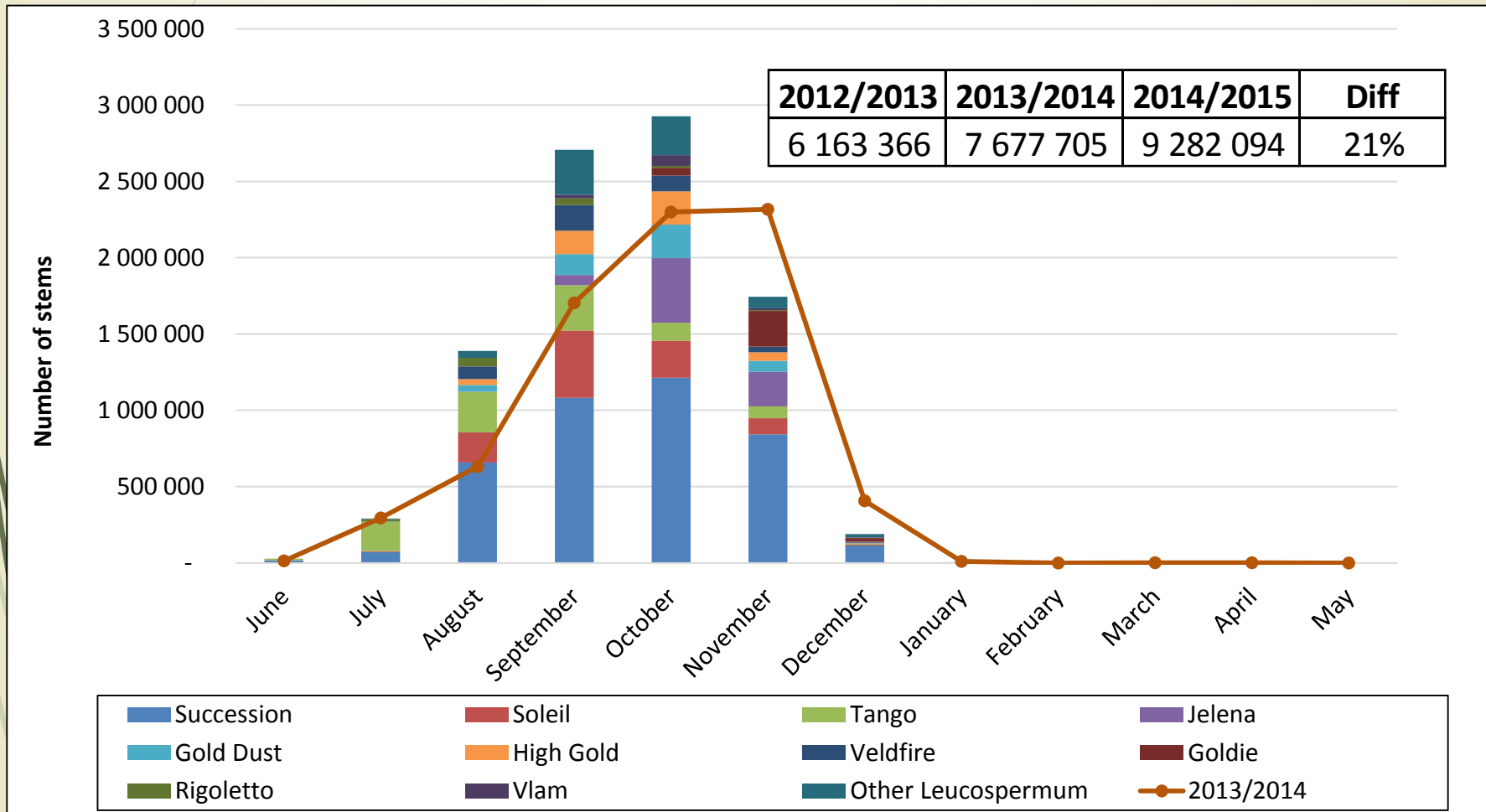
# Leucadendron Exports: 3 Year Comparison



