



fpéf  
fresh produce  
EXPORTERS' FORUM  
SOUTH AFRICA

# 2023

ANNUAL REPORT



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# CHAIRMAN'S REPORT

MARK JENSEN



## Sustainability of the greater brand reputation

### October 2022 – September 2023

Adverse weather had a significant impact on the production volumes for 2023. The impact was immediately prevalent on summer grape and stone fruit volumes, which were 10-15% lower than the year before. Despite hail in several pome fruit production areas and weather being blamed for significantly lower volumes in some of the citrus production regions, the exported volumes in both these categories still exceeded the prior year.

The combination of the above-mentioned volumes, empty markets due to the Northern Hemisphere off-crop, more marginal fruit moved directly into processing, favourable exchange rates and the freight coming back (although still not to the pre-Covid levels) delivered what has been, for most of the industry, a fantastic year financially.

What is becoming evident, however, is that successful and sustainable returns are very dependent on the right commodities and varieties – being packed to the appropriate quality, targeted into

the correct markets and in the best timing windows. The year was also riddled with disasters where we got this wrong...

There has been some encouraging progress with the APAC Board regarding the rules governing export agents, which can hopefully be resolved in time to avoid the scheduled litigation in January 2024.

Our struggles with the Department of Trade, Industry and Competition (dtic) – in terms of their commitment to trade fairs – continues, and we have again motivated for a stronger public-private partnership to improve the Brand South Africa presence and offer our members better meeting facilities. Given the recently published fiscal challenges of Government, the risk remains that going forward we will be required to play a greater role in funding international fresh produce trade fairs – something for which we need to be financially prepared.

Despite some good news – Market Access, which must be seen in conjunction with Tariffs and

Duties, is still one of the greatest challenges and risks to the industry. It is very difficult to compete against our Southern Hemisphere competitors who have dedicated governmental task teams – working tirelessly on making them more competitive – especially in the Near and Far Eastern markets. We can only hope that, at some stage, the critical importance of these factors is understood and properly addressed by Government.

The other major risk is the poor state of our port and rail infrastructure that, coupled with bad management, continues to result in terrible productivity at every level. The attitude of finding reasons to justify the poor performance rather than seeking advice and solutions to improve performance indicates that, unfortunately, nothing is likely to change for the foreseeable future.

There are indeed those trying their best to work with industry to improve performance and find solutions, which would ultimately contribute to overall economic improvement with the additional job creation. Sadly, it appears they are in the minority and that the tentacles of state capture continue to hold powerful levers in critical positions within the group. As such, our last hope for the country in this regard remains the successful roll-out of public-private partnerships. Thus, we sincerely hope that this is not derailed by self-seeking politicians, unions and management.

No assessment of risks and challenges is, however, complete without also looking inwards at ourselves. We have a global reputation of being an industry that is deeply divided in the pursuit of our own goals and profits. Whilst it is fair to say that strong competition is the very foundation of what has driven our

success as an industry, it also could, if we are not careful, be what destroys our industry.

I believe that almost everyone in the industry has been guilty of making decisions based on short-term profit, rather than the sustainability of the greater brand reputation of our industry. Whilst this has worked in an undersupplied market, it will in my opinion have catastrophic consequences if it continues into what is likely to be an oversupplied market.

It is therefore appropriate that we should start having some open discussion and debate around how we find the balance between serving our responsibility to our producers and customers, but at the same time protecting the industry and reputation of Brand South Africa fruit.

We need to fully appreciate that we are not only responsible for the livelihoods of our businesses and our staff, but of our producers, their staff and the many families that rely on them. There are also those along the support chain – from carton manufacturing, fertilisers, chemicals, transport and cold storage to many other support services.

In closing, I would like to thank Adolf Kieviet, my fellow Board members, Anton Kruger and the FPEF Executive for their outstanding support during the past year. Wishing you all a well-deserved break, and all the best in preparing for what is likely (touch wood) to be the largest export volume in history in the 2023/2024 season.

Regards,

Mark Jensen

## MESSAGE FROM THE CEO

ANTON KRUGER



Collaboration  
is the new currency

*“Collaboration is the new currency.”*

Cathy Burns – CEO of the International Fresh Produce Association (IFPA)

These words by Cathy Burns aptly describe the approach that the FPEF has taken over the past year to address the challenges and constraints faced by the fresh produce export industry. Collaboration is a joint effort, but in many instances our offer to collaborate with the public sector was rather one-sided. Confronting this situation gave rise to some tension, but it also created the opportunity for frank and open discussions. As a solution-driven industry, we made it clear that a partnership implies both parties seeking solutions – whilst confirming our commitment to working in partnership with Government.

One serious concern is the information provided by the National Treasury regarding severe financial problems within Government, which affirmed that the fresh produce export industry

must continue its assistance – in order to ensure our produce arrive in sound condition in export markets and that our industry is sustained. The contributions of FPEF members, via membership and pallet fees, effected our strategy of assisting Government over the past year. I would like to thank all of our members – this is highly appreciated!

The APAC Rules for Export Agents remained problematic, despite our efforts (since 2012) to explain the difference between the export process and the role of export agents – versus that of local market agents. As was reported in the 2022 Annual Report, the FPEF realised that in order to get the Rules set aside or adapted, the only option left was to take legal action. The process commenced in September 2022, and is still ongoing. The costs to the FPEF and to our members have been too high and is diminishing our competitiveness in the international market.

The FPEF is, however, not opposed to a form of regulation in the industry – provided that it is practical and makes sense. This is evident in

the FPEF membership requirements – membership for export agents will only be considered, following registration with the Agricultural Produce Agents’ Council (APAC) and the Perishable Products Export Control Board (PPECB). (At the same time, I am pleased to report a continued increase in the FPEF membership count.)

A very positive development was the withdrawal of the APA Amendment Bill from Parliament – mainly due to our efforts. The Bill will be redrafted in collaboration with the industry. I would like to acknowledge and thank the FPEF representatives who serve on the Export Agent Committee, namely Aileen Zulch, Angelo Petersen and Liezl Gelderblom (Chairperson) – they ensure that our viewpoints are being heard.

The importance of collaboration and solution-driven approaches were also evident in our engagements with the other Fruit SA member associations, the Department of Agriculture, Land Reform and Rural Development (DALRRD), the Department of Trade, Industry and Competition (dtic), the Department of Science and Innovation (DSI), Transnet and Agbiz.

