



## PARTICIPANT SURVEY

2011



# SURVEY COMPLETED BY **132 PARTICIPANTS**

- Growers: 17%
- Pack Houses: 10%
- Logistical Service Providers: 10%
- Export Agent: 6%
- Importers: 7%
- Retailers: 7%
- Government Officials: 8%
- Consultants: 7%
- Researchers: 1%
- Extension Officers: 2%
- Industry Representatives: 5%
- Other: 20%



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### PRODUCTS

- Citrus: 29%
- Pomes: 16%
- Stone: 15%
- Sub-Tropical: 15%
- Other: 25%

### DESIGNATIONS

- Owners: 30%
- Managers: 44%
- Employees: 26%



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## SUSTAINABILITY THREAT LEVEL

1. Land reform
2. Declining infrastructure
3. Supply chain costs
4. Safety and security of farmers
5. Unsustainable production practices
6. Inadequate bio-security / Government capacity and support
7. CO2 Emissions
8. Change agility: new areas, cultivars
9. SA labour legislation
10. Sanitary and Phytosanitary issues



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# SUSTAINABILITY THREAT LEVEL

11. Withdrawal of PPPs
12. Unfair ethics in the market
13. Slow skills transfer to black farmers
14. Loss of product in the market
15. Lack of traceability (in the market)
16. Declining terms of trade
17. Supply / Marketing competition / Food safety issues
18. Performance of industry bodies / research / innovation technical transfer / training
19. New markets – slow entry
20. Rationalization / Consolidation / Buyouts
21. Ethical trade compliance