SATI
SOUTH AFRICAN TABLE
GRAPE INDUSTRY

PORT OF CAPE TOWN
STAKEHOLDER DIALOGUE

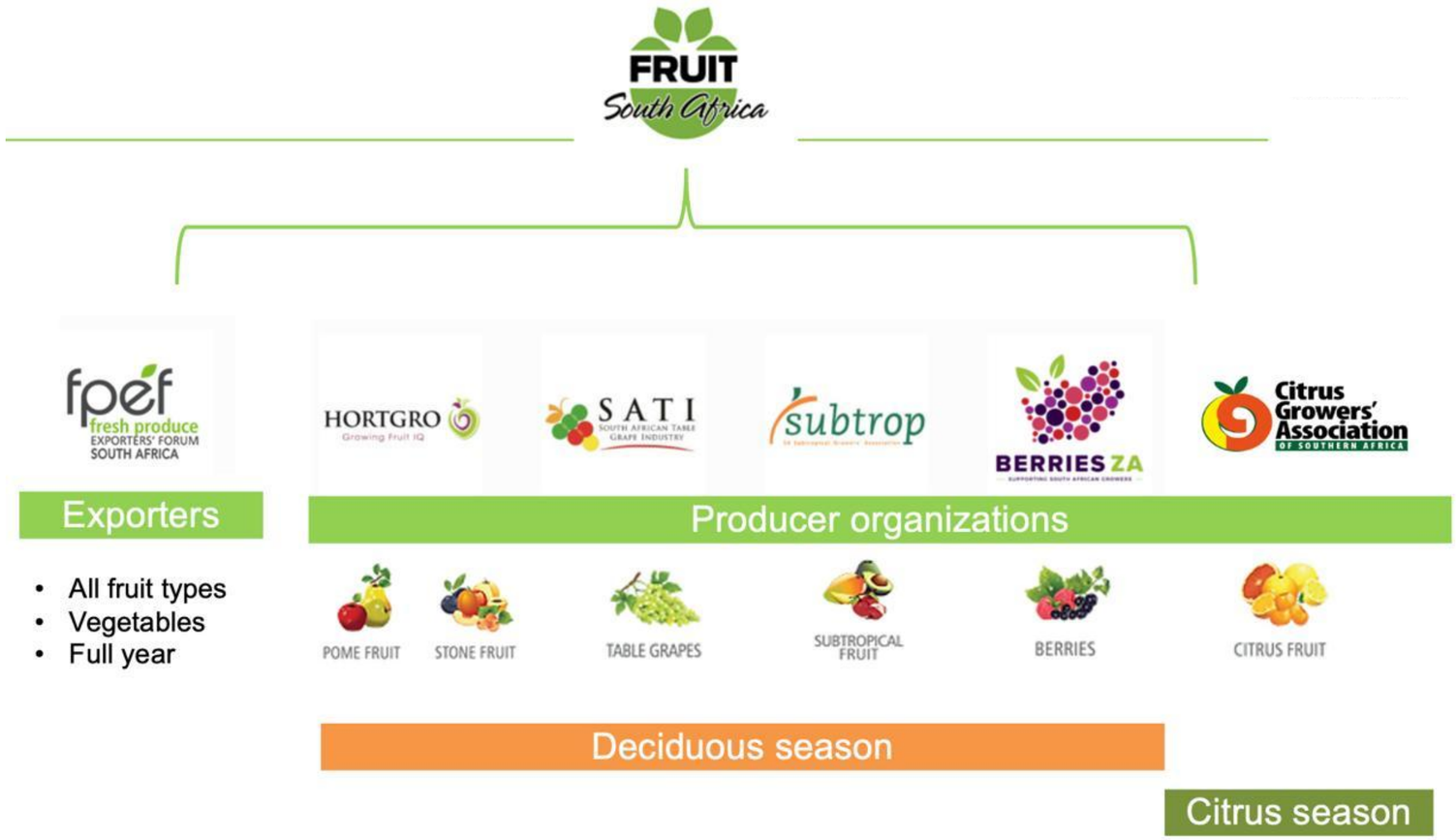
Export Industry Perspective on Disruptive Event Mitigation

