



CFSA JMF Exports, Estimates

August 2017

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%
Total	1128	1106	1111	1070	1041	-3%

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
- Arnelia
- Bergflora
- Cape Mountain Flora
- de Mooij
- Forest Ferns CC
- Fresh Cap Marketing
- Fynbloem/Bloemenkraal
- Intaba Flowers
- OZ Flora
- Proteus Logistics
- Snyman Flora
- The Flower Co

Fynbos Export Estimate

All volumes are in stems (Estimate for loose stems only)

Group	2013/2014	2014/2015	2015/2016	2016/2017	3 yr Average	2017/2018 Est	2017/2018 Est vs 2016/2017 Actuals	
Protea	2 513 068	2 579 169	2 621 848	2 948 242	2 716 419	3 209 345	261 103	9%
Leucadendron	6 686 873	6 612 277	7 461 397	6 998 834	7 024 169	7 365 286	366 452	5%
Leucospermum	7 680 325	9 298 204	9 519 277	9 158 651	9 325 377	9 753 804	595 153	6%
Total	16 880 266	18 489 650	19 602 522	19 105 727	19 065 966	20 328 435	1 222 708	6%

Estimate Comparison

All volumes are in stems

	2016/2017 Est Exports (Aug 2016)	2016/2017 Est Exports (Feb 2017)	2016/2017 Act Exports
Protea	2 889 990	2 900 780	2 948 242
Leucadendron	7 847 037	7 303 249	6 998 834
Leucospermum	10 264 963	9 984 017	9 158 651
Total	21 001 990	20 188 046	19 105 727

	Aug 2016 vs Actuals	Feb 2017 vs Actuals
Protea	-2%	-2%
Leucadendron	11%	4%
Leucospermum	11%	8%
Total	9%	5%