We are still party to the Agricultural and Agro-processing Master Plan (AAMP). However, no progress was made in 2023 – despite the fact that the AAMP was signed more than a year ago – being hailed as a plan focused on implementation. In the same vein, the trading environment remained tough with the industry experiencing as many challenges and disruptions during 2023 as in the year before.

We did see progress, though, in terms of access to new markets. This can be largely attributed to our visits to priority markets – together with our engagements with trade representatives and government officials, in collaboration with South African Embassy staff members abroad, not only during the past year but over the past decade.

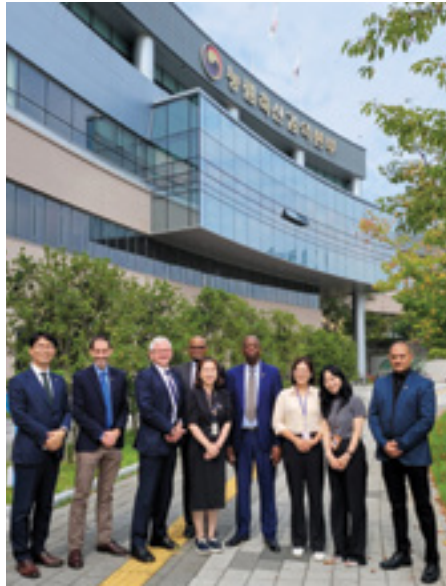
It was thus positive when the protocol for avocado exports to the People’s Republic of China was concluded during the BRICS Summit. We are also awaiting conclusion of the protocol for the export of avocados to Japan, but indications are that this is imminent.



Our international trade engagements would not have been possible without the financial contributions of our members. We were also able to convince the Minister and Director General of DALRRD to dedicate an official to be included in our industry delegations. The industry funded participation of the appointed DALRRD representative, whose presence during meetings with international governments made a significant impact.

As the official Fresh Produce Export Council in South Africa, registered with the dtic, the FPEF is responsible for raising awareness about the South African fresh produce export industry – particularly as a counter-seasonal supplier of high-quality fresh fruit. International trade events provide the ideal opportunity; thus we are grateful that the dtic has sponsored our participation in the Fruit Logistica trade fairs this year. The industry had to fully fund participation in Fruit Attraction and AgriLink, though. Given the aforementioned financial constraints of Government, future funding is not guaranteed – a risk the industry must be prepared for.

The FPEF, as the representative body for the fresh produce export industry, is often involved in high-level international engagements. Some examples during the past year include a State Visit by the Premier of Singapore, as well as resident diplomatic missions of the Philippines, Indonesia, Malaysia, Myanmar, Singapore, Thailand and Vietnam.



Our Graduate Placement programme (previously known as the Intern programme) is gaining strong momentum as more of our members are willing to participate and use the ‘subsidy’ of R5 000 per month, provided by the FPEF to its members.

The FPEF is in a financially sound position, which is greatly due to the prudent management of membership fees and external grants by our Financial Manager, Marinda Roux. Her diligence led to the FPEF obtaining unqualified audit reports every year.

On another note – it is a fact of life that we go through various seasons in our lives, which unfortunately include darker periods. It was a sad moment for us when Junette Davids reached such a season and had to leave the FPEF team due to ill health. Junette has managed the Post-Harvest Innovation (PHI) Programme in a very professional manner and has delivered sterling service for more than a decade. We wish her well.



Junette



Desirée

In the same breath, we were pleased to welcome Desirée Thompson back into the FPEF family where she took over Junette’s role. Desirée is no stranger to the FPEF or the PHI Programme, having been involved as the writer and/or editor of several of our publications over the years. Some of these include four of the PHI books, the FPEF Basic and Intermediate Trade Chain Manuals, as well as various editions of the FPEF Fresh Produce Export Directory and the FPEF Annual Report.

In conclusion, I would like to thank the FPEF staff members for their dedication and hard work, as well as the FPEF Board members for their support and guidance. Let us stay true to the FPEF’s commitment to contribute to a profitable, sustainable and equitable fresh produce export industry. Despite or maybe because of the challenges – and the ways in which solutions are being sought – it remains a privilege to be part of such an exciting industry!

Regards,

Anton Kruger  
FPEF Chief Executive Officer (CEO)



## REPORT FROM THE COO

WERNER VAN ROOYEN



### Importance of private sector and Government working together

During the past year, the FPEF has been actively involved in addressing pressing industry matters to create more certainty in the changing landscape of fresh produce exports. In the beginning of the year, global inflation was a real concern – eroding the purchasing power of consumers, particularly in our most prominent export markets. The cost of living in many of our markets has been earmarked as one of the largest risk factors impacting fruit trade in 2023. Fortunately, the impact was less than expected.

Agricultural business confidence in South Africa declined for two consecutive terms, which indicated a rather bleak outlook. Interest rates were adjusted upwards to curb inflation and to stabilise currency fluctuations. Not only is the cost of living in South Africa under strain, but infrastructure deterioration – particularly in the energy and transport sectors, increased the cost of doing business. Depreciation of the Rand, however, boosted export earnings and the resilience of FPEF members led to more optimism towards the latter part of 2023. Whilst these macro-economic factors affected

exports, the FPEF must continue to create a more sustainable export environment for its members. In this regard, the FPEF invested in research and partnered with the Bureau for Food and Agricultural Policy (BFAP) to compile a citrus market report – analysing the present marketing situation in South Africa within a global context. This initiative supports the FPEF's engagement with government entities for export assistance.

A myriad of constraints in a difficult export environment requires a unique response from the FPEF. One such constraint is the energy shortage in South Africa, which had a negative impact on our exporter and associate members. This was particularly evident in the packaging, transport and cold storage links of the supply chain. To assist our members, the FPEF submitted a motivation to receive diesel rebates from the South African Revenue Service (SARS).

Another systemic constraint is delays in the export certification process. Certification delays

not only remain problematic, but these also increase transaction costs. In order to minimise the impact of delays and resolve critical issues, the FPEF continuously engage with the Perishable Products Export Control Board (PPECB), the Department of Agriculture, Land Reform and Rural Development (DALRRD) and its related electronic certification platform (eCert).

The FPEF also manages the risk of import regulatory changes and requirements to reduce the impact for our members and to prepare them for compliance. These may include changes in customs procedures; sanitary and phytosanitary measures. One example is the recent World Trade Organisation notification, received from the United Kingdom (UK), on the final version of the Border Target Operating Model that sets out new sanitary and phytosanitary controls at UK borders.

