

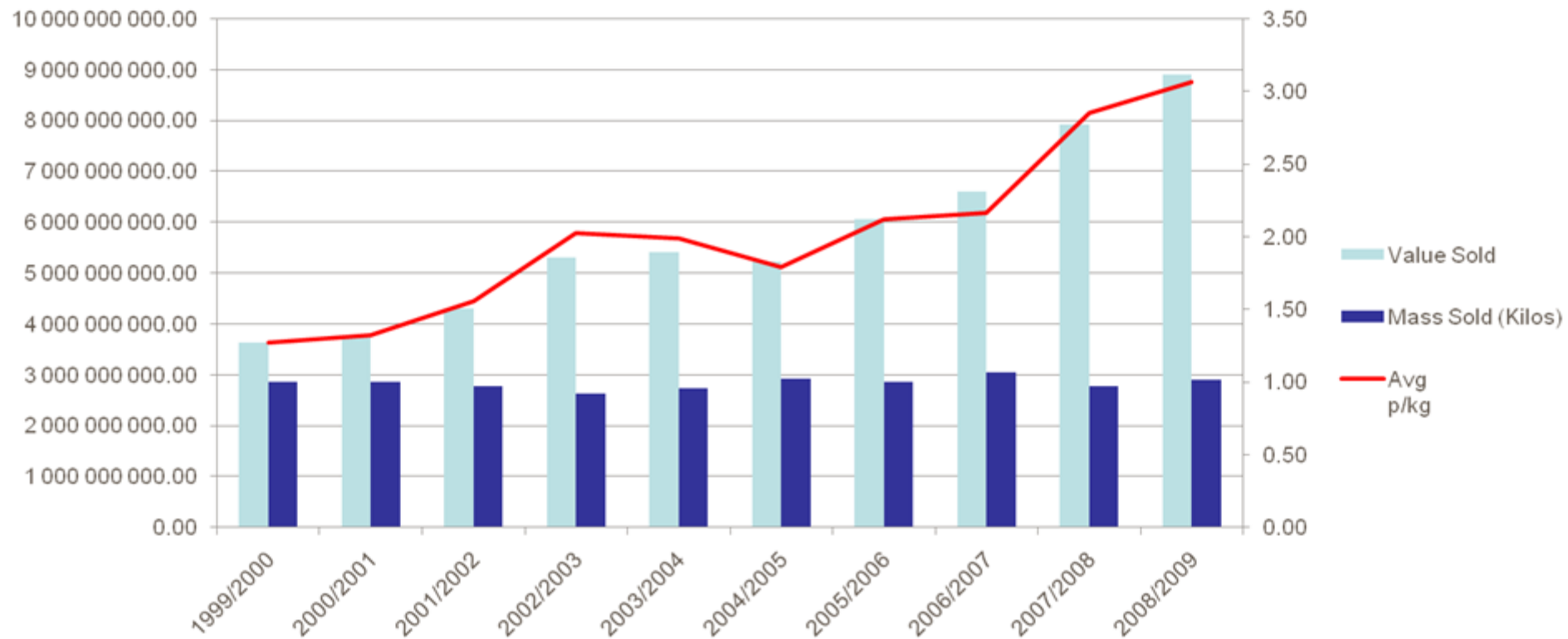


Presentation: PPECB International Harmonization Meeting:20/4/2010

Market Trends

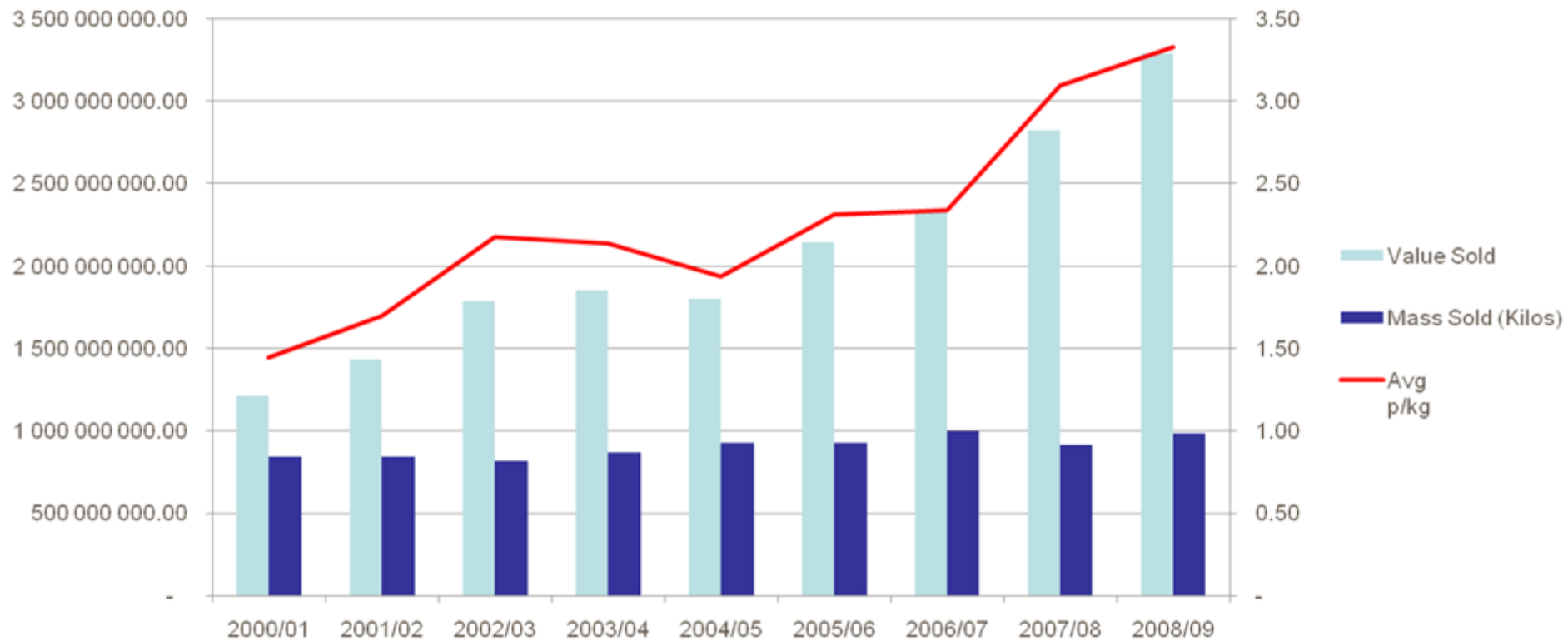


ALL MARKETS





JHB MARKET





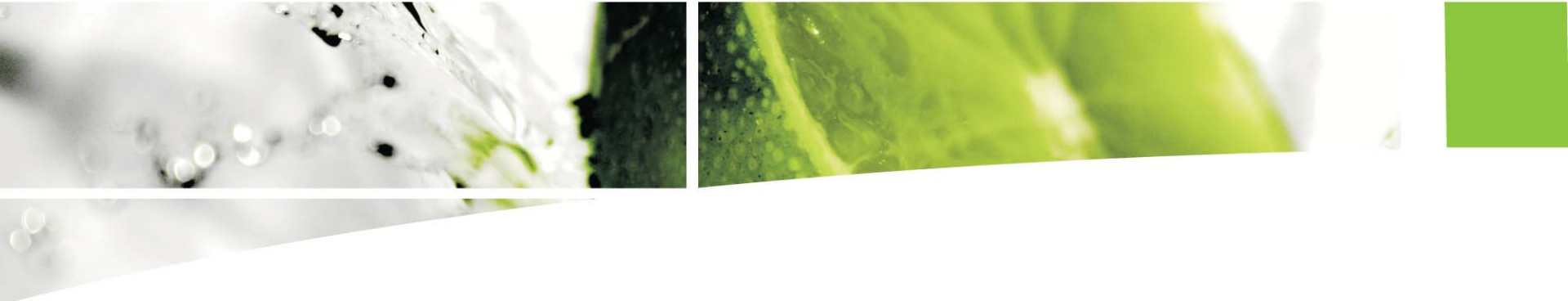
Joburg Market Performance



- **TURNOVER:** R3,2 billion per annum, up 15% compared to 2007/08.
- **VOLUME:** 988 060 tons of fruit and vegetables, up 8% compared to 2007/08.
- **PRICE PER TON:** R3,362, up 8% compared to 2007/08.
- **RECORD SALES FOR A MONTH:** R315 million (Dec 2008)
- **AVERAGE SALES PER MONTH:** R272 million.
- **SALES RECORD FOR A SINGLE BUSINESS DAY:** R20 million.
- **AVERAGE SALES TRANSACTIONS PER MONTH:** 400 000.
- **BUYERS:** 17 000 with 8 700 regulars.
- **DAILY VEHICLE TRAFFIC:** 4 300.