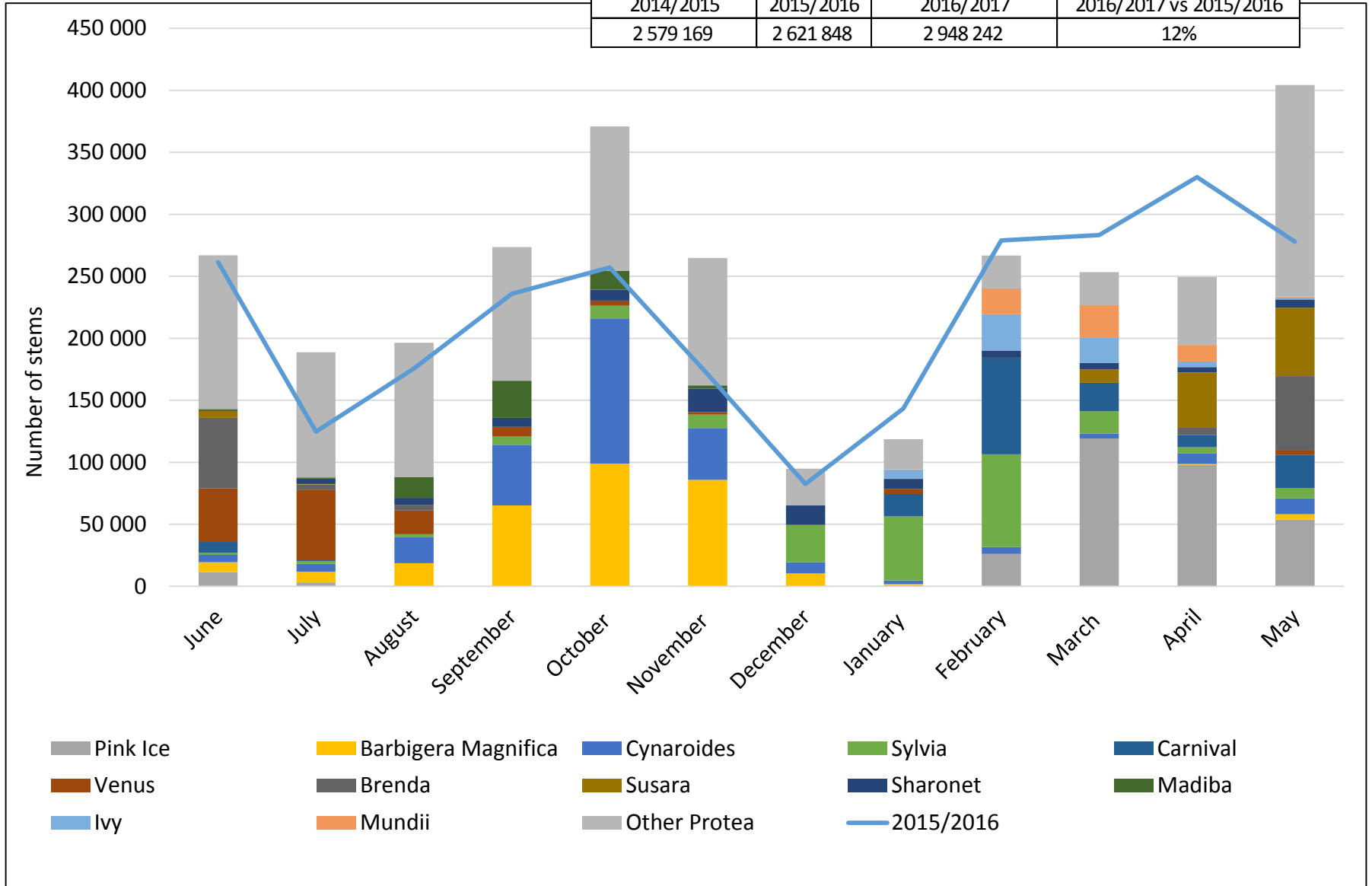
Protea Estimate

All volumes are in stems

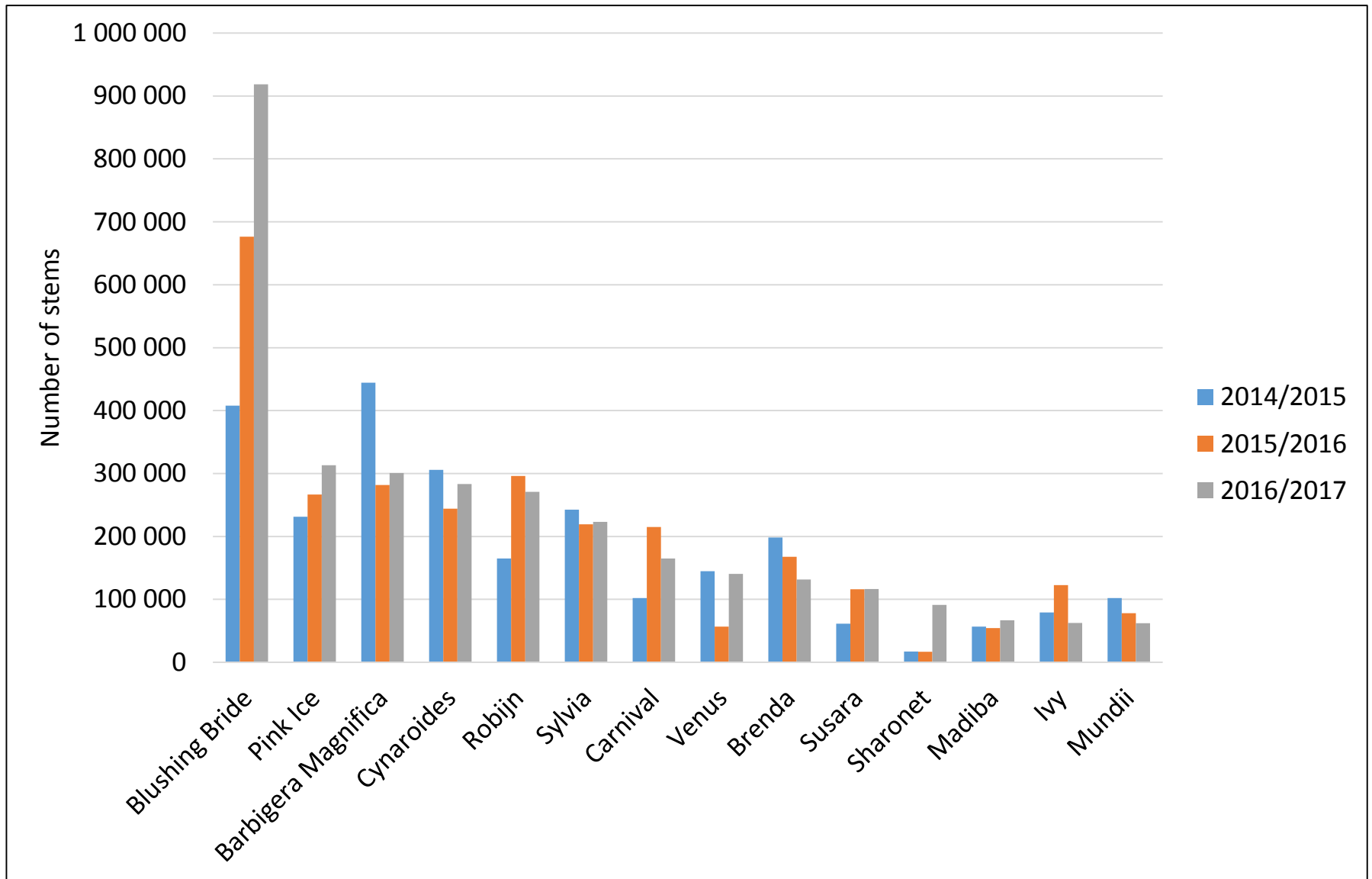
Variety	2013/2014 Exports	2014/2015 Exports	2015/2016 Exports	2016/2017 Exports	3 yr Average	2017/2018 Export Est	2017/2018 Estimate vs 2016/2017 Actuals	
Pink Ice	197 937	231 473	266 732	313 151	270 452	370 120	56 969	18%
Barbigera Magnifica	532 297	444 314	281 895	300 929	342 379	328 166	27 238	9%
Cynaroides	243 675	305 758	244 196	283 361	277 772	306 971	23 610	8%
Sylvia	282 845	242 425	219 312	223 115	228 284	239 770	16 655	7%
Carnival	117 455	102 307	215 044	165 056	160 802	165 056	-	0%
Venus	136 419	144 930	56 661	140 404	113 998	151 240	10 836	8%
Brenda	71 425	198 219	167 665	131 514	165 799	148 750	17 237	13%
Susara	93 859	61 543	115 930	116 484	97 986	141 725	25 241	22%
Sharonet		17 115	16 888	91 170	41 724	107 113	15 944	17%
Ivy	120 725	79 261	122 569	62 434	88 088	62 434	-	0%
Other Protea	716 431	751 824	914 956	1 120 625	929 135	1 187 999	67 374	6%
Total Protea in loose stems	2 513 068	2 579 169	2 621 848	2 948 242	2 716 420	3 209 345	261 103	9%
Stems in Bouquets	2 559 602	2 872 320	2 181 234	2 272 659	2 442 071	2 442 071	169 412	7%
Total Protea	5 072 670	5 451 489	4 803 082	5 220 902	5 158 491	5 651 416	430 514	8%
Blushing Bride	94 000	407 740	676 212	918 594	667 515	1 117 596	199 002	22%
Banksia	134 687	174 466	129 413	202 771	168 883	202 771	-	0%

Protea: 2016/2017 Exports

Number of stems exported			
2014/2015	2015/2016	2016/2017	2016/2017 vs 2015/2016
2 579 169	2 621 848	2 948 242	12%



