

allesbeste[®]

SIMPOSIUM | SYMPOSIUM

DISCUSSION

7 AUGUST AT 11:35

MARKET REPORTS, PROTOCOLS AND WHAT THE NUMBERS ARE TELLING US ABOUT THE FUTURE

Trends you should be aware of. Considerations you should take into account in your marketing decisions and production. Cape region analysis and growth opportunities. Who should you trust with your Maluma and why, even when it's not us. The key advantages we still see with Maluma. Back-on-farm Price reporting, Cost of Sales evaluations, and maximizing earnings. Evaluation of India and China as new market opportunities.

DONOVAN LEWIS (Allesbeste)

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Hello, I am Tom, I am Ruben and I am Nico



avor

farmers of avocado



Introduction

- Joint venture between Allesbeste (25%) and Farmhouse International (75%)
- The best avocados year-round
- European market
- Focus on food safety, sustainability and product quality



avor

**“Creating the best
avocado experience”**



The Viavi Brand

Launched with the aim of providing consumers with the ultimate avocado eating experience and quality consistency.

Benefits Viavi avocado:

- Longevity after slicing
- Insignificant waste levels
- Improved storage



Export markets

Market Segments



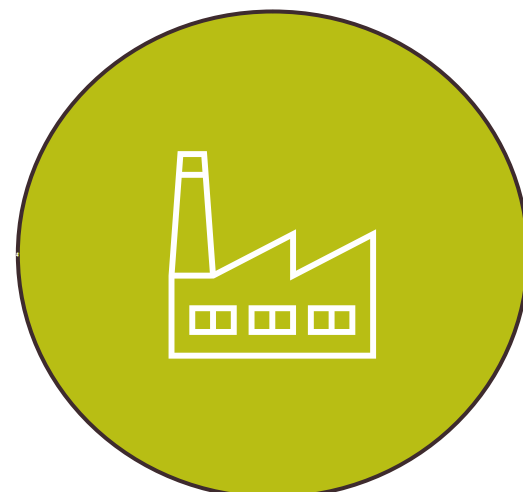
Retail



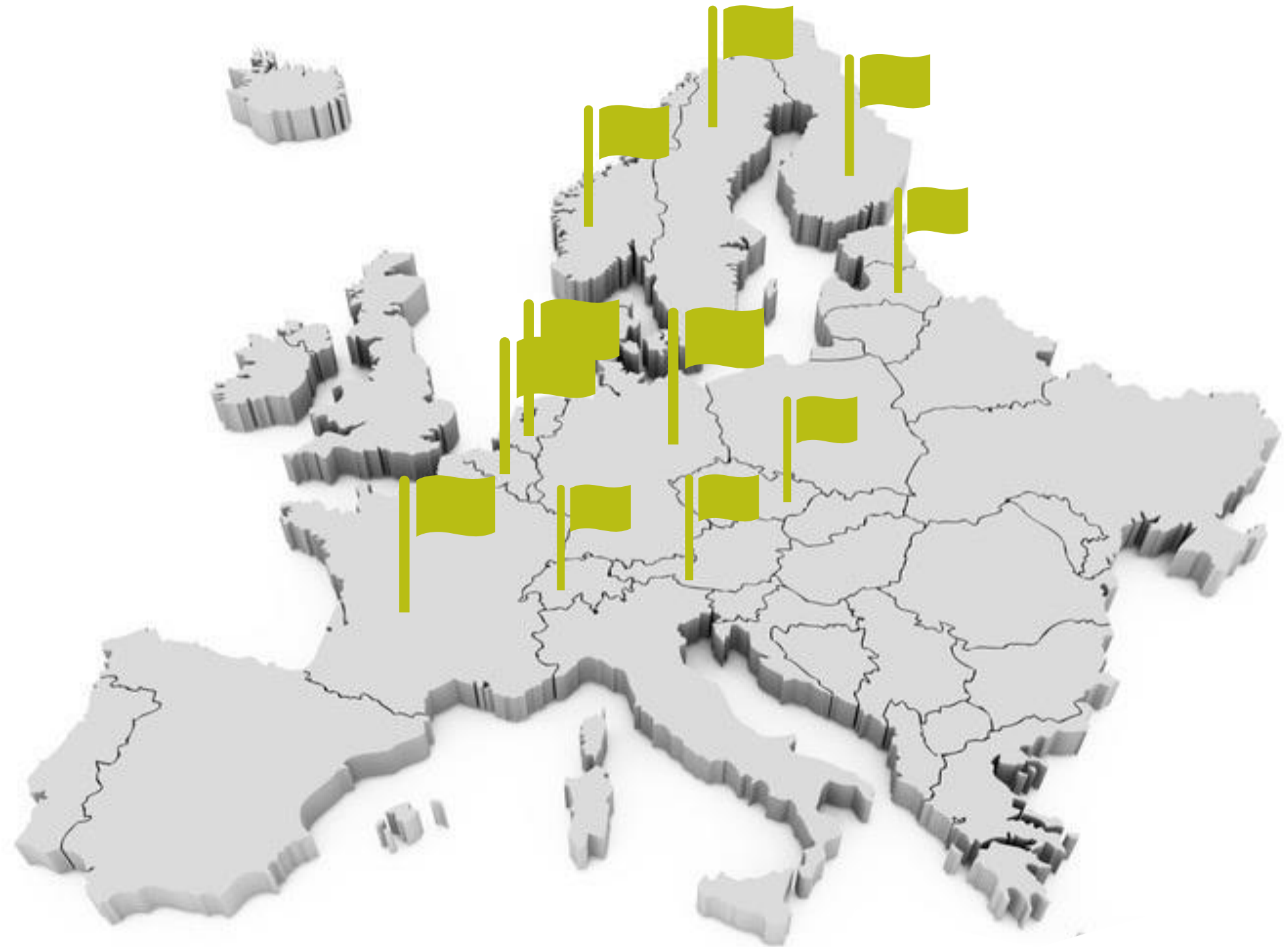
Wholesale



Foodservice



Processing



Listed retailers



Trends in '24



- Less promotions in retail summer '24 because of less volumes out of Peru
- Undersupplied summer compared to previous years
- Retail is finding direct link to farms
- Private equity investing in Latin America / Africa
- Shipping lines avoid Suez creating long transits out of East Africa
- Interesting window for Cape fruit with early season ending Peru.