Mecia Petersen, SATI CEO

12 February 2026

FRUIT SOUTH AFRICA

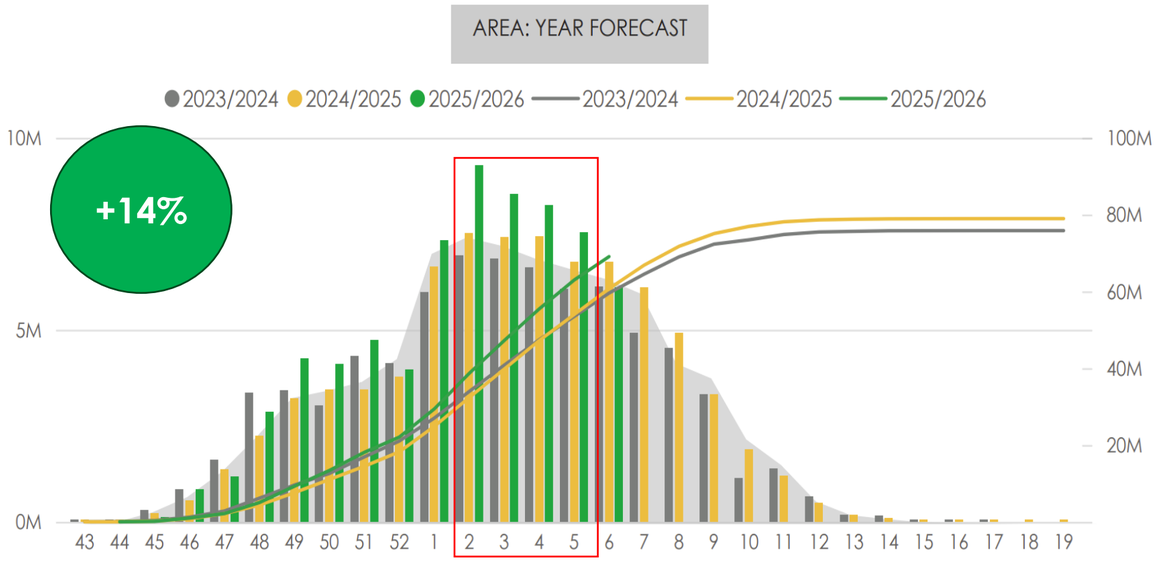
UMBRELLA ORGANISATION



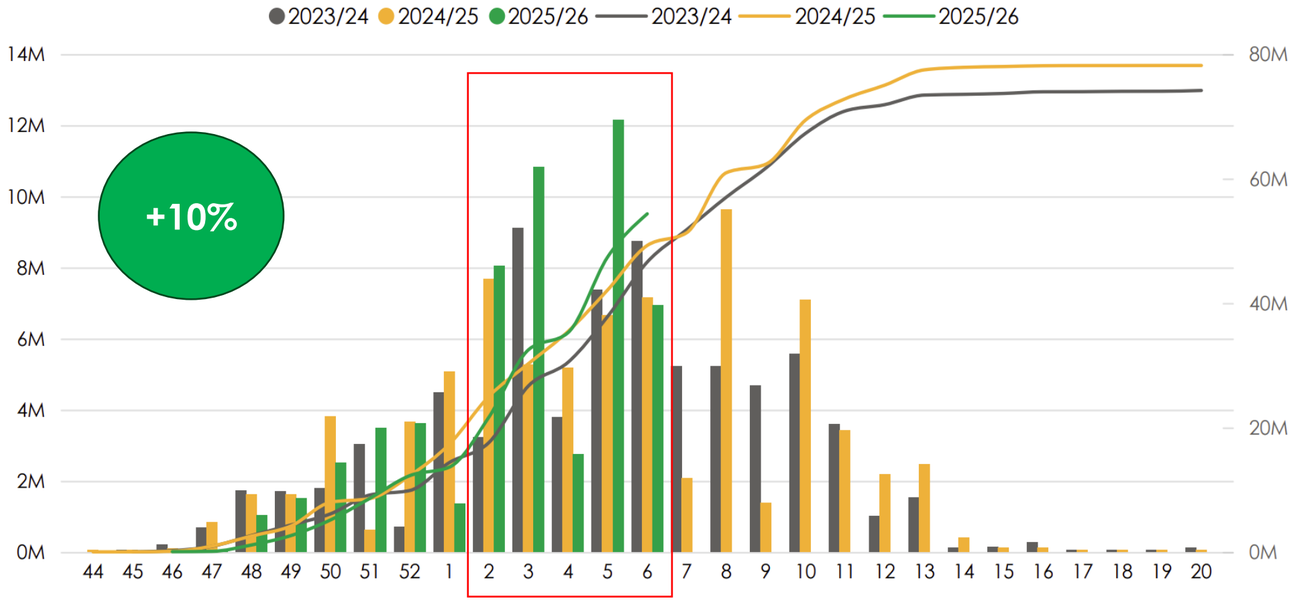
INSPECTION & EXPORT VOLUMES

TABLE GRAPES WEEK 06 2025/26

CARTONS INSPECTED PER WEEK (4.5KG)



CARTONS EXPORTED PER WEEK (4.5KG)



Inspections

- 69,06 mil cartons vs 60,7mil cartons (+14% YOY)
- **Season is 10-14 days earlier in the Hex + Berg Rivier**
- More volumes ready for shipping earlier

