



OUR MISSION

**SUPPORTING CITRUS GROWERS
TO BE GLOBALLY COMPETITIVE AND
MAXIMISING THE LONG-TERM PROFITABILITY
OF ITS MEMBERS**

STRATEGIC OBJECTIVES

- ✓ Administer, fund and resource the CGA Group
- ✓ Gain, retain and optimise market access
- ✓ Fund, control and implement research and development
- ✓ Develop industry intelligence
- ✓ Provide product and quality assurance
- ✓ Engage with government and other stakeholders
- ✓ Assist growers' long term sustainability
- ✓ Drive industry transformation
- ✓ Facilitate efficient logistics'

Citrus Growers' Association of Southern Africa

Reg. No. 2000/010147/08

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CHAIRMAN'S REVIEW

Cornel van der Merwe

The 2021/22 season may be remembered as one of the most difficult and challenging seasons in the history of our citrus industry.

The COVID-19 pandemic played a devastating role for the remainder of our season with the Durban looting only adding to the enormous challenges and logistical problems experienced at all ports in South Africa.

Due to a shortage of shipping equipment throughout the world, shipping rates skyrocketed to levels never recorded before, eliminating any chance of profits on the table.

Fewer shipping opportunities resulted in obstructions in ports, major storage costs and delayed arrivals at markets resulting in further quality issues.

Although these external factors played a huge detrimental role on our citrus export campaign, we still managed to export a record amount of 161.5 million cartons.

Successful roadshows were held across the country in all the citrus-growing regions in February and early March. The CGA worked tirelessly to open Maputo port for citrus exports the following season with increased volumes anticipated to the Far and Middle East.

Further positive feedback includes the shipment of citrus fruit to the Philippines and the long-awaited protocol change on the lemon exports to China. Due to the massive increase in citrus production expected within the next few years, our strategic objective remains to gain, retain and optimise market access. This will remain a challenge when marketing through current logistic channels and sourcing new markets,

due to a substantial increase in citrus volumes available for export.

We have experienced challenging seasons in our industry before, yet with many more challenges in the future, we will continue as 'notorious survivors'.

The year 2022 marks the 25th anniversary of the CGA – may we continue to grow from strength to strength.

As chairman, I would like to take the opportunity to thank the growers, the CGA board and Justin and his staff, for all their hard work and support during this difficult season. I wish Hannes de Waal all the best in leading the CGA as the new chairman of the board, with his vast experience gathered in the industry over the years.

Ek wil ook graag elke persoon bedank wat 'n bydrae maak tot die sukses van die Suider Afrikaanse Sitrus Industrie – insluitend die personeel in diens van die CGA, CRI, RB-Xsit, CGAGDC, CA, CGACC, gekontrakteerde navorsers, verskaffers en dienste sektor.

It was an honour to serve this wonderful industry as chairman of the board.





CEO'S REPORT

Justin Chadwick,
CGA CEO

Things change very quickly in the fruit world – after an extremely pleasing 2020 season, 2021 was the polar opposite.

The term “black swan” is accorded to events that are unpredictable, are beyond what would normally be expected and have high impact. During 2021 the citrus industry in southern Africa was impacted by two significant black swan events. The first was the insurrection in early July 2021, which coincided with increased volumes of Valencia oranges.

Growers in the north could not access the Durban port as national highways (N3 and N2) were closed and port workers could not get to work due to the lack of public transport, infrastructure damage and safety concerns. The CGA convened daily recovery meetings to ensure that everyone in the supply chain could discuss and plan returning to normal logistics. Some growers in the north re-routed fruit to Eastern and Western Cape ports.

No sooner did we get things back to some level of normality than Transnet suffered a cyber-attack.

Recovery meetings were reactivated, and discussions restarted to put plans in place to keep fruit moving where possible, or stop packing for a period until the situation normalised. The cyber-attack had a more significant impact as all ports were now affected, meaning that fruit diversion was not an option, and Transnet officials' personal computers and mobile devices were also hacked. Transnet must be commended for their response to the crisis – and their ability to work through the problem and get things running without extensive delays.

However, the impact of these events meant that 2021 was a poor season for most citrus growers. The erratic supply of fruit, and big volumes of fruit exported late in the season as growers played catch-up, meant that gross industry returns decreased in 2021, while the export price per ton decreased for all four citrus categories (oranges, mandarins, lemons and grapefruit). In addition, the ability to comply with phytosanitary risk management systems was compromised. The impact of this will be felt in future seasons.



