



SESSION 3
MARKET DEVELOPMENT

FRUIT SA

Market Awareness Activities

ANTON KRUGER
CEO
FRESH PRODUCE EXPORTERS' FORUM

fpéf
SOUTH AFRICA™
FRESH PRODUCE
EXPORTERS' FORUM

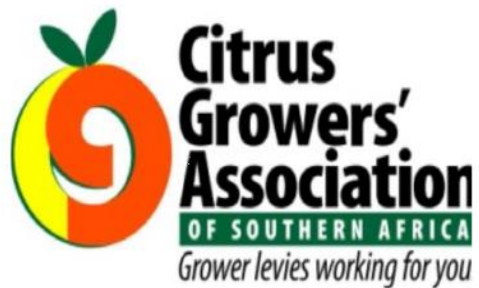
CONTENT



- What is market awareness?
- Why is it necessary?
- How is it done ?
- South African fruit.
- Export destinations.
- Trade Shows, trade missions, visitors.



FRUIT SA MEMBERS





GENERAL INFO: SOUTH AFRICAN FRESH FRUIT EXPORTS

- Fresh fruit = 50% of SA's agricultural exports
- SA = 2nd largest exporter of citrus
- Fruit types: citrus, pome fruit, stone fruit, table grapes, subtropical fruit
- 2,7 million tonnes exported to 92 countries annually
- Value = about R30 billion (\$2,4 billion)

WHAT IS MARKET AWARENESS?

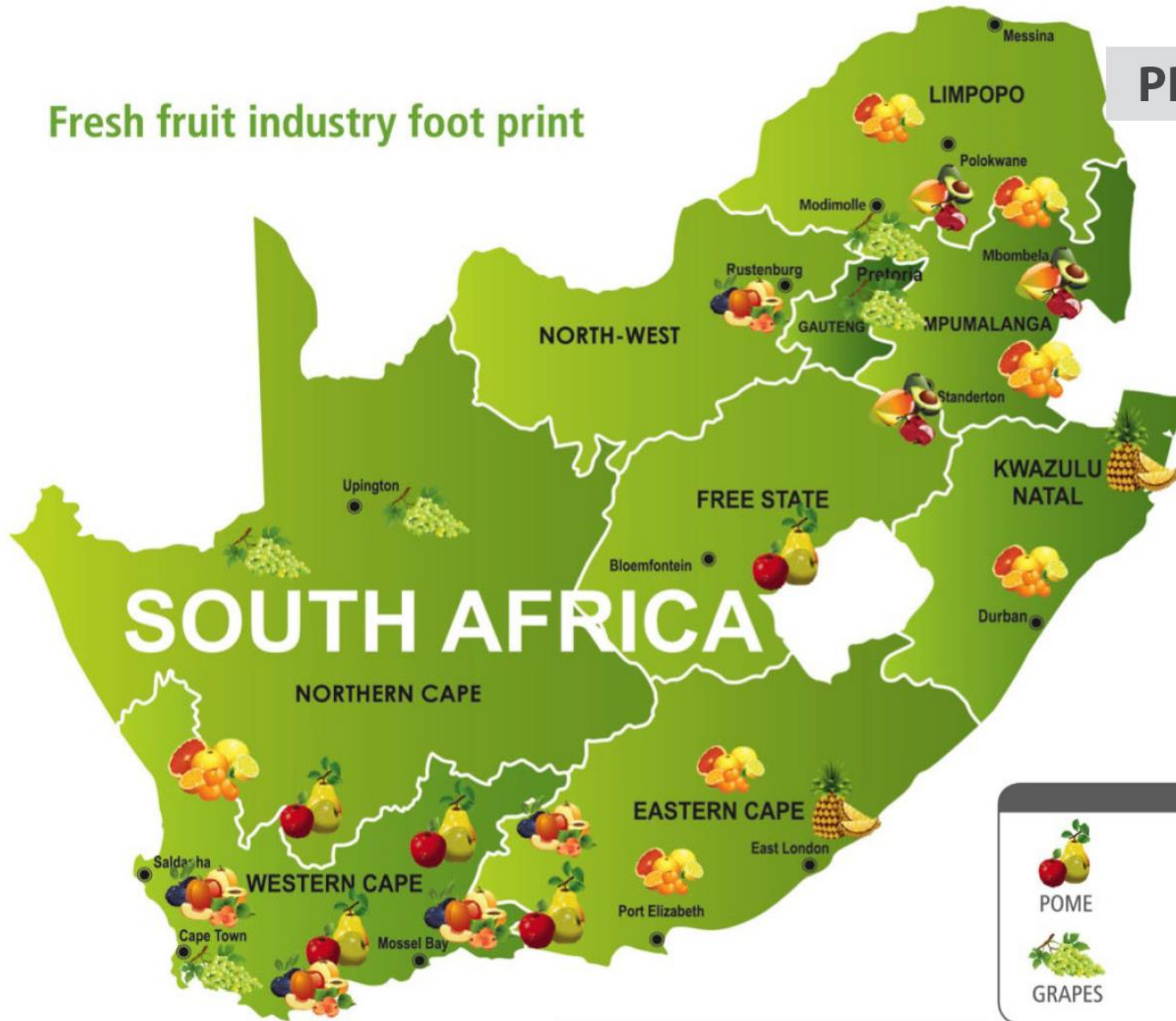


Ensuring that target audiences are aware of:

- Where SA is located.
- SA produces fruit: Counter-seasonal.
- SA does have capacity & expertise to export fruit.
- Logistical infrastructure.
- That SA provides high quality fruit.
- Consumers, importers, traders know about SA fruit.