Lets dive a bit into the Local markets



ALLESBESTE SYMPOSIUM 2024

CHRISTOFF DE WET

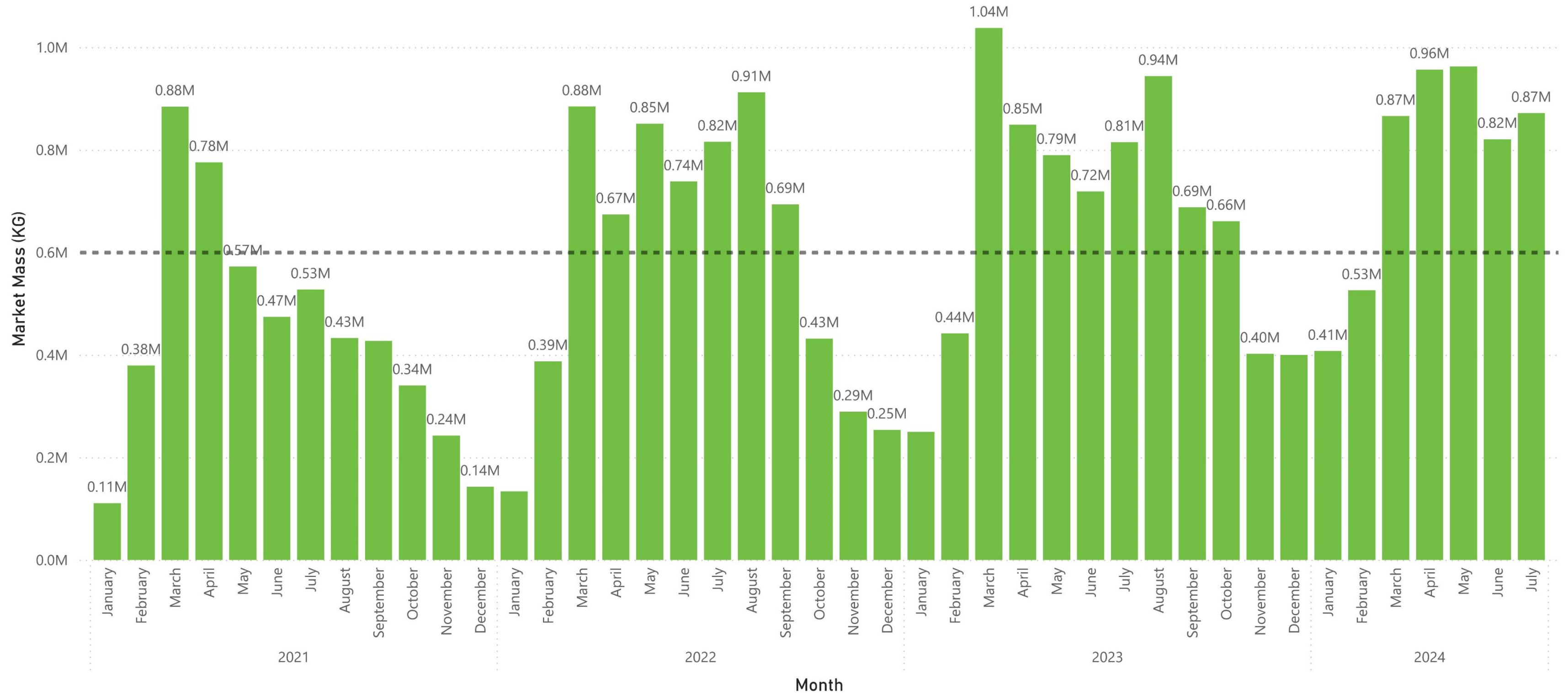


Informal Trade

AVOCADO PERFORMANCE - JHB MARKET

BAGS

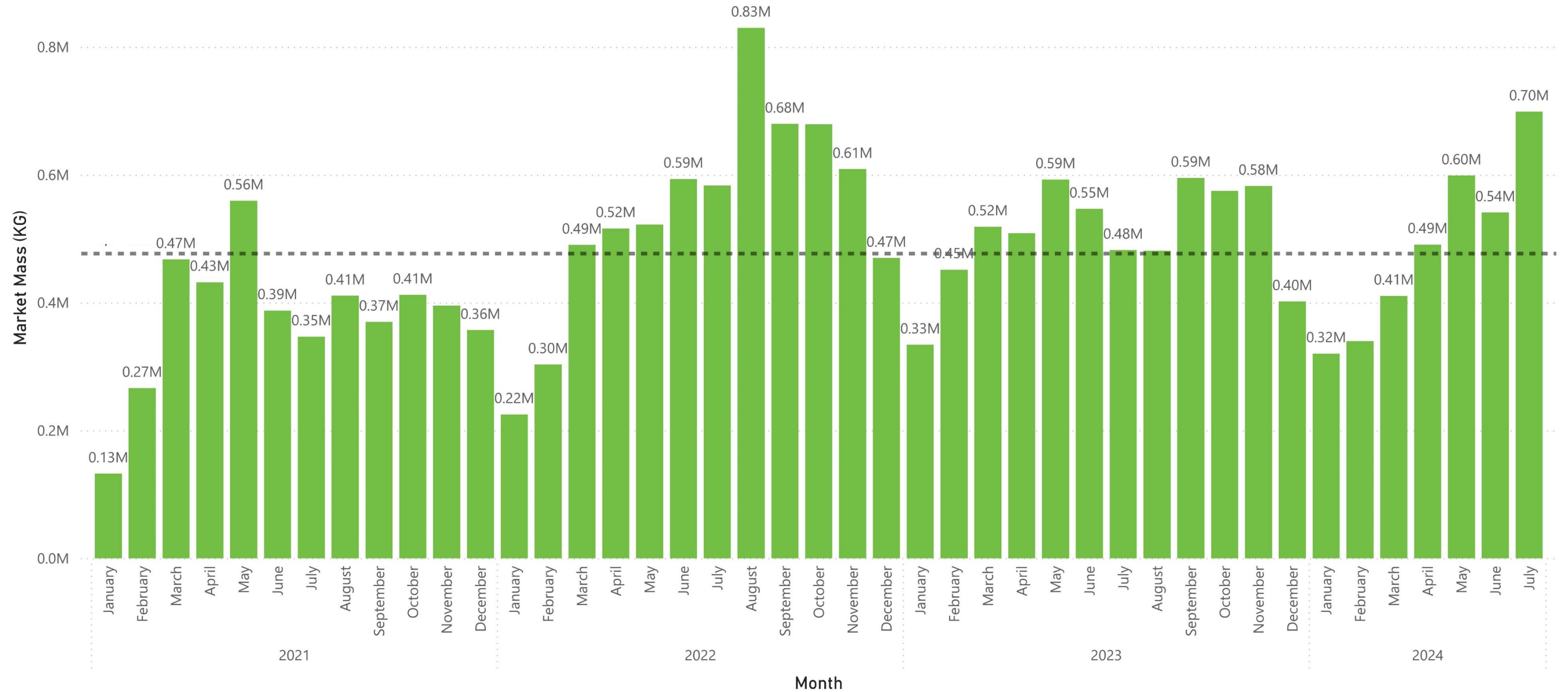
Volume (KG) per Month per Year



AVOCADO PERFORMANCE - JHB MARKET

4KG TRAYS

Volume (KG) per Month per Year

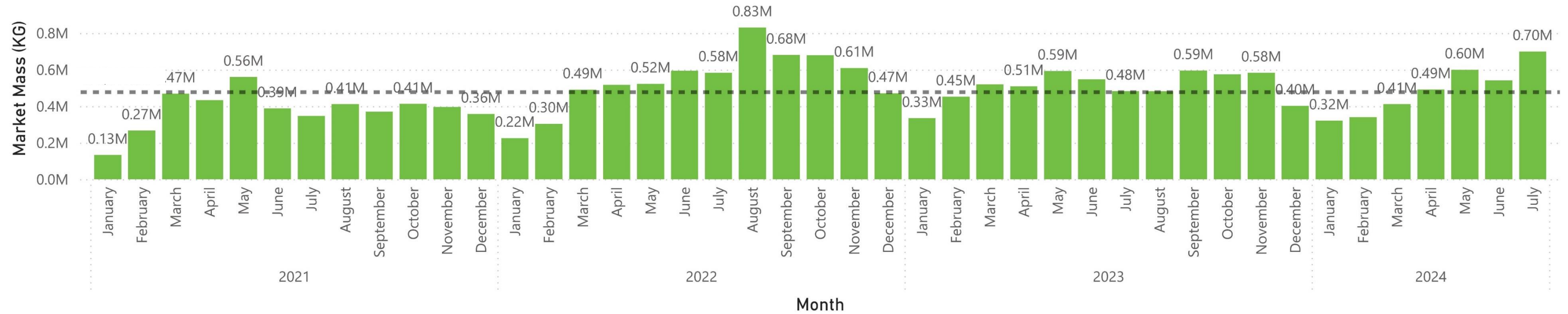


Informal Trade

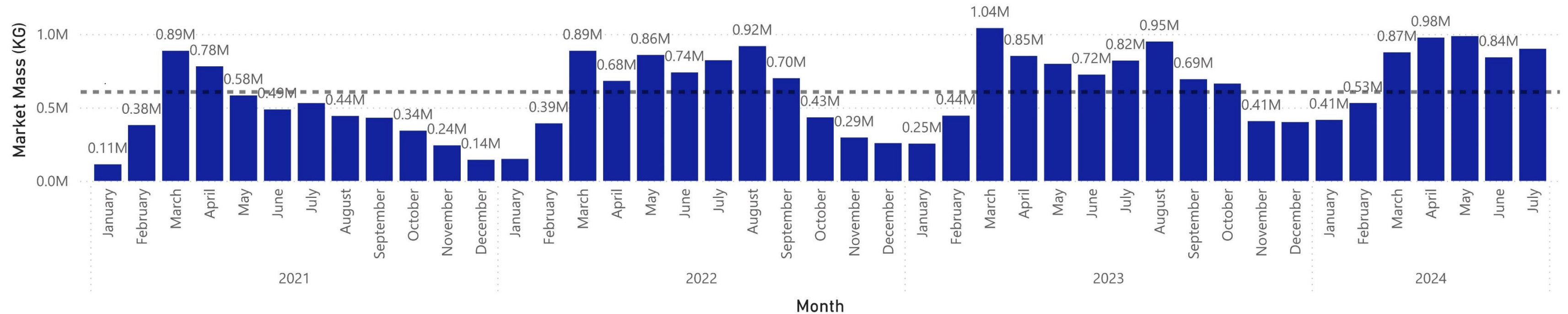
AVOCADO PERFORMANCE - JHB MARKET

4KG TRAYS COMPARED TO BAGS

Trays - Volume (KG) Growth



Bags - Volume (KG) Growth





**Dynamic informal
trade**

Maluma Hass

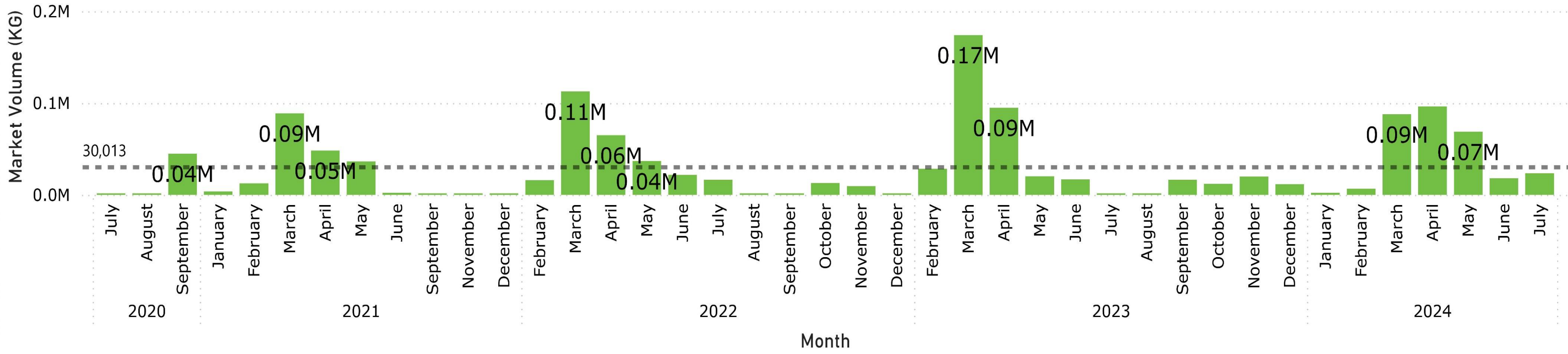


Overall Market Performance - Maluma Hass

Market

All

Total Market Volume (KG) per Year per Month



Total National Markets - Avocados

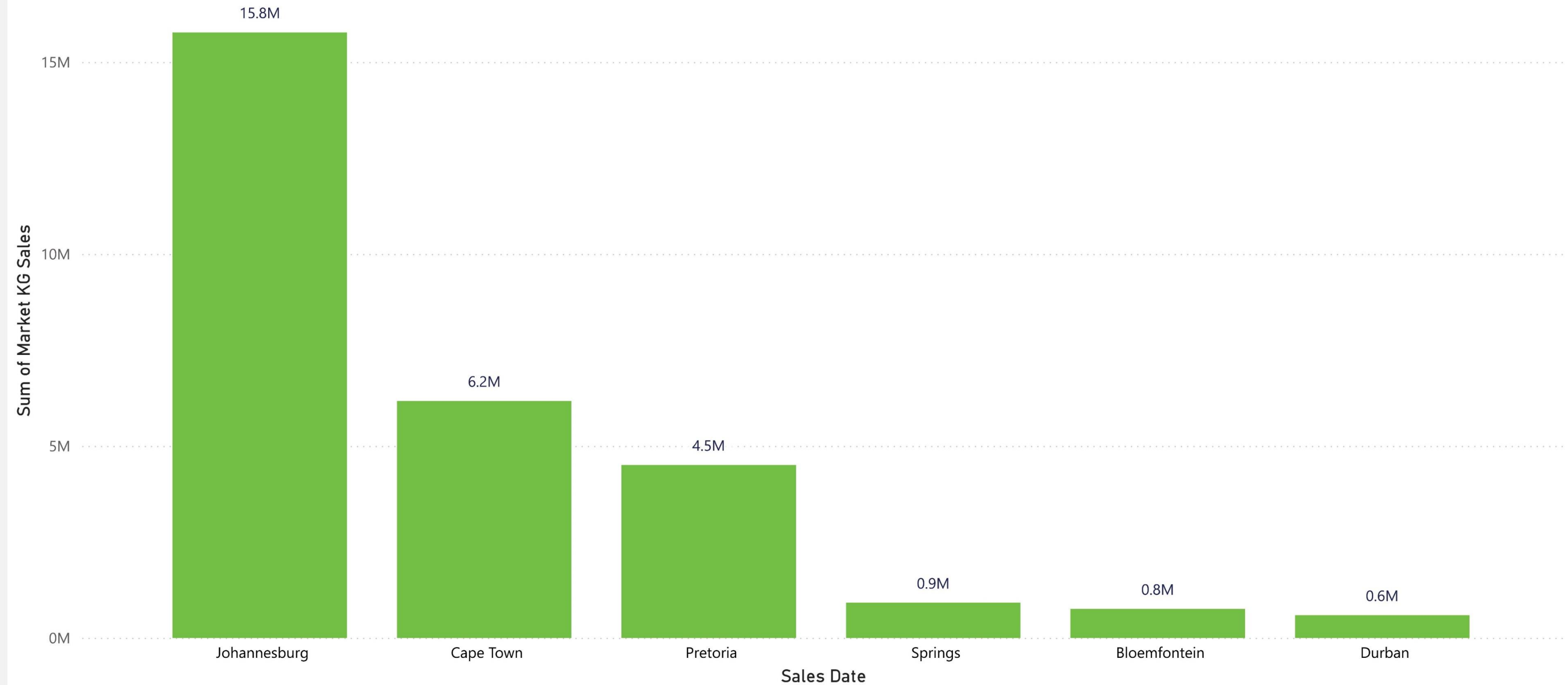


NATIONAL FRESH PRODUCE MARKET - AVOCADO PERFORMANCE - 2024 FINANCIAL YEAR