Protea Exports: 3 year comparison



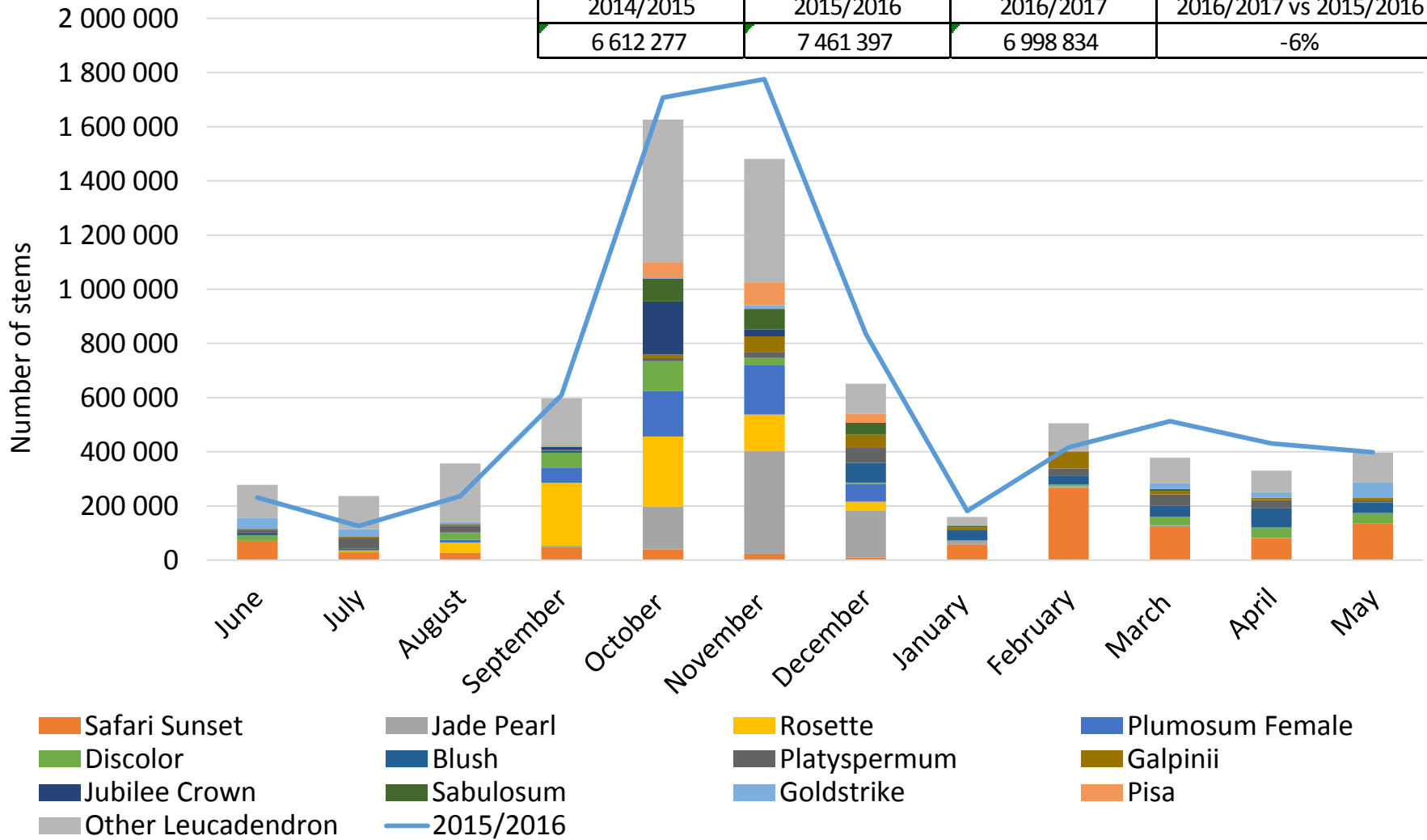
Leucadendron Estimate

All volumes are in stems

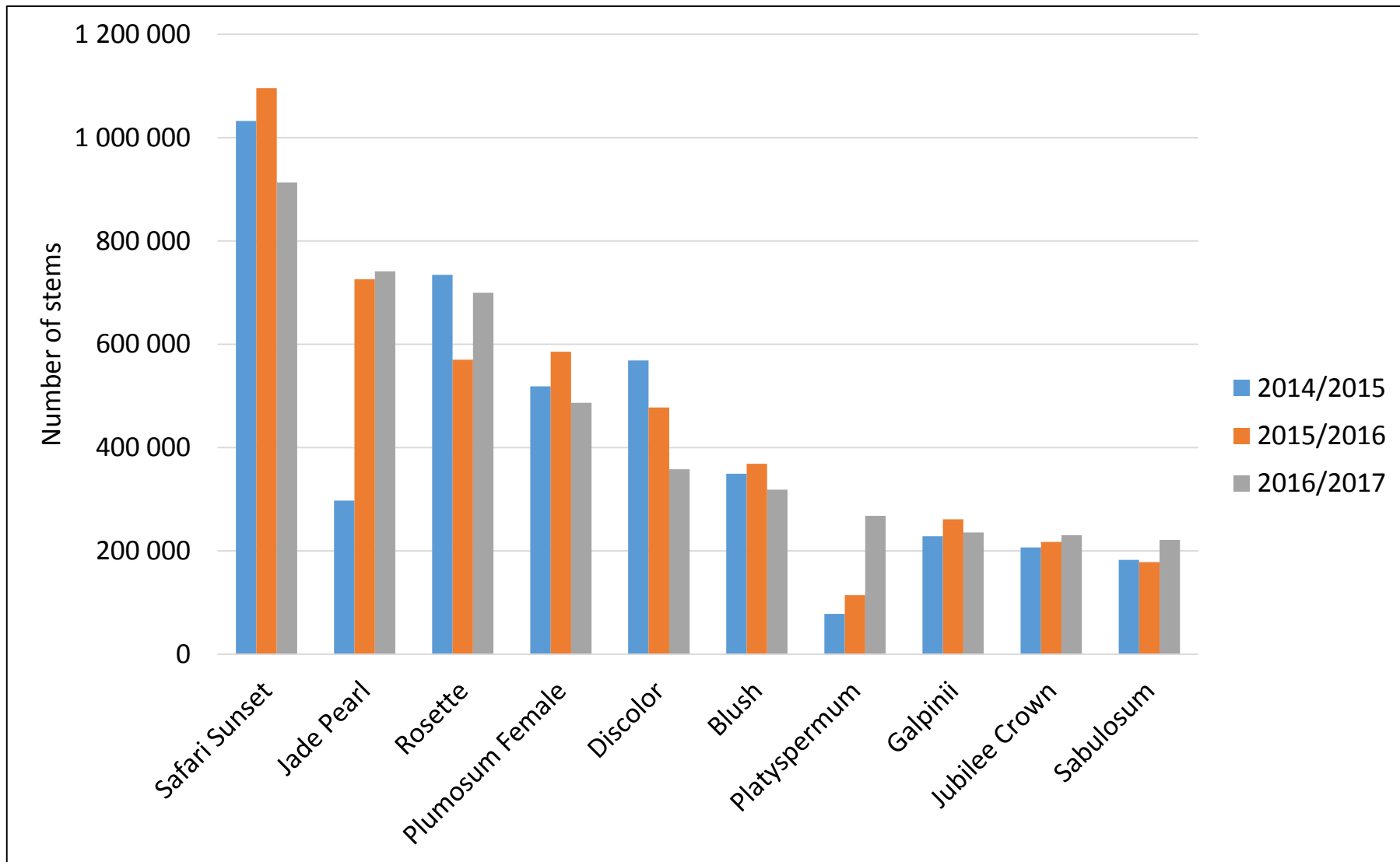
Variety	2013/2014 Exports	2014/2015 Exports	2015/2016 Exports	2016/2017 Exports	3 yr Average	2017/2018 Export Est	2017/2018 Estimate vs 2016/2017 Actuals	
Safari Sunset	1 008 310	1 032 096	1 096 035	913 421	1 013 851	960 084	46 663	5%
Jade Pearl	164 032	297 601	725 985	741 202	588 263	741 202	-	0%
Rosette	1 132 819	734 223	570 051	699 728	668 000	699 728	-	0%
Plumosum Female	508 816	518 653	585 383	486 716	530 251	486 716	-	0%
Discolor	545 136	568 729	477 861	358 241	468 277	358 241	-	0%
Blush	317 090	349 511	368 750	318 394	345 552	354 782	36 388	11%
Platyspermum	192 204	77 934	114 396	268 212	153 514	268 212	-	0%
Jubilee Crown	198 180	206 875	217 557	230 393	218 275	245 983	15 590	7%
Goldstrike	273 253	334 820	320 254	205 342	286 805	242 110	36 768	18%
Galpinii	180 226	228 444	261 229	235 545	241 739	235 545	-	0%
Sabulosum	89 941	182 534	178 193	221 255	193 994	221 255	-	0%
Platy Star	134 295	115 037	136 493	135 528	129 019	212 972	77 444	57%
Other Leucadendron	1 942 571	1 965 820	2 409 212	2 184 859	2 186 630	2 338 457	153 598	7%
	6 686 873	6 612 277	7 461 397	6 998 834	7 024 169	7 365 286	366 452	5%

Leucadendron: 2016/2017 Exports

Number of stems exported			
2014/2015	2015/2016	2016/2017	2016/2017 vs 2015/2016
6 612 277	7 461 397	6 998 834	-6%