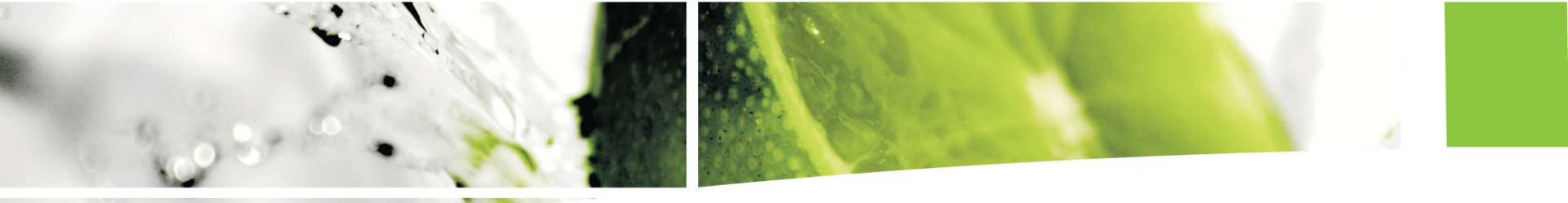
Adopted four pillars of strategy



- **Innovation:** the productive exploitation of new generation ideas to gain competitive advantage
- **Food Safety & Quality Control:** the delivery of a suitable infrastructure and services aimed at assuring quality, Food safety and commodity traceability
- **Customer Centric:** an unwavering commitment to addressing the interests of those procuring from JFPM
- **Human Capital Development:** sharpening and developing JFPM employee skills and competencies to meet food industry requirements



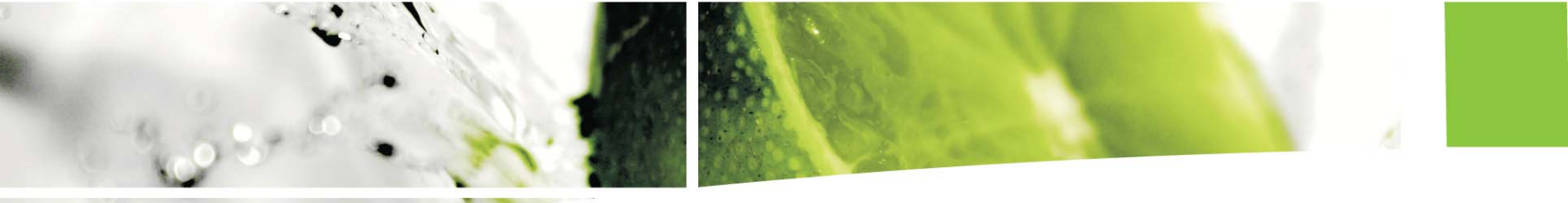
Strategy Execution



- **Commercialisation of the Laboratory**
- **Farm-gate/market integration (SGS Project)**
- **Real time pricing project**
- **Revamp Customer offerings**
- **Upskilling programs**
- **Sweating of the land**
- **Market of the Future (Premium Hall)**
- **International Business and Online Trading**



Rationale Behind Market Of the future



- **Claim back market share**
- **Address food safety requirements and cold chain management**
- **Diversify revenue streams**
- **Modernise business processes with a view of introducing efficiencies**
- **Differentiated Product Offering**