Fresh fruit industry foot print

PRODUCTION REGIONS



KEY		
		
POME	CITRUS	STONE FRUIT
		
GRAPES	SUBTROPICAL	PINEAPPLES

WHY IS IT NECESSARY?

- Position SA vs. competitor countries.
- Retain and grow existing markets.
- Assist with process of market access:
 - Establish SA fruit's image in potential markets.
 - Create & develop awareness of SA in new markets.



FRUIT EXPORTS : 2015/2016



- Citrus 65%
- Deciduous 23%
- Table Grapes 9%
- Subtropical 3%

EXPORT DESTINATIONS OF SA FRUIT



EXPORT DESTINATIONS



Destination	Percentage
● Europe	34%
● Middle East	18%
● Far East	16%
● UK	12%
● Russia	9%
● Africa	5%
● USA/Canada	4%
● Other	2%
Total	100%

SA FRUIT ON ITS WAY



VALUE/LOGISTICS/COLD CHAIN



The South African fresh fruit supply chain is very long. From the point of picking, it can take up to 40 days before an apple, pear or bunch of grapes is in the consumer's hand. The cold chain commences the moment fruit is first cooled, as soon as possible after harvesting. Without the cold chain, exports will not be possible – fruit quality and shelf life depend on it. The entire supply chain is also a value chain. As fruit is moved along the chain, its value steadily increases along with the financial risk to the producer and exporter. The goal is always to deliver the best quality and achieve the highest return on investment. *(It is a 40 day period from the orchard to the supermarket and another eight days shelf life, bringing the total to 48 days.)*

HOW IS IT DONE?



- Methods depend on target audience, available schemes and desired outcomes.
- **Understand target audience:**
 - Personal interaction/relationships.
 - Culture, consumer trends, who takes the decisions in each segment/audience.
 - Media landscape.

MOSCOW, RUSSIA

Russian Barbecue Association



CONSUMER TRENDS



“Marketing is an expensive undertaking that will only succeed when consumers’ wants, needs and behaviours are understood and used to build marketing strategies.”

CONSUMER TRENDS



- Lifestyle.
- Convenience.
- Cost.
- Cultural differences.
- “Value for Values”.
- Food security.



HÀNG HÓA CÓ NGUỒN GỐC THỰC VẬT NHẬP KHẨU
COPY Số: 23.088/KDTV

Cấp cho: CÔNG TY TNHH XUẤT NHẬP KHẨU TCT.....
Địa chỉ: 28A4 PHẠM HỒNG THÁI, BA ĐÌNH, HÀ NỘI.....
Là chủ sở hữu (hoặc người đại diện) lô hàng sau:

ST T	Tên thương mại	Tên khoa học	Số lượng/trọng lượng	Phương tiện vận chuyển	Nơi đi	Nơi đến
1	QUA TÁO TUỔI	<i>Malus domestica</i>	1029 KIẾN = 18.522 TẤN B/L: EGLV 456442281596	EMCU5335128	TACOMA, WA	HẢI PHÒNG

Tên, địa chỉ tổ chức, cá nhân nhập khẩu: CÔNG TY TNHH XUẤT NHẬP KHẨU TCT.....
28A4 PHẠM HỒNG THÁI, BA ĐÌNH, HÀ NỘI.....
Nước xuất khẩu: USA.....
Cơ sở sản xuất: DOMEX SUPERFRESH GROWERS Mã số (nếu có):
Địa chỉ: 151 LOW ROAD YAKIMA WASHINGTON 98908 USA.....
Cửa khẩu nhập: HẢI PHÒNG - VẬN CHUYỂN VỀ HÀ NỘI.....

CHỨNG NHẬN

☒ Lô hàng trên đã được kiểm tra và chưa phát hiện dịch hại thuộc diện điều chỉnh của Việt Nam;
Lô hàng đã được kiểm tra và phát hiện loài ...X X X... Là dịch hại thuộc diện điều chỉnh hoặc dịch hại lạ của Việt Nam: *(nếu nào không cần thì gạch đi)*

☒ Lô hàng trên có kết quả kiểm tra hồ sơ, ngoại quan đáp ứng yêu cầu về ATTP.
Lô hàng có kết quả kiểm tra, kiểm nghiệm đáp ứng yêu cầu về ATTP.

Quy định một số điều kiện trong khi gửi và nhận hàng:

☒ Lô hàng được phép sử dụng tại địa điểm quy định trên;

☒ Bảo ngay cho cơ quan KDTV/BVTV nơi gần nhất khi phát hiện dịch hại thuộc diện điều chỉnh của Việt Nam *(trong quá trình bốc dỡ, vận chuyển, sử dụng ...)*;
Điều kiện khác:

Giấy này được cấp căn cứ vào:

☒ Giấy phép KDTV nhập khẩu số 2972/BVTV-KD Ngày 01/07/2014.....