Leucadendron Exports: 3 year comparison

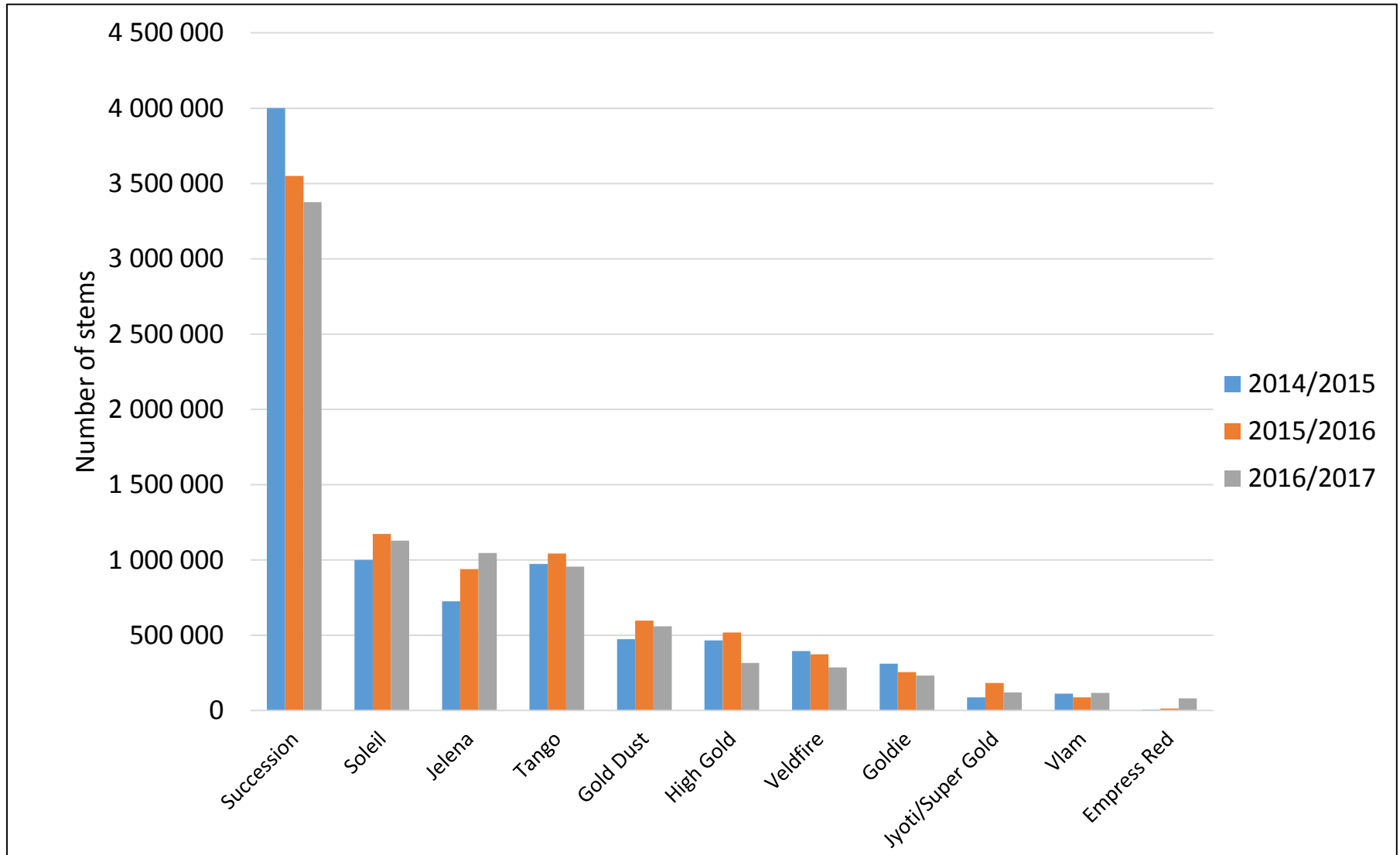


Leucospermum Estimate

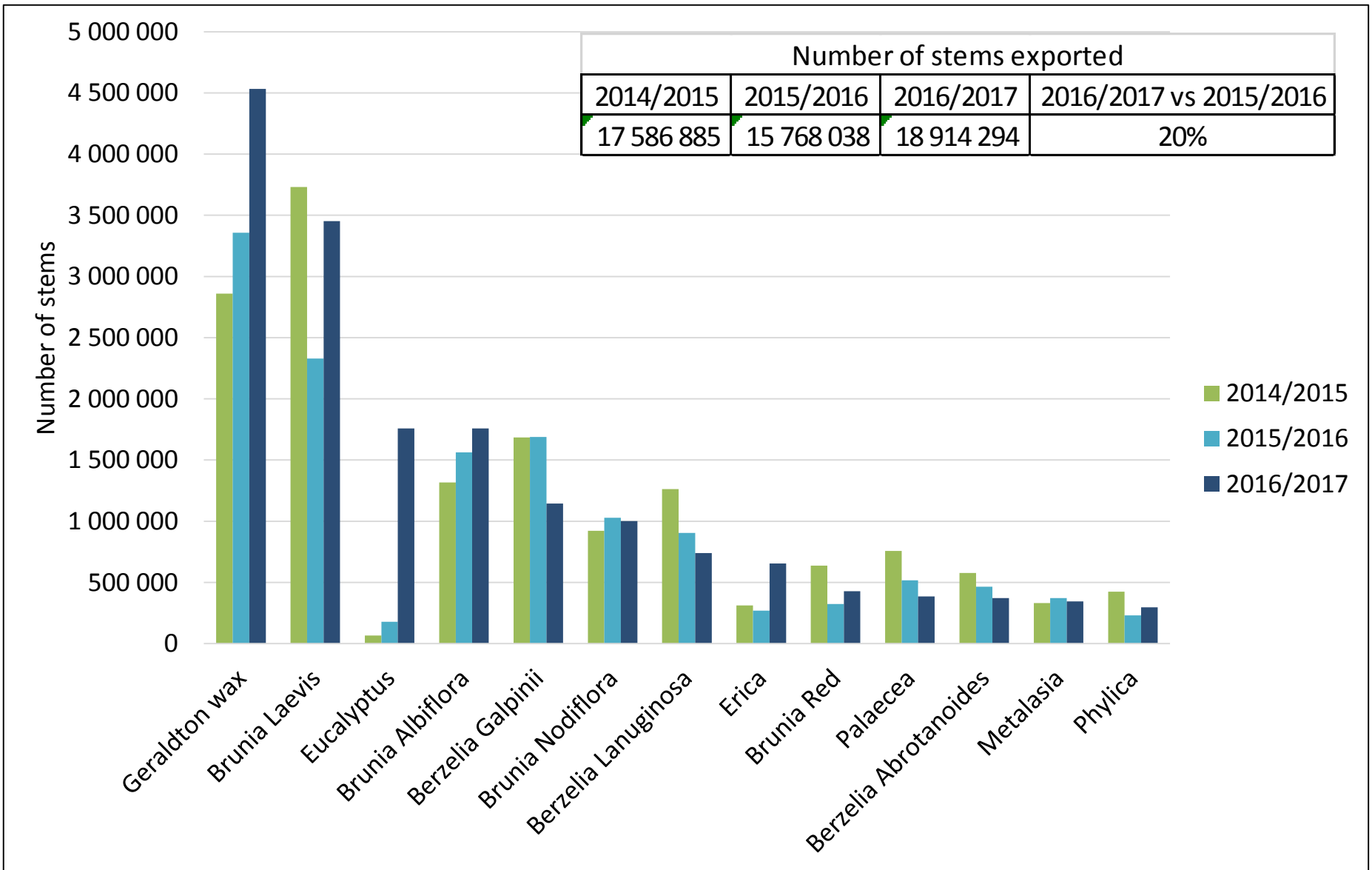
All volumes are in stems

Variety	2013/2014 Exports	2014/2015 Exports	2015/2016 Exports	2016/2017 Exports	3 yr Average	2017/2018 Export Est	2017/2018 Estimate vs 2016/2017 Actuals	
Succession	2 879 932	4 001 397	3 550 829	3 375 414	3 642 547	3 684 911	309 497	9%
Soleil	386 485	1 000 081	1 173 332	1 127 555	1 100 323	1 134 111	6 556	1%
Jelena	515 305	725 986	938 815	1 045 541	903 447	1 070 107	24 566	2%
Tango	943 170	973 367	1 043 434	955 360	990 720	1 040 933	85 572	9%
Gold Dust	413 855	473 421	597 987	559 267	543 558	572 953	13 685	2%
High Gold	430 765	464 888	518 124	316 499	433 170	364 316	47 816	15%
Veldfire	366 427	394 265	374 262	287 015	351 847	287 015	-	0%
Goldie	334 645	311 559	255 485	231 500	266 181	231 500	-	0%
Vlam	123 025	111 705	86 646	117 449	105 267	136 570	19 121	16%
Jyoti/Super Gold	149 600	87 510	182 874	120 564	130 316	120 564	-	0%
Queen Juliana			23 905	80 210	52 058	112 294	32 084	40%
Other Leucospermum	1 137 116	754 025	773 584	942 276	823 295	998 530	56 254	6%
Total Leucospermum in loose stems	7 680 325	9 298 204	9 519 277	9 158 651	9 325 377	9 753 804	595 153	6%
Stems in Bouquets	66 624	653 994	616 416	416 844	562 418	562 418	145 574	35%
Total Leucospermum	7 746 949	9 952 198	10 135 693	9 575 495	9 887 795	10 316 221	740 726	8%

