SATI
South African Table Grape Industry

SOUTH AFRICA TABLE GRAPE *Conference* 2026

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CHARTERING THE NEXT CHAPTER FOR THE SOUTH AFRICAN TABLE GRAPE SECTOR

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OUR PAST *Legacy*



PROUDLY SERVING GLOBAL MARKETS FOR OVER 130 YEARS



1659

Hanepoot harvested for the first time in South Africa



1888

First efforts to ship South African grapes to the UK



1893

First 334 cases of grapes successfully shipped from SA to the UK



1900

Grape exports reach 250 tons



1952

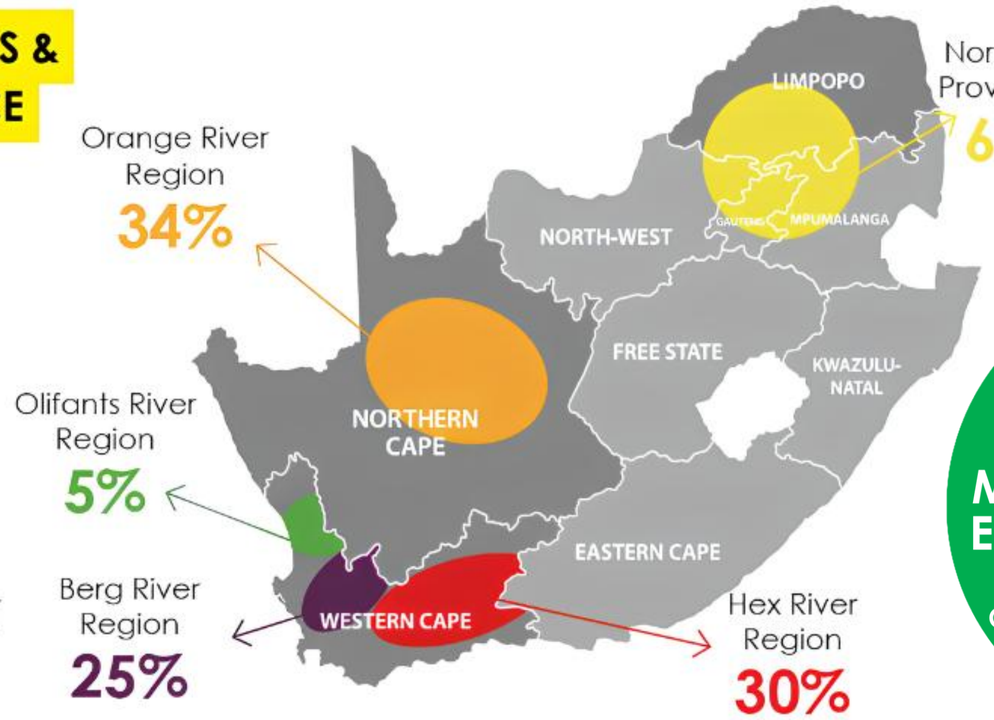
Exports reach 4 million cases

THE SA TABLE GRAPE INDUSTRY TODAY

2026

PRODUCTION REGIONS & INDUSTRY AT A GLANCE

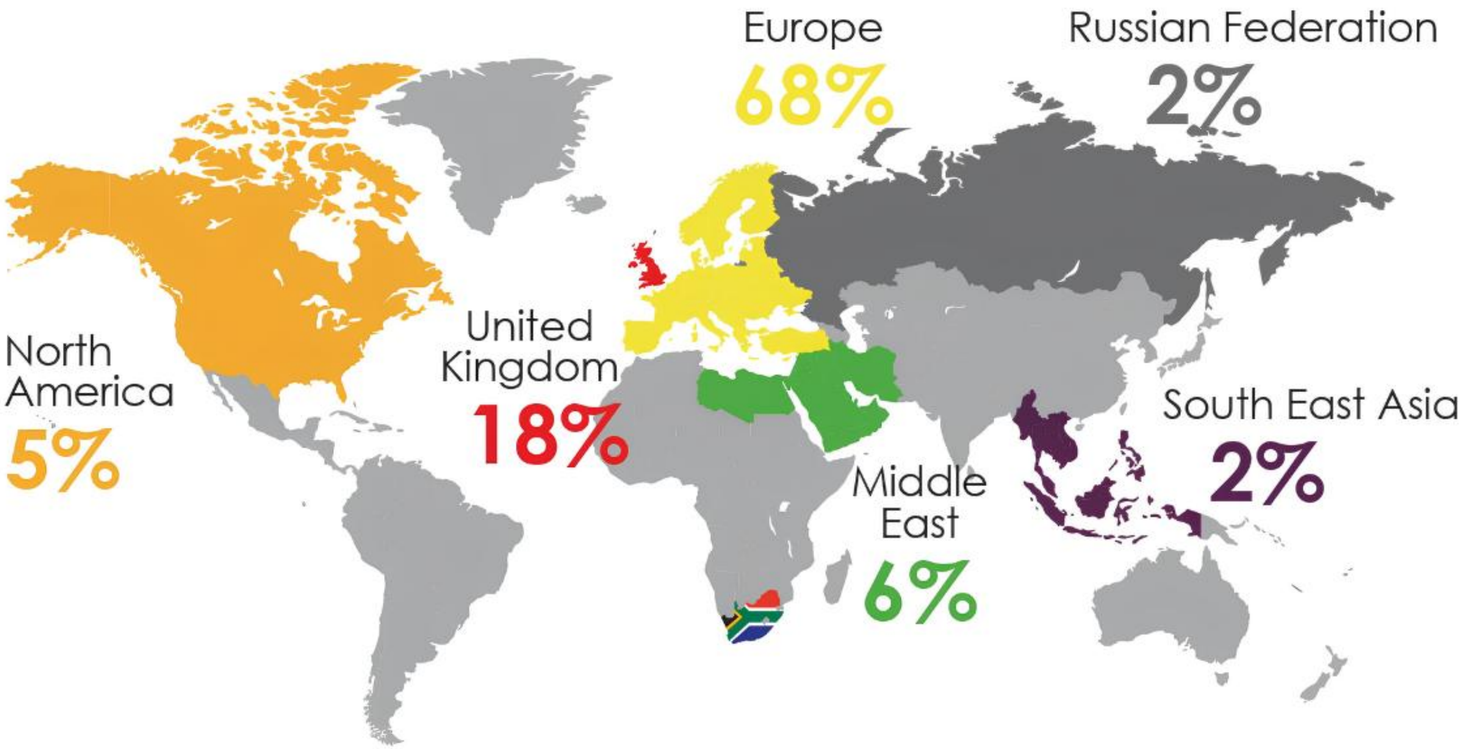
- 5 REGIONS
- 307 PRODUCERS
- 488 PRODUCTION UNITS (PUC'S)
- 103.4K JOBS
- 19.3K HECTARES
- 81.2M 4.5 KG EQUIVALENT CARTONS INSPECTED