Sustainability is becoming more crucial. The European Union (EU) views trade as a vital mechanism for assisting developing nations in their efforts to enhance sustainable development – in line with the United Nations' 2030 Sustainable Development Goals (SDGs). This creates an urgent need to identify strategies to make EU trade and its effects on global value chains more sustainable – in other words, to make EU trade a Net positive contributor to sustainable development.

Europe being our most prominent trading partner, signals the importance of sustainability compliance for South African exports. The FPEF is represented on the newly established Fruit SA Sustainability Committee, which was created to better coordinate industry-wide sustainability efforts.

In terms of Section 7 of the Marketing of Agricultural Products Act 47 of 1996, the FPEF COO was appointed to serve on the Section 7 Committee that was established to develop a public-private campaign – focused on increased consumption and exports of fruit and vegetables in Africa and other markets. This opportunity emphasises the importance of the private sector and Government working together to grow export earnings from agricultural products. As the official Fresh Produce Export Council in South Africa, registered with the Department of Trade, Industry and Competition (dtic), the FPEF would appreciate more joint initiatives towards export promotion.

The FPEF included vegetables as part of its Memorandum of Incorporation a few years ago. In addition, the FPEF is exploring the need to establish a formalised structure with a specific focus on vegetable exports. The aim is to independently liaise amongst FPEF members who are exporting vegetables, other vegetable groupings, as well as local and international regulatory agencies to promote sustainable vegetable exports. It will also serve as a platform to effectively advocate, influence and use collective bargaining power to drive industry priorities. Most importantly, it will help to manage industry compliance to local and international legislation and standards.

Regards,

A handwritten signature in black ink, appearing to read 'W. van Rooyen'.

Werner van Rooyen  
FPEF Chief Operating Officer (COO)

## LOGISTICAL AFFAIRS

ANTOINETTE VAN HEERDEN



The goal is to improve performance

### Cape Town

It has been a challenging year for fresh fruit on various fronts and estimated that deciduous fruit volumes concluded 11% below forecast for the 2022/2023 export season. Excessive wind delays during peak season in Cape Town tested the limitations of the logistics chain. For the 2023/2024 fruit export season, we can look forward to increased cold storage and plug capacity at current facilities to mitigate weather delays – in addition to increased rail capacity.

Inland hubs in Worcester, that will include a cold store and rail facilities, are in the planning phase. Transnet National Ports Authority (TNPA) has published a request for information regarding the development of a logistics park at the current Culemborg facility and the industry was well represented during the public session.

Port equipment availability showed a steady decline throughout the year. However, the Cape Town Container Terminal – with the help of shipping lines, has put measures into place to

increase equipment availability for the next season. Whilst these temporary measures will assist, it highlights the urgency of procuring new equipment. Stakeholders have been working on plans to mitigate export risks through the use of break bulk, alternative ports and feeder strategies.

### Durban

The long-anticipated private sector participation in Pier 2, Durban, concluded with International Container Terminal Services Incorporated (ICTSI) as the preferred bidder – for a 25-year joint venture to develop, upgrade and manage Pier 2 of the Durban Container Terminal.

ICTSI is one of the largest container terminal operators in the world – managing 34 terminals in 20 countries, including ports in Australia, Indonesia, the People's Republic of China, Mexico and Brazil. The new operator, which will start on 1 April 2024, will also be responsible for new equipment in the port of Durban, Pier 2 terminal.

### Gqeberha

Similar to what happened in Cape Town with deciduous fruit, citrus fruit exports were marred by wind delays and rough weather – to the extent that vessels had to seek shelter near Maputo to escape the adverse weather conditions. A by-product of wind disruption is ranging inside the port, which causes vessel movement on the berth and negatively affects productivity. To counter ranging, the port deployed shore tensioners and magnetic fenders (Moore Master).

### Transnet Freight Rail

A combination of flooding, load shedding and cable theft reduced rail volumes on the Natcor line and Transnet Freight Rail contracted security companies with an 'outcome-based' approach. Stable performance is required to attract parties interested in purchasing slots on the line.

Jan-Louis Spoelstra, who is an independent Board member of the Interim Rail Economic Regulatory Capacity, shared that the Transport Economic Regulator (TER) will incorporate the port, road, rail and airline regulators as a single entity. The process is currently being finalised and expected to be established during the first quarter of 2024.

Government also signed the Luxembourg Rail Protocol that is a subset of the old Cape Town protocol. It relates to the protection of private rolling stock, which will allow banks to start funding locomotives and wagons that will run on a joint network. The rolling stock will be centrally managed by an entity still to be created.

### National Logistics Crisis Committee

The National Logistics Crisis Committee (NLCC), announced by President Ramaphosa on 5 April 2023, will include representatives of the Department of Transport, the Department of Public Enterprises, National Treasury, the Department of Trade, Industry and Competition, as well as Transnet. A Joint Strategic Operations Committee will be established between the NLCC and the private sector – coordinated by Business for South Africa.

Whilst the overarching NLCC Terms of Reference (TOR) awaits sign-off from cabinet, work has started on the TOR for Workstream 1 – the General Freight Corridor, in which the agricultural sector will participate. The goal is to improve performance of the multimodal and bulk freight rail network, as well as the port system. This workstream will be deployed through project teams and the local Port Consultative Committee. The team in the Western Cape team will proceed in October 2023.



## MARKETING

MARLETTA KELLERMAN



Business as usual  
for majority of trade fairs

The international fresh produce trade calendar returned to pre-Covid times in 2023, which meant it was business as usual for the majority of trade fairs. This enabled the FPEF to accomplish one of its key objectives, namely to promote our members in the global arena. World Food Moscow is the only trade fair that we are still not participating in – understandably, due to the war between Russia and the Ukraine.

### Fruit Logistica Berlin

Fruit Logistica Berlin returned to its traditional time slot in early February 2023 – amidst the usual icy and snowy winter conditions. After our participation was entirely funded by industry in 2022, the Department of Trade, Industry and Competition (dtic) funded the South African pavilion this year. It was the 30th edition of the fair, which attracted 63 470 trade visitors from 140 countries and 2 610 exhibitors from 92 countries.

The FPEF and only six of its members were approved (at short notice) as co-exhibitors – due to new requirements of the dtic whereby exhibitors are approved according to their B-BBEE status.

Nevertheless, the communal area was constantly busy with South Africans who conducted their meetings at the stand. The FPEF also rented extra chairs and tables that were offered to our members. In addition, the dtic has confirmed funding of a national pavilion next year.

*The next Fruit Logistica Berlin is scheduled for 7 to 9 February 2024.*



Fruit Logistica Berlin 2023.