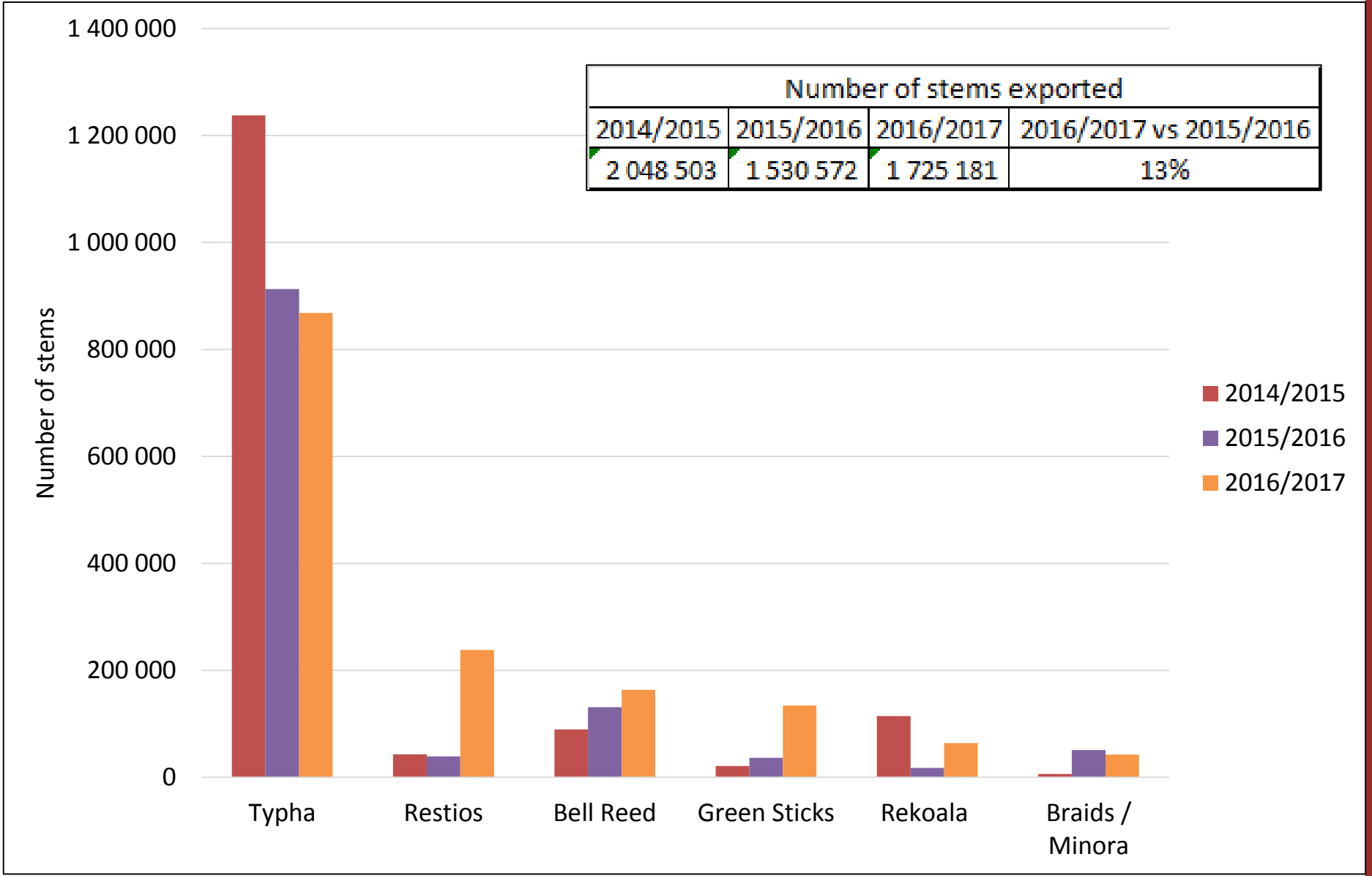
Leucospermum Exports: 3 year comparison



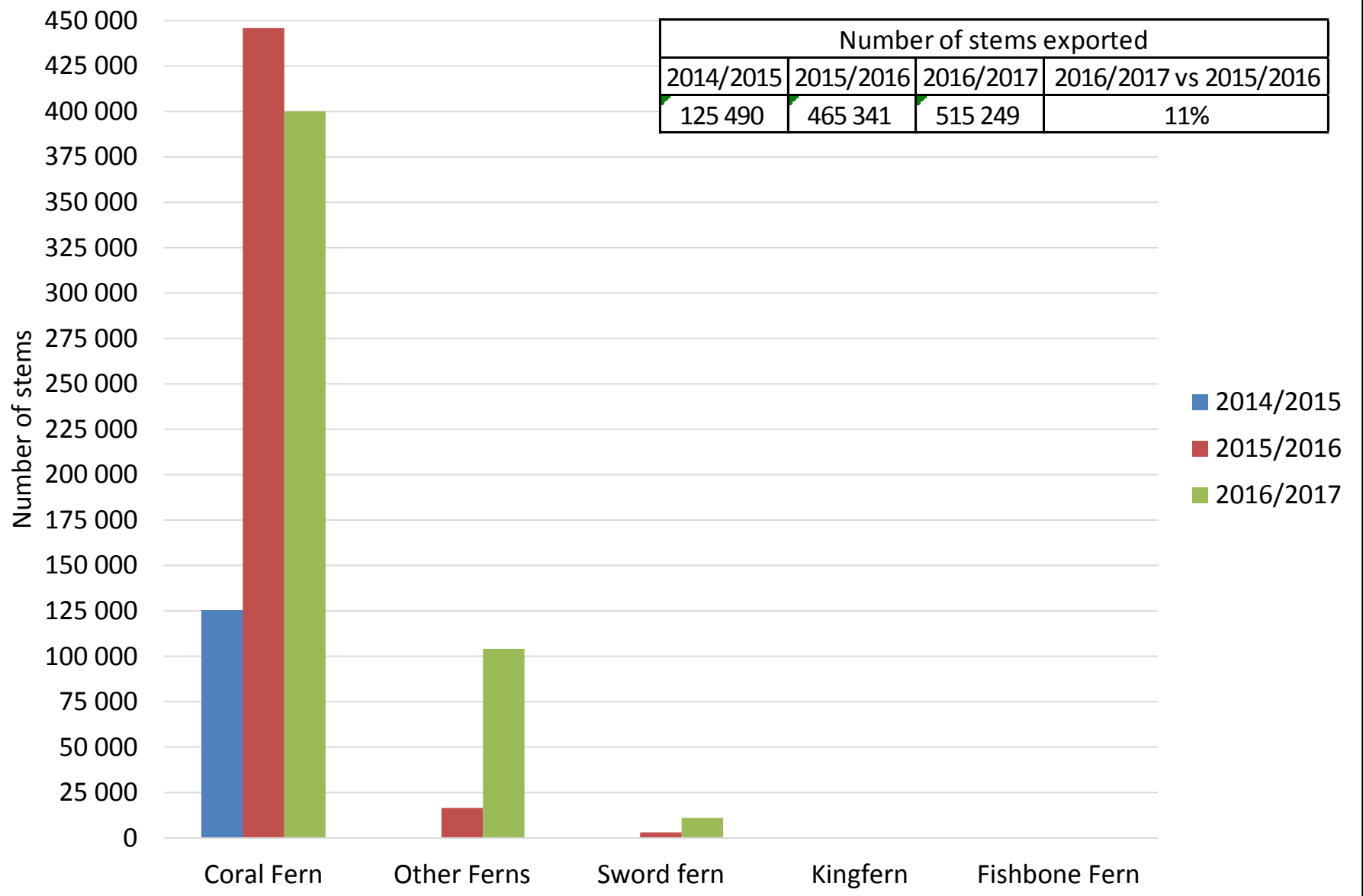
Greens: 3 year comparison



Grasses: 3 year comparison

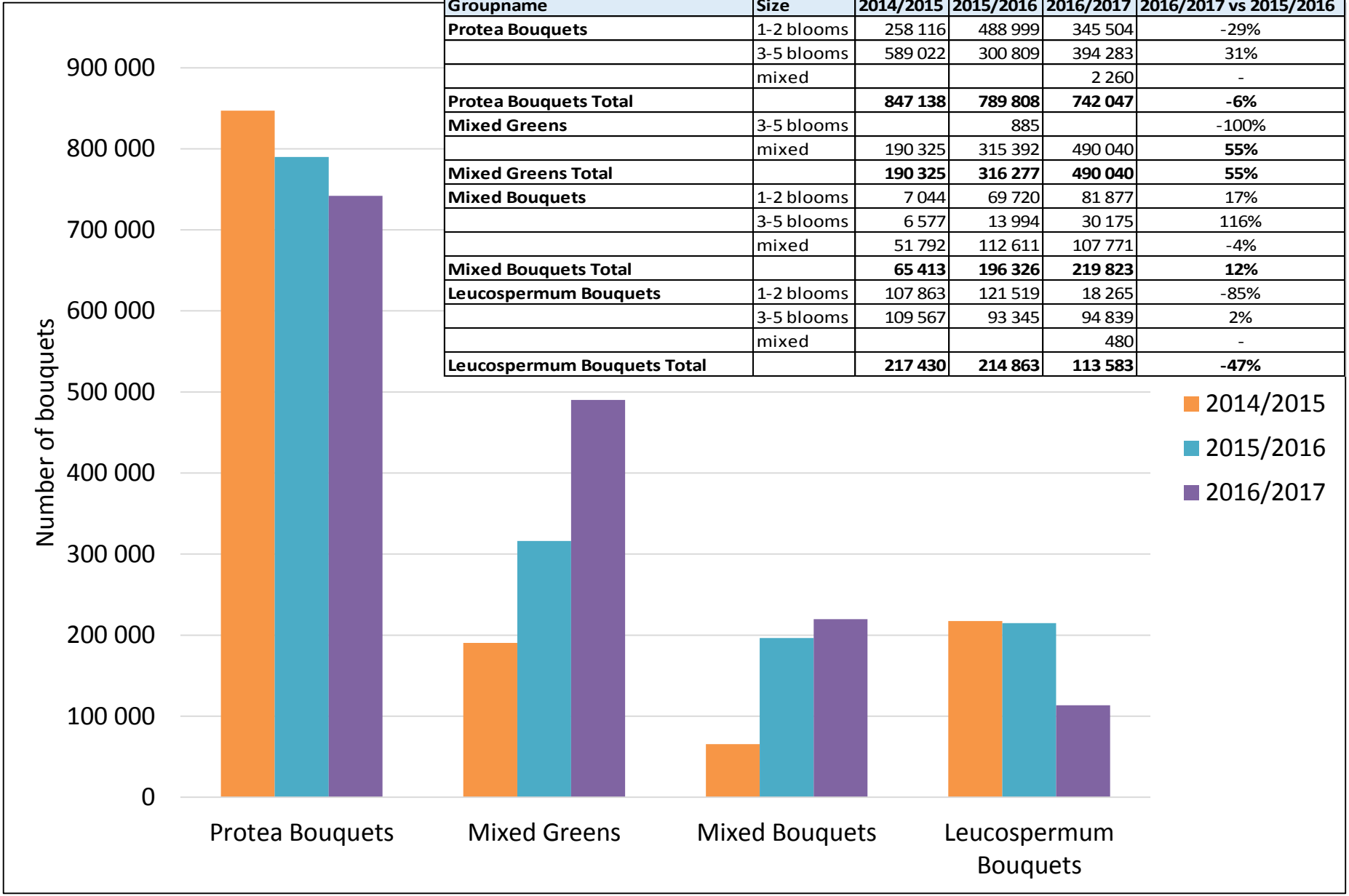


Ferns: 3 year comparison



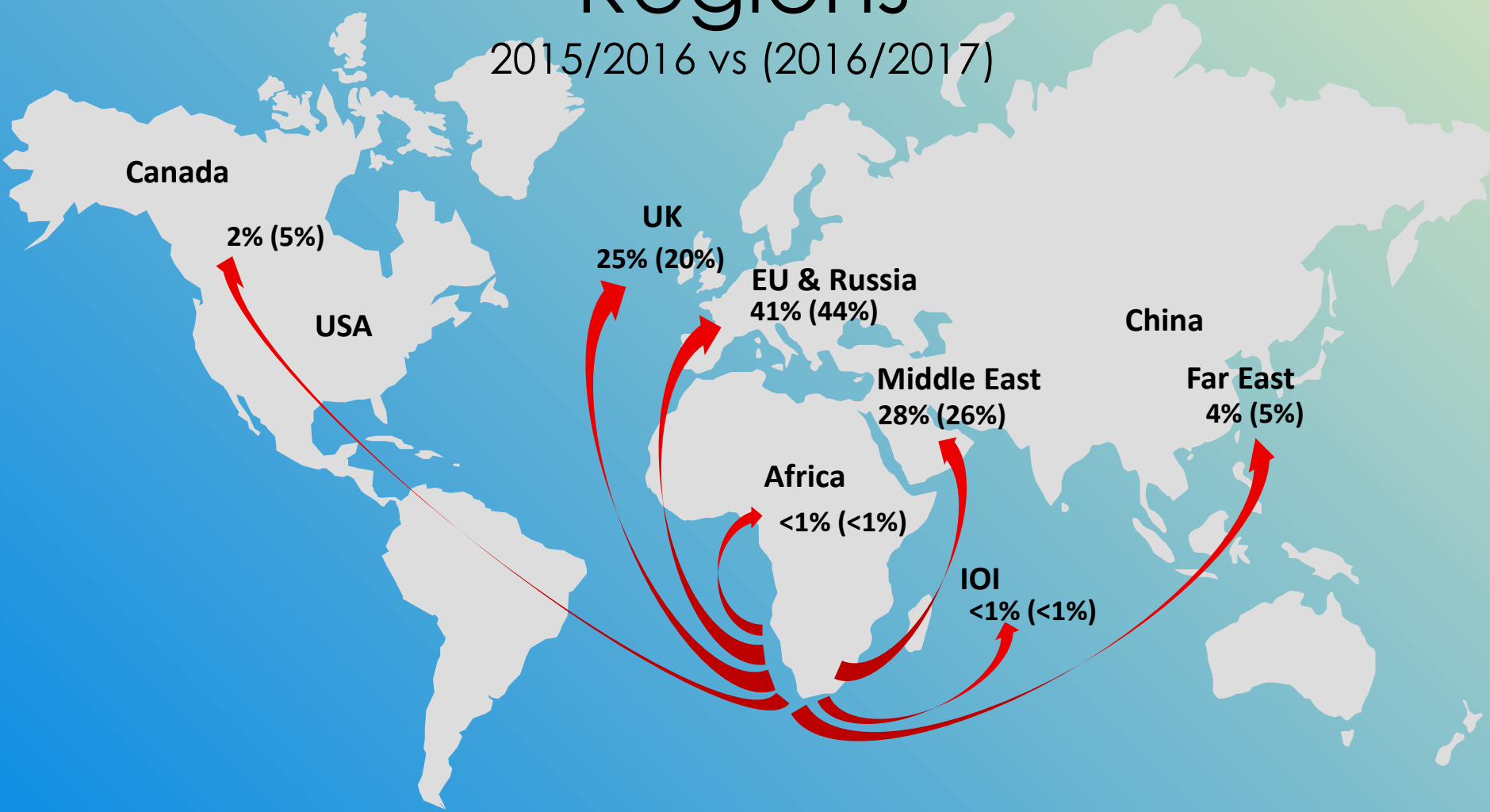
Bouquets: 3 year comparison

Groupname	Size	2014/2015	2015/2016	2016/2017	2016/2017 vs 2015/2016
Protea Bouquets	1-2 blooms	258 116	488 999	345 504	-29%
	3-5 blooms	589 022	300 809	394 283	31%
	mixed			2 260	-
Protea Bouquets Total		847 138	789 808	742 047	-6%
Mixed Greens	3-5 blooms		885		-100%
	mixed	190 325	315 392	490 040	55%
Mixed Greens Total		190 325	316 277	490 040	55%
Mixed Bouquets	1-2 blooms	7 044	69 720	81 877	17%
	3-5 blooms	6 577	13 994	30 175	116%
	mixed	51 792	112 611	107 771	-4%
Mixed Bouquets Total		65 413	196 326	219 823	12%
Leucospermum Bouquets	1-2 blooms	107 863	121 519	18 265	-85%
	3-5 blooms	109 567	93 345	94 839	2%
	mixed			480	-
Leucospermum Bouquets Total		217 430	214 863	113 583	-47%



Main South African Fynbos Export Regions

2015/2016 vs (2016/2017)



Thank you