There was some good news in the year under review.

Exports to Philippines became a reality with finalisation of the administrative process and issuing of permits. The Department of Agriculture, Land Reform and Rural Development (DALRRD) ensured that Indonesian exports continued with the extension of the Mutual Country Recognition Agreement. DALRRD also successfully concluded an agreement with the People's Republic of China, allowing for a revised cold treatment procedure for lemons.

After two years of virtual meetings the CGA staff welcomed the opportunity to get back into the regions and meet with growers during the two weeks of roadshows held in February 2021.

On behalf of the CGA staff, I would like to thank the board for their leadership over the past year. The CGA board has a combined 190 years of service to the citrus industry, with almost half of the board serving for over ten years, and three directors serving for twenty years each. This access to institutional memory stands the industry in good stead as we face up to an uncertain future, multiple challenges, and a host of opportunities.



ADMINISTRATION

Tanya Ungerer,
Executive PA to the CGA CEO

Governance

Members of the Citrus Growers' Association nominate representatives from their citrus-growing region to represent them on the CGA board of directors for a two-year period, with the growers having the opportunity to either nominate or re-elect a representative after that period.

The board governs the CGA and keeps their members informed on all matters pertaining to citrus export markets. Matters of concern are communicated by growers to the directors, and the board, as a collective, discuss and find the best way forward, which is then communicated to the growers.

During the year under review, the governance of the CGA was carried out by nineteen directors, comprising sixteen regional representatives, the director of government relations, the chairperson of the Finance and Risk Review Committee, and two emerging farmer representatives, one from the north and one from the south of the country. The National Agricultural Marketing Council (NAMC) is the government agency responsible for the statutory levy process. A representative from the NAMC is invited to attend CGA board meetings and the annual general meeting as an observer, as the continuation of the statutory levy is dependent on the NAMC's approval every four years.

Cornel van der Merwe, chairman of the CGA board for the year under review, will step down as chairman and take up the position of outgoing vice-chairman for a period of two years, while the incoming vice-chairman, Hannes de Waal, will

take over as chairman from April 2022 for the next two-year period. Gerrit van der Merwe will take over the position of incoming vice-chairman.

The grower representative from the Letsitele region, Ben Vorster, resigned during the year under review, and Andries van Wyngaardt was nominated as his replacement. This resignation also left a vacancy on the executive committee, which was filled by Jan-Louis Pretorius.

CGA directors receive no compensation and give of their time freely to attend the board meetings. During the year under review, George Hall completed his 20th year as director and Ben Vorster completed his 10th year. The commitment and generosity from the directors are greatly appreciated by the citrus industry.

Executive Committee for 2022/23

Hannes de Waal – chairman
Cornel van der Merwe – outgoing vice-chairman
Gerrit van der Merwe – incoming vice-chairman
George Hall
Piet Engelbrecht
Jan-Louis Pretorius



Board Meetings

7-8 September 2021

The Beach Hotel, Port Elizabeth

Directors attended either in person or via the Zoom platform. Apologies received from Guy Whitaker.

18 November 2021

Special Board Meeting held via Zoom

Apologies received from Andrew Muller, Per Nøddeboe, Hannes de Waal, Piet Engelbrecht, Charles Rossouw, Jock Danckwerts, Eric Nohamba, Vangi Titi-Msumza, Bennet Malungane.

8-9 March 2022

River Meadow Manor, Irene

Directors attended either in person or via the Zoom platform. Apologies received from Charles Rossouw and Per Nøddeboe.

30 March 2022

Special Board Meeting held via Zoom

Apologies received from Cornel van der Merwe, Piet Engelbrecht, Vangile Titi-Msumza, Justin Chadwick, Tommie Landman, Phillip Dempsey, Ben Vorster, Bennett Malungane, Guy Whitaker, Jock Danckwerts, Eric Nohamba and Per Nøddeboe.

Annual General Meeting

The annual general meeting of the CGA Group companies (Citrus Growers' Association, Citrus Research International, Citrus Academy, CGA Grower Development Company, CGA Cultivar Company and River Bioscience/Xsit) was held on the 6th September 2021 at The Beach Hotel, Port Elizabeth.