☒ Giấy đăng ký kiểm dịch và kiểm tra ATTP hàng hóa có nguồn gốc thực vật nhập khẩu;

☒ Giấy chứng nhận KDTV của nước xuất hàng;

☒ Kết quả kiểm tra, phân tích giám định trong phòng thí nghiệm KDTV;

Dấu xử lý vật liệu đóng gói của nước xuất khẩu:

Căn cứ khác:

THỦ TRƯỞNG ĐƠN VỊ
(Ký tên, đóng dấu)
VI N
CHỊ ĐỨC TRƯỜNG

Ghi chú:

- Nghiêm cấm chở hàng đến địa điểm khác nếu không được phép của cơ quan KDTV/BVTV nơi gần nhất.
- 01 liên đóng dấu giáp lai giao cơ quan Hải quan.
- 01 liên đóng dấu giáp lai lưu cơ quan Kiểm dịch. (Điện thoại: 031 3 842 104)



HANOI, VIETNAM

WHAT EUROPEAN CONSUMERS WANT

- Food safety, fair trade and environmentally friendly products.
- Quality & consistency.
- Convenience.
- Variety and new options.





USA MARKET CHARACTERISTICS

- Health-conscious consumers.
- Pay for convenience and quality.
- Want variety.
- Carbon footprint, traceability, responsible environmental and fair labour practice standards.

HOW IS IT DONE?



- **Partnerships**
 - SA Government (dti, DIRCO, DAFF).
 - SA Embassies.
 - Importers' associations, retailers.

FUNDING



- Two most important trade shows:
Fruit Logistica Berlin & Asia Fruit Logistica.
- The South African fresh fruit export industry participates annually.
- Funded by Department of Trade and Industry (dti).



FRUIT LOGISTICA, BERLIN





MARKET AWARENESS ACTIONS

- Fruit Logistica Berlin - 25th anniversary.
- More than 75 000 trade visitors from 130 countries.
- SA pavillion (400m²) sponsored by dti.
- FPEF + 22 other co-exhibitors/FPEF members.
- Positive feedback - SA Embassy, Berlin.
- 'The Great Fruit Adventure'
- Specific promotional campaigns by HORTGRO, eg. Germany.

FRUIT LOGISTICA, BERLIN



FRUIT LOGISTICA, BERLIN



South Africa

Inspiring New Ways



FRUIT LOGISTICA, BERLIN



the dti

Department:
Trade and Industry
REPUBLIC OF SOUTH AFRICA

South Africa



MEDIA



HONG KONG



MARKET AWARENESS ACTIONS



- **Asia Fruit Logistica 2016:**
- 665 exhibitors from 37 countries.
- More than 11 000 visitors from 74 countries.
- SA participation sponsored by the FPEF, SATI, HORTGRO, the CGA, Subtrop and the Western Cape Department of Agriculture.
- Marketing material in Mandarin and English.

ASIA FRUIT LOGISTICA, HONG KONG



ASIA FRUIT LOGISTICA, HONG KONG



TRADITIONAL INTERNATIONAL MARKETS

EUROPE



TRADITIONAL INTERNATIONAL MARKETS

UNITED KINGDOM



MARKET AWARENESS ACTIONS

- Targeted promotions by HORTGRO





MARKET AWARENESS ACTIONS

Fresh Summit: Produce Marketing Association (PMA)

- Summer Citrus promotion : W Cape Citrus Producers' Association
- PMA = global trade association, since 1950s in USA
- October 2017, Orlando, Florida
- 21 000 visitors from 60 countries & 100 exhibitors
- Market access: SA litchis, citrus (2017)