Exports

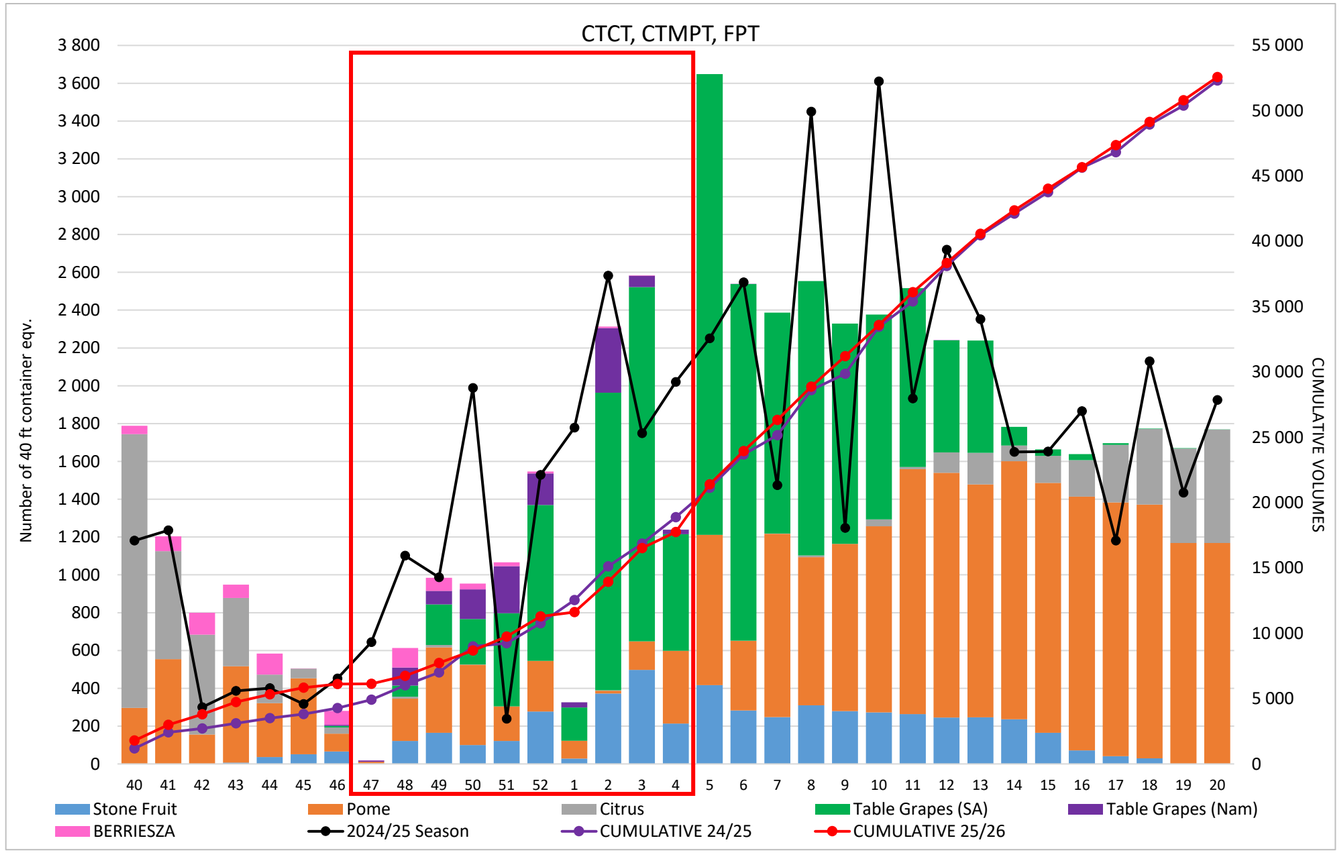
- 54,32 mil cartons vs 49,28 mil cartons (+10% YOY)
- Air Freight: 1 130 pallets vs 2 589 pallets previous season
- **Current Inspections vs Exports 21% (incl. Namibia)**