### Asia Fruit Logistica

Asia Fruit Logistica was hosted in Hong Kong during the first week of September 2023. The South African pavilion was sponsored by the dtic. The FPEF and Fruit SA exhibited at the stand, which was shared amongst a total of eight co-exhibitors of which only three FPEF exporter members were approved as co-exhibitors – due to the dtic’s strict new B-BBEE regulations.

As in previous years, the FPEF supplied colourful graphic material for the stand. The two meeting rooms were well utilised by FPEF members, whilst the communal area was continuously busy with back-to-back meetings, hosted at the stand, and a vast number of trade visitors.

Asia Fruit Logistica 2023 was dramatically cut short, and the entire third day of the fair cancelled, due to a black rainstorm warning by the Hong Kong government - after the city was unexpectedly hit by the worst rainstorm in 150 years the night before. Despite the disruption caused by the extreme weather conditions, the event was an overall success for the South African fresh produce export industry.

*The next Asia Fruit Logistica is scheduled for 4 to 6 September 2024.*



Marletta Kellerman, Werner van Rooyen and Anton Kruger at Asia Fruit Logistica 2023.



Asia Fruit Logistica 2023.

### Fruit Attraction

Madrid, Spain, was the place to be in 2023 as Fruit Attraction exploded into one massive celebration. The fifteenth anniversary of this trade fair attracted over 90 000 trade visitors from 135 countries, whilst 2 000 exhibitors from 56 countries participated in the event. With an extraordinary visitor count, achieved over two consecutive years, Fruit Attraction is fast becoming a serious competitor to Fruit Logistica Berlin!

As in the year before – the event was well represented by FPEF members, which re-emphasised the importance of this show. Our participation in Fruit Attraction was funded by Fruit SA member associations (the FPEF, HORTGRO, the CGA, SATI

and Subtrop), which were able to secure a 128 m<sup>2</sup> stand. We are also grateful for the financial support of the Western Cape Department of Agriculture (WCDoA) and the Perishable Products Export Control Board (PPECB).

The Fruit SA stand was a hive of activity with South Africans conducting meetings almost continually. The fact that the FPEF had to rent additional tables and chairs that was, at times, not enough to accommodate the vast amount of trade visitors, indicates the tremendous success of the event for the South African fresh produce export industry.



*Fruit Attraction in Madrid 2023.*



### AgriLink

The FPEF participated in the AgriLink trade fair in the Philippines – under the Fruit SA banner. The Fruit SA delegation essentially consisted of industry experts, in order to address market

access matters. The FPEF was responsible for the arrangements and graphic material at the stand, where we also had a booth.



*AgriLink in the Philippines 2023.*



### FPEF Export Directory

The FPEF Fresh Produce Export Directory is annually updated as an essential source of information about the South African fresh produce export industry. The directory is an excellent marketing tool, since it provides a list of all FPEF members with their contact details and product information. It also features the latest statistics on South African fresh fruit and vegetable export volumes, export periods and export destinations.

The latest edition of the FPEF Export Directory was launched at Fruit Logistica Berlin 2023, during which Anton Kruger (FPEF CEO) presented copies to the Ambassador of South Africa in Berlin, Stone Sizani, and Cem Özdemir – Minister of Food and Agriculture in Germany.

Printed copies were also distributed during the Asia Fruit Logistica and Fruit Attraction trade fairs in 2023. To cater for the Asian market, the Export Directory was translated into Mandarin and made available on USB cards. Apart from printed copies and USB cards, the FPEF Export Directory is also available for download from the FPEF website – In English and Mandarin.

### Export Council

As the official Fresh Produce Export Council in South Africa, registered with the dtic, the FPEF provides a pivotal link between Government and the industry regarding market access, promoting the industry and related matters. Every year, the FPEF submits a business plan to the dtic in order to qualify for a grant that is used for transformation.





## MEMBERSHIP & COMMUNICATION

CLAUDIA WALKLETT ROSS



### Difference between interest and commitment

#### Governance

During 2023, the FPEF Board of Directors included a total of sixteen representatives of the fresh produce export industry. In addition, Mr Luke Govender of the Department of Trade, Industry and Competition (dtic) continued to serve as an ex officio member of the Board.

We would like to thank our Board members for being committed to our organisation through consistent engagement, involvement and active participation in Board meetings. They collectively have a firm understanding of the industry, support ethical decisions and give their time and talent selflessly to keep our members' best interests at heart.

On 17 November 2022, the FPEF hosted a successful and well-attended Annual General Meeting (AGM) at Glen Carlou Vineyards in Klapmuts. Our speaker, Dr Andrew Shaw – Chief Strategy and Planning Officer at Transnet, shared valuable insights into Transnet's objectives, especially regarding the ports in South Africa.

The majority of the 2022 Board members indicated their availability to stand for re-election in 2023 – apart from those who had reached the end of their five-year term of office, namely Mr Patrick Bird (Dole South Africa), Mr Charl du Bois (Capespan South Africa), Mr Charl du Toit (De Keur Marketing) and Mr James Perch (SAFPRO). The following Board members were not available to serve on the Board for the upcoming year: Mr Hannes de Waal (SRCC Marketing), Mr Wiekus Hellmann (Green Marketing) and Mr Mkhululi Mankazana (Independent Consultant).

According to the FPEF's Memorandum of Incorporation, the FPEF Board of Directors must consist of a minimum of twelve and a maximum of sixteen members. The Associate members will have four seats (instead of two) and these members need not be FPEF members. Eight members who served on the Board in 2022 were eligible for re-election and twelve additional candidates were nominated for election.

The following candidates, who have served on the FPEF Board of Directors in 2022, were eligible for re-election:

<b>Awie de Jager</b>	Delecta Fruit
<b>Marietjie Franzsen</b>	The Grape Company
<b>Liezl Gelderblom</b>	Producer Ally
<b>Annelie Haumann</b>	Stems Fruit
<b>Cyril Julius</b>	Perishable Products Export Control Board (PPECB)
<b>Wayne Mudge</b>	Cape Five Export SA
<b>Jan Pienaar</b>	Grape Alliance Marketing
<b>Vireesh Ramburan</b>	Citrogold

The following candidates were nominated in the Exporter category:

<b>Gary Britz</b>	ELE Trading
<b>Hans Boyum</b>	Westfalia Marketing
<b>Mark Jensen</b>	SAFPRO
<b>Adolf Kieviet</b>	Freshworld
<b>Nico Kotze</b>	Capespan South Africa
<b>Ikarabele Legae</b>	Lona Citrus
<b>Max le Roux</b>	Van Doorn Citrus
<b>Hannes Nieuwoudt</b>	Dole South Africa
<b>Roelf Pienaar</b>	Tru-Cape Fruit Marketing
<b>Craig Schaefer</b>	Core Fruit

The following candidates were nominated in the Associate category:

<b>Iain McIntosh</b>	Ocean Network Express (ONE) South Africa
<b>Mariaan Rademan</b>	Contour Logistics

FPEF members could vote for a total of sixteen candidates to serve on the FPEF Board of Directors. Votes were cast via an online polling platform, known as Slido, which greatly improved the efficiency, accuracy and speed of the voting process.

