



CFSA JMF Exports, Estimates

February 2017

Fynbos Total Area Planted

	Hectares				
Group	2012	2013	2014	2015	2015 vs 2014
Protea	661	601	595	550	-8%
Leucospermum	200	206	201	175	-13%
Leucadendron	132	143	134	130	-3%
Greens	54	59	67	72	7%
Total	1 047	1 009	996	926	-7%

Fynbos Age Distribution

Protea	0-2 years	3-5 years	6-17 years	18-25 years	25+ years
Hectares	59	113	298	66	13
Distribution	11%	21%	54%	12%	2%

Leucospermum	Non-bearing	2-4 years	5-12 years	12+ years
Hectares	15	50	106	4
Distribution	9%	29%	60%	2%

Leucadendron	Non-bearing	2-4 years	5-12 years	12+ years
Hectares	7	36	57	30
Distribution	5%	28%	44%	23%

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

Protea Estimate

All volumes are in stems

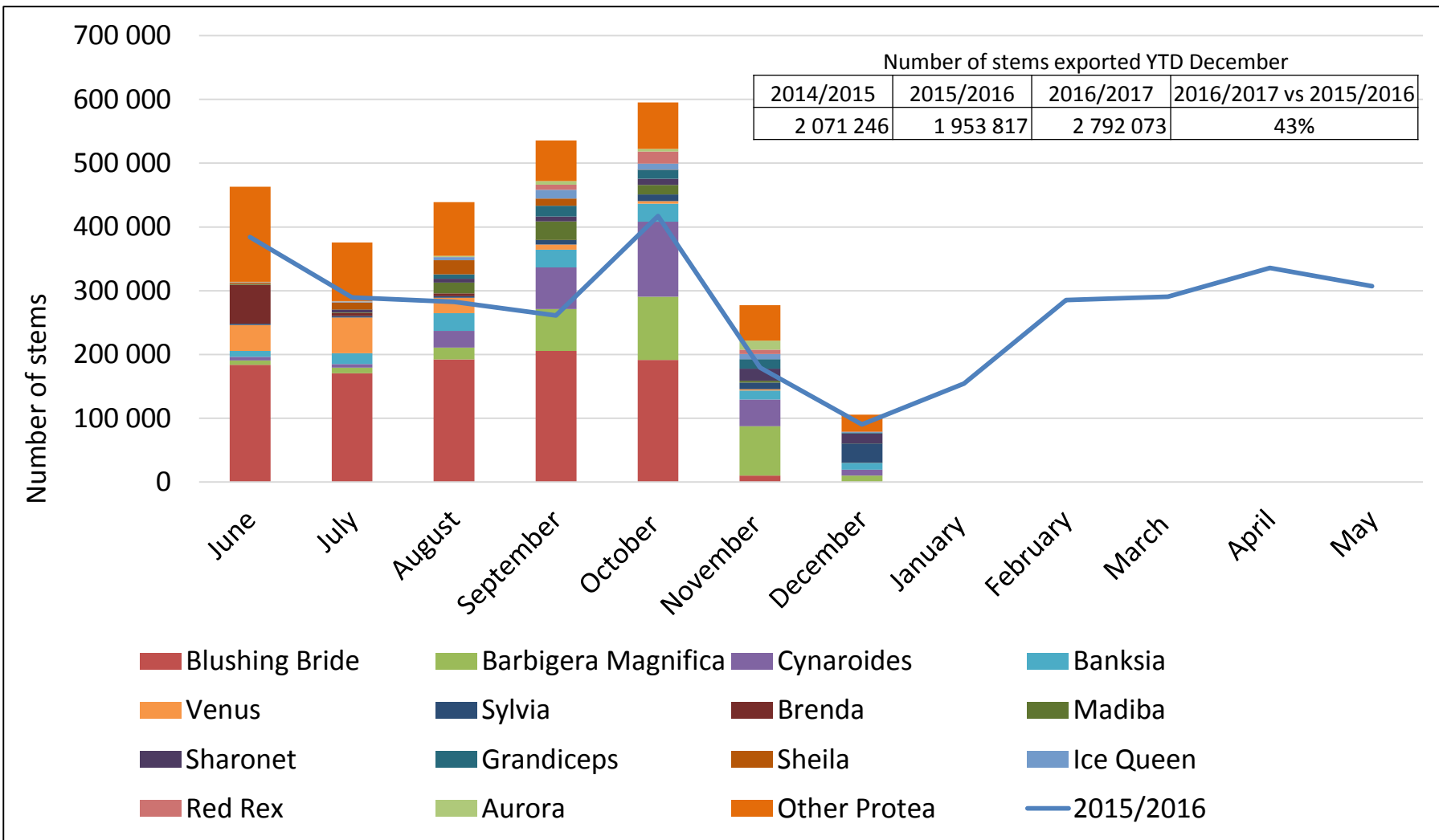
Variety	2012/2013 Exports	2013/2014 Exports	2014/2015 Exports	2015/2016 Exports	3 yr Average	2016/2017 Est Exports	2016/2017 Estimate vs 2015/2016 Actuals		YTD Dec 2016
Blushing Bride	38 069	94 000	407 740	676 212	392 651	954 458	278 247	41%	954 458
Cynaroides	228 912	243 675	305 758	243 805	264 413	269 697	25 892	11%	269 697
Pink Ice	267 036	197 937	231 473	266 732	232 047	298 740	32 008	12%	16 484
Sylvia	261 576	282 845	242 425	219 312	248 194	224 984	5 672	3%	65 294
Brenda	108 640	71 425	198 219	167 665	145 770	202 432	34 767	21%	70 321
Carnival	80 360	117 455	102 307	215 044	144 935	232 248	17 204	8%	21 865
Barbigera Magnifica	394 986	532 297	444 314	210 435	395 682	286 157	75 722	36%	286 157
Banksia	100 217	134 687	174 466	120 275	143 143	134 534	14 259	12%	134 534
Susara	65 150	93 859	61 543	115 930	90 444	117 108	1 178	1%	6 067
Ivy		120 725	79 261	122 569	107 518	122 569	-0	0%	15
Grandiceps	75 357	104 941	89 100	70 556	88 199	54 657	-15 900	-23%	54 657
Other/Private	965 710	747 909	824 769	898 648	823 775	961 554	62 905	7%	912 523
Total Protea in loose stems	2 586 013	2 741 755	3 161 375	3 327 184	3 076 771	3 859 138	531 954	16%	2 792 073
Stems in Bouquets	1 968 006	2 559 602	2 872 320	2 155 768	2 529 230	2 429 230	273 462	13%	1 319 576
Total Protea	4 554 019	5 301 357	6 033 695	5 482 951	5 606 001	6 288 368	805 417	15%	4 111 649

28% left for export!