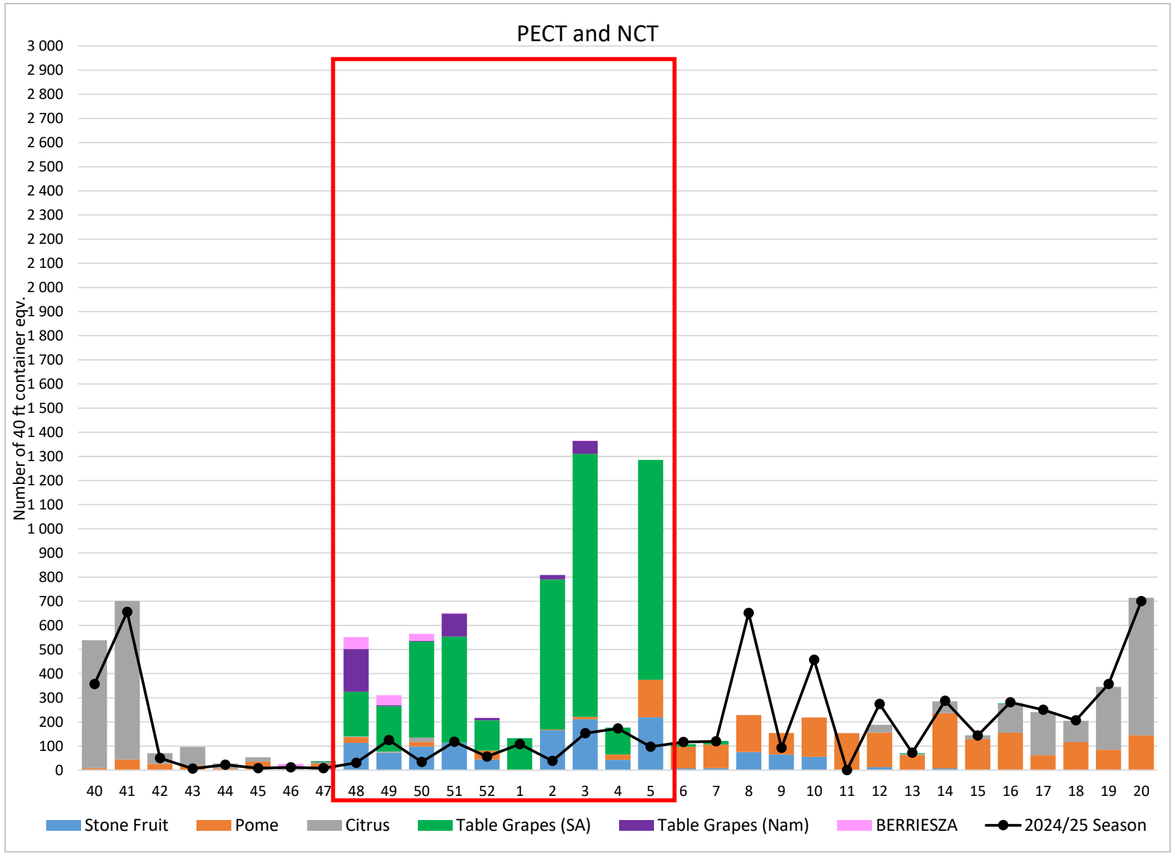
WK 05
12.1 mil
cartons
exported

EXPORT INSIGHTS

DIVERSIONS FROM CAPE TOWN TO EASTERN CAPE

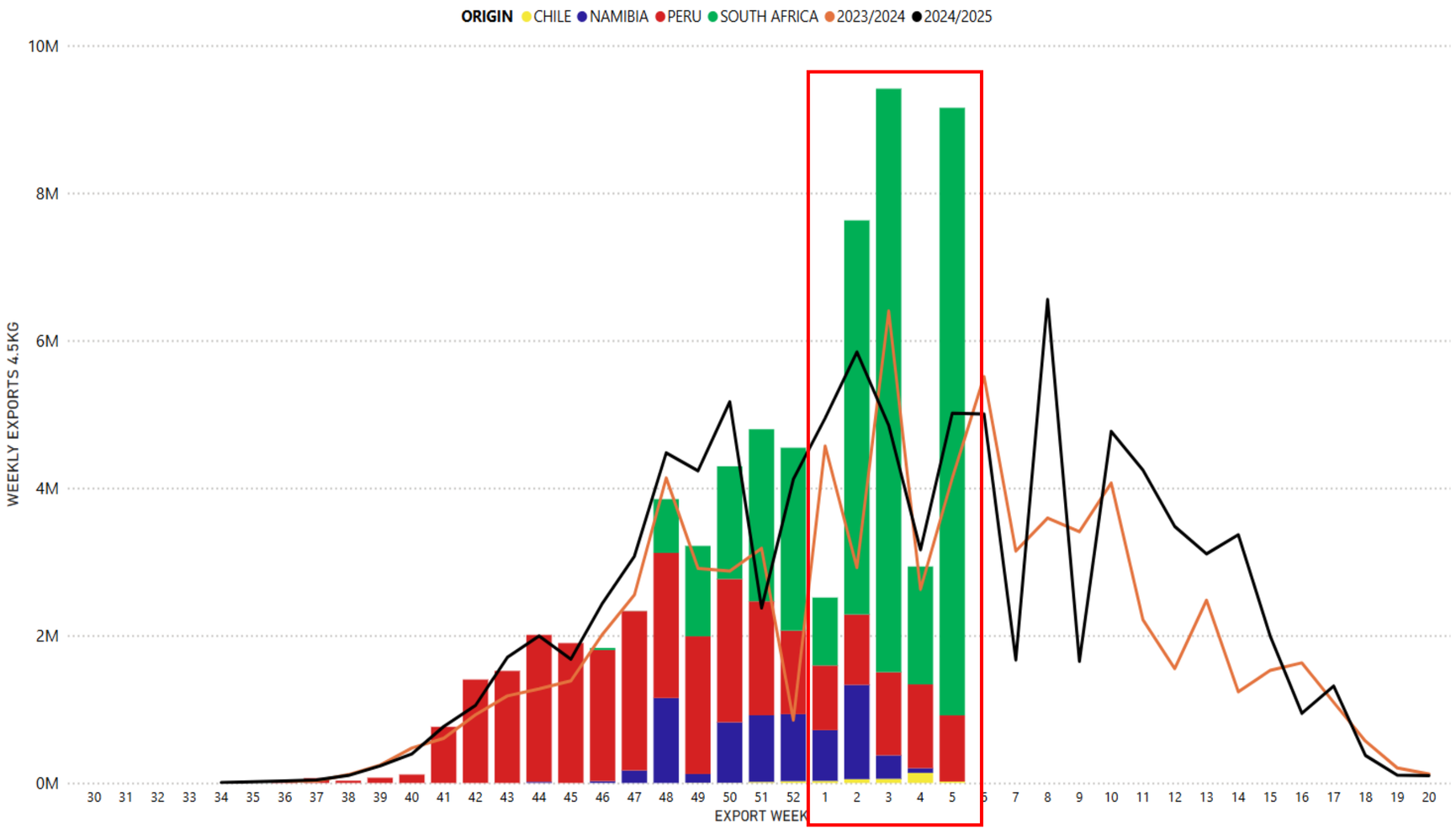
YTD WK 06 : 7722 containers vs 2167 (+256%)





SOUTHERN HEMISPHERE VOLUME TRENDS

GRAPE EXPORTS TO EUROPE



EUROPE EXPORT TREND YTD WK 5

- SA: 50%
- Peru: 39%
- Nam: 10%
- Chile: 1%

MARKET IMPACTS

UNSEEN CONSEQUENCES, COSTS ABSORBED BY GROWER

1. Pile up of fruit in key marketing windows
2. Old and new fruit on shelves at same time
3. More retail promotions
4. Loosing shelf space & sales to other fruits/countries
5. Lower prices on arrival due to quality/oversupply
6. **Reputational damage & lost market share**

Lower Sales Price | Higher Repacking & Claims Costs | Less Money at Farmgate | May not Breakeven

ECONOMIC IMPACTS

INDICATIVE COSTS OF DELAYS EXPERIENCED THIS SEASON

Estimated additional costs/losses due to CTCT disruptions

YTD week 05 = ±R463 million

This list is not exhaustive. It demonstrates the indicative economic impact of key disruptions experienced this season. The idea is to illustrate the magnitude of the often 'unseen' costs, which are ultimately absorbed by the grower.