After voting, the FPEF Board consisted of the following Directors during 2023:

<b>Gary Britz</b>	ELE Trading
<b>Awie de Jager</b>	Delecta Fruit
<b>Marietjie Franzsen</b>	The Grape Company
<b>Liezl Gelderblom</b>	Producer Ally
<b>Luke Govender</b>	Ex officio and dtic
<b>Annelie Haumann</b>	Stems Fruit
<b>Mark Jensen</b>	SAFPRO
<b>Cyril Julius</b>	PPECB
<b>Adolf Kieviet</b>	Freshworld
<b>Nico Kotze</b>	Capespan South Africa
<b>Iain McIntosh</b>	Ocean Network Express (ONE) South Africa
<b>Wayne Mudge</b>	Cape Five Export SA
<b>Hannes Nieuwoudt</b>	Dole South Africa
<b>Jan Pienaar</b>	Grape Alliance Marketing
<b>Roelf Pienaar</b>	Tru-Cape Fruit Marketing
<b>Mariaan Rademan</b>	Contour Logistics
<b>Craig Schaefer</b>	Core Fruit

The Board members voted for Mr Mark Jensen to serve as Chairman for 2023, and Mr Adolf Kieviet as Vice-Chairman.

Mr Luke Govender of the dtic will continue to serve as an ex officio member of the FPEF Board.

In 2023, Board meetings were hosted at the FPEF offices as well as the Capespan offices on the following dates:

- 25 January – FPEF offices
- 24 May – FPEF offices
- 23 August – Capespan offices

### Membership

The FPEF membership count currently stands at 157 members. During the period under review, the FPEF had the pleasure of approving five Exporter, one Emerging Exporter and two Associate membership applications. We also had five membership resignations, consisting of two Exporter and three Associate members.

### Communication

#### Social media

FPEF members are invited to follow and connect with us on LinkedIn, as well as Facebook.

Both the FPEF Facebook and LinkedIn pages are used to share relevant industry information, news about trade shows and to promote articles showcasing some of our exporter and associate members.

### Website

The FPEF website was updated and relaunched with a fresh, new look in 2023. It continues to be a successful tool in informing the industry about relevant news. The FPEF Fresh Produce Export Directory, which contains handy graphs and statistics, as well as all of our members' contact details, can be downloaded from the website by potential importers wanting to do business with them.

### Newsletters

'Keeping it Fresh' is a bimonthly newsletter that informs our members about current events and the FPEF whereabouts as and when they happen.

We also distribute various newsletters on a weekly basis on behalf of our industry partners, which include Agbiz, Agri-Hub, Business Unity South Africa (BUSA), the Bureau for Food and Agricultural Policy (BFAP), the Sustainability Initiative of South Africa (SIZA), the CGA and HORTGRO.

### Final note

**"There is a difference between interest and commitment. When you're interested in something, you do it only when it's convenient.**

**When you're committed to something, you accept no excuses, only results."**

*Kenneth Blanchard*



## POST-HARVEST INNOVATION PROGRAMME

DESIREÉ THOMPSON



A prime example of a successful public-private partnership

There is reason to celebrate the Post-Harvest Innovation (PHI) Programme in 2023. Not only is the PHI Programme a prime example of a successful public-private partnership, but it is also 15 years since it was initiated in 2008. Over the years, the Programme has stayed true to its vision of transforming the global competitiveness of the South African fresh horticultural export industry – by developing innovative technology in the post-harvest link of the value chain.

The Department of Science and Innovation (DSI) contracts the FPEF as the implementing agent for the PHI programme. Based on the FPEF's sterling performance since 2008, the DSI was willing to initiate a next phase – again with the FPEF as implementing agent.

It is the mission of the PHI Programme to engender a culture of innovation by providing funding opportunities to deserving applicants that will creatively seek solutions for the technology gaps identified in the fresh horticultural export value chain. This is accomplished through funding that the PHI Programme receives from the

DSI – through its Sector Innovation Fund (SIF), which is matched in equal part by industry.

The PHI Programme is currently in its fifth phase (PHI-5), with HORTGRO Science, the South African Table Grape Industry (SATI), the South African Subtropical Growers' Association (Subtrop), Cape Flora SA and Berries ZA as industry partners. PHI-5 is being implemented over four years – it has officially started in April 2022, and is scheduled to conclude in March 2026.

Thirteen research and development (R&D) projects are being conducted at various research institutions, including ExperiCo, AgriSMART SA, Stellenbosch University and the University of KwaZulu-Natal. A number of students and interns (undergraduate, Honours, Master's, PhD and Postdoctoral) are participating in selected R&D projects, whilst more students and interns are being recruited under PHI-5. Not only do these students and interns benefit from funding – provided through bursaries, stipends, co-funding or salaries, but some of the students have also found employment as a result of their project involvement. This attests



to the PHI Programme's commitment to human capital development.

Projects under PHI-5 are well underway, with the majority of these delivering exciting preliminary research results. Some of the thirteen R&D projects include:

#### **Non-chemical control of post-harvest diseases of avocados**

The post-harvest disease control of avocados has depended almost entirely on the use of fungicides – particularly prochloraz (the main post-harvest fungicide used against anthracnose and stem-end rot). However, the European Union (EU) has now reduced the maximum residue limit of prochloraz for avocados to the point where there is no longer any value in applying the fungicide. Essentially, it is banned in fruit destined for the EU from 31 December 2023.

The South African avocado industry can lose 30-70% of R9 billion in post-harvest disease losses if there are no effective alternative control measures available. This project therefore aims to develop effective non-chemical disease control measures for avocados that can replace prochloraz.

#### **Improving the structural integrity of cartons for the export of fynbos**

The failure of existing cartons, used to export Cape Flora (fynbos), is analysed in this project – to either provide an improved carton design or to establish minimum specifications for carton strength that can lead to industry standardisation.