FRESH SUMMIT, ORLANDO FLORIDA

**Welcome to
Fresh Summit 2016**

W Hall A4

N Hall B1

FRESH SUMMIT, ORLANDO FLORIDA



FRESH SUMMIT, ORLANDO FLORIDA



FRESH SUMMIT, ORLANDO FLORIDA



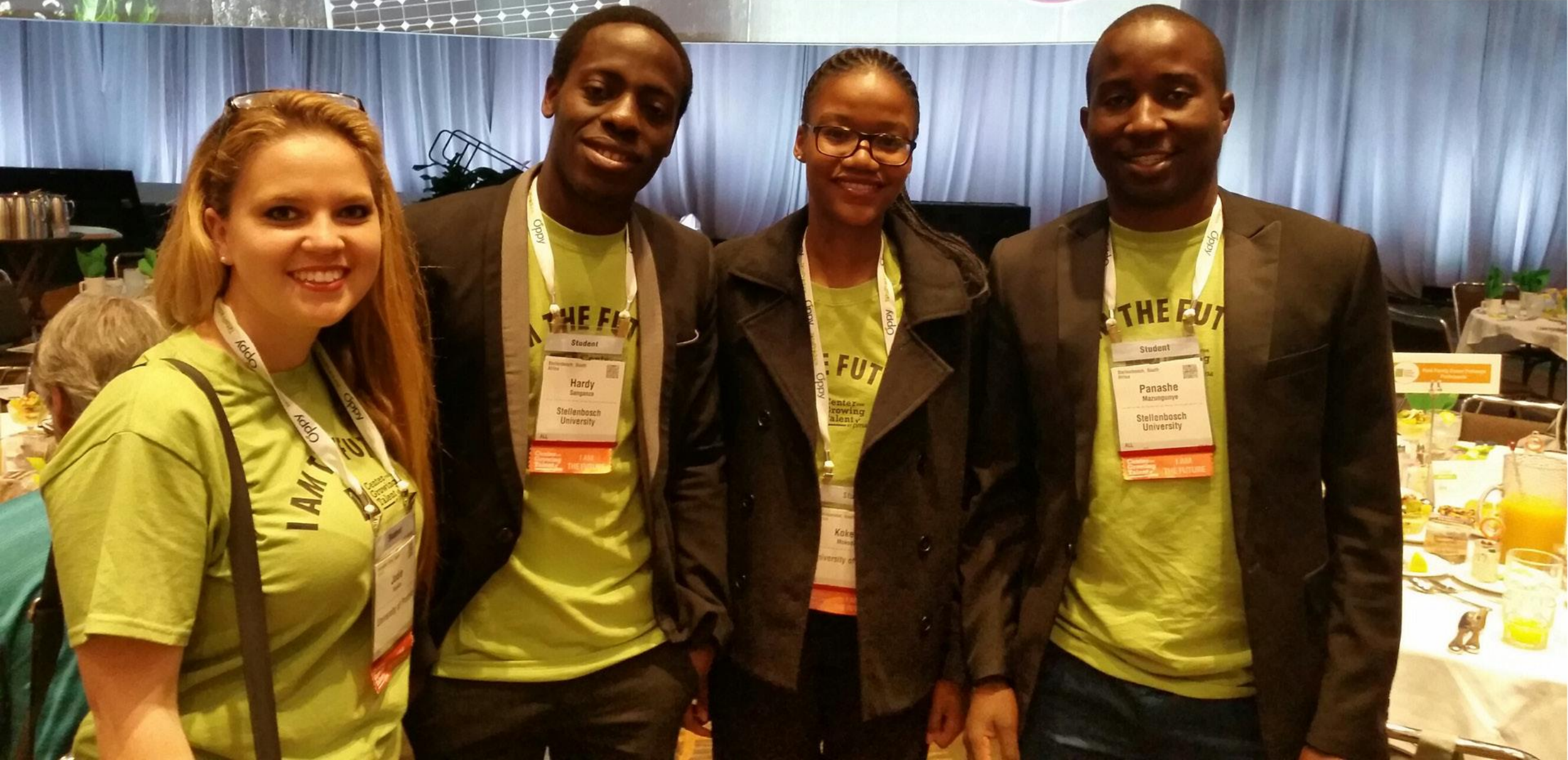
the dti

Department:
Trade and Industry
REPUBLIC OF SOUTH AFRICA



pma
FRESH SUMMIT
CONVENTION + EXPO

FRESH SUMMIT, ORLANDO FLORIDA

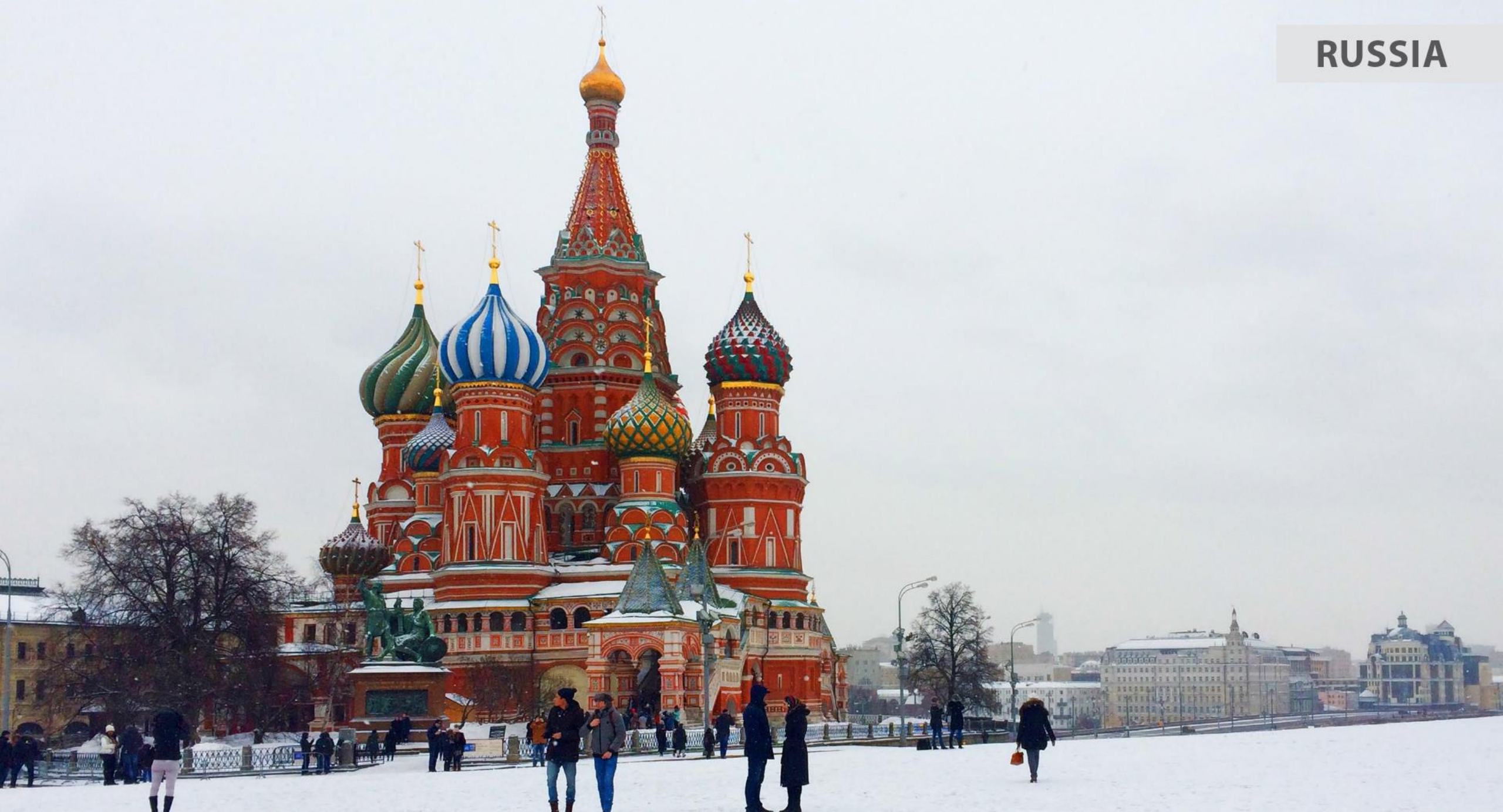


WHAT MAKES POTENTIAL NEW MARKETS APPEALING?



- Import duties, tariffs.
- Reliable partners.
- Understanding culture & market.
- Sufficient demand, growth potential.
- Manageable phytosanitary protocols.
- Counter-seasonality.
- Logistics and cold chain infrastructure.

RUSSIA





MOSCOW, RUSSIA

MARKET AWARENESS ACTIONS



World Food Moscow:

- Largest food and beverage trade fair in Russia.
- September 2016: 1 522 exhibitors from 62 countries.
- 31 000 trade visitors.
- dti funded and organised SA pavilion.
- Raised awareness & generated trade leads.



MOSCOW, RUSSIA



Южная Африка

MOSCOW, RUSSIA

South Africa

Inspiring new wa

www.southafrica.net



ROBINSON & SINCLAIR
PREMIUM WINES



ALLÉE BLEUE



ALLÉE BLEUE



ALLÉE BLEUE



PAINTED *dolph* WINES





WORLD FOOD MOSCOW

Luke Govender (dti Export Promotion), Isaac Miti (SA Agricultural Attaché, Moscow), Jodi Scholtz (dti CEO), Anton Kruger (FPEF CEO), Ambassador Sibanda-Thusi and Moloko Leshaba (SA Trade Attaché in Moscow).