CGA BOARD OF DIRECTORS 2021/22



Hannes de Waal	- Sundays River Valley
Hennie Ehlers	- Sundays River Valley
Jan-Louis Pretorius	- Letsitele
Ben Vorster	- Letsitele
Piet Engelbrecht	- Senwes
Charles Rossouw	- Senwes
Cornel van der Merwe	- Onderberg
George Hall	- Boland
Gerrit van der Merwe	- Western Cape
Andrew Muller	- Nelspruit
Guy Whitaker	- Limpopo River
Jock Danckwerts	- Eastern Cape Midlands
Marius Bester	- Oranje Rivier / Northern Cape
Mike Woodburn	- KZN / Pongola
Paul Bristow	- Zimbabwe
Per Nøddeboe	- Eswatini
Phillip Dempsey	- Patensie
Smit le Roux	- Burgersfort / Ohrigstad
Tommie Landman	- Hoedspruit
Eric Nohamba	- S PDI
Bennet Malungane	- N PDI
Vangile Titi-Msumza	- Government Relations
Rajen Govender	- Finance Risk Review Committee

CGA COVID-19 Response Committee (CRC)

The CRC is a subcommittee of the CGA board, dedicated to addressing threats arising from the COVID-19 pandemic and the effect this has on the citrus industry. During the year under review, representatives from DALRRD, PPECB and FPEF joined the grower members and CGA staff to expand the CRC. Between February and August 2021, the CRC regularly assessed risks in terms of impact on the industry, probability of recurrence and the CGA's ability to influence the situation. Ultimately, the COVID-19 threats were mitigated, and all stakeholders are thanked for their efforts to ensure the crop was exported in 2021.

Orange Heart

Orange Heart is the social responsibility initiative of the Citrus Growers' Association of Southern Africa. It provides a structure through which citrus growers and other industry stakeholders can contribute to uplifting and supporting the people of South Africa, especially people living in rural citrus-growing regions. It is very important to the CGA to uplift those less fortunate and promote rural growth and development. Through Orange Heart we encourage and enable the grower community to get involved and lend a hand.

The Orange Heart Fruit Drive was established in 2020 to alleviate the effects of COVID-19 on the socio-economic situation of many households in South Africa. This was done by requesting donations of fruit from growers within the Citrus Growers' Association.

Many households are still struggling to put food on the table and there is still a big

need for assistance and feeding schemes. Communities who have received fruit thus far are in Limpopo and Western Cape.

After the unrest in KwaZulu-Natal and Gauteng in July 2021, there was an urgent need for food to be delivered to struggling communities. The CGA once again raised their hands and the Orange Heart Food Drive assisted with food relief. A partnership was formed with two beneficiary organisations, Kwanalu and FoodForward SA. Donations channelled through the Orange Heart Fruit Drive included household staples such as maize meal, tinned food and long-life milk, and financial contributions. Assistance went to communities around KwaZulu-Natal.



In 2021, Orange Heart also initiated a COVID-19 Vaccination Drive that was aimed at initiating and promoting the vaccination of workers at citrus enterprises. Support was provided to enterprises in the form of guidelines and resources, and Orange Heart kept track of vaccinations at citrus industry workplaces.

We are grateful to all the citrus growers and stakeholders who assisted and donated to the Orange Heart Fruit Drive.



COMMUNICATION

Roadshows

During February and early-March 2022, two CGA teams took to the road for the biannual grower roadshows, visiting all sixteen citrus-growing regions. There was a pleasing turnout at all the meetings, with a total of 521 growers attending the meetings.

In week one, Justin Chadwick, accompanied by Dave Watts, Jon Roberts, Sean Thackeray, Lukhanyo Nkombisa, Sam Louw, Sean Moore and Paula Bester, visited the Boland, Western Cape and Oranje Rivier regions. Paul Hardman, together with Mitchell Brooke, Vaughan Hattingh, Rob Elfick and Jacomien de Klerk visited Patensie, Sundays River Valley and Eastern Cape Midlands.

During the second week, Mitchell Brooke, Wayne Mommsen, Tevan Lehman and Jacomien de Klerk joined Justin's team, travelling to the Burgersfort/Ohrigstad, Hoedspruit, Letsitele, and Limpopo River regions, ending their week with a visit across the border to see the Zimbabwean growers at Nottingham Estate. Paul's team was joined by Sive Silo and Hesti Botha, travelling to the Senwes, Onderberg and Nelspruit regions. The Eswatini growers joined the Mpumalanga meeting. Growers from KwaZulu-Natal got together for a meeting at the Nkwalini Farmers Hall on the 17th of March.