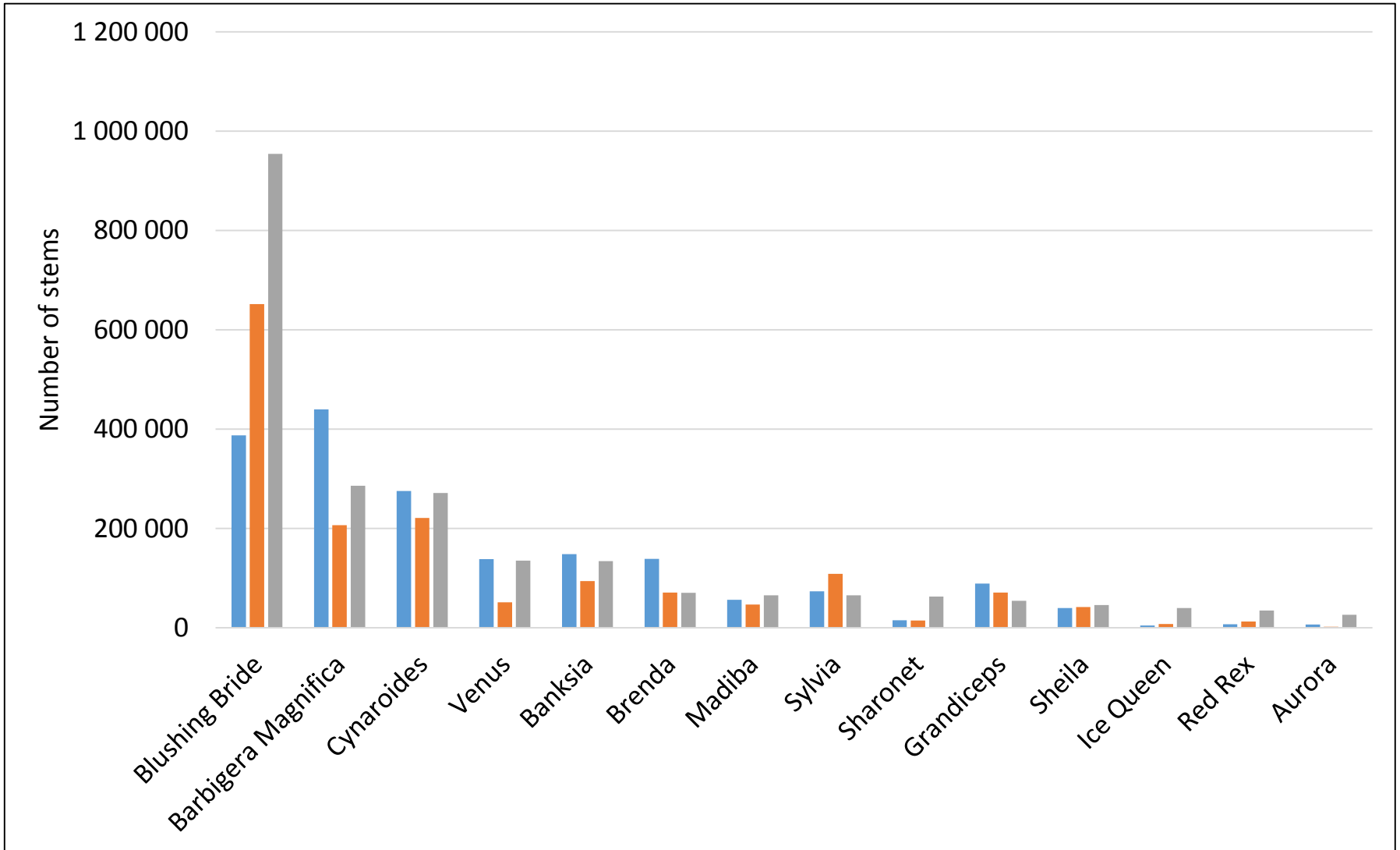
Updated the Protea: Loose stem +100 000

Updated the Protea: Stems in Bouquet -100 000

Protea: 2016/2017 Exports



Protea Exports: 3 year comparison YTD December 2016



Leucadendron Estimate

All volumes are in stems

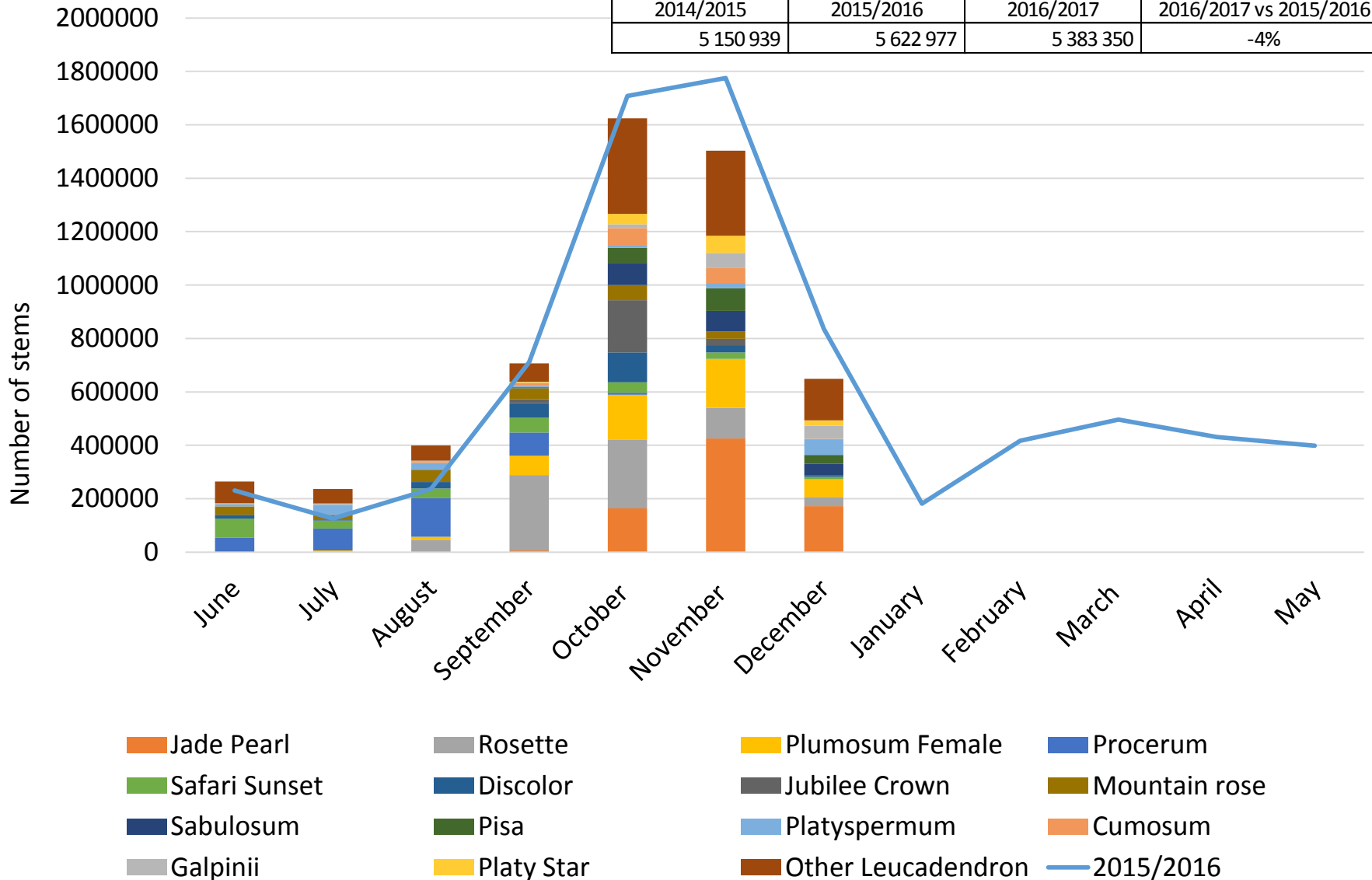
Variety	2012/2013 Exports	2013/2014 Exports	2014/2015 Exports	2015/2016 Exports	3 yr Average	2016/2017 Estimate	2016/2017 Estimate vs 2015/2016 Actuals		YTD Dec 2016	
Safari Sunset	1 397 932	1 008 310	1 032 096	1 101 130	1 047 179	1 095 621	-5 509	-1%	266 455	
Jade Pearl	190 940	164 032	297 601	725 985	395 873	779 662	53 677	7%	767 162	
Plumosum Female	208 770	508 816	518 653	585 383	537 617	504 121	-81 262	-14%	504 121	
Rosette	808 816	1 132 819	734 148	675 966	847 644	738 949	62 983	9%	738 949	
Discolor	453 592	545 136	568 729	462 594	525 486	353 952	-108 642	-23%	237 673	Adjusted: -100 000
Blush	305 716	317 090	349 511	368 061	344 887	315 086	-52 975	-14%	95 370	
Gold Strike	229 913	273 253	334 820	300 786	302 953	253 304	-47 483	-16%	107 399	Adjusted: -60 000
Galpinii	110 473	180 226	228 444	261 229	223 300	207 592	-53 638	-21%	136 110	Adjusted: -50 000
Pisa	89 780	114 080	183 630	205 520	167 743	179 093	-26 427	-13%	179 093	
Jubilee Crown	260 310	198 180	206 875	217 557	207 537	235 643	18 086	8%	235 643	
Blush Pearl		11 000	18 700	168 269	65 990	38 686	-129 583	-77%	38 686	Did not make estimate of 190 000
Sabulosum	71 216	89 941	182 534	178 193	150 223	204 805	26 612	15%	204 805	
Other/Private	2 045 753	2 142 440	1 956 536	2 296 800	2 131 925	2 409 239	112 438	5%	1 871 835	
Total Leucadendron	6 173 211	6 685 323	6 612 277	7 547 473	6 948 358	7 315 749	-231 724	-3%	5 383 350	

27% left for export!