Upgrade of Hall 5&6 and 7&8





Transport Hub

Wholesale Distribution

Market of the Future

Market of the future

Retail

Shopping Complex

JFPM

Exports
Retail Packing

Ripening
Canning

DC

Sorting,
Packing

Processing
Processing

Market Rd

Bio digester

Meat Market

Fish

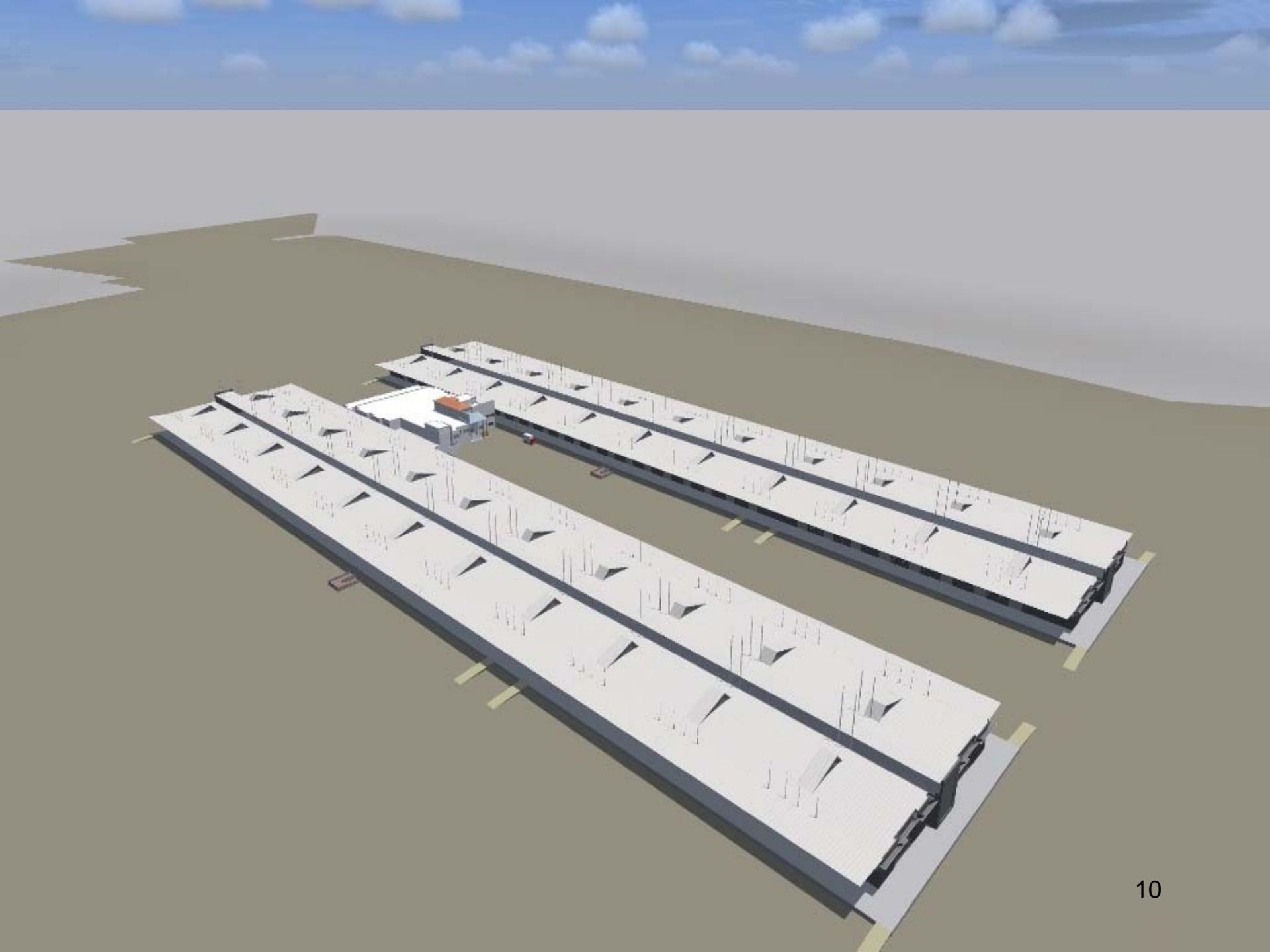
Milk

DC

Supporting
Services

M19

F19 (P)