***Not quantified here** are lower costs achieved in market due to arrival quality/claims/repacking amongst other*

OCCURENCE	IMPACT	ESTIMATED COST
One Resilience short shipped	370 containers	R250 mil
Kalahari Express short shipped	73 containers	R52 mil
*Train derailment	1 container	R720 000
***PE / Coega Diversions wk 48-05**	**4558 containers** vs 533 last season	**R160 mil**
Total		**±R463 mil**

YTD figures

*Table grape data only

ECONOMIC IMPACTS

INDICATIVE COSTS OF DELAYS EXPERIENCED THIS SEASON

Estimated additional pome & stone costs due to PE & Durban diversions

YTD = R762 million

This list is not exhaustive. It demonstrates the indicative economic impact of key disruptions experienced this season. The idea is to illustrate the magnitude of the often 'unseen' costs, which are ultimately absorbed by the grower.

***Not quantified here** are lower costs achieved in market due to arrival quality/claims/repacking, Reputational damage, loss of market share, potential of being delisted*

ITEM	ESTIMATED COST
Transport pome & stone (trucking to PE & Durban)	R68 535 00
Bulk reefer vessels	1 243 583
LAR costs pome & stone	5 831 920
QC claims	**204 253 661**
Diverted fruit	**482 144 695**
Total (excl. transport of all commodities)	**762 008 859**

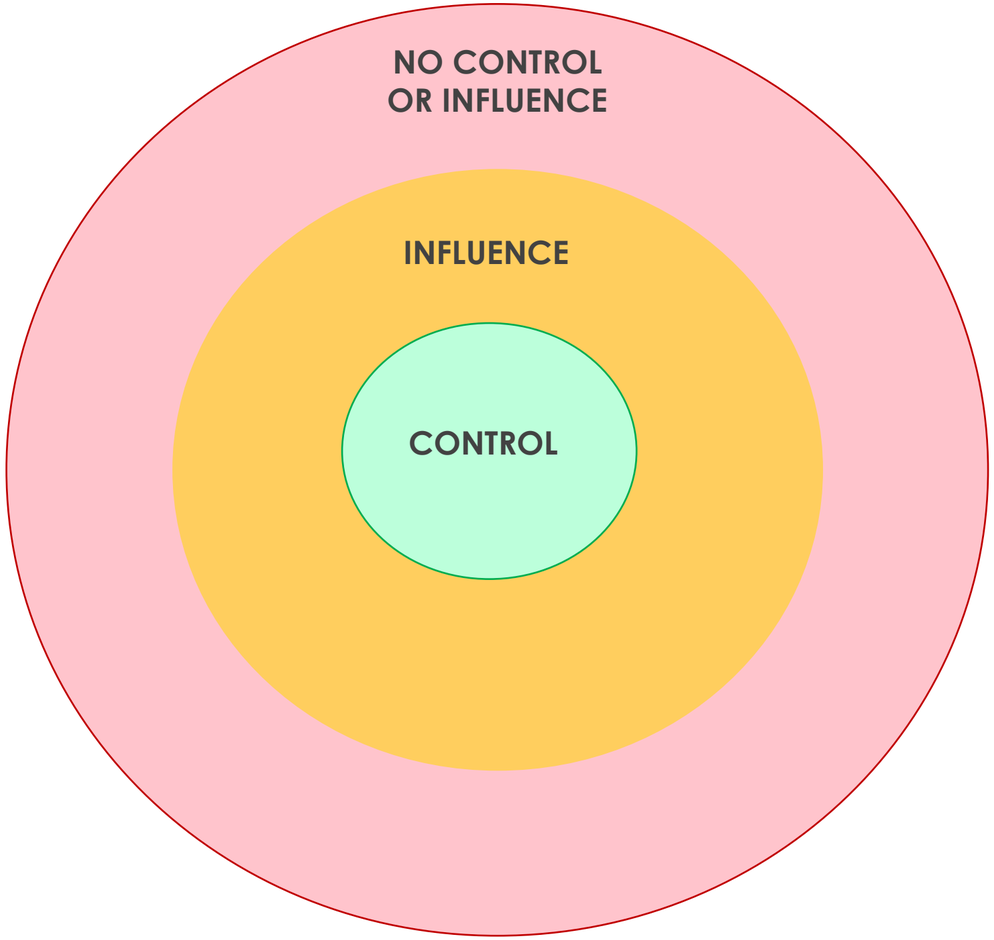
YTD figures, will increase by end of season

Pome and stone fruit data only

MAJOR FACTORS IMPACTING DISRUPTION

CHALLENGES EXPERIENCED THIS SEASON

1. Weather delays
2. Time it takes to start up
3. Volume planning (terminal & shipping lines)
4. Equipment breakdowns
5. Efficient use of equipment e.g. hot seats
6. Staff available and onsite
7. Agile processes to pivot, respond
8. Management coordination
9. Reliable systems with back up
10. Industry engagement & collaboration