Updated estimate: -500 000 due to actual exports and calculated adjustments

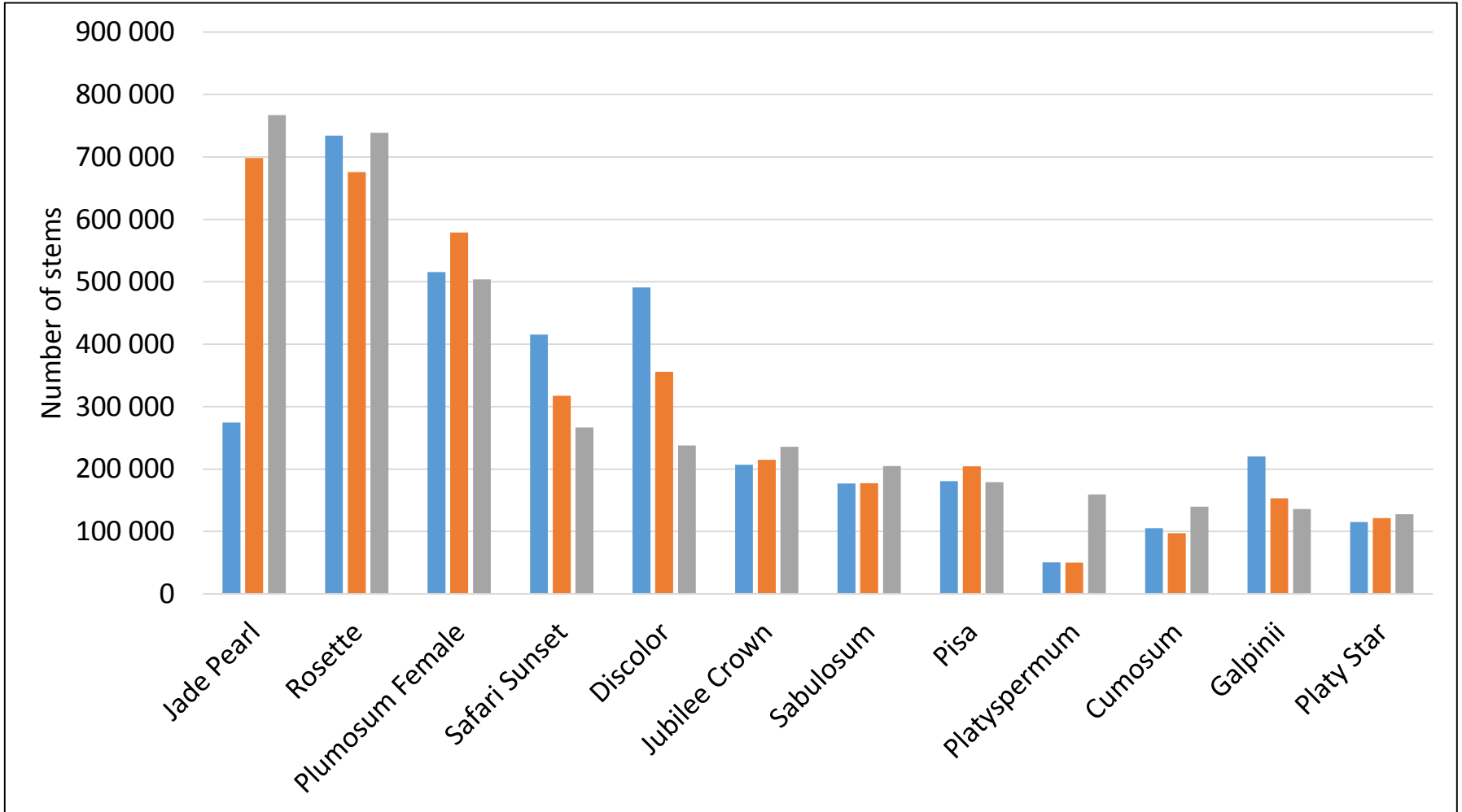
Leucadendron: 2016/2017 Exports

Number of stems exported YTD December			
2014/2015	2015/2016	2016/2017	2016/2017 vs 2015/2016
5 150 939	5 622 977	5 383 350	-4%