Docking Stations

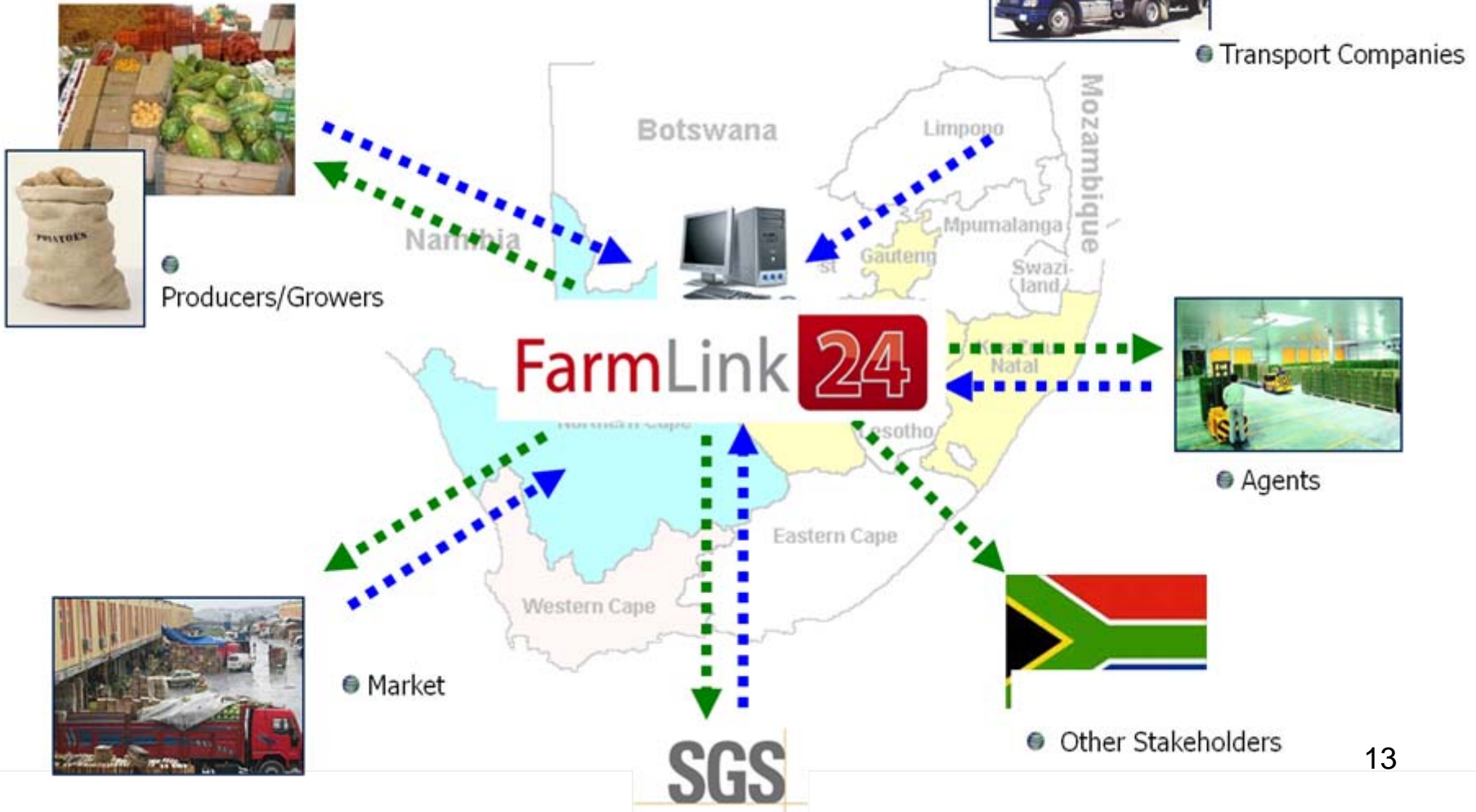




Sell on samples, professional buying area



Stakeholder Integration: Farmlink 24



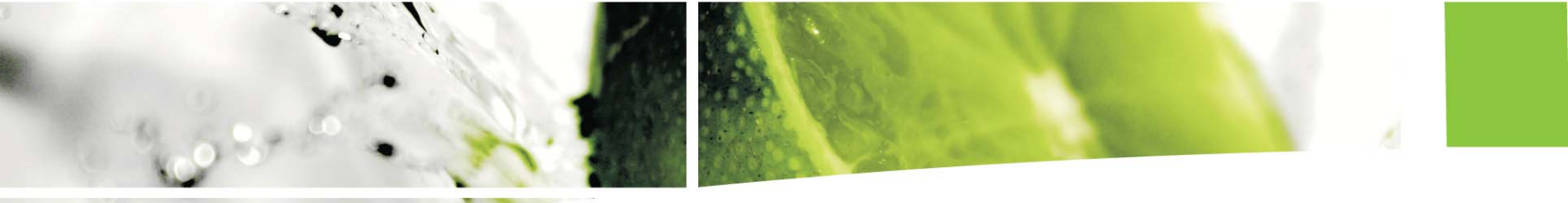
Noting The Plight of Emerging Farmers: Challenges



- Lack of packaging facilities
- Lack of knowledge on sorting, grading, packaging
- Poor transport logistics
- Lack of cold storage facilities
- Poor cold chain management abilities
- Lack of food safety management systems



Noting The Plight of Emerging Farmers



MOU signed with the Vhembe District Municipality

Packhouse revamp process at commissioning stage.