The opportunity to network and catch up after the meetings over refreshments and braais was made possible by our sponsors Nedbank (Senwes, Onderberg, Nelspruit, Patensie, Sundays River Valley, Eastern Cape Midlands, Burgersfort/Ohrigstad, Hoedspruit, Letsitele, Limpopo River Valley) and Inteligro (Oranje Rivier). We are grateful to them for making this possible.

Growers raised concerns during the meetings around increasing freight rates, port efficiency, EU phytosanitary requirements, increasing input costs, and industry growth.



From the Desk of the CEO

The CEO's weekly newsletter summarises the latest news, reports on current matters and provides information on upcoming industry events. The newsletter is made available in both English and Afrikaans, and anyone, not just growers, can request to be added to the mailing list and join the more than 3 600 recipients.

Twitter

Follow Justin Chadwick (@justchad_cga), CEO of CGA, to stay updated on what is current in the industry.

CGA Comms Tool

This is an internally managed communications tool of the CGA, used to circulate information to various groups within the citrus industry. We rely on growers and stakeholders to inform us of changes in their details, including changes to email or postal addresses and changes in ownership, or if they no longer wish to receive communication from the CGA.

Details of changes can be sent to info@cga.co.za.

CGA Members Register

The CGA is in the process of compiling a member register, and is asking all citrus growers in southern Africa (South Africa, Zimbabwe, Eswatini and Botswana) to submit their details. This will enable the CGA to communicate more effectively with growers, and to ensure that all citrus growers benefit from its services.

Citrus Marketing Forum (CMF)

The CMF is a joint initiative of the CGA and Fresh Produce Exporters Forum (FPEF). The CMF meets twice a year – at the start of the season in March to discuss estimates, and again in October to conclude the season, and share successes and learnings from the season. Another meeting can be called mid-season at the discretion of the different Variety Focus Groups, the CGA and FPEF, if deemed necessary.

The purpose of the CMF is to provide a platform for sharing information, initiate research and investigations, and make recommendations on a wide range of industry issues.

All growers and registered export agents are eligible to attend these meetings, but other interested parties, such as suppliers or shipping companies, can request an annual membership from the CGA.

Please email info@cga.co.za for membership queries and to be included in these meetings.

CGA Website (www.cga.co.za)

The CGA website is a source of information for growers and other stakeholders. The member section is accessible to registered citrus growers issued with a Production Unit Code (PUC) or Food Business Operator (FBO) code, as well as members of the Fresh Produce Exporters Forum (FPEF).

We currently have around 700 members accessing information in the password-protected section of the website.



South African Fruit Journal (SAFJ)

The South African Fruit Journal (SAFJ) is published every second month and all registered members of the CGA receive a copy free of charge. The publication's shareholders comprise the CGA, Hortgro, SA Table Grapes and FPEF. The publication contains

informative articles from various sources within these industries and covers a wide range of subjects, including research, technical papers, market information, skills development, and other articles of interest.

To access a digital copy of the SAFJ, visit www.safj.co.za, or contact editor@safj.co.za if you have any comments or questions about the publication.

REPRESENTATION

The CGA is represented on various boards and committees, with the representatives reporting relevant information to the CGA board of directors. The office bearers for the period April 2021 to March 2022 were as follows:

Agbiz Justin Chadwick,
Cornel van der Merwe, Charles Rossouw

Agrihub Mitchell Brooke

BI Steering Committee

Vaughan Hattingh

CGA Combined Disaster Management

Committee Ben Vorster, Fanie Meyer,
Charles Rossouw, Francois Dillman,
Hannes de Waal, Jock Danckwerts,
Per Nøddeboe, Peter Nicholson,
Piet Smit (Citrusdal), Deon Joubert,
Piet Smit (Komati Group),
Cornel van der Merwe, Elma Carstens,
Gerrit van der Merwe, Pieter Nortjé,
Justin Chadwick, Vaughan Hattingh,
Rocco Renaldi

CGA Communication Committee

Jan-Louis Pretorius, Deon Joubert,
Justin Chadwick

CGA Cultivar Company (CGA CC)

Barend Vorster, George Hall,
Guy Whitaker, Siseko Maqoma,
Hannes Joubert

Citrus Academy (CA)

Phillip Dempsey, Marius Bester,
Bennet Malungane, Frikkie Olivier

Citrus Growers Development Chamber

(CGDC) Eric Nohamba,
Bennet Malungane

CGA Grower Development Company

(CGA GDC) Andrew Muller,
Ronald Ramabulana, Rajen Govender

Citrus Improvement Scheme (CIS)