Leucadendron Exports: 3 year comparison

YTD December 2016



Leucospermum Estimate

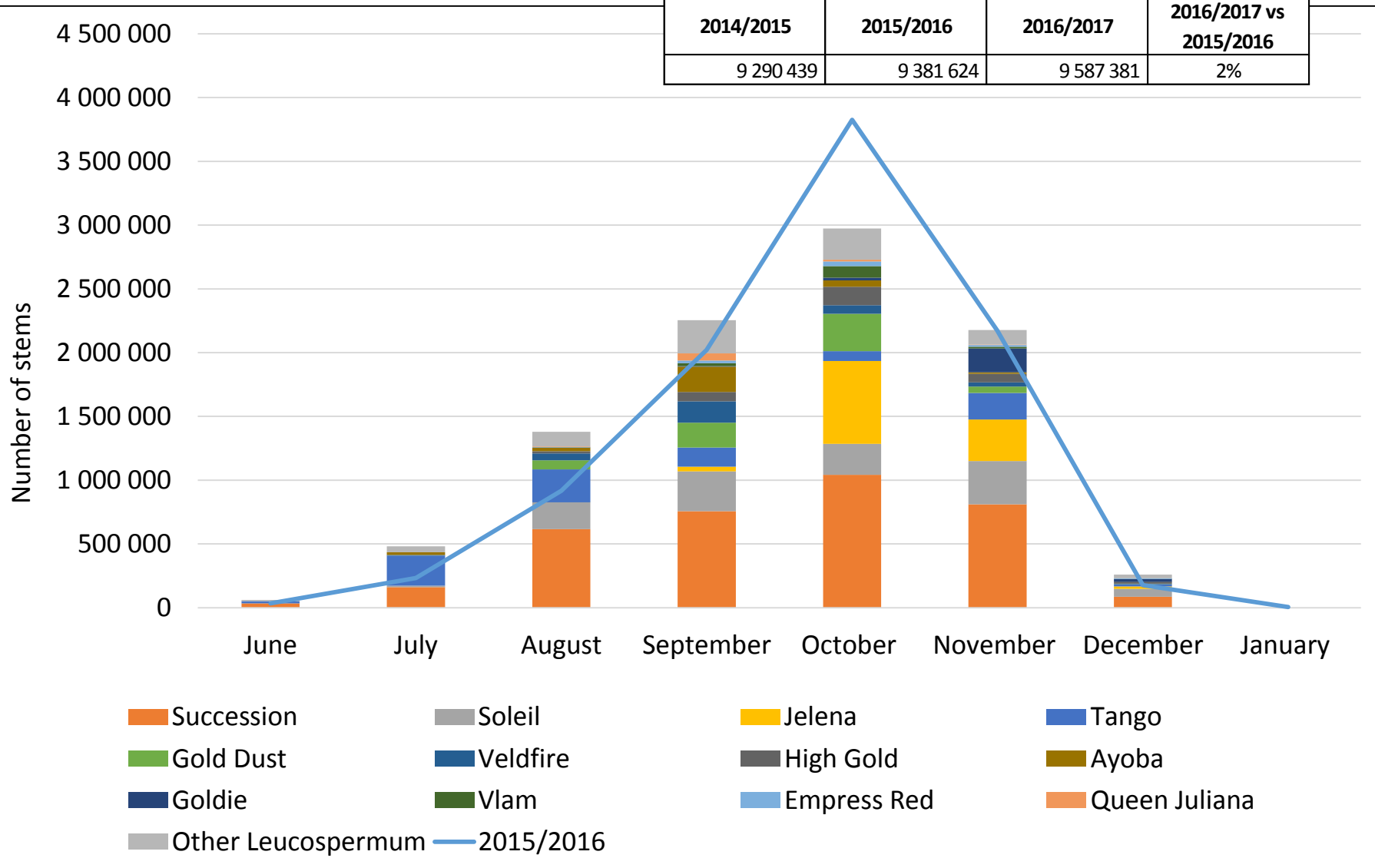
All volumes are in stems

Variety	2012/2013 Exports	2013/2014 Exports	2014/2015 Exports	2015/2016 Exports	3 yr Average	2016/2017 Estimate	2016/2017 Estimate vs 2015/2016 Actuals		2016/2017 actuals	2016/2017 Actuals vs 2015/2016 Actuals	
Succession	2 316 611	2 879 932	4 001 397	3 487 369	3 456 233	3 788 897	301 528	9%	3 509 920	22 551	1%
Tango	736 745	943 170	973 367	1 043 434	986 657	1 247 230	203 796	20%	961 653	-81 781	-8%
Soleil	339 315	386 485	1 000 081	1 164 202	850 256	1 164 202	-	0%	1 178 105	13 903	1%
Jelena	427 365	515 305	725 986	938 815	726 702	1 025 759	86 944	9%	1 028 959	90 144	10%
Gold Dust	437 475	413 855	473 421	597 987	495 088	597 987	-	0%	614 156	16 169	3%
High Gold	367 159	430 765	464 888	516 124	470 592	566 072	49 947	10%	317 961	-198 164	-38%
Veldfire	444 931	366 427	394 265	348 052	369 581	348 052	-	0%	326 120	-21 932	-6%
Goldie	147 170	334 645	311 559	255 485	300 563	259 296	3 811	1%	231 382	-24 102	-9%
Rigoletto	202 119	124 475	132 381	119 623	125 493	131 106	11 483	10%	66 173	-53 450	-45%
Vlam	165 150	123 025	111 705	86 646	107 125	91 984	5 338	6%	130 197	43 551	50%
Jyoti/Super Gold	125 305	149 600	87 510	168 954	135 355	168 954	0	0%	137 345	-31 609	-19%
Other Leucospermum	454 021	1 012 641	621 644	679 766	771 350	796 351	116 585	17%	1 085 410	405 644	60%
Total Leucospermum in loose stems	6 163 366	7 680 325	9 298 204	9 406 457	8 794 995	10 185 890	779 433	8%	9 587 381	180 924	2%
Stems in Bouquets	521 330	66 624	653 994	616 416	445 678	616 416	-	0%	396 636	-219 780	-36%
Total Leucospermum	6 684 696	7 746 949	9 952 198	10 022 873	9 240 673	10 802 306	779 433	8%	9 984 017	-38 856	0%

Season almost finished.
Overestimated by 6%.