Market

Multiple selections

Market Volume (KG) per Market



Total National Markets - Avocados



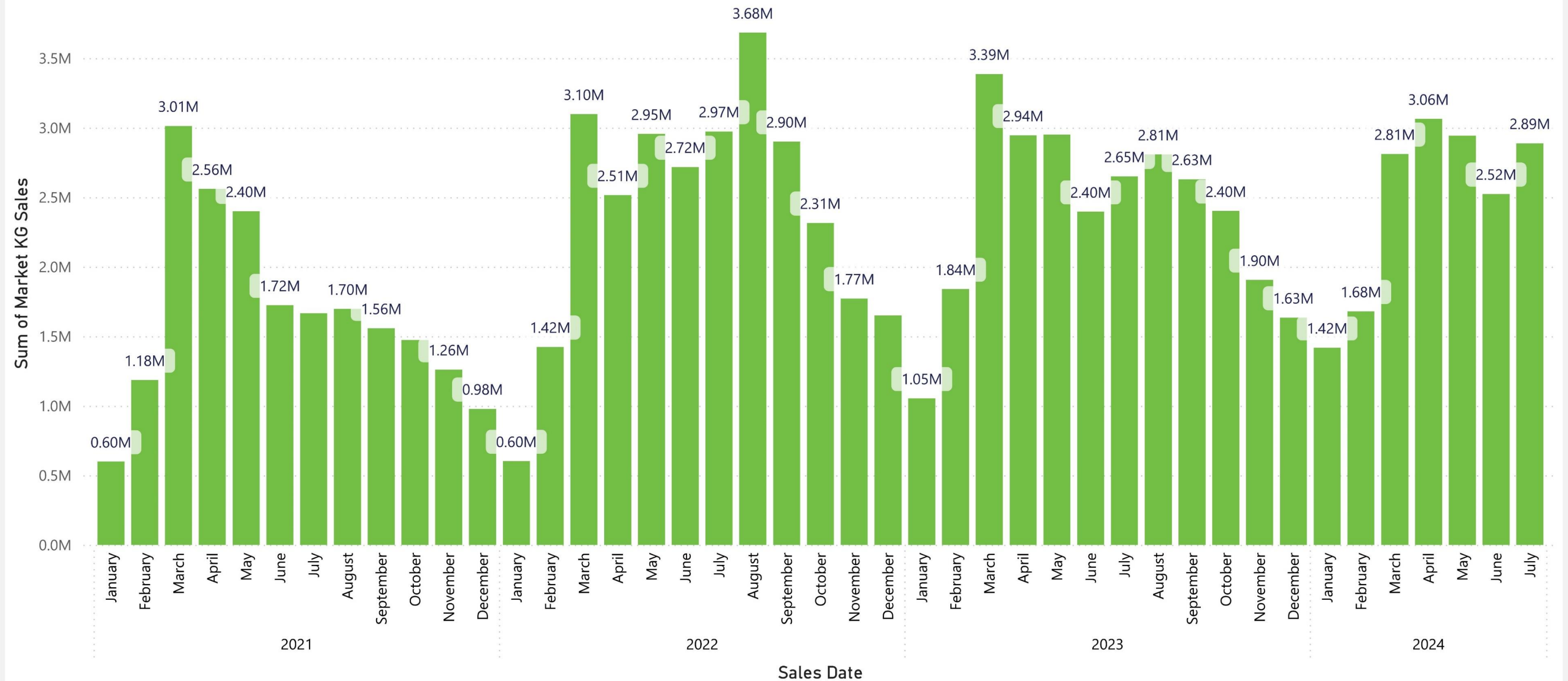
NATIONAL FRESH PRODUCE MARKET - AVOCADO PERFORMANCE

3 Year Period

Market

Multiple selections

Market Volume (KG) per Month per Year



Total National Markets – All Produce

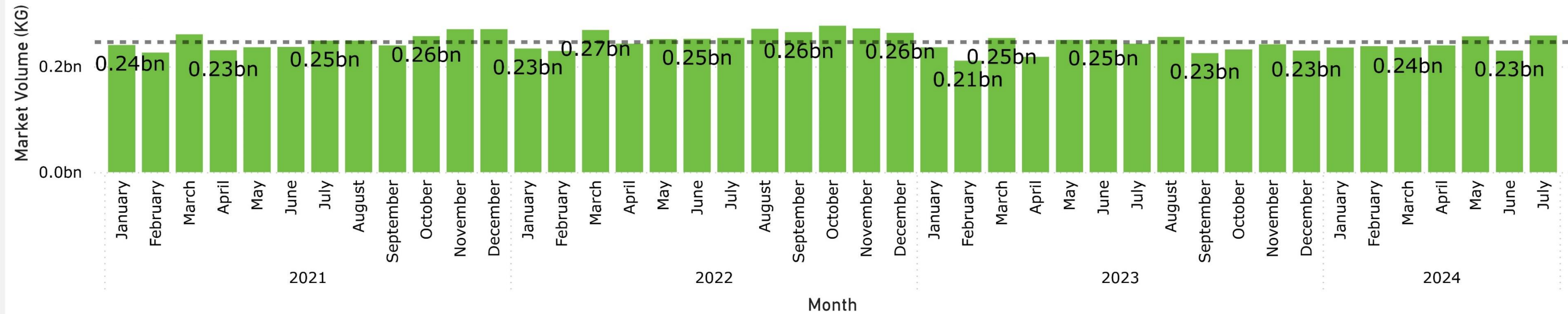


Overall Market Performance - All Produce

Market

All

Total Market Volume (KG) per Year per Month



Market R/KG per Year per Month



In Summary

1. Informal Avocado Trade is on the increase
2. Historically low volume avocado months are being filled with local fruit
3. The Markets are open to accepting new varieties of Avocados
4. The National Markets are strong and healthy



Thank you for your time

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join the *av*olution.