Recruitment of personnel in progress

Intense training to start soon



Noting The Plight of Emerging Farmers: Before

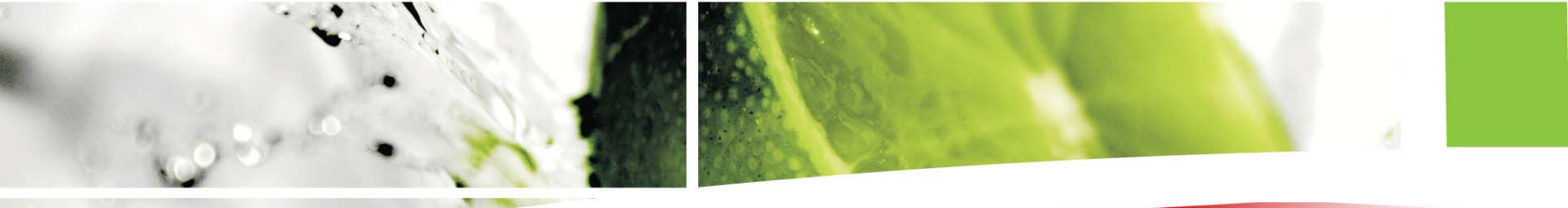


Vhembe Project: After





Branding sample on packaging materials





Rollout of Fresh Produce Franchise stores

- Five star retail outlet that offers quality produce at 2 star prices

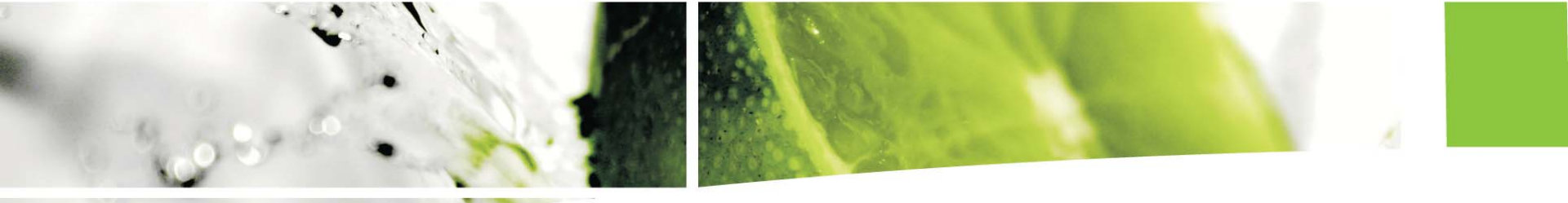


FruityDay - Workplace Wellness

- FruityDay is a workplace fruit and vegetable delivery service available to South African Corporate entities.
- The aim is to promote workplace wellness through weekly supply of fruits and vegetables in easy to carry lifestyle signature boxes.
- The service is targeted at consumers who value convenience and have higher level of health consciousness

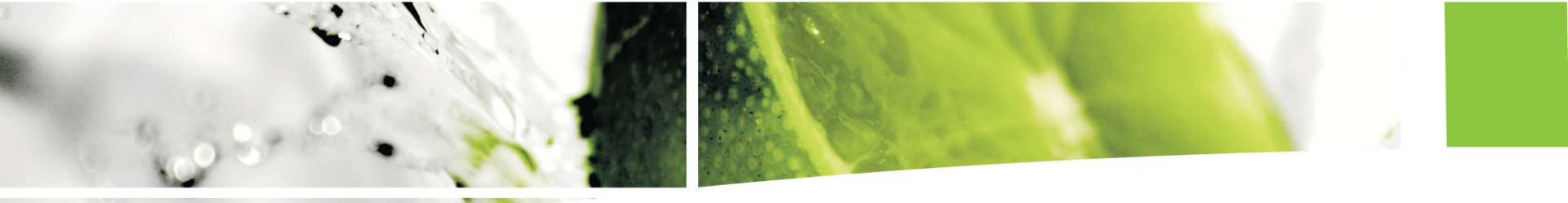


International Business: Challenges



- Lack of packaging facilities
- Lack of knowledge on sorting, grading, packaging
- Poor transport logistics
- Lack of cold storage facilities
- Poor cold chain management abilities
- Lack of food safety management systems

International Business: Opportunities





a world class African city



Thank You