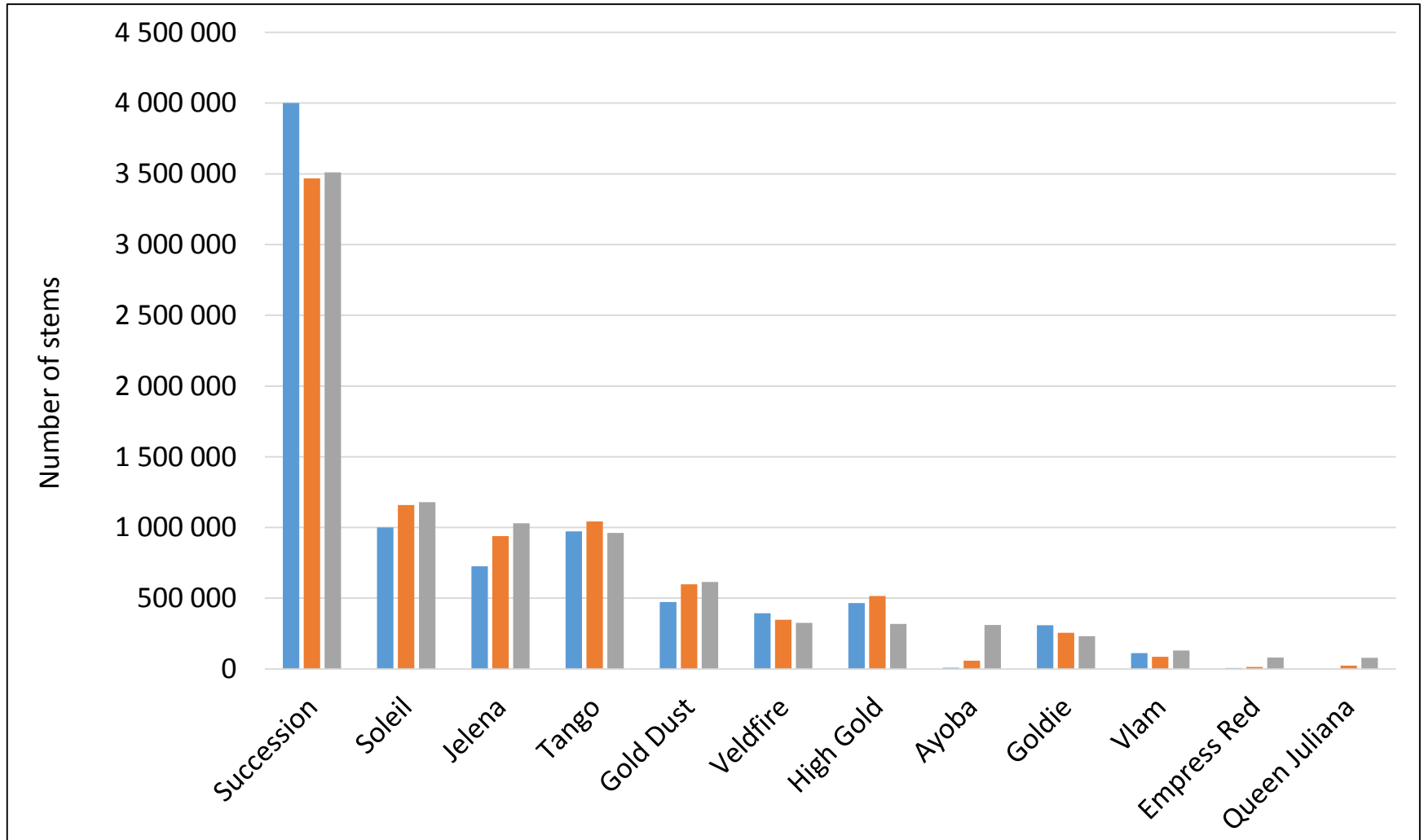
Leucospermum: 2016/2017 Exports

Number of stems exported YTD December			
2014/2015	2015/2016	2016/2017	2016/2017 vs 2015/2016
9 290 439	9 381 624	9 587 381	2%