MOSCOW, RUSSIA



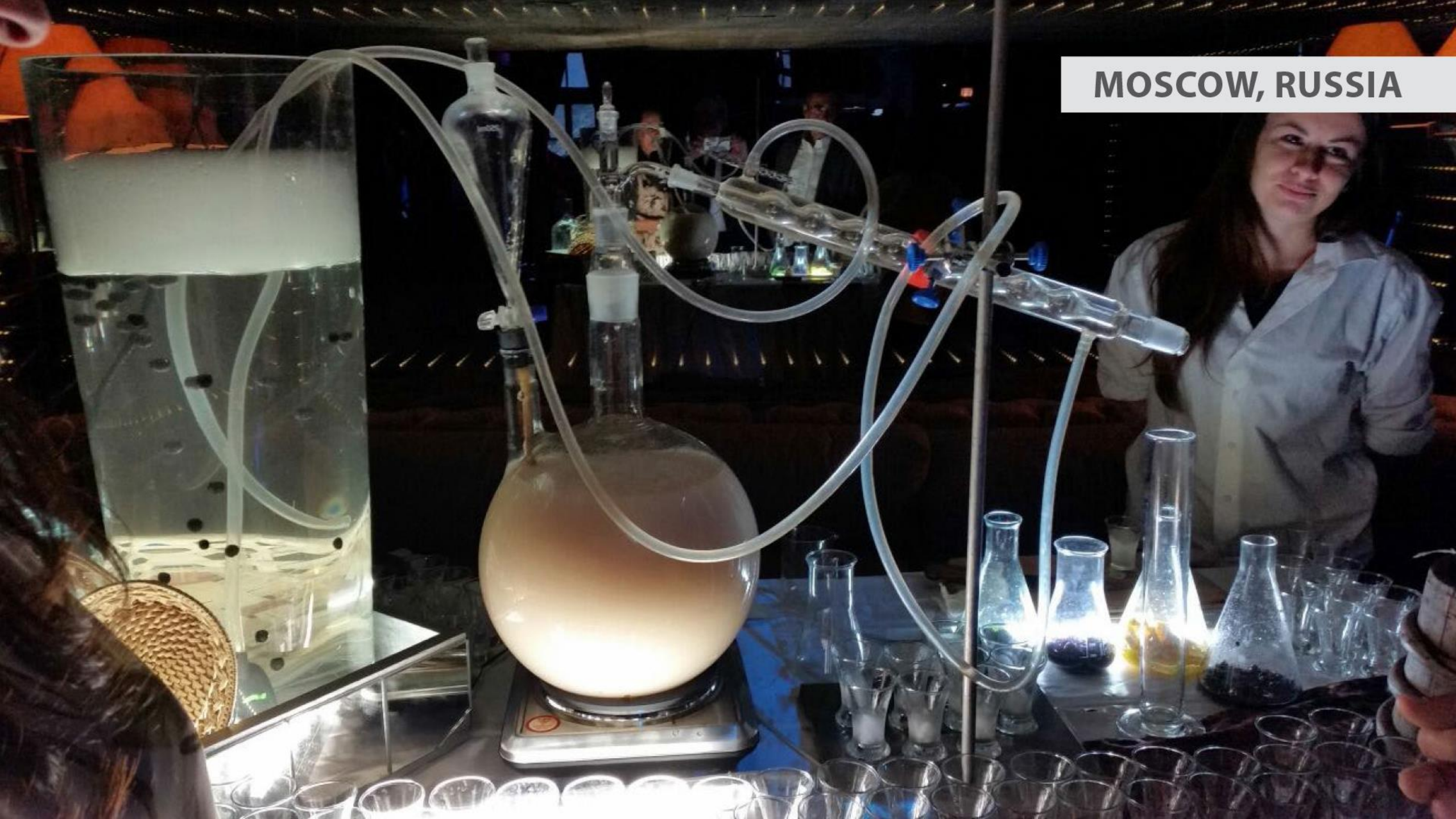
**SOUTH AFRIC
EMBASSY**



MOSCOW, RUSSIA



MOSCOW, RUSSIA



MOSCOW, RUSSIA

МОСКОВСКИЙ МЕТРОПОЛИТЕН

СТАНЦИЯ
ВЫСТАВОЧНАЯ





DUBAI, MIDDLE EAST

MIDDLE EAST



- 140 million people.
- Media promotes health benefits.
- Vastly improved cold storage infrastructure.



MARKET AWARENESS ACTIONS

- Gulfood Trade Show.
- World of Persihables Trade Show (WOP).
 - Only fresh produce trade fair in Middle East.
 - 235 exhibitors from 34 countries.
 - FPEF's first attendance.
 - Sponsor: Sector Specific Assistance Scheme (SSAS).
 - 11 emerging producer-exporters sponsored.

SOUTH AFRICAN DELEGATION: WORLD OF PERISHABLES EXPO, DUBAI 2016



“PLEASE DO NOT WALK ON THE LAWN”





GLOBAL ECONOMIC MAP IS SHIFTING

EASTERNISATION

POPULATION GROWTH: 2015 vs 2050 (million)



2015		2050	
• China	1,372	India	1,660
• India	1,314	China	1,366
• United States	321	United States	398
• Indonesia	266	Nigeria	397
• Pakistan	199	Indonesia	366
• Bangladesh	160	Pakistan	344
• Russia	144	Bangladesh	202

Source: United Nations. 2015

ASIA



- 16% of SA fruit exports.
- SA's fastest growing market.
- Low awareness of SA fruit among importers, retailers and consumers.
- Generic promotions needed.

ASIA



FAR EAST COUNTRIES

- China (including Hong Kong & Macao), Japan, Mongolia, North Korea and South Korea, Brunei, Cambodia, East Timor, Indonesia, Laos, Malaysia, Myanmar, Philippines, Singapore, Taiwan, Thailand, and Vietnam.
- Far East have a combined population of >2,2 billion.

ASIA

- Trade shows (including national pavillions).
- Outward selling missions.
- Inward buying missions.
- In-store promotions.
- Events, eg. SA National Day.



THREE YEAR PROMOTIONAL PLAN



TRADE SHOWS

- **India:** Mumbai.
- **China:** Beijing, Shanghai.
- **Hong Kong.**
- **Indonesia:** Jakarta.
- **Japan:** Tokyo.
- **South Korea:** Jeju Island.
- **Thailand:** Bangkok.
- **Philippines:** Manila.
- **Vietnam:** Hanoi.

INDIA



MARKET AWARENESS ACTIONS



Fresh Produce India Trade Show, Mumbai:

- April.
- Target audience: importers, competitor countries and FSSAI officials.
- Event partners: Fruit SA, SA Exporters, Embassy.
- Annapoorna WorldFood.

MUMBAI, INDIA



CHINA



CHINA MARKET CHARACTERISTICS



- 1,4 billion people.
- Has considerable potential as fresh fruit and vegetables export market.
- Demands good taste, prefers large fruit, imposes high quality standards and is extremely brand conscious.
- Fierce competition for a share in Far Eastern market.