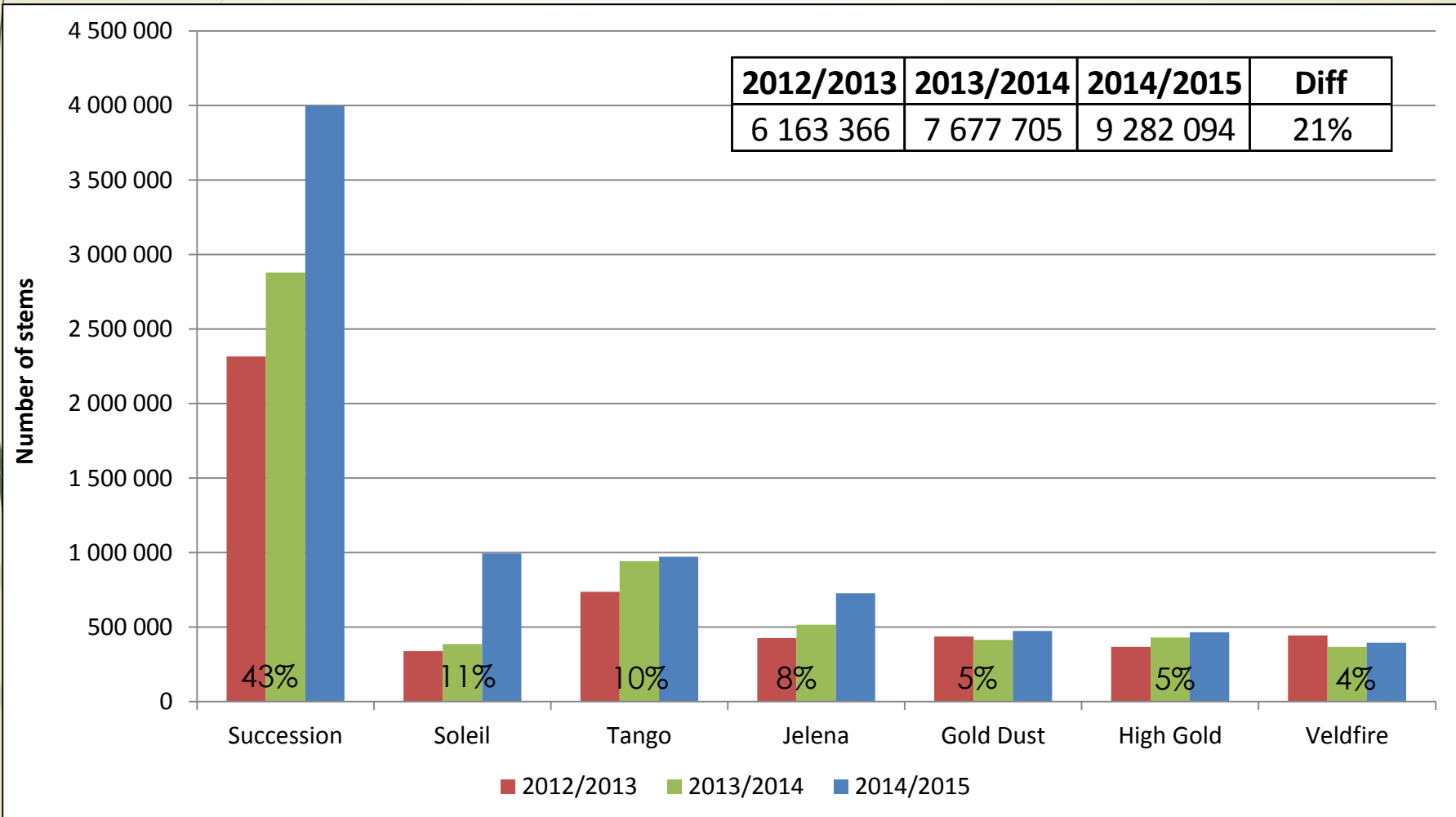
# Leucospermum Estimates

Variety	2012/2013 Exports	2013/2014 Exports	2014/2015 Exports	3 yr Average	2015/2016 Estimate	2015/2016 Estimate vs 2014/2015 Actuals	
Succession	2 316 611	2 879 932	3 998 927	3 065 157	4 267 300	268 373	7%
Soleil	339 315	386 485	994 916	573 572	994 916	-	0%
Tango	736 745	943 170	972 387	884 101	1 128 073	155 686	16%
Jelena	427 365	515 305	725 986	556 219	725 986	-	0%
Gold Dust	437 475	413 855	473 421	441 584	473 421	-	0%
High Gold	367 159	430 765	464 888	420 937	496 949	32 061	7%
Veldfire	444 931	366 427	394 265	401 874	394 265	-	0%
Goldie	147 170	334 645	311 559	264 458	348 878	37 319	12%
Rigoletto	202 119	124 475	132 256	152 950	141 908	9 652	7%
Vlam	165 150	123 025	111 705	133 293	111 705	-	0%
Jyoti/Super Gold	125 305	165 416	91 550	127 424	96 285	4 735	5%
Cordifolium	56 655	70 250	55 280	60 728	55 280	-	0%
Other/Private	397 366	923 955	554 954	625 425	655 635	100 681	18%
<b>Total Leucospermum</b>	<b>6 163 366</b>	<b>7 677 705</b>	<b>9 282 094</b>	<b>7 707 722</b>	<b>9 890 601</b>	<b>608 507</b>	<b>7%</b>