#### **Internal browning of 'Cripps Pink' apples – focusing on unanswered questions**

Internal flesh browning is a low-temperature storage disorder that affects certain apple cultivars and threatens export market acceptance. This project aims to understand the influence of pre-harvest temperatures on internal browning (IB), specifically the development of radial flesh browning, to predict the risk of post-harvest IB development.

#### **Botrytis cinerea as a pathogen of blueberries**

There is currently little research on the diseases of blueberries in South Africa. This project is divided into six sub-projects to generate new knowledge and provide foundational data on the prevalence, community structure and fungicide resistance of *Botrytis cinerea*, which will also enable appropriate sanitation practices in pack houses.

In addition, the project aims to make a fungal inoculant available for use in blueberry nurseries, together with a checklist of fungal diseases affecting blueberry plants.



#### **Generation of a berry cracking index for the table grape gene bank**

This project aims to implement an optimised assay across the entire South African table grape gene bank, and to develop an index for cracking resistance or susceptibility. This information can be used by growers to select cultivars and by breeders to select the best starting material for future crosses, as well as to screen and rank new cultivars imported into South Africa.

#### **Ultra-low oxygen and nitric oxide treatment for pests in pome and stone fruit**

Post-harvest fumigation with methyl bromide is highly effective. However, methyl bromide is no longer a feasible option – it depletes the ozone layer and is thus being phased out. This project aims to develop an alternative post-harvest fumigation treatment that can replace methyl bromide for phytosanitary pest control. The intent is a safe, reliable and cost-effective treatment that will kill insect pests without having a negative impact on fruit quality.

In addition, the PHI Programme continues to ensure the prudent use of funds, whilst complying with a clear schedule for project delivery as well as reporting – within set timelines. Since the Programme provides a platform to facilitate and support post-harvest research, development and innovation; it also contributes to capacity building and skills development – to enhance the global competitiveness of the South African fresh horticultural export industry.

# TRANSFORMATION

JOHANNES BRAND



The greatest potential  
to transform our industry

The FPEF has a commitment and a vision for industry transformation – to facilitate a significant shift in the inclusion and sustainable participation of black South Africans within secondary agriculture in the fresh produce export value chain.

### FPEF Graduate Placement programme

The FPEF's Graduate Placement programme is our flagship transformation programme, since we believe it has the greatest potential to transform our industry in the long term. The momentum that the programme has gained over the past few years was maintained in 2023, with fourteen black graduates finding employment in the fresh produce export industry – despite a difficult export environment.

Since the programme was launched in 2016, a total of 68 graduates have been appointed to positions within the industry. We are proud of the programme's high retention rate, with 70% of the graduates to date receiving permanent employment – following their initial fixed-term contract period.

Agrijob, as a service provider to the FPEF, handles recruitment on behalf of the programme and provides a high service level. Agrijob meets with individual FPEF member companies to understand their needs before introducing them to suitable candidates. The FPEF covers the recruitment fees and contributes R5 000 per month, for the first twelve months, towards the salaries of each graduate appointed.

Interaction amongst the graduates is important – to develop professional and social contacts, build relationships and to exchange information. Peer-to-peer networking is facilitated via a WhatsApp group, whilst the FPEF organises an annual networking event for the graduates. In October 2022, Fruitworks (FPEF member company) hosted the networking event for the first time, which was a great success. Fruitworks has generously offered to host the October 2023 networking event again, with exciting plans to grow the reach and impact of the event.



*FPEF Graduate Networking event in October 2022.*

### Top of the Class Fruit Export Value Chain training programme

The Top of the Class (TOC) programme covers the fruit export value chain – from harvest to home. Although the TOC programme is mainly aimed at employees in junior to middle management within fruit export companies, pack houses and logistics companies; it is also a valuable training tool for emerging farmers and exporters.

Participants gain an excellent understanding of the entire value chain, together with additional knowledge and insight into their individual areas of responsibility. Training under the TOC programme covers topics such as quality management, compliance, cold chain management, primary production, packing and packaging; road, sea and air freight; documentation, consumers, markets and the role of exporters.

A total of 83 individuals completed the course in 2023, which brings the total number of people

trained since the programme was initiated in 2004 to 1 287. During 2023, the programme was presented in an interactive, online format in May, whilst it is also scheduled for October – collectively for the training of 30 industry employees. The course was also presented at two FPEF member companies, covering a total of 35 employees.



*Fruitworks employees during TOC training in August 2023.*

### Market access for emerging farmers and exporters

In January 2023, the FPEF Transformation Manager facilitated a training session to help prepare emerging fruit farmers from the Western Cape – sponsored by the Western Cape Department of Agriculture (WCDoA) – to attend Fruit Logistica Berlin in 2023.

The FPEF, in collaboration with Partners in Agri Land Solutions (PALS) and the 'Koue Bokkeveld Opleidingsentrum', facilitated a two-day export market access training session for emerging farmers in September – hosted in the rural town, Op-Die-Berg, which is close to Ceres in the Western Cape. A similar two-day training session, which includes the assistance of an isiXhosa interpreter, is scheduled for October in Ceres.

These training sessions are focused on providing the farmers with a comprehensive overview of the export process, which is set into motion once the fruit leaves the farm. The training is intended to assist growers in understanding export economics, market dynamics and the role of export agents – to help strengthen relationships between farmers and export agents and to improve export market access.

In addition, the FPEF continues to assist aspiring and emerging exporters through a 'help desk' that guides them in becoming export ready, whilst focusing on risk management. The FPEF also provides emerging exporters with free membership, with full benefits, for a minimum period of two years.



*PALS farmers and the FPEF Transformation Manager at an export market access training session.*



### FPEF annual Transformation Webinar

The FPEF hosted its seventh annual Transformation Webinar on 19 September 2023. The goal of the webinar is to inspire and equip business leaders to facilitate proactive and effective transformation within their businesses. This year's speakers were Jonathan Goldberg and Athol Trollip. Mr Goldberg is the Chairman of Global Business Solutions and has been a business leader in the changing landscape of labour law over the past twenty years.

Mr Trollip is a well-known politician, former Mayor of Nelson Mandela Bay, motivational speaker and erstwhile farmer who is currently the Provincial Chairman of ActionSA in the Eastern Cape.

In his talk, Jonathan Goldberg unpacked the implications of the new Employment Equity (EE) Amendment Bill on businesses. He highlighted the fact that 94% of employers surveyed by the Director General of the Department of Employment

and Labour were found to be non-compliant with the current employment equity legislation. However, he emphasised that, in his view, all employers can avoid non-compliance and fines – provided that they either meet the targets or keep adequate records to justify not meeting the EE targets.