78.8
MILLION CARTONS EXPORTED 2025/26
(4.5 KG EQUIVALENT CARTONS)

COMPARED TO 78.2 MILLION CARTONS IN 2024/25

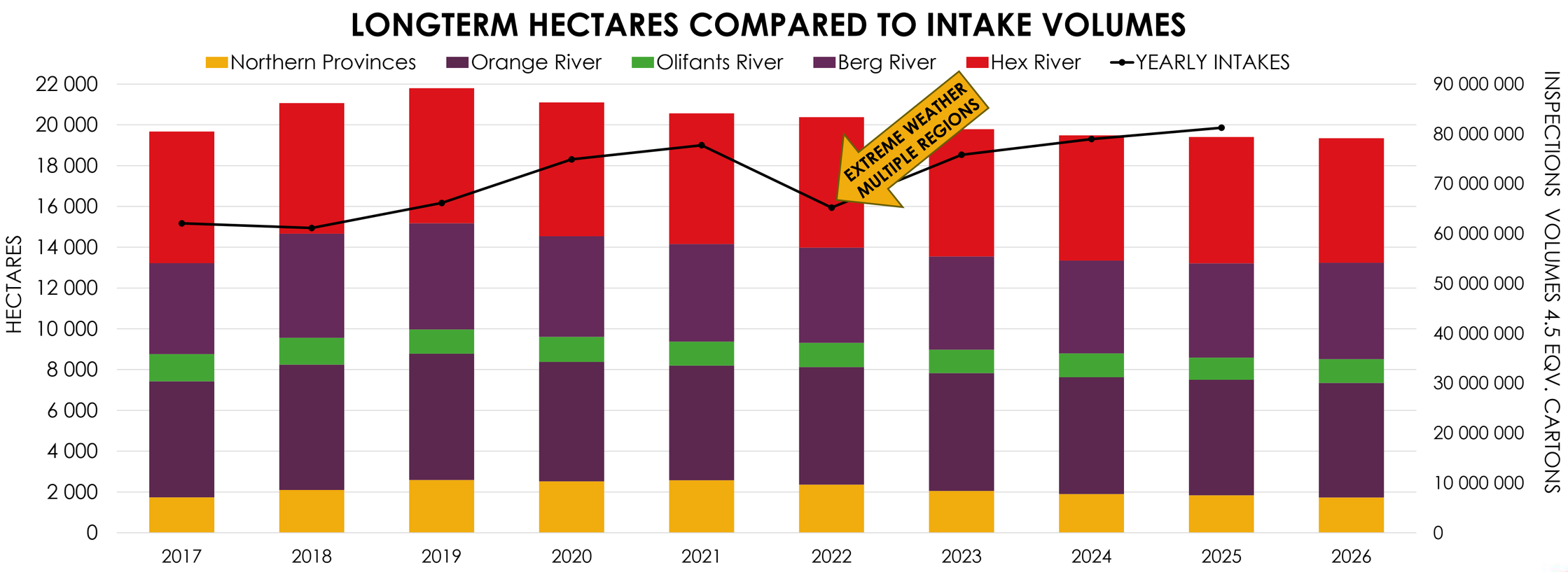
GLOBALLY COMPETITIVE INDUSTRY



SHARE OF SA EXPORTS PER MARKET 2025/26

- Proudly **exporting** to global markets for **more than 130 years**.
- **Access to 17 of the top 18 table grape import markets.**
- **Fifth** largest exporter of table exporter **globally**, **third in Southern Hemisphere**.

A SECTOR THAT CONTINUES TO ADAPT



GLOBAL PRESSURES RESHAPING LANDSCAPE

2021	2022	2023	2024	2025	2025/26	2027
Covid-19 Recovery	Global Container Shortage	Israel-Hamas War	Red Sea Conflict	USA Tariffs	USA Tariffs	USA Tariffs
		Shipping Disruptions	Panama Canal		Strait of Hormuz	El Niño
	Russia-Ukraine War		Peru & USA Crop Losses	Cost-of-Living Crisis	Oil Prices	
					Global Inflation & Interest Rates	

THE WORLD IS CHANGING

STRATEGIC SHIFTS

Environmental stewardship	→	Environmental compliance
Quality	→	Quality & Consistency of supply
Vineyard focused decisions	→	Whole value chain complexity
Incremental innovation	→	Accelerating innovation cycles

WHAT RESILIENCE MEANS FOR TABLE GRAPES

STRATEGIC SHIFTS

Each Shift = Increased Risk = Complexity = Need for Better Decision-Making

Industry must:

- Respond
- Adapt
- Anticipate
- Remain competitive

RESILIENCE

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We have moved beyond

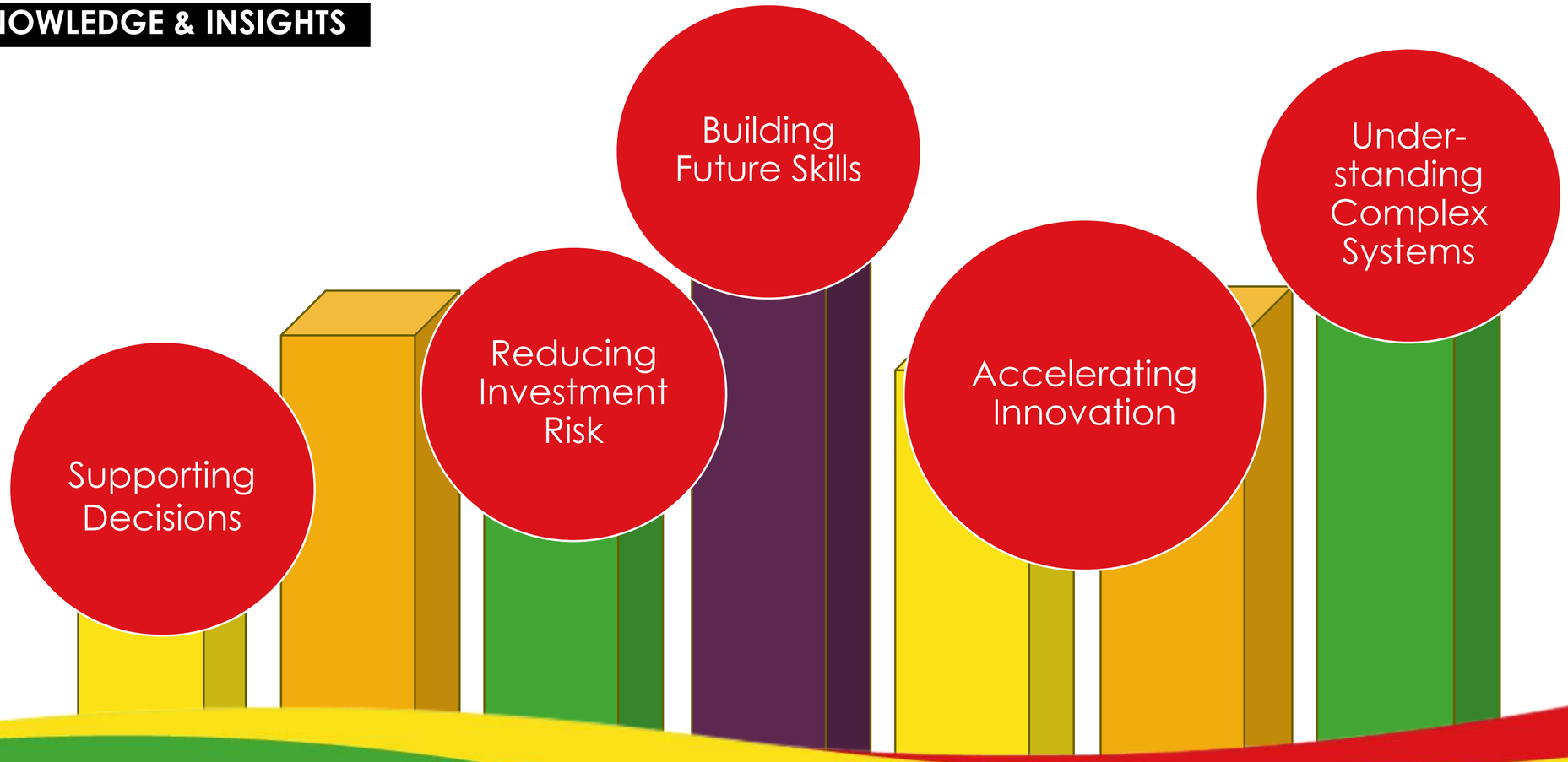
TECHNICAL & PRODUCTION RESEARCH





RESEARCH AS AN ENABLER FOR RESILIENCE

DATA, KNOWLEDGE & INSIGHTS



RESEARCH DRIVEN BY GROWER NEEDS

WE ASK. WE LISTEN. WE RESPOND WITH DIRECTION.

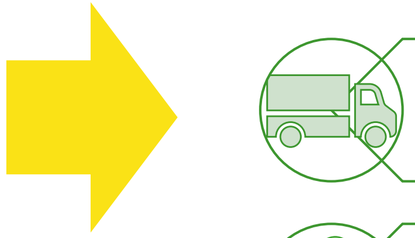
Ranking	All Regions	Northern Region	Orange River Region	Olifants River Region	Berg River Region	Hex River Region
1	Crop Protection	Postharvest/Cold chain (pre-export)	Crop Protection	Crop Protection	Postharvest/Cold chain (pre-export)	Sustainability
2	Sustainability	Vineyard performance (quality focus)	Plant Material Quality	Sustainability	Crop Protection	Vineyard performance (quality focus)
3	Vineyard performance (quality focus)	Crop Protection	Postharvest/Cold chain (pre-export)	Vineyard performance (quality focus)	Sustainability	Crop Protection
4	Postharvest/Cold chain (pre-export)	Sustainability	Sustainability	Plant Material Quality	Plant Material Quality	Plant Material Quality
5	Plant Material Quality	Plant Material Quality	Vineyard performance (quality focus)	Postharvest/Cold chain (pre-export)	Vineyard performance (quality focus)	Postharvest/Cold chain (pre-export)