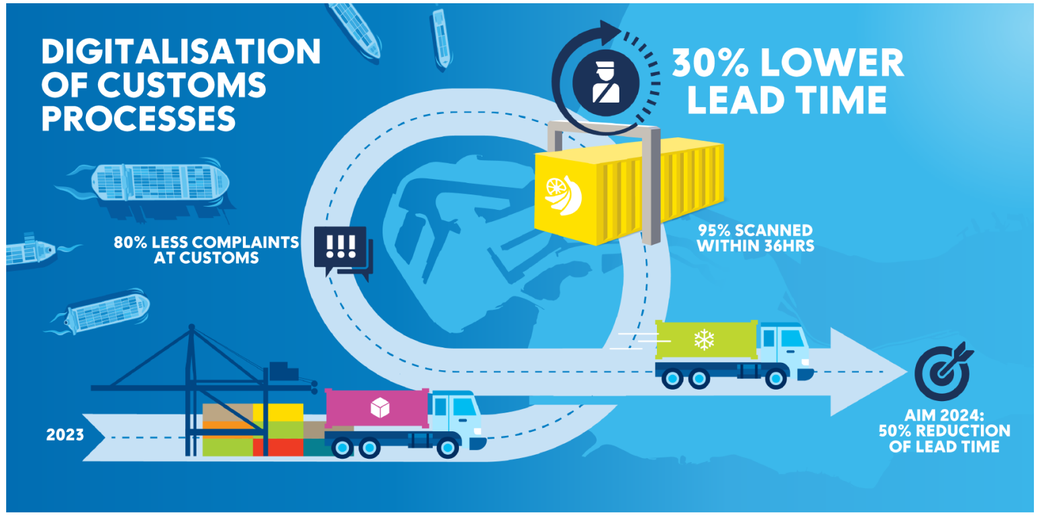
WHAT NEXT? WHAT CAN WE DO

RECOMMENDATIONS TO DEAL WITH DISRUPTIONS

Streamlining, integration & collaboration are imperative.

Key aspects to focus on:

1. Streamlining what we have – various dashboards, tools, resources
   - Including digital approaches
   - Automation
2. Understanding how to drive behavioral change
3. Improving the planning interface
   - Black swan event planning / Scenario planning
   - Integrated approach to logistics management
4. Global best practice
5. Continued & closer collaboration, PSPs



Port of Rotterdam

GEN SETS CTCT – EXCELLENT PSP EXAMPLE

CONTINUE THIS TYPE OF THINKING, MAKE THE IMPACT BIGGER

WHAT'S AT STAKE?

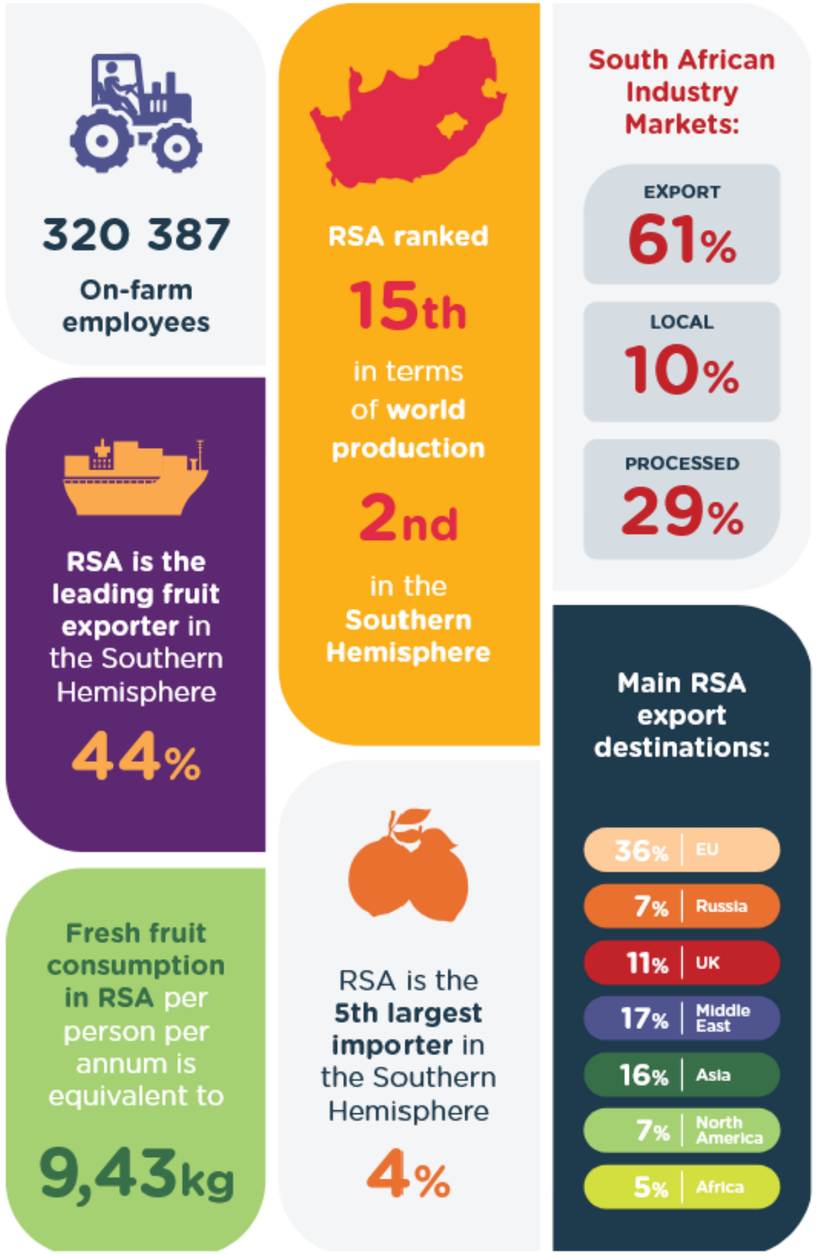
SOUTH AFRICA'S CONTRIBUTION TO GLOBAL INDUSTRIES