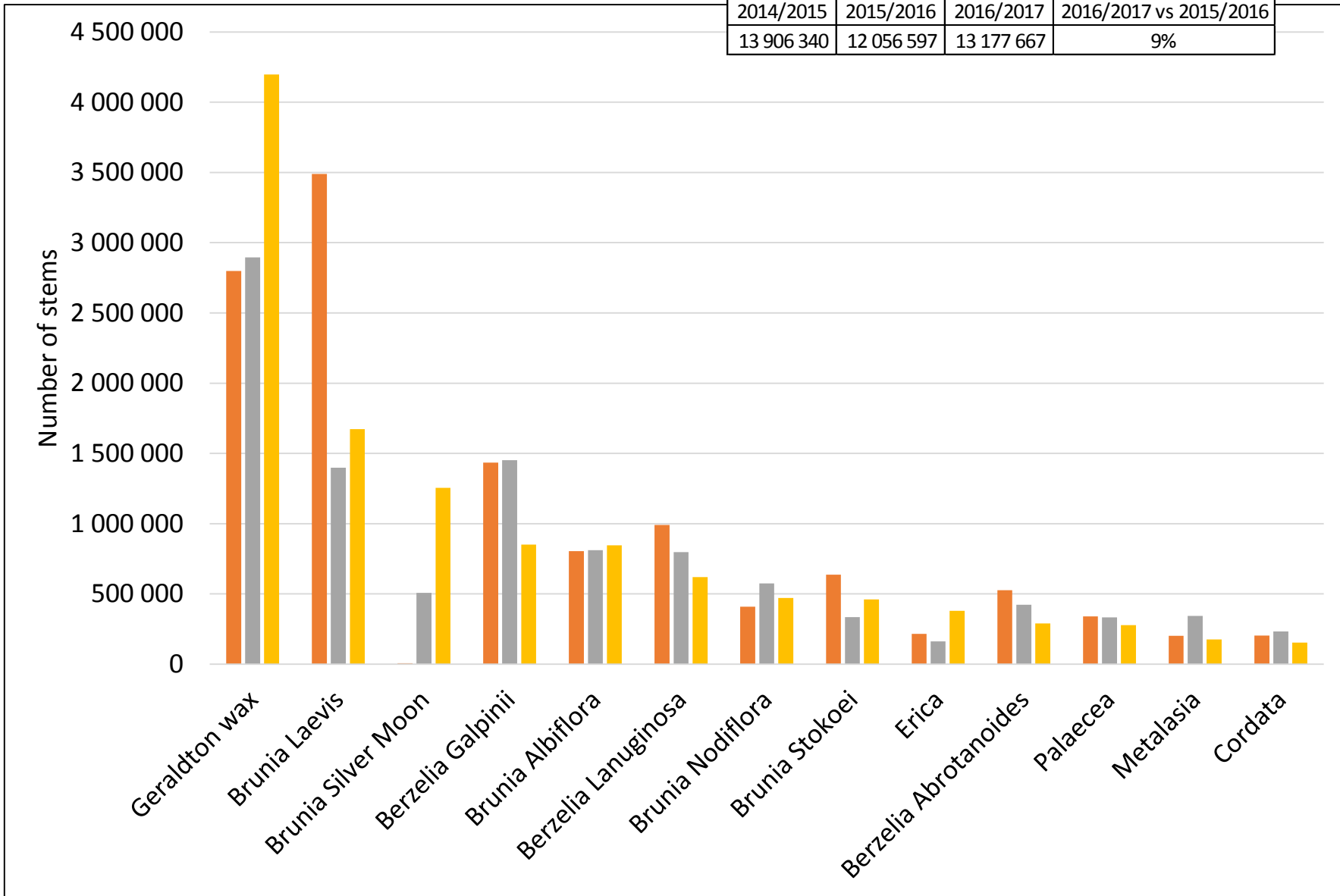
Leucospermum Exports: 3 year comparison

YTD December 2016



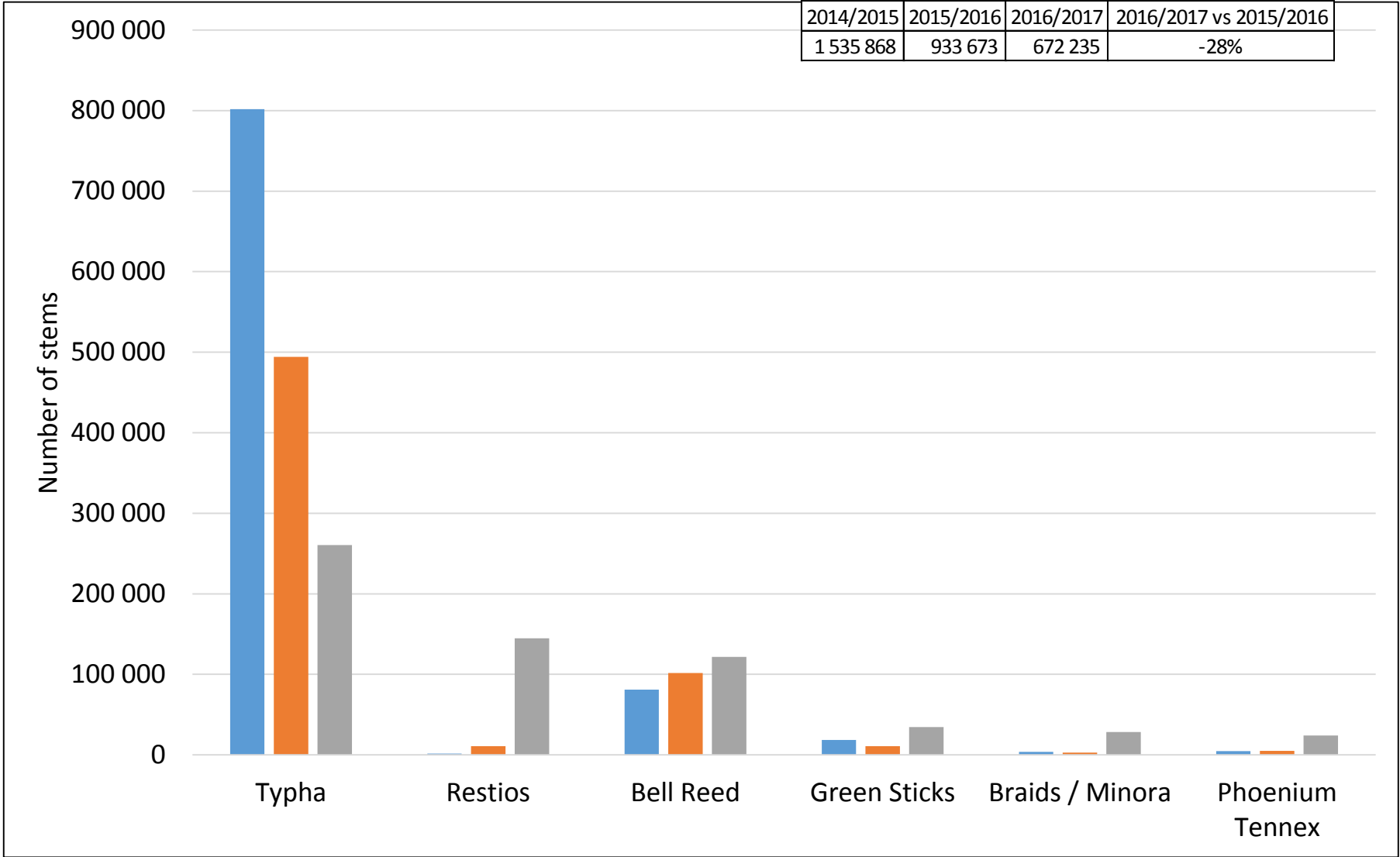
Greens: 3 year comparison

Number of stems exported YTD December			
2014/2015	2015/2016	2016/2017	2016/2017 vs 2015/2016
13 906 340	12 056 597	13 177 667	9%