**New Market(s) & Protocols,
Reports and and what the
numbers are telling us about
the future...**



Allesbeste Bemarking

Donovan Lewis

#avoca_do



Jana Gana Mana Adhinaayak Jaya Hey



Bharat 1

In the national flag of India the top band is of Saffron colour, indicating the strength and courage of the country.

The white middle band indicates peace and truth with Dharma Chakra.

The last band is green in colour shows the fertility, growth and auspiciousness of the land.

1.442 BILLION

Data points

The screenshot displays the IndiaMART website interface. At the top, there is a navigation bar with the IndiaMART logo, a location dropdown set to 'All India', a search bar with a microphone icon and the text 'Enter product / service to search', and a 'Get Best Price' button. On the left side, there is a vertical menu with categories: Bananas, Litchi, Pineapple, Papaya, Jamun, Avocado Plant, Frozen Fruits, Organic Fruits, and Fresh Fruits. The main content area shows three product listings for avocados:

- Product 1:** A Grade Avocado, Packaging Size: 10 Kg, priced at ₹200/ Kg. Supplier: Schwitz Biotech, Memnagar, Ahmedabad. Rating: 3.9/5 (174). Includes a 'View Mobile Number' link and a 'Contact Supplier' button.
- Product 2:** Avocado A Grade Fresh Hass Avacoda Fruit, Packaging Size: 5 Kg, priced at ₹380/ Kg. Supplier: Agrilane Private Limited, Ghodbunder, Thane. Rating: 4/5 (360). Includes a 'View Mobile Number' link and a 'Contact Supplier' button.
- Product 3:** A Grade Hass Avocado, Packaging Size: 20 Kg, priced at ₹70/ Kg. Supplier: Food Excellencia Exim Private Limited, Jaura, Jaora, Dist. Ratlam. Rating: 4.4/5 (7). Includes a 'View Mobile Number' link and a 'Contact Supplier' button.