# Leucospermum Monthly Exports 2014/2015

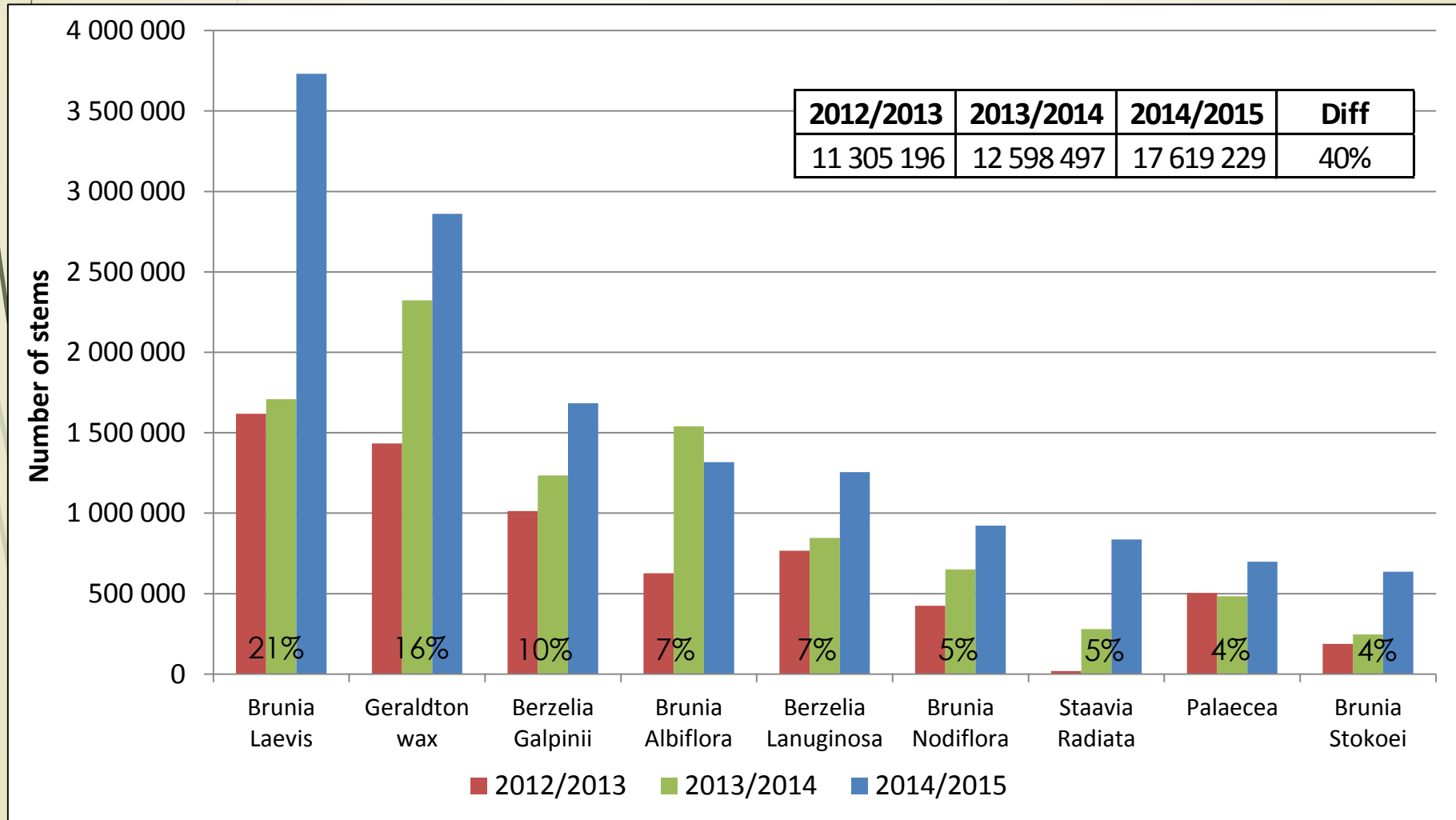


# Leucospermum Export: 3 Year Comparison