CHINESE INTERNATIONAL FRUIT & VEGETABLE FAIR

BEIJING, CHINA



2015年北京国际果蔬展览会暨研讨会

中国果蔬行业第一展
No.1 Fresh Show In China

China International Fruit & Vegetable Fair 2015



展览时间

09月09日 星期三 09:30-17:00
09月10日 星期四 09:30-17:00
09月11日 星期五 09:30-16:00

Show Time

09-30 - 17:00 Sept 09, 2015 Wednesday
09-30 - 17:00 Sept 10, 2015 Thursday
09-30 - 16:00 Sept 11, 2015 Friday

主办单位
中国果品流通协会
中国蔬菜流通协会

承办单位
北京国际果蔬展览会暨研讨会

协办单位
北京国际果蔬展览会暨研讨会
北京国际果蔬展览会暨研讨会

支持单位
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MARKET AWARENESS ACTIONS



Fruit & Veg Trade Show, Beijing

- Annual.
- 8 000 visitors.
- Target audience: Importers, competitor countries and AQSIQ officials.
- Event partners: SA Exporters, Fruit SA, SA Embassy.

THE WAY THE CHINESE VIEW THE WORLD

发地国际农产品会展中心



北京华联农业文化博览园

BEIJING, CHINA

South Africa



South Africa



HORTGRO
Growing Fruit IQ





F3

BEIJING, CHINA



BEIJING, CHINA

南非新鲜农产品
fpoe
FRESH PRODUCE
EXPORTERS' FORUM
SOUTH AFRICA

INDONESIA



INDONESIA MARKET AWARENESS ACTIVITIES



- FSA delegation visited Jakarta in May 2016.
- Strengthen relationships: SA Embassy, Government authorities, importers.
- Challenges and opportunities.
- 'Mutual Country of Recognition' (MCR) status.
- Benefits: Port of Jakarta & laboratory tests.

THE FSA DELEGATION MEET WITH INDONESIAN OFFICIALS



JAPAN



JAPAN MARKET CHARACTERISTICS

- 6 852 islands, only 430 are inhabited by 126,9 million people.
- Very health-conscious.
- World's highest life expectancy - 84 years.



MARKET AWARENESS ACTIONS



Foodex Trade Show, Tokyo

- Largest international food & beverage trade show in Asia.
- Attracts more than 80 000 trade visitors from 64 countries annually.
- 3 000 exhibitors at National Pavilion.
- Event partners: SA Exporters, Fruit SA, dti.



THE FSA DELEGATION AND THE JAPANESE MINISTRY OF AGRICULTURE IN TOKYO



**AMBASSADOR
BERYL ROSE SISULU
SA EMBASSY
TOKYO**

THE FSA DELEGATION AND THE JAPANESE CITRUS ASSOCIATION MEET IN TOKYO



SOUTH KOREA



SOUTH KOREA MARKET CHARACTERISTICS



- 50,7 million people.
- 25 million residents live in high-rises in Seoul.
- Seoul = 7th most sustainable city in the world.
- Consumers have disposable income, demand high quality fruit.
- High import duties and costs.



JEJU ISLAND, SOUTH KOREA



MARKET AWARENESS ACTIONS



World Food Expo, Jeju Island

- International Citrus Conference / Expo Jeju Island.
- Target audience: Importers, competitor countries and consumers.
- Event partners: SA Exporters, Fruit SA.
- Jeju Island: Soft citrus.
- Opportunity for SA: Grapefruit.

JEJU ISLAND, SOUTH KOREA



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SOUTH AFRICA
FRESH PRODUCE
EXPORTERS' FORUM



JEJU ISLAND, SOUTH KOREA



THAILAND



BANGKOK



MARKET AWARENESS ACTIONS



Thaifex World of Food Asia, Bangkok

- 25 - 29 May.
- 38 000 visitors.
- Target audience: Importers & competitor countries.
- Event partners: SA Exporters, Fruit SA, SA Embassy, dti.

MANILA

PHILIPPINES



MANILA, PHILIPPINES



MARKET AWARENESS ACTIONS



AgriLink Trade Show, Manila

- 6 - 8 October.
- 25 000 visitors.
- Target audience: Importers & competitor countries.
- Event partners: SA Exporters, Fruit SA.

MANILA, PHILIPPINES

WORLD TRADE CENTER

METRO MANILA

MANILA, PHILIPPINES



MANILA, PHILIPPINES



MANILA, PHILIPPINES



VIETNAM





MARKET AWARENESS ACTIONS



Agroviet Trade Show, Hanoi

- November.
- 15 000 visitors.
- Target audience: importers, wholesalers.
- Event partners: SA Exporters, SA Embassy.

HANOI, VIETNAM



HANOI, VIETNAM



27 APRIL



FREEDOM DAY

FREEDOM DAY CELEBRATIONS



SA Freedom Day celebration at SA Embassy in Berlin:

- Reception for more than 400 guests.
- Cultural programme featuring SA artists.

Authentic menu with fruit salad donated by
SA industry.