- Gross Value Add of **Agri in SA contributed R207 billion to the economy (3% of GDP)**
- **Fruit industry contributed R145 billion** (31% of agriculture)

The Fruit Industry

- Employed **320,000** people in 2024
- **35% of total agricultural employment**
- **2% of total employment** in South Africa
- **The 320,000 people 1.28 million dependents**

→ Impact on employment & food security



Sources: Fruit SA (2025), Stats SA (2024)

IN CONCLUSION

Local Industry, Global Reach

Power of Collaboration

THANK YOU

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SOUTH AFRICAN TABLE GRAPES

SATI DATA & DECISION-SUPPORT TOOLS (2025/26)

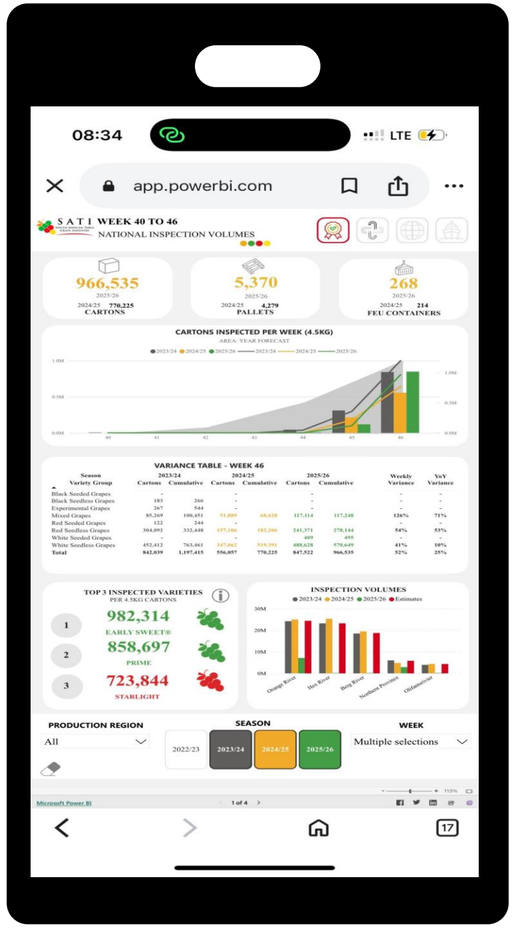
SUPPORTING INFORMED DECISION-MAKING THROUGH TIMELY, ACCURATE & ACTIONABLE INDUSTRY DATA

📊 Dynamic Dashboard

- Weekly inspections & export statistics
- **Filter by region**, market, variety & time period
- **Interactive**, online & member-accessible

🌎 S-Hemisphere Dashboard

- Weekly export data from **Chile, Peru & Namibia**
- Global supply visibility & benchmarking
- Supports market planning & JGMF insights



🚢 Logistics Model Dashboard

- Developed with Transnova
- **Scenario modelling & logistics risk mitigation**
- Port utilisation guidance & stock visibility
- **New interactive dashboard** for 2025/26

CTCT WIND HOURS

TOTAL WIND DELAY HOURS RECORDED PER MONTH

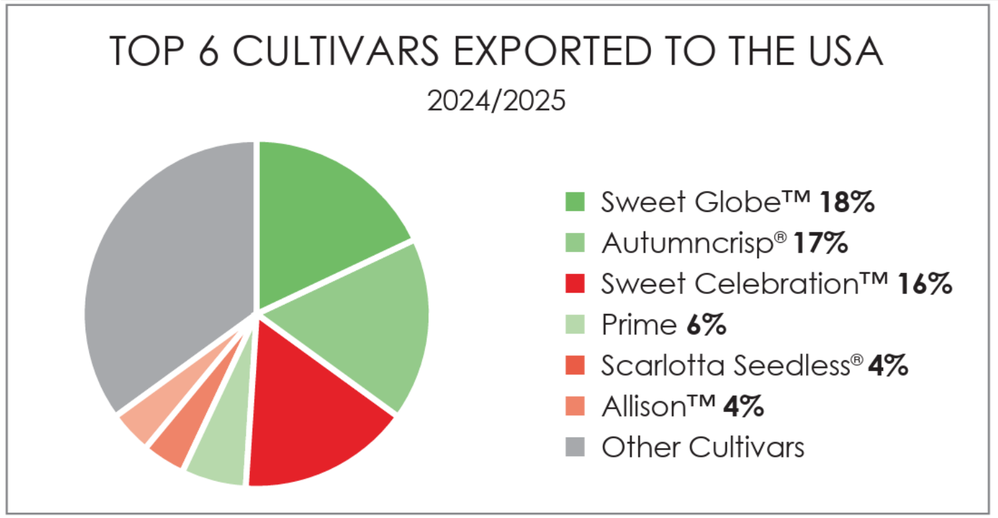
	2021/22	2022/23	2023/24	2024/25	2025/26
Nov	162	84	79	**265**	**414**
Dec	143	160	215	**127**	**349**
Jan	135	248	167	**167**	**214**
Feb	139	190	248	245	**45***
Mar	196	254	105	214	
Season Total	**775**	**936**	**814**	**1 018**	**814**