Jock Danckwerts, Paul Hardman

Citrus Industry Trust (CIT)

Phillip Dempsey

Citrus Marketing Forum (CMF)

Cornel van der Merwe,
Jan-Louis Pretorius

Citrus Research International (CRI)

Piet Smit, Fanie Meyer, Deon Joubert,
Edward Vorster, Mike Woodburn,
Piet Engelbrecht, Louisa Mogotsi
(Citrus Growers Development Chamber)

CGA COVID-19 Response Committee

Cornel van der Merwe, Hennie Ehlers,
Gerrit van der Merwe, Piet Engelbrecht,
Jan-Louis Pretorius, Justin Chadwick,
Paul Hardman, Mitchell Brooke,
Jacomien de Klerk

Finance & Risk Review Committee

(FRRC) Rajen Govender, Andrew Muller,
Mike Woodburn, Hannes de Waal,
Jan-Louis Pretorius, Phillip Dempsey

FMS Steering Committee

Jan-Louis Pretorius

Food Safety Forum – GLOBALG.A.P.

National Technical Work Group / Fruit

SA IT Steering Committee / SHAFFE

Sustainability Task Force / Citrus

Improvement Scheme (CIS) / MRL

Workgroup Paul Hardman

Fruit South Africa (FSA)/SA Fruit

Journal/SHAFFE/ATF Justin Chadwick

HLB Steering Committee

Justin Chadwick, Jock Danckwerts,
Cornel van der Merwe

Market Access Committee

Elma Carstens

Perishable Produce Export Control

Board (PPECB) Martli Slabber,
Khaya Katoo

River Bioscience/Xsit Marius Jurgens,

Jan-Louis Pretorius, Rajen Govender
Piet Smit (Citrusdal), Eric Nohamba

SIZA Alana Snyman

SPS/CLAM/CFSC Vaughan Hattingh



FINANCE

Robert Miller,
Financial & Business
Administration Manager

Levy

The Citrus Growers' Association administers the statutory levy due on export citrus. The levy is allocated to fund the following activities:

- Research and technical support services, carried out on behalf of the CGA by Citrus Research International (CRI)
- Market access and market development
- Consumer assurance and food safety
- Provision of industry information and statistics
- Logistics coordination
- Transformation services, including:
 - Human capital development, carried out by the Citrus Academy
 - Enterprise development, carried out by the CGA Grower Development Company

The 2021 season was the first season of the new four-year statutory levy cycle, approved by the Minister in the Government Gazette number 43979 on the 11th of December 2020. The statutory levies for the four-year levy cycle were approved as follows:

2021 – R1.64 per 15kg carton

2022 – R1.68 per 15kg carton

2023 – R1.73 per 15kg carton

2024 – R1.79 per 15kg carton

In the year under review, R255 million was collected and used to fund the various services provided by the CGA to growers.

CGA BEE Status

During early 2022, the CGA renewed its B-BBEE certification. This year a group approach was taken to the audit and verification process and a new CGA group B-BBEE certificate was obtained. This certificate covers the CGA, River Bioscience, XSIT, the CGA Cultivar Company, CRI and the CRT.

As a group, the CGA improved to a level 5 rating on the AgriBEE Sector Code. This rating will apply to the companies covered by the new certificate and is valid until the 30th of March 2023.

The new B-BBEE certificate is available on the CGA website.

CGA Group Finance and Risk Review Committee (FRRC)

The members of the CGA Group Finance and Risk Review Committee for the year under review were Rajen Govender (chairman), Mike Woodburn (CGA director KZN), Hannes de Waal (CGA director SR Valley), Andrew Muller (CGA director Nelspruit), Phillip Dempsey (CGA director Patensie) and Jan-Louis Pretorius (CGA director Letsitele).

The main function of the FRRC is to provide oversight and guidance to the various CGA Group company boards on risk, financial and internal control management. Additionally, the FRRC ensures compliance with company regulations and corporate governance requirements.

The FRRC held two meetings during the year under review, on the 6th of July 2021 and the 23rd of February 2022.



RISK MANAGEMENT

Some of the main risks identified by the CGA and mitigation measures in place:

Effect of phytosanitary constraints on export volumes and associated levy income

Citrus Black Spot (CBS)

- A disaster management committee is in place.
- Special envoy is engaged with