RESEARCH DRIVEN BY GROWER NEEDS

REGION SPECIFIC

REGIONAL PRIORITIES BASED ON INDUSTRY NEEDS SURVEY

1. Crop Protection
2. Sustainability
3. Vineyard Performance (quality focus)
4. Postharvest/Cold Chain (pre-export)
5. Plant Material Quality





Orange River & Olifants Regions

Crop Protection

Northern & Berg River Regions

Postharvest / Cold Chain



Hex River Region

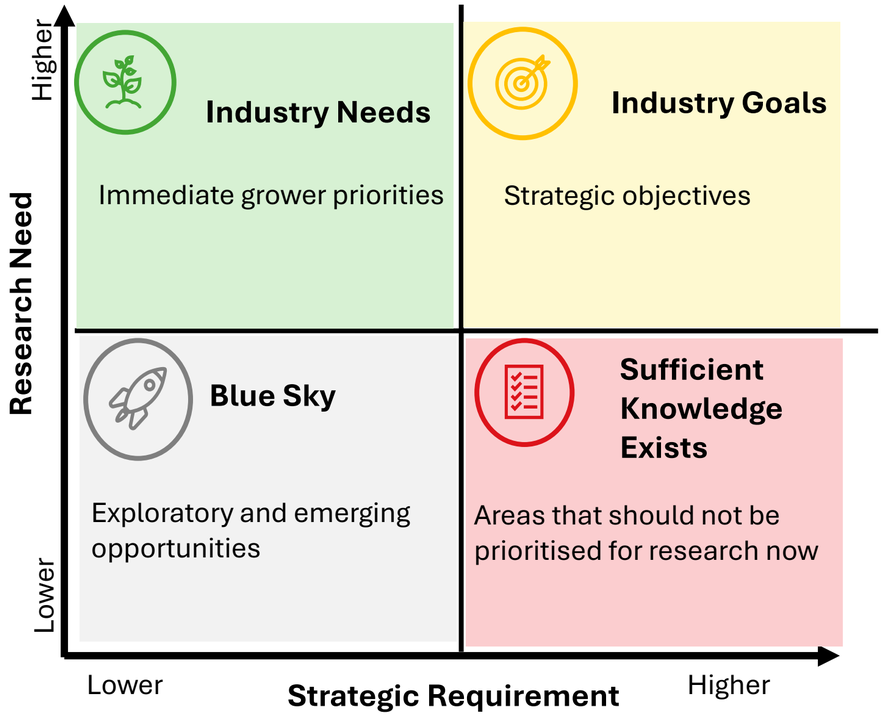
Sustainability

RESEARCH FUNDING STRATEGY

WHAT'S NEW

Industry Needs
- Partnerships/Collaboration
- Enhanced knowledge transfer
- Support decision-making

Blue Sky NEW
- Innovation
- Talent pipeline
- Capability building



Industry Goals NEW
- Talent pipeline & capability
- Capability building
- Preparing for the future

Sufficient Knowledge Exists
- Sufficient knowledge and expertise exist
- Knowledge transfer opportunity

RESEARCH AS A LONG-TERM COMPETITIVE ADVANTAGE

- Table grape specific expertise
- Talent development
- Knowledge advancement
- Future skills
- Better investment decisions
- Industry competitiveness



KEY TAKE OUTS

AI Technologies	Precision agriculture to maintain competitiveness
Collaboration	Adoption, avoid duplication, leverage strengths
Research has Evolved	Whole value chain

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THE BEST WAY TO PREDICT YOUR FUTURE IS TO *Innovate it*



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