Athol Trollip reminded us of the devastating effect of the 1913 Native Land Act in South Africa, which led to evictions, expropriation, relocation and segregation and is responsible for much of the trouble that blights transformation in the South African agricultural sector. However, he believes that we can overcome this legacy with a lot of time and effort from both Government and the private sector.

He also shared some of his experiences relating to the time that he was contracted to support SAFPRO's exemplary support of thirteen black citrus farmers in the Eastern Cape, as well as two pack houses serving the growers. (SAFPRO is a member company of the FPEF.)



### FPEF BEE certification

The FPEF achieved BEE compliance with level 8 recognition as a Qualifying Small Enterprise under the amended agricultural sector scorecard for specialised entities, following a BEE audit conducted in September 2023.

### Government and industry collaboration

The FPEF remains active as a member of the Fruit Industry Value Chain Round Table (FIVCRT) Transformation Working Group. The purpose of the working group is to drive transformation – amongst Fruit SA member associations (HORTGRO, the CGA, SATI, Subtrop, Berries ZA and the FPEF) and various government departments – in an effective and coordinated manner. A key outcome of this initiative is the coordinated monitoring of transformation progress within Fruit SA member associations and the compilation of an annual transformation report to keep the government informed in this regard.

The FPEF also serves on the Horticulture Sector Sub-Committee and the Sectoral Skills Committee of the Agricultural Sector Education Training Authority (AgriSETA), to represent the interests of FPEF members within the AgriSETA.

# FINANCIAL REPORT

MARINDA ROUX



highest standard of  
professionalism, accuracy and transparency

The 2023 annual financial statements of the Fresh Produce Exporters' Forum have been independently audited by SDK Chartered Accountants (SA) and reflect a clear analysis of the financial position of the Forum as of 30 September 2023. These statements have been prepared in accordance with the International Financial Reporting Standard for Small and Medium-sized Entities and are based upon appropriate accounting policies – consistently applied and supported by reasonable and prudent judgements and estimates. The audit report was unqualified.

The directors can confirm that the finances of the Forum were managed with the highest standard of professionalism, accuracy and transparency over the past financial year. Comprehensive management accounts are

regularly presented to the FPEF Board of Directors during the year, whilst any concerns and/or challenges are immediately reported to the Chief Executive Officer – as and when such concerns or challenges may arise.

It is of paramount importance to the Forum that our members' annual contributions are optimally utilised, since it enables the Forum to achieve its objectives. We can assure our members that investment possibilities are continuously looked at – in order to invest any surplus funds at the best possible return. Evident of this, is the fact that our interest revenue increased by R408 220 in the current financial year.

Apart from the daily FPEF operations, the FPEF also manages donor funds by way of

grants and contributions, made available for the funding of various projects and initiatives in the South African fresh produce export industry. Such entities include various funding initiatives by Tesco, as well as different government departments. The Department of Trade, Industry and Competition (dtic) contributes to various international trade fairs, as well as the publication of the annually updated FPEF Export Directory.

The Department of Science and Innovation (DSI) approved a next, fifth phase of the Post-Harvest Innovation (PHI) Programme on 9 September 2022. Research and Development (R&D) projects are funded fifty/fifty by the DSI and the various industry associations,

whilst PHI Programme management costs are shared amongst the DSI, the industry and the FPEF. The total contribution from the DSI represents an amount of R13 756 147.24 (VAT inclusive). The current fifth phase of the Programme (PHI-5) will conclude on 31 March 2026. We account separately on the Income and Expenditure of PHI-5. This ensures that the auditing process is streamlined and the margin for errors is minimised.

The fact that these entities continuously channel funds through the FPEF, is a great vote of confidence in the integrity and high standards with which the FPEF manages these funds.





FRESH PRODUCE EXPORTERS' FORUM NPC  
(registration number: 1998/018451/08)



Detailed Income Statement for the year ended 30 September 2023

	2023 R
<b>INCOME</b>	<b>17 308 948</b>
<b>CONTRIBUTIONS</b>	
<b>FPEF MEMBERS</b>	<b>14 856 331</b>
Membership fees (including new member acquisition)	13 374 219
Export Directory publication (Adverts)	341 000
Trade Fairs (FPEF + Industry partners)	56 500
Interest Std Bank / Stanlib re-investment	901 514
Recoveries - various costs / Tesco management fee	148 078
Sundry income (SA Fruit Journal / PPECB Board allowance)	35 020
<b>GRANTS / PROJECT FUNDING - dtic</b>	<b>1 316 614</b>
Export Directory publication	200 000
Reimbursement FL Berlin	31 041
Reimbursement FL Asia	33 073
Reimbursement Foodex Japan	52 500
Export Council grant	1 000 000
<b>FUNDING &amp; GRANTS RAISED / RECEIVED</b>	<b>712 177</b>
Transformation - Training TOC	198 000
Donor Funds - Fruit Attraction Madrid Agri-Western Cape	130 000
Tesco - Africa Community Fund	384 177
<b>OTHER PROJECTS / MANAGED BY FPEF</b>	<b>423 826</b>
DSI - Department of Science & Innovation - PHI-4	423 826

	2023 R
<b>EXPENDITURE</b>	<b>17 128 050</b>
Annual Report	94 195
Audit - tax and secretarial	36 671
Audit fee	88 000
Bad debts	17 316
Bank charges	54 457
Compensation commissioner	30 161
Consult: Legal & Mediation / HR / Lobby	303 307
Courier and postage	40 369
Depreciation	40 645
DSI - Post-Harvest Innovation Programme (Phase 4)	345 536
Employees and contract employees	6 349 890
Entertainment	15 177
Export Directory	377 130
FPEF - Media platforms: web maintenance	53 471
FPEF - Meetings / Board / AGM and other	155 142
FPEF contribution - Post-Harvest Innovation Programme	611 259
Fruit SA - Export Council grant	1 000 000
Fruit SA - Exporter contribution	536 614
Agri-Hub industry contribution	469 350
Insurance	41 046
Internet, IT and computer maintenance	92 039
Market access	1 932 849
Market development: international promotions	18 500
Marketing materials - FPEF	24 504
Market statistics and information	197 833
Marketing forums and technical meetings	67 953
New member credit checks	2 604
PPECB - Board allowance	17 310
Printing and stationery	37 668
Regus - Office administration / telephone / fax etc.	3 138
Rental / parking / storage / signage	203 558
Small assets written off	4 818
Staff training	13 500
Stanlib - Fair Value Adjustment	85 202