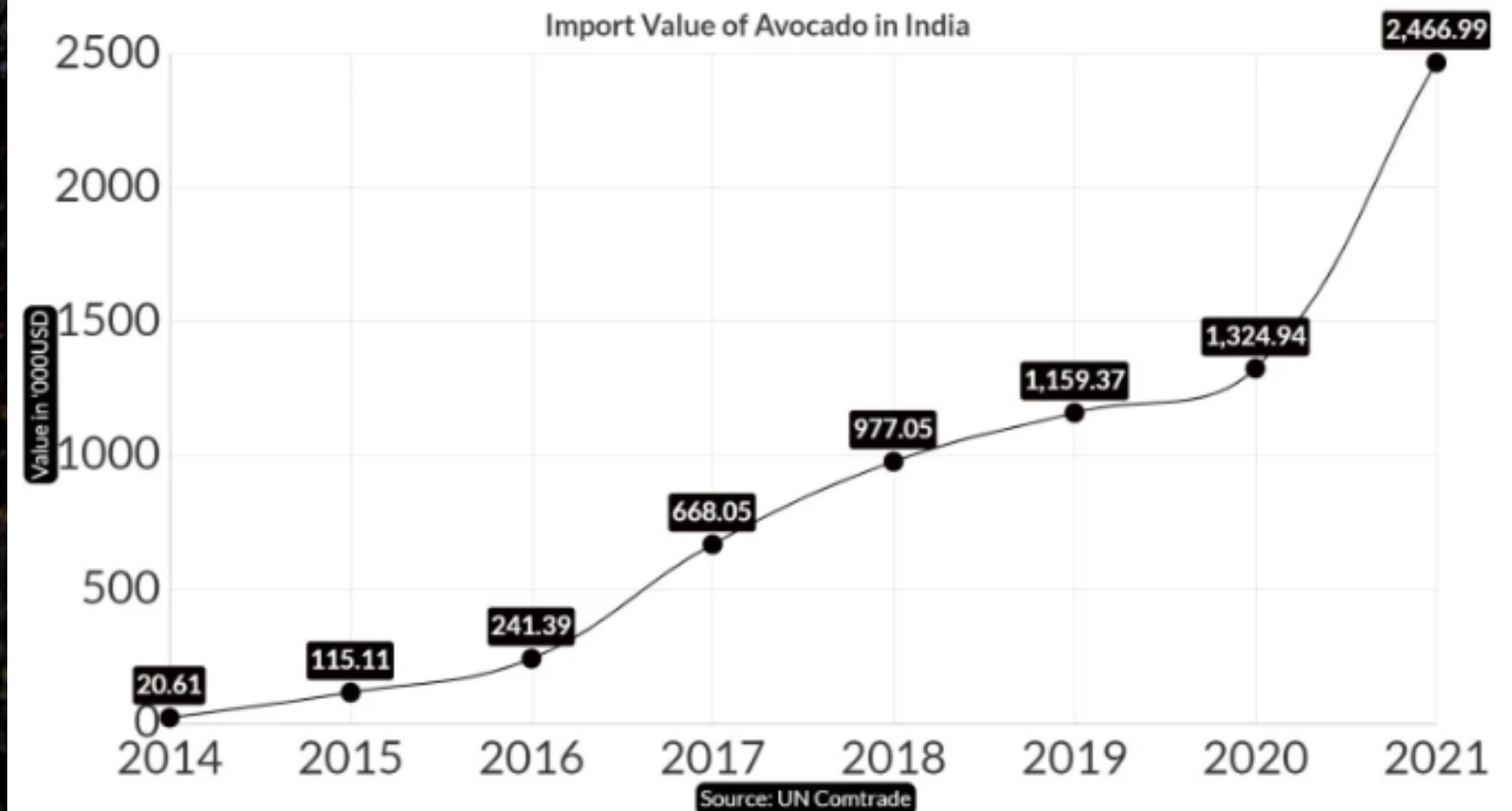
IndiaMART is India's largest online B2B marketplace, connecting buyers with suppliers. With 60% market share of the online B2B Classified space in India, the channel focuses on providing a platform to Small & Medium Enterprises (SMEs), Large Enterprises as well as individuals. Founded in 1999, the company's mission is 'to make doing business easy'.

India Growth

Avocado Imports India

Imports of avocado in India were valued at nearly **2.5 million US Dollars** in 2021. Compared to the previous year, it is an increase of **86%**. The sharpest climb was from 2014 to 2015 when the import value rose from about **21,000 US Dollars** to around **115,000 US Dollars**.

Here are the total values in import of avocados in India between 2014 and 2021.



Avocado Price in India per kg

The cost of a kilo of imported avocados in India can be between **200 Indian rupee (US2.51 dollars)** and **300 Indian rupee (US3.76 dollars)**. This is based on the average import price per kg. This wholesale price has gone as high as **306 Indian rupee (US3.84 dollars)** in the recent past.

Protocol to India

(4)	(5)	(6)
(viii) South Africa	<p>Free from:</p> <ul style="list-style-type: none"> a) <i>Avocado Sunblotch viroid</i> (Avocado Sun blotch) b) <i>Ceratitidis capitata</i> (Mediterranean fruit fly) c) <i>Ceratitidis cosyra</i> (Mango fruit fly) d) <i>Ceratitidis rosa</i> (Natal fruit fly) e) <i>Cornu aspersum</i> (Common Garden snail) f) <i>Milviscutulus mangiferae</i> (Mango shield scale) g) <i>Sphaceloma perseae</i> (Avocado scab) h) <i>Spodoptera littoralis</i> (Cotton leafworm) 	<p>1. Export consignment must comply with Systems Approach for production and export and</p> <p>2. Methyl bromide fumigation @ 32 g/m³ for 2 hrs at 21°C or above at NAP against Mediterranean fruit fly, Natal fruit fly and Mango fruit fly (or)</p> <p>In-transit cold treatment at 2°C for 19 days plus in-transit refrigeration against Mediterranean fruit fly, Natal fruit fly and Mango fruit fly.</p> <p>The details of treatment and production under Systems Approach should be endorsed in Phytosanitary Certificate issued at the Country of Origin/re-export.</p>

Which way do we go?