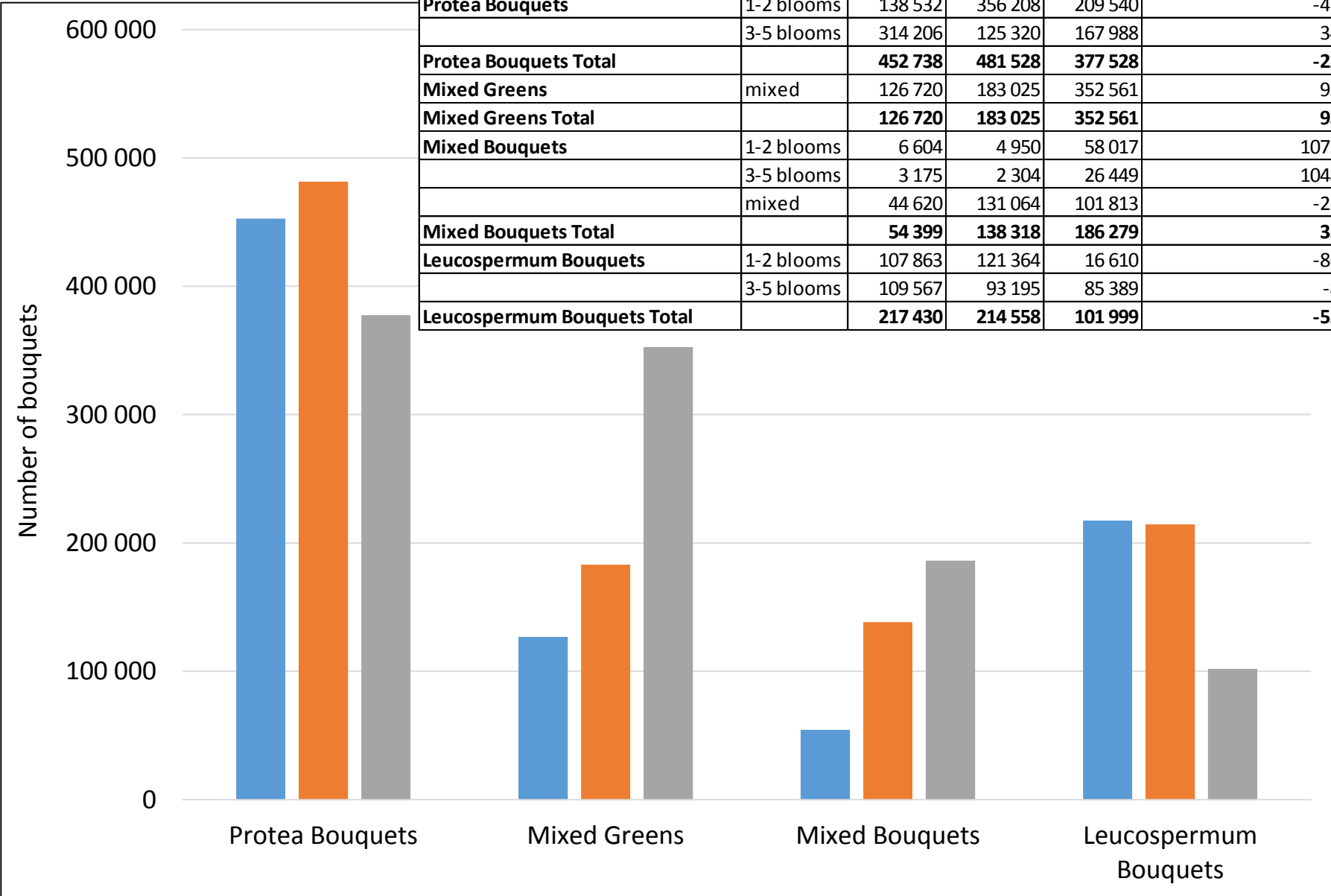


Grasses: 3 year comparison

Number of stems exported YTD December			
2014/2015	2015/2016	2016/2017	2016/2017 vs 2015/2016
1 535 868	933 673	672 235	-28%

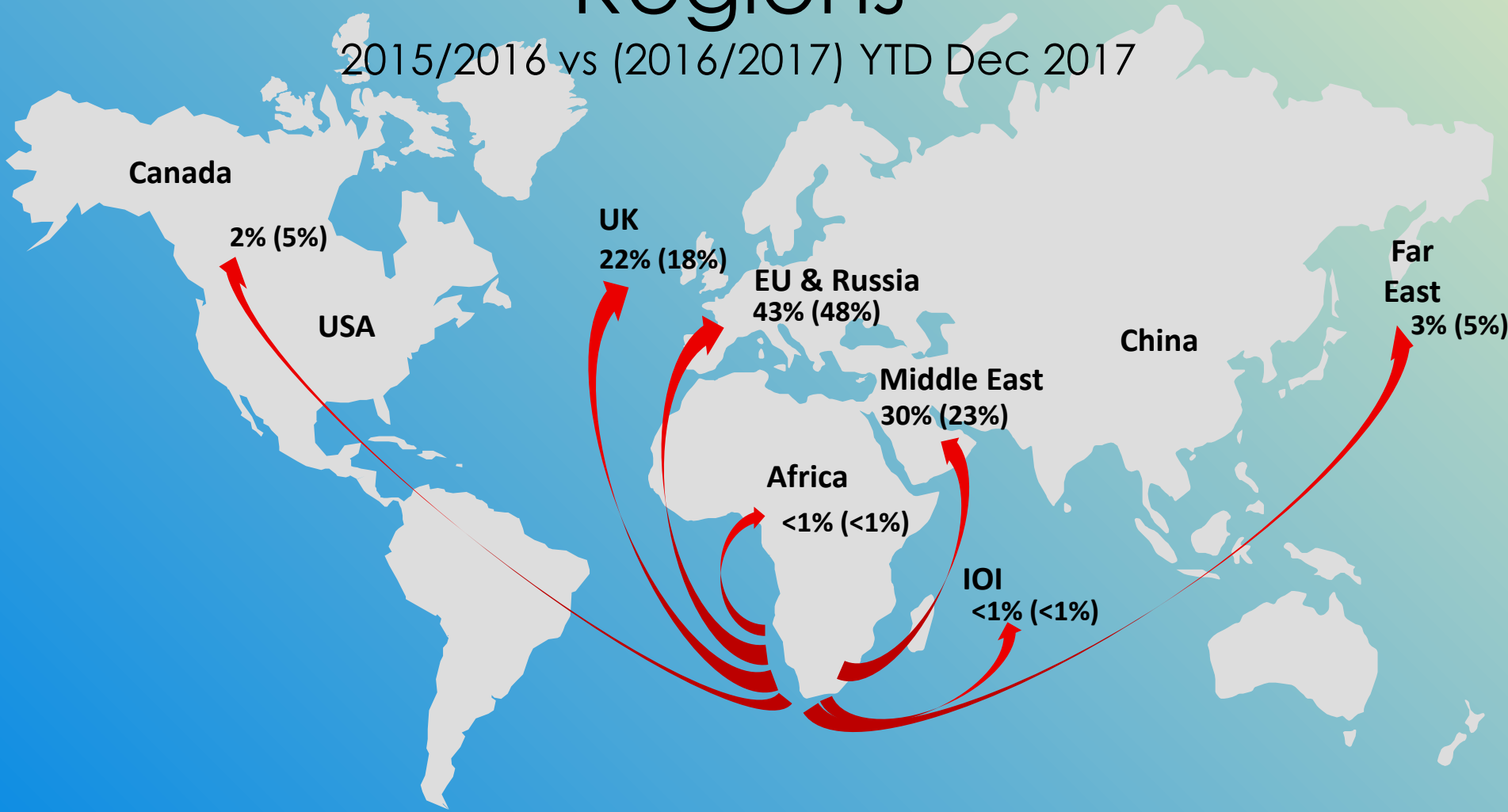


Bouquets: 3 year comparison



Main South African Fynbos Export Regions

2015/2016 vs (2016/2017) YTD Dec 2017



Thank you

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