	2023
<b>EXPENDITURE</b> (continued)	R
Subscriptions / membership fees / conferences	111 960
Sundries	16 334
Telephone (cellular)	20 876
Tesco - Africa Communities fund	386 817
Trade fairs	699 055
Transformation initiatives	1 922 782
Travel and accommodation: local	122 336
Travel and accommodation: overseas	486 678
<b>NET SURPLUS FOR THE YEAR</b>	<b>180 898</b>
Minus: Funds transferred to/from Project Reserves	- 75 651
<b>FPEF SURPLUS FOR THE YEAR</b>	<b>105 247</b>

FRESH PRODUCE EXPORTERS' FORUM NPC  
(registration number: 1998/018451/08)

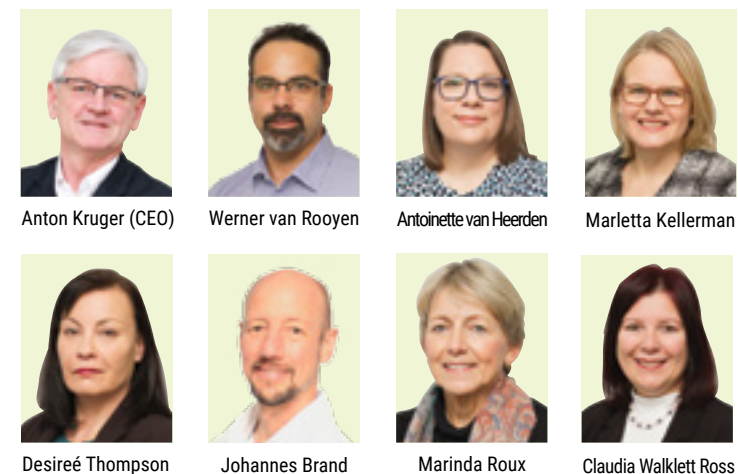
Income Statement for the Post-Harvest Innovation Programme:  
PHI-5 for the year ended 30 September 2023

	2023
<b>PHASE 5</b>	R
<b>INCOME</b>	<b>10 586 727</b>
DSI (Department of Science & Innovation) GRANT	6 408 709
CONTRIBUTIONS (Industry partners)	4 108 224
Interest income	69 794
<b>EXPENDITURE</b>	<b>7 413 555</b>
Research and development projects	5 234 418
Programme management/implementation	2 179 137
<b>NET SURPLUS FOR THE YEAR</b>	<b>3 173 171</b>

## FPEF BOARD OF DIRECTORS



## FPEF STAFF MEMBERS



## EXPORTER MEMBERS

Access Farms	Freshgro Citrus Growers	Karsten Marketing	Southern Cross Marketing and Management
Afrigold SA	Freshness First	Kat River Citrus Primary (KATCO)	Southern Fruit Growers
ALG Marketing	Freshworld	Kingfisher Fruits	Southern Fruit Trading
Alliance Fruit	Fruit Heart Exporters	Komati Fruit	SRCC Marketing
AM Fresh South Africa	FruitOne	Kromco	Stargrow Fruit Marketing
Angon Fruit	Fruitways Marketing	Laeveld Sitrus	Star South Fruits
A.S. Viljoen & Seuns Boerdery	Fruitworks	Le Roux Fruit Exporters	Stems Fruit
Banhoek Fruit Packers	FVC International	Letaba Estates	Suiderland Plase
Berryworld South Africa	GF Marketing	Lona Citrus	Swellenfruit Packing
Bet-El Fruits	Global Pacific Produce SA	Lucerne Fresh	The Fruit Farm Group South Africa
Betko Fresh Produce	Good Hope Fruit	Mahela Group	The Grape Company
Bono Farm Management	Grape Alliance Marketing	Makutangi Farming Operations t/a Easy Farms	Toro Fruit
Boschkrans Boerdery	GrapeHub	Market Demand Fruits	Triple D Farms
C Fruit	Green Marketing International	Masterclass International	Tru-Cape Fruit Marketing
Cape Five Export SA	Groep 91 Uitvoer	Modderdrift	Twente Partners South Africa
Capespan South Africa	Growers by Nature	Mooigezicht Estates	Uitvlugt Farming Trust
CitrX	Grown4U	Mouton Citrus	Unichoice Produce Direct
Core Fruit	G.S. Schoonbee Landgoed	Niche Fruit	Unifrutti SA
De Keur Marketing	Hendrik Schoeman Boerdery	Nine Fruits Exports	United Exports South Africa
Delecta Fruit	HNP Marketing	Orex Export	Van Doorn Citrus
Dibanisa Fruit t/a Unipack Fruit	Hoekstra Fruit Exporters	Patensie Citrus	Vanguard International USA
DKI Fruit Marketing	Icon Fruit	Pitto	Venganix
Dole South Africa	Ideafruit Export	Pomona Fruit	Vintage Group
DuToit Agri	Impala Citrus	Pure Legacy	Vrugteboom SA
ELE Trading	In Season Marketing	Remhoogte Boerdery	Westfalia Marketing
Emex International	In2Fruit	SAFPRO	Wolseley Fruit Packers
Epic Fruit Exporters	Internode Marketing Company & Logistics	Samapro Trading	WP Fresh Distributors
Everseason	Iris Fresh	SAFRESHCO	XTreme International
EXSA	Jo-Rie Products	SAPEX Exports	Yukon International
Favourite Fresh Export	JWM Asia South Africa	Seaboard International Trading Company	Zest Fruit
Freshgold SA Exports	Karpus Exports	Seven Seas	

## ASSOCIATE MEMBERS

APL Cartons  
Citricom IP  
Citrogold  
ClemenGold International  
Contour Logistics  
DHL Global Forwarding SA  
Energy Partners Refrigeration  
Ethekwini Cold Stores  
FPT Group  
GoGlobal Group  
Hapag-Lloyd Africa  
H.G. Molenaar  
Hortec  
Integrated Fruit Marketing  
Khold  
Laeveld Agrochem Marble Hall  
LCL Logistics Southern Africa  
Maersk South Africa  
Master Pallet Association  
Morgan Cargo  
Mpact  
Ocean Network Express (ONE) South Africa  
Paltrack  
PCA Logistics  
Perishable Products Export Control Board (PPECB)  
Portfreight  
Potatoes South Africa  
Producer Ally  
Prophet Systems SA  
SAFT Group  
Sappi Southern Africa  
Tesco  
Unitec South Africa  
ZZ2





fpef  
fresh produce  
EXPORTERS' FORUM  
SOUTH AFRICA

# 2023

## ANNUAL REPORT

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