*Feb 2026 wind hours year-to-date

SA EXPORTS TO THE USA 2024/25

VOLUMES AND TRENDS

SA Table Grape Exports to the USA					
	2020/21	**2021/22**	**2022/23**	**2023/24**	**2024/25**
Cartons (4.5 kg)	1 081 545	826 337	768 875	1 329 367	**2 196 873**
Tonnes	4 867	3 719	3 460	5 982	**9 886**
Containers (FEU's)	300	230	214	369	**610**



- SA's table grape exports to the USA accounted for **3% of total volumes** in 2024/25
- Export volumes to the USA have grown at a **CAGR of 20%** from 2020/21 to 2024/25
- Implementation of **30% tariff will have significant impact** of shipped volumes in 2025/26
- Secondary impact in SA's traditional markets

PRESCRIPTIVE LOGISTICS MODEL

PHASE 1 — MODEL BUILD AND BASELINE ANALYSIS

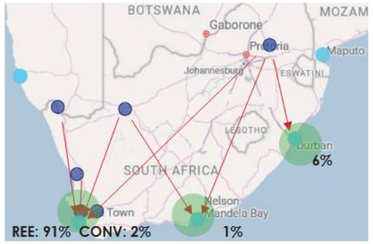
In Phase 1 of the project, SATI developed a prescriptive logistics model using digital twin technology. The primary objective was to provide industry stakeholders – including producers, exporters, freight forwarders, and national ports – with **data-driven insights** into the **impact of the 2023/24 season's constraints by generating high-level national and season views**. The model was also designed to **provide alternate solutions** to these constraints and identify optimal strategies for mitigating these challenges.

The port utilisation maps generated by the model, as shown below, illustrate historic and actual 2023/24 season route to market data that was used to generate a baseline scenario given constraints experienced in the 2023/24.

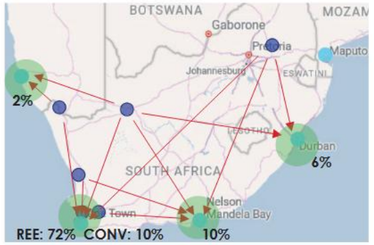
This information was used to pose the question:

"What would an optimal scenario look like?"

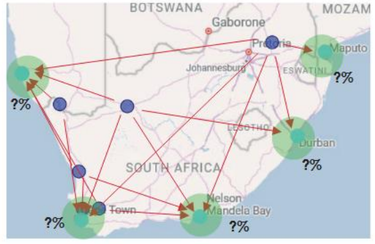
HISTORICAL



2023/24



OPTIMAL?



KEY OBJECTIVES ACHIEVED

- Build a prescriptive logistics model
- Generate a baseline using actual 2023/24 season data
- Identify an optimal plan given the constraints
- Identify the impact of the constraints
- Provide an initial 2024/25 season plan, should similar constraints arise

MODEL OUTCOMES

- Created visibility of the table grape supply chain
- Estimated R300 - R450 mil additional cost impact identified
- Provided optimal plan that would yield:
  - Reduction in avg. age of product by ±5 days
  - Estimated reduction of R300 mil in claims
  - Estimated reduction of R150 mil in logistics costs

PHASE 2 — TACTICAL MODEL RUN FOR THE 2024/25 SEASON

In Phase 2, the prescriptive logistics model was deployed as a **tactical planning tool** for the 2024/25 season. The model was run fortnightly, with results presented at the JGMF sessions, offering insights and **scenario-based planning recommendations, and regional-level insights** to industry stakeholders.

KEY OBJECTIVES ACHIEVED

- Provide tactical plan per farming region, identifying best route to market given assumed port constraints
- Present future port utilisation plans given most likely scenarios
- Provide regional level insights and vessel targeting planning based on various scenarios
- Season Planned vs Actual Reporting

MODEL OUTCOMES

- Regional specific plans providing detailed container allocations per vessel berthing presented at 10 JGMF sessions
- Scenario plan provided for delays experienced at CTCT
- Improved stakeholder engagements driven by clear visibility

EXAMPLE OF SEASON PLANNED VS ACTUAL TRACKING AS AT WEEK 12 (SEE ILLUSTRATION BELOW):

The similarities between actual and planned volumes observed during the greater part of the season suggest that the 2024/25 season closely followed the ideal planning scenario, which was possible due to limited delays at CTCT.

	Containers Exported	Estimated Transport & Shipping Costs	Estimated Revenue Realised	Estimated Gross Profit Margin/ Container Exported
2023/24 Actual	21 054	R2 395 533 266	R12 771 239 556	81.24%
2024/25 Baseline +30%*	21 000	R2 333 242 072	R13 859 733 587	83.20%
2024/25 Actual	21 537	R2 533 040 754	R13 834 345 234	81.70%

* The baseline capacity used by the model for CTCT was adjusted to improve the accuracy of planned results versus actuals in response to sustained improvement in port performance.

SOUTH AFRICA
QUALITY ON ROOT