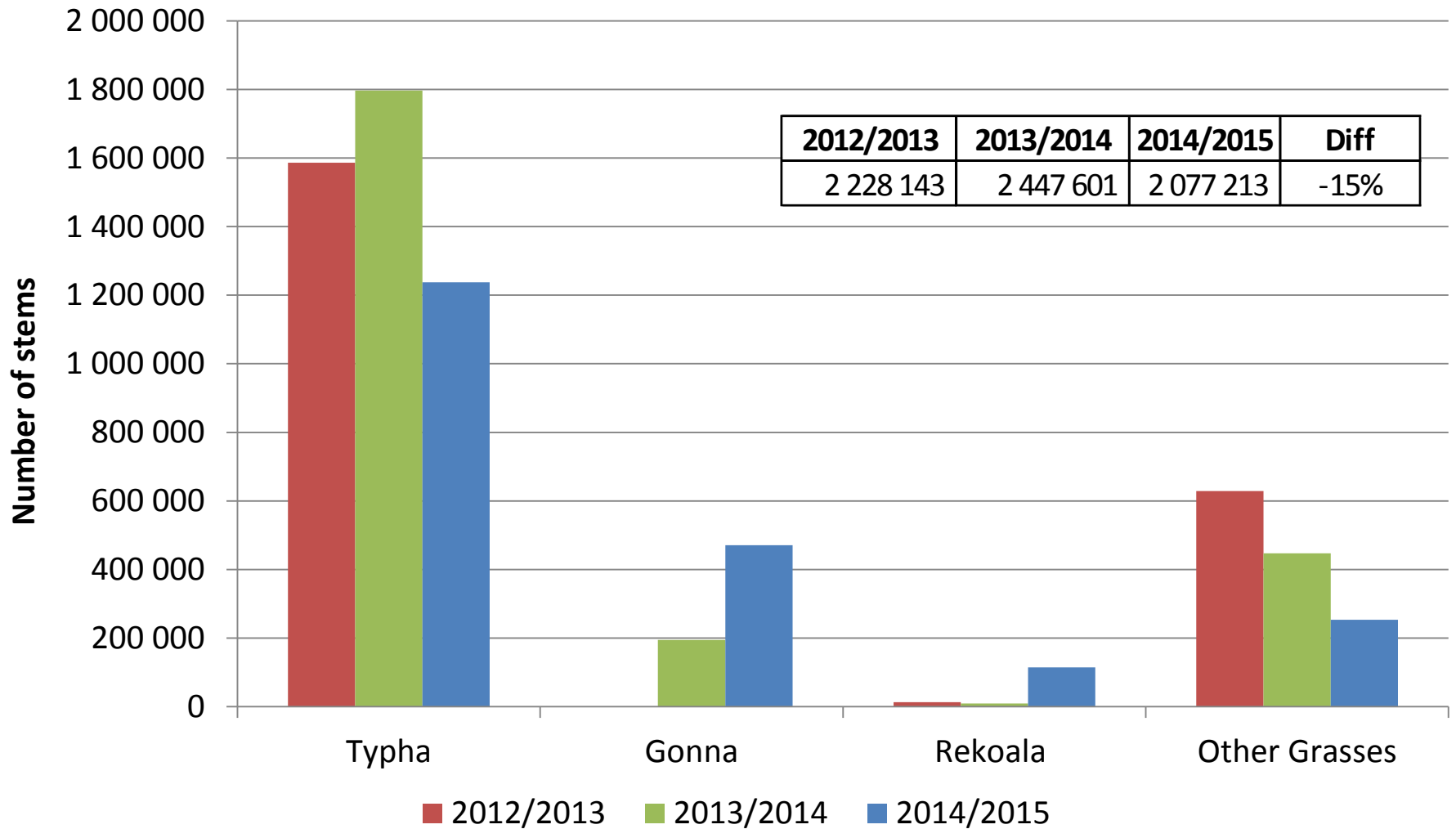




# Greens Exports: 3 Year Comparison



# Grasses Exports: 3 Year Comparison



# Bouquet Exports: 3 Year Comparison