Questions:

1. Methyl bromide or cold treatment?
2. Impact of both methods on fruit?
3. Does Avocado travel well at 2 degrees?
4. Where would the market window be?

Is Maluma the answer?

Avocados, Maluma Hass, 4.00 kg cartons (open top)

Number	Reference	Grower(s)	Packhouse(s)	Brand(s)	Cat.	Size (quantity)	Issues	Summary	Storage	Score	Color
356024-03-01	22402737	D0833	D1563	AVOCADO	1	14 (1320), 16 (1848), 18 (1848), 20 (264)		The consignment is fit for normal marketing purposes.	1 week	3	■

Qc Report of Maluma Container:

- 52 Days in transit
- High Maturity around DM 28%
- Temp adjusted to 2 Degrees
- No internal or external cold damage
- No internal problems
- Fruit landed mostly above 20kg pressure and some between 16-19kg



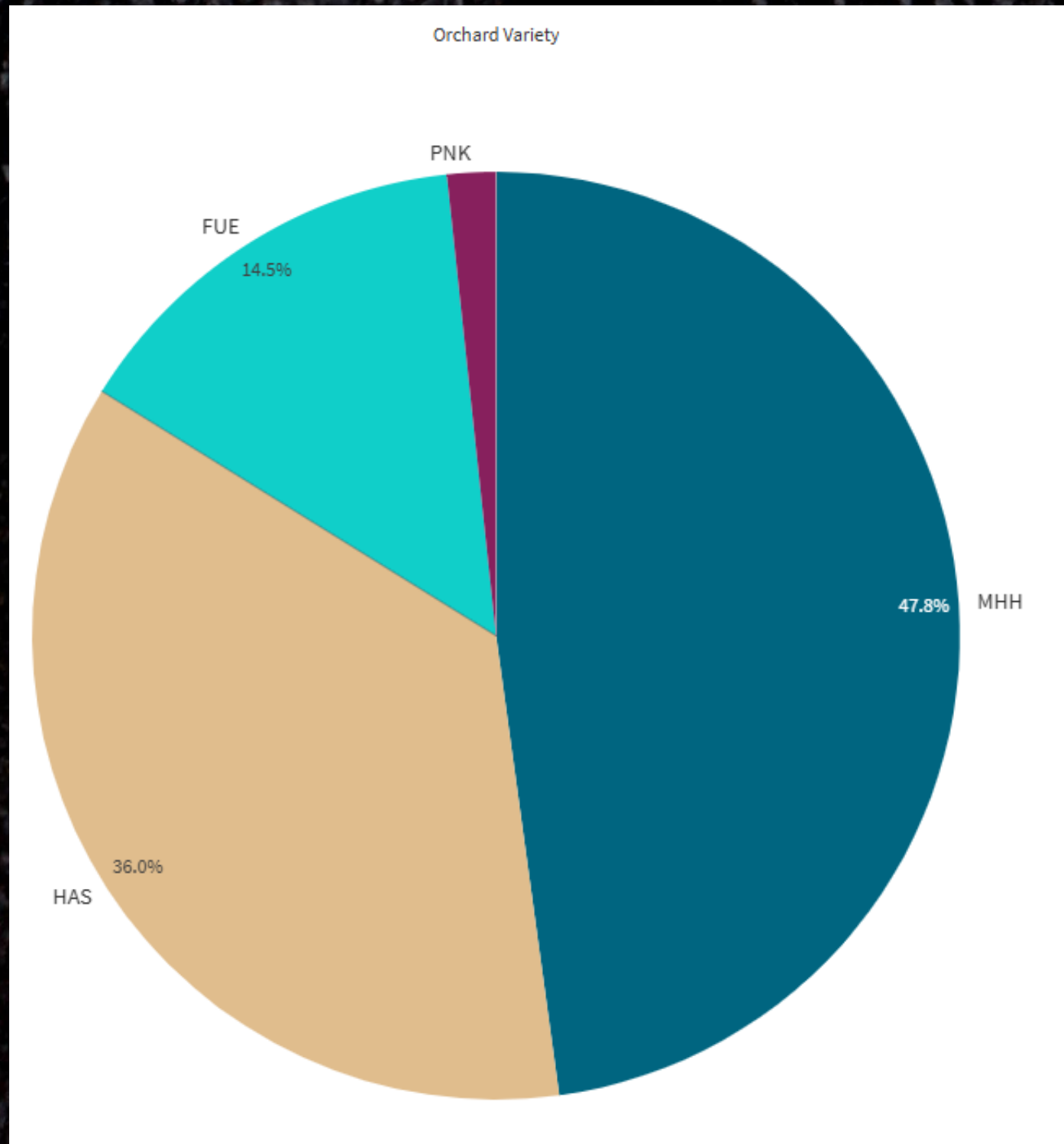
Gross selling		Export cost						
Rupee	R	SA cost	Shipping	IND Tax	SACom	OSCom	Total cost	BOF
500.00	112.75	61.70	19.39	33.83	2.26	9.02	126.19	(13.44)
550.00	124.03	61.70	19.39	37.21	2.48	9.92	130.70	(6.68)
600.00	135.30	61.70	19.39	40.59	2.71	10.82	135.21	0.09
650.00	146.58	61.70	19.39	43.97	2.93	11.73	139.72	6.85
700.00	157.85	61.70	19.39	47.36	3.16	12.63	144.23	13.62
750.00	169.13	61.70	19.39	50.74	3.38	13.53	148.74	20.39
800.00	180.40	61.70	19.39	54.12	3.61	14.43	153.25	27.15
850.00	191.68	61.70	19.39	57.50	3.83	15.33	157.76	33.91
900.00	202.95	61.70	19.39	60.89	4.06	16.24	162.27	40.68
950.00	214.23	61.70	19.39	64.27	4.28	17.14	166.78	47.44
1,000.00	225.50	61.70	19.39	67.65	4.51	18.04	171.29	54.21
1,050.00	236.78	61.70	19.39	71.03	4.74	18.94	175.80	60.97
1,100.00	248.05	61.70	19.39	74.42	4.96	19.84	180.31	67.74
1,150.00	259.33	61.70	19.39	77.80	5.19	20.75	184.82	74.50
1,200.00	270.60	61.70	19.39	81.18	5.41	21.65	189.33	81.27
1,250.00	281.88	61.70	19.39	84.56	5.64	22.55	193.84	88.03
1,300.00	293.15	61.70	19.39	87.95	5.86	23.45	198.35	94.80
1,350.00	304.43	61.70	19.39	91.33	6.09	24.35	202.86	101.56
1,400.00	315.70	61.70	19.39	94.71	6.31	25.26	207.37	108.33
1,450.00	326.98	61.70	19.39	98.09	6.54	26.16	211.88	115.09
1,500.00	338.25	61.70	19.39	101.48	6.77	27.06	216.39	121.86
1,550.00	349.53	61.70	19.39	104.86	6.99	27.96	220.90	128.62
1,600.00	360.80	61.70	19.39	108.24	7.22	28.86	225.41	135.39
1,650.00	372.08	61.70	19.39	111.62	7.44	29.77	229.92	142.15
1,700.00	383.35	61.70	19.39	115.01	7.67	30.67	234.43	148.92
1,750.00	394.63	61.70	19.39	118.39	7.89	31.57	238.94	155.68
1,800.00	405.90	61.70	19.39	121.77	8.12	32.47	243.45	162.45
1,850.00	417.18	61.70	19.39	125.15	8.34	33.37	247.96	169.21
1,900.00	428.45	61.70	19.39	128.54	8.57	34.28	252.47	175.98

India Costing



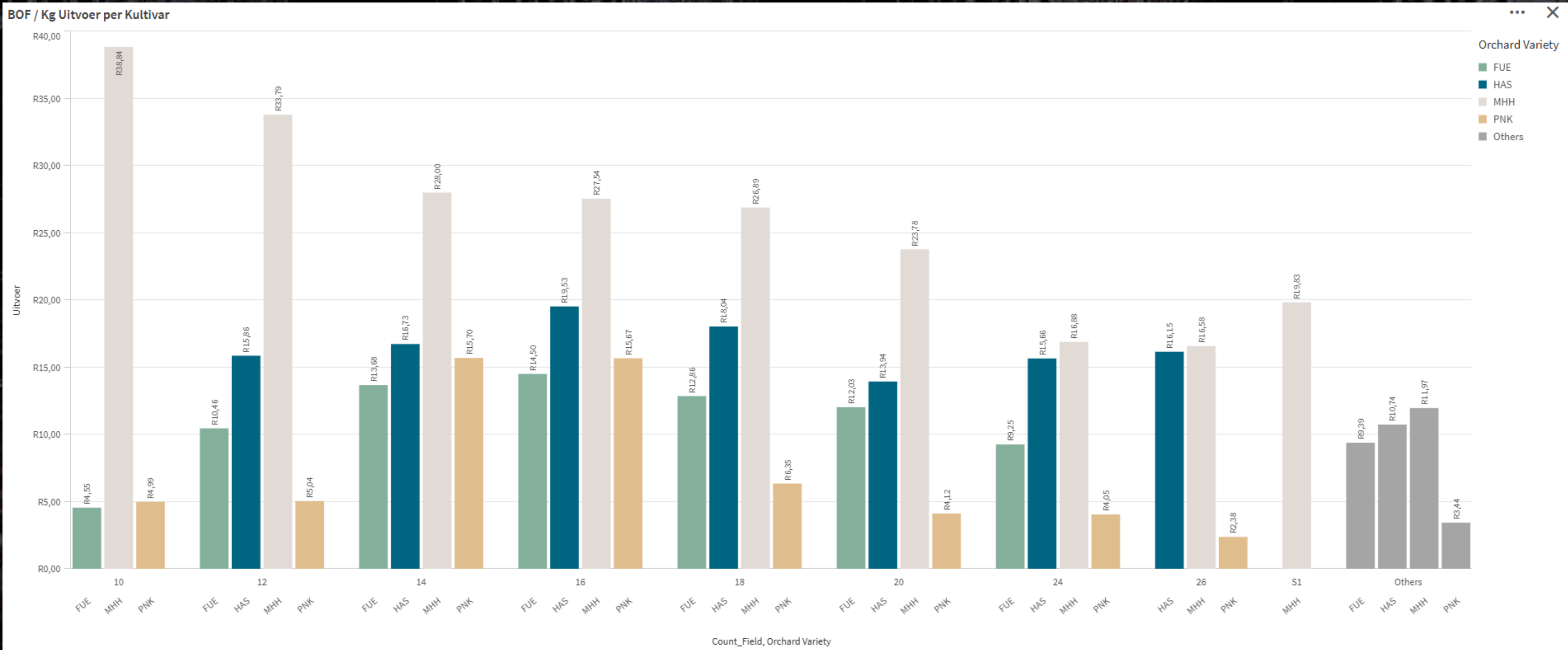
MaLuma *avo* join the *av*olution.

2024 Allesbeste Bemarking Recap



Take into account 2024 not finalised

BOF ave per count per Cultivar 2024



At Allesbeste Bemarking we
believe that when the Farmer is
King the rest will speak for
itself

allesbeste™

Bemarking



Thank You! Gracias!
Baie Dankie! Ngibona kakhulu!!



join the *av*olution.



Can Allesbeste and Avor really compete with the big dogs?

Wait!? what!? you mean we are the Pomeranians of the Avo industry - shucks. No kidding well get serious about numbers. Don't worry. We might also define what size is all about and where we do fit in that you might not yet notice.

"But, if I want to supply (or supply more) can you really handle it?"

"Oh this is my favorite!!!" love this one. We'll talk capacity that Avor is selling in Europe currently and how South Africa strategically fits in.

"Don't you only do Maluma..."

"Gits frits!?" (ek hoop nie iemand wat die lees se naam is regtig Frits nie) Well, we don't but we are pretty sure we do it the best. But bring our cultivar brothers and sisters too.

"You don't have ripening rooms like..."

is there no eye-roll emoji here? can we continue this conversation in private?

"You're in South Africa (or Tzaneen) and I'm in...although I like your concept unfortunately it will be tough..."