GIVING FRUIT TO EMBASSYS ON 27 APRIL - FREEDOM DAY



GIVING FRUIT TO EMBASSIES ON 27 APRIL - FREEDOM DAY



GIVING FRUIT TO EMBASSYS ON 27 APRIL - FREEDOM DAY



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GIVING FRUIT TO EMBASSYS ON 27 APRIL - FREEDOM DAY



GIVING FRUIT TO EMBASSYS ON 27 APRIL - FREEDOM DAY



FRUIT ART





FRUIT ART

MEDIA COVERAGE: TELLING THE WORLD



South Africa



310-1

牡丹江市汇永进出口有限责任公司
Mudanjiang Huiyong Import and Export Co., Ltd.

309

洛川延刚经贸果业有限责任公司
Luochuan Yangang Fruit Trade Co., Ltd.

MEDIA

乡果网·家门口的果
WWW.XIANGGUOWANG.COM

果6

MEDIA





MEDIA



Антон Крюгер

Исполнительный директор Союза экспортеров
плодоовощной продукции Южной Африки

Бизнес
Вектор

МЧС: Экипаж Ми-8 отрабатывал технологии спасения в особо сложных условиях

IS IT SUCCESSFUL?



- Measurable?
- Long term focus.
- Potential harm to SA's reputation if SA fresh fruit industry is not visible.



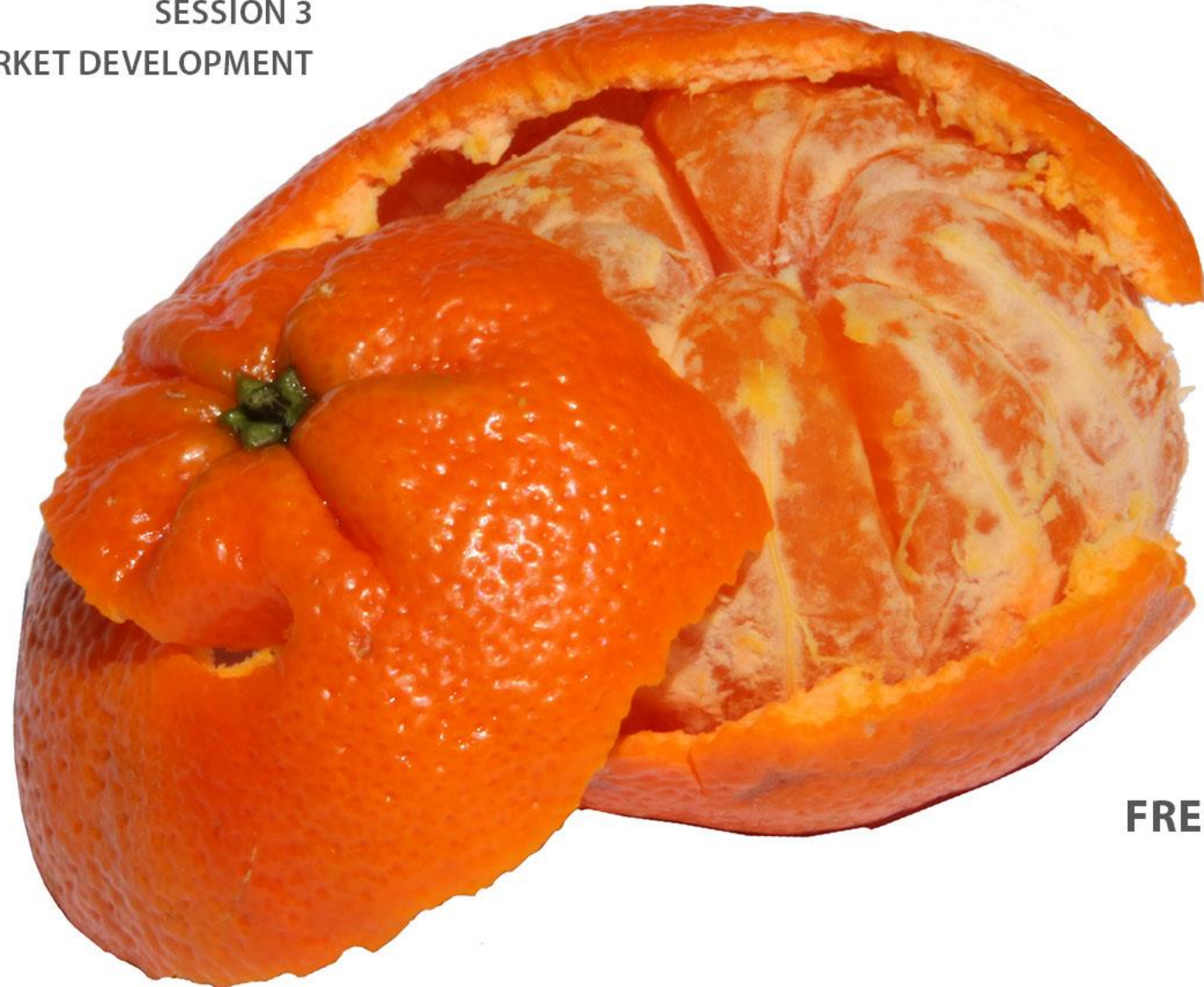



ECONOMY
CLASS

SINGAPORE AIRLINES



SESSION 3
MARKET DEVELOPMENT



Thank you

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