

# CFSA JMF

## Exports, Estimates

1 March 2018

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## Fynbos Total Area Planted

Group	Hectares					2016 vs 2015
	2012	2013	2014	2015	2016	
Protea	735	687	696	667	666	0%
Leucospermum	207	216	211	192	181	-6%
Leucadendron	132	144	137	138	132	-4%
Greens	54	59	67	73	62	-15%
<b>Total</b>	<b>1128</b>	<b>1106</b>	<b>1111</b>	<b>1070</b>	<b>1041</b>	<b>-3%</b>

## Fynbos Age Distribution

Protea	0-2 years	3-5 years	6-17 years	18-25 years	25+ years
Hectares	107	148	327	66	17
Distribution	16%	22%	49%	10%	3%

Leucospermum	Non-bearing	2-4 years	5-12 years	12+ years
Hectares	18	47	109	6
Distribution	10%	26%	60%	3%

Leucadendron	Non-bearing	2-4 years	5-12 years	12+ years
Hectares	11	44	53	23
Distribution	9%	34%	40%	18%

## 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)

## Participating Exporters:

The export volumes in this presentation are a summary of the export volumes shared by these exporters.

- AFG
- Afrex Trading
- Intaba Flowers
- Bergflora
- Cape Mountain Flora
- de Mooij
- Fresh Cap Marketing
- Fynbloem/Bloemenkraal
- OZ Flora
- Proteus Logistics
- Snyman Flora
- The Flower Co
- ZuluFlora

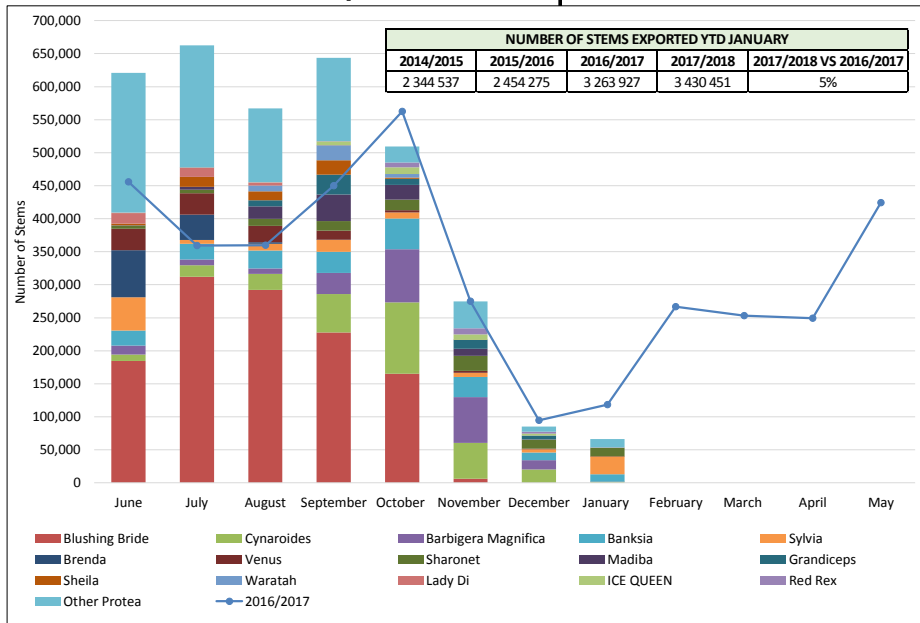
# Protea Estimate

All volumes are in stems

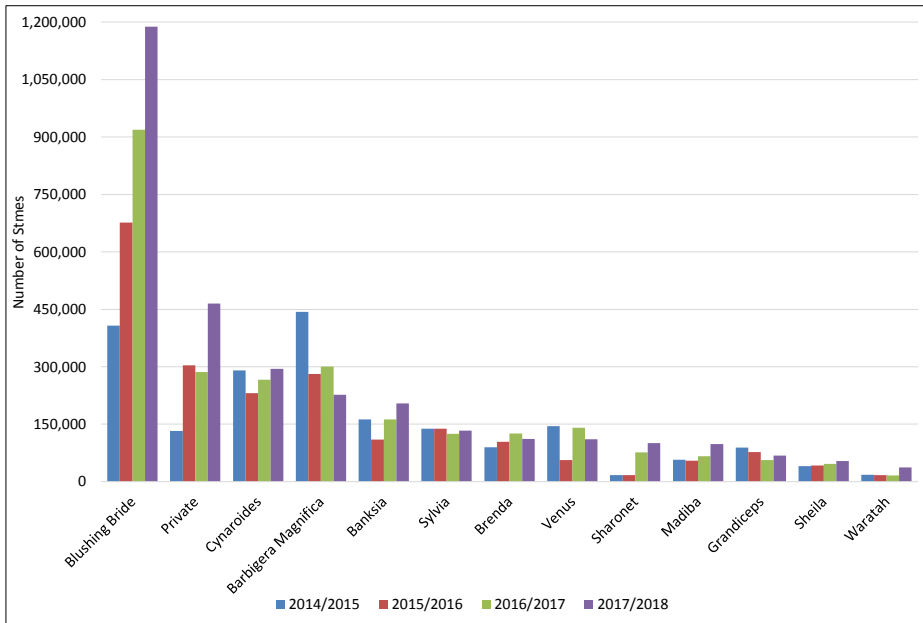
Variety	2014/2015 Exports	2015/2016 Exports	2016/2017 Exports	3 yr Average	2017/2018 Export Est	2017/2018 Estimate vs 2016/2017 Actuals		YTD JAN 2018	Theoretical Aug 2017	
Blushing Bride	407 740	676 212	918 594	667 515	1 188 017	269 423	29%	1 188 017	1 117 596	
Pink Ice	231 473	266 732	313 151	270 452	320 120	6 969	2%	19 111	370 120	Adjusted:-50 000
Barbigera Magnifica	444 314	281 895	300 929	342 379	238 166	-62 762	-21%	226 485	328 166	Adjusted:-90 000
Cynaroides	305 758	244 196	283 361	277 772	306 971	23 610	8%	295 441	306 971	
Ivy	79 261	122 569	62 434	88 088	62 434	-	0%	7 399	62 434	
Sylvia	242 425	219 312	223 115	228 284	239 770	16 655	7%	141 497	239 770	
Banksia	174 466	129 413	202 771	168 883	209 173	6 402	3%	209 173	202 771	
Carnival	102 307	215 044	165 056	160 802	160 056	-5 000	-3%	18 608	165 056	Adjusted: -5 000
Venus	144 930	56 661	140 404	113 998	126 240	-14 164	-10%	110 260	151 240	Adjusted: -25 000
Brenda	198 219	167 665	131 514	165 799	153 750	22 237	17%	111 843	148 750	Adjusted: +5 000
Susara	61 543	115 930	116 484	97 986	126 725	10 241	9%	11 242	141 725	Adjusted: -15 000
Other Protea	768 939	931 844	1 211 795	970 859	1 295 113	83 318	7%	1 119 145	1 295 113	
<b>Total Protea in loose stems</b>	<b>3 161 375</b>	<b>3 427 473</b>	<b>4 069 607</b>	<b>3 552 818</b>	<b>4 426 535</b>	<b>356 928</b>	<b>9%</b>	<b>3 458 220</b>	<b>4 529 712</b>	
Stems in Bouquets	2 872 320	2 181 234	2 272 659	2 442 071	2 192 071	-80 588	-4%	1 270 275	2 442 071	Adjusted: -250 000
<b>Total Protea</b>	<b>6 033 695</b>	<b>5 608 707</b>	<b>6 342 266</b>	<b>5 994 889</b>	<b>6 618 606</b>	<b>276 339</b>	<b>4%</b>	<b>4 728 495</b>	<b>6 971 783</b>	

29% left for export!  
 Updated the Protea: Loose stem -225 000  
 Updated the Protea: Stems in Bouquet -250 000

## Protea: 2017/2018 Exports



## Protea Exports: 4 year comparison



## Leucadendron Estimate

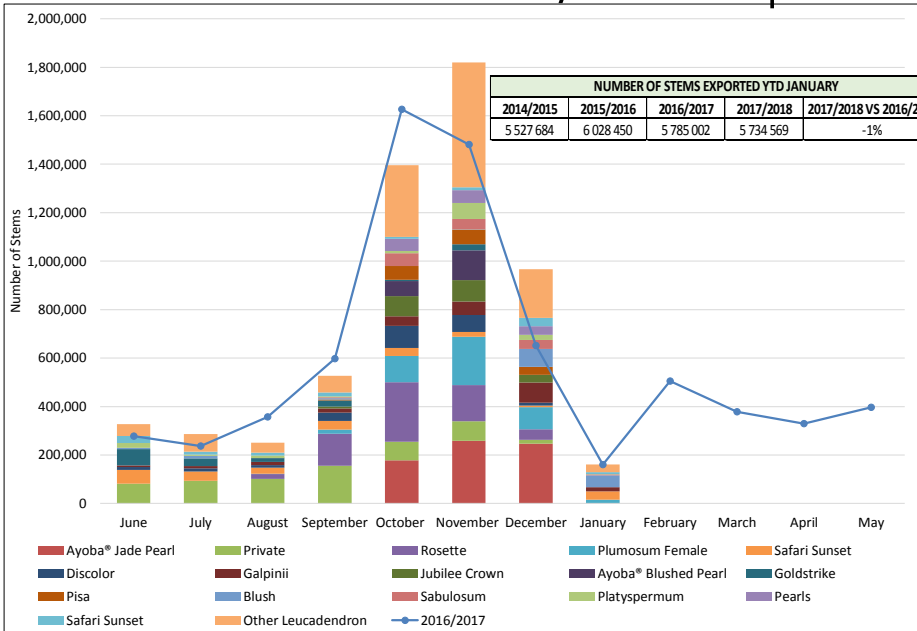
All volumes are in stems

Variety	2014/2015 Exports	2015/2016 Exports	2016/2017 Exports	3 yr Average	2017/2018 Export Est	2017/2018 Estimate vs 2016/2017 Actuals		YTD JAN 2018	Theoretical Aug 2017	
Safari Sunset	1 032 096	1 096 035	913 421	1 013 851	960 084	46 663	5%	381 608	960 084	
Ayoba ® Jade Pearl	297 601	725 985	741 202	588 263	691 202	-50 000	-7%	685 158	741 202	Adjusted: -50 000
Rosette	734 223	570 051	699 728	668 000	590 362	-109 366	-16%	590 362	699 728	
Plumosum Female	518 653	585 383	486 716	530 251	447 699	-39 017	-8%	447 699	486 716	
Discolor	568 729	477 861	358 241	468 277	358 241	0	0%	242 830	358 241	
Blush	349 511	368 750	318 394	345 552	354 782	36 388	11%	161 817	354 782	
Platyspermum	77 934	114 396	268 212	153 514	263 212	-5 000	-2%	148 933	268 212	Adjusted: -5 000
Jubilee Crown	206 875	217 557	230 393	218 275	212 312	-18 081	-8%	212 312	245 983	
Goldstrike	334 820	320 254	205 342	286 805	257 110	51 768	25%	170 312	242 110	Adjusted: +15 000
Galpinii	228 444	261 229	235 545	241 739	241 860	6 315	3%	241 860	235 545	
Platy Star	115 037	136 493	135 528	129 019	115 035	-20 493	-15%	115 035	212 972	
Pisa	183 630	205 520	180 323	189 824	158 059	-22 264	-12%	154 055	193 059	Adjusted: -35 000
Other Leucadendron	1 934 654	2 348 060	2 225 790	2 169 501	2 366 652	140 862	6%	2 249 763	2 366 652	
	<b>6 582 207</b>	<b>7 427 572</b>	<b>6 998 834</b>	<b>7 002 871</b>	<b>7 016 610</b>	<b>17 776</b>	<b>0%</b>	<b>5 801 744</b>	<b>7 365 286</b>	

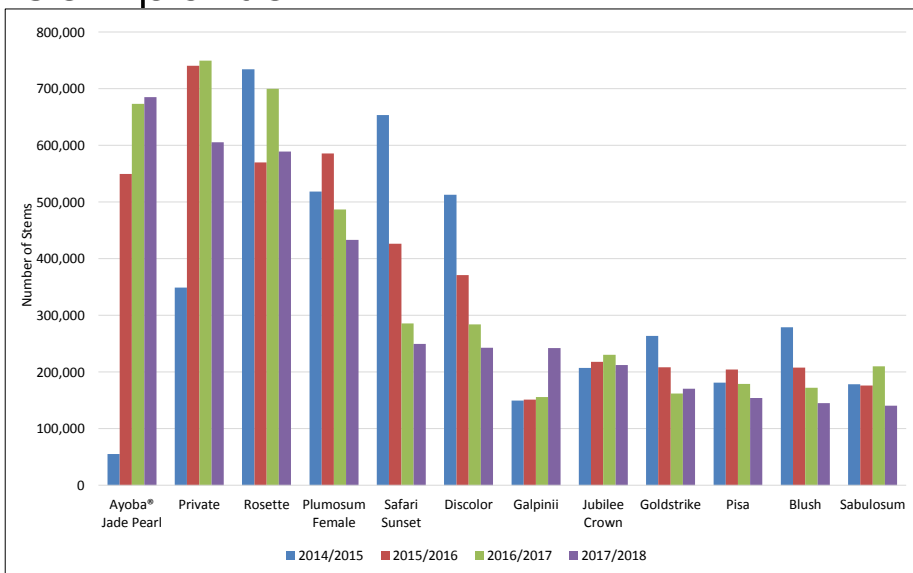
17% left for export!

Updated the Leucadendron: Loose stem -75 000

# Leucadendron: 2017/2018 Exports



# Leucadendron Exports: 4 year comparison



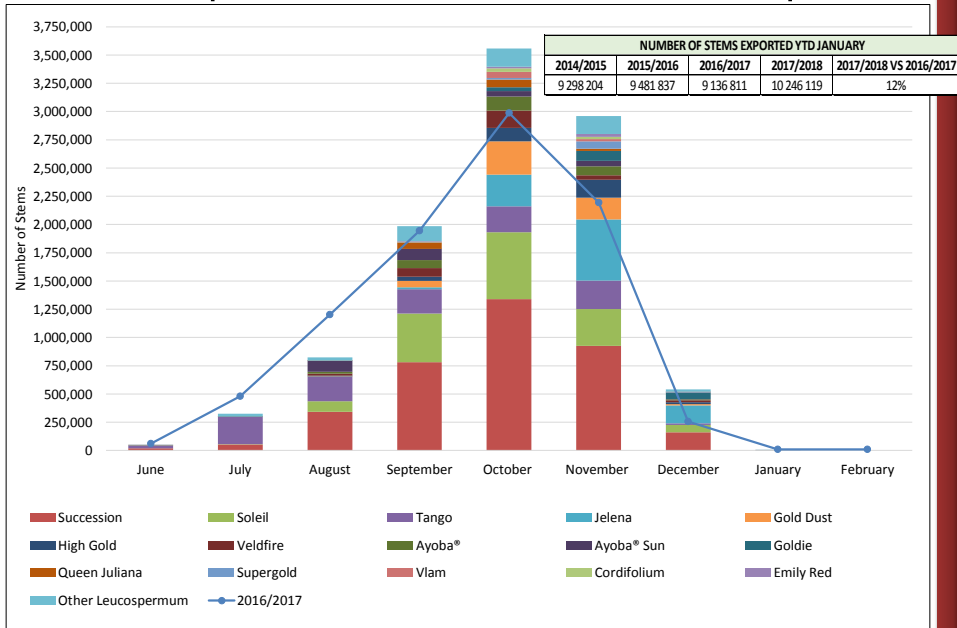
# Leucospermum Estimate

All volumes are in stems

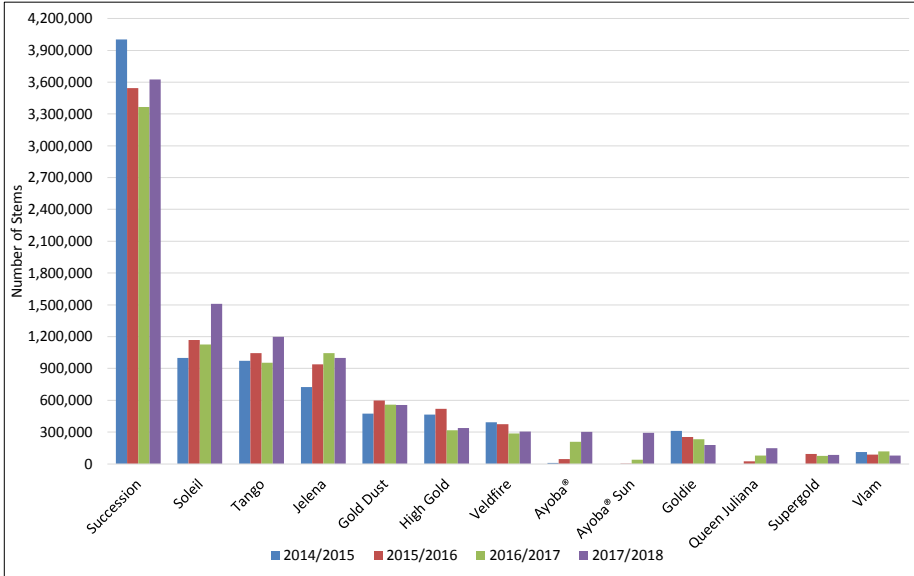
Variety	2014/2015 Exports	2015/2016 Exports	2016/2017 Exports	3 yr Average	2017/2018 Export Est	2017/2018 Estimate vs 2016/2017 Actuals		2017/2018 Actual	2017/2018 Actual vs 2016/2017 Actuals	
Succession	4 001 397	3 550 829	3 375 414	3 642 547	3 684 911	309 497	9%	3 625 464	250 050	7%
Soleil	1 000 081	1 173 332	1 127 555	1 100 323	1 134 111	6 556	1%	1 508 790	381 235	34%
Jelena	725 986	938 815	1 045 541	903 447	1 070 107	24 566	2%	1 000 011	-45 530	-4%
Tango	973 367	1 043 434	955 360	990 720	1 040 933	85 572	9%	1 199 922	244 562	26%
Gold Dust	473 421	597 987	559 267	543 558	572 953	13 685	2%	554 375	-4 892	-1%
High Gold	464 888	518 124	316 499	433 170	364 316	47 816	15%	338 306	21 807	7%
Veldfire	394 265	374 262	287 015	351 847	287 015	0	0%	305 440	18 425	6%
Goldie	311 559	255 485	231 500	266 181	231 500	0	0%	179 978	-51 522	-22%
Vlam	111 705	86 646	117 449	105 267	136 570	19 121	16%	79 106	-38 344	-33%
Jyoti/Super Gold	87 510	182 874	120 564	130 316	120 564	0	0%	124 934	4 370	4%
Queen Juliana		23 905	80 210	52 058	112 294	32 084	40%	147 985	67 775	84%
Other Leucospermum	754 025	773 584	942 276	823 295	998 530	56 254	6%	1 181 808	239 532	25%
<b>Total Leucospermum in loose stems</b>	<b>9 298 204</b>	<b>9 519 277</b>	<b>9 158 651</b>	<b>9 325 377</b>	<b>9 753 804</b>	<b>595 153</b>	<b>6%</b>	<b>10 246 119</b>	<b>1 087 468</b>	<b>12%</b>
Stems in Bouquets	653 994	616 416	416 844	562 418	562 418	145 574	35%	408 318	-8 526	-2%
<b>Total Leucospermum</b>	<b>9 952 198</b>	<b>10 135 693</b>	<b>9 575 495</b>	<b>9 887 795</b>	<b>10 316 221</b>	<b>740 726</b>	<b>8%</b>	<b>10 654 437</b>	<b>1 078 942</b>	<b>11%</b>

Season finished.  
Underestimated by 3%.

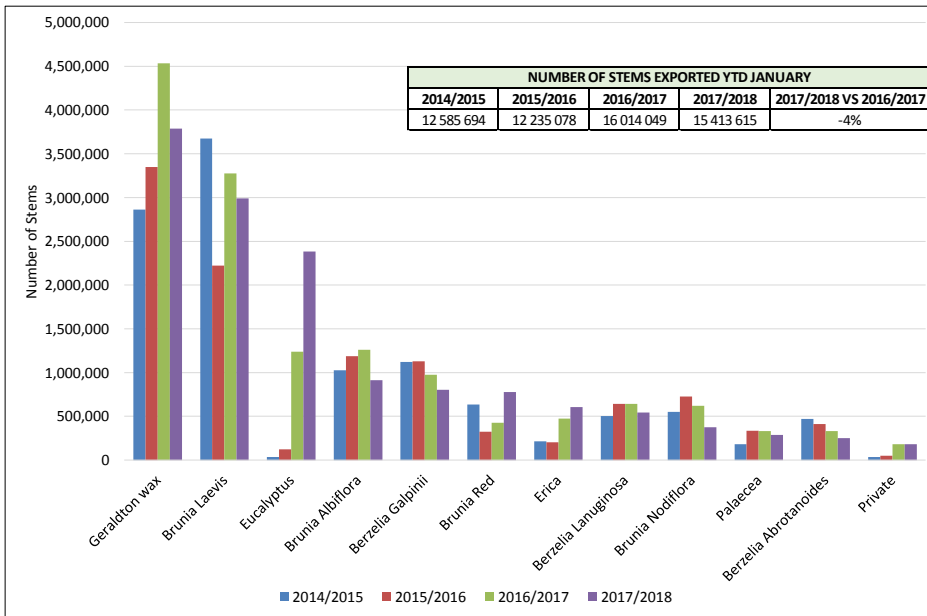
## Leucospermum: 2017/2018 Exports



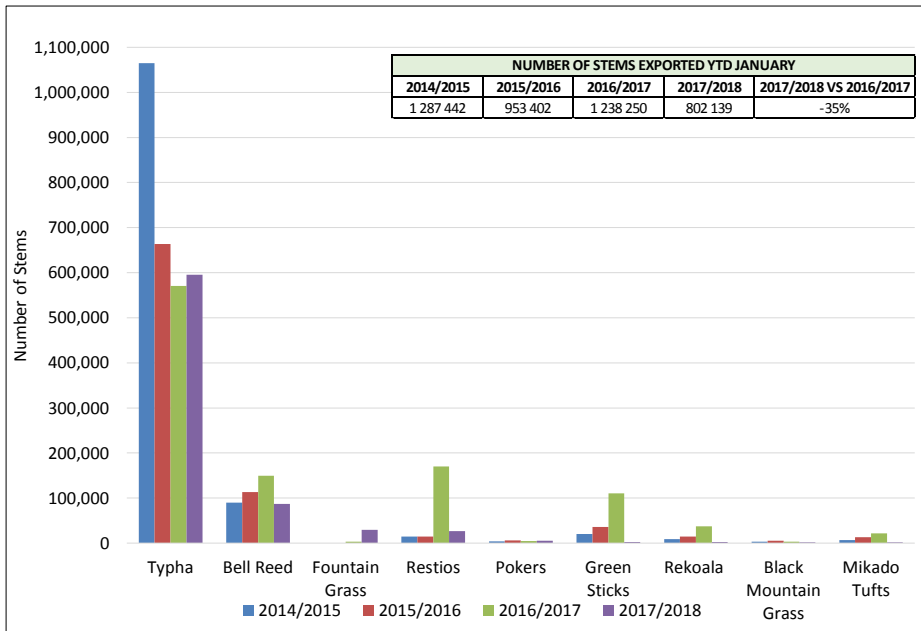
## Leucospermum Exports: 4 year comparison



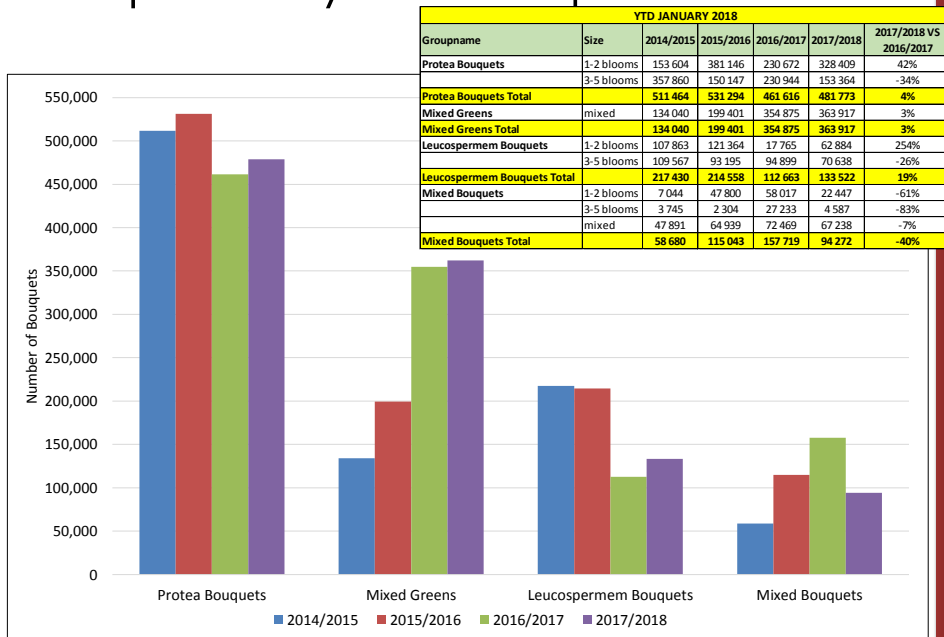
## Greens: 4 year comparison



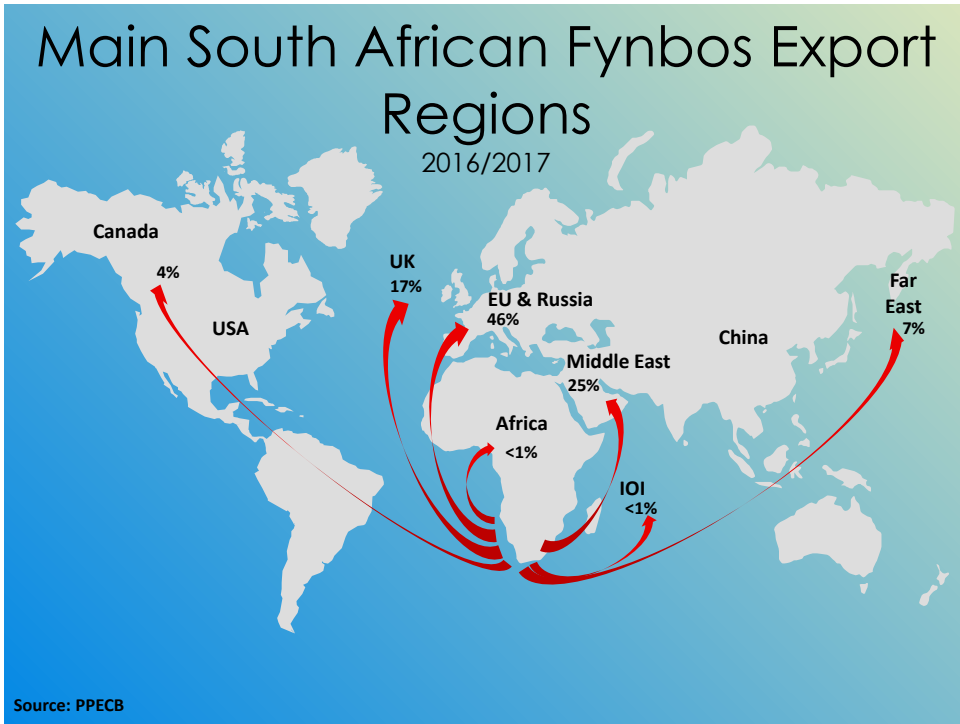
## Grasses: 4 year comparison



## Bouquets: 4 year comparison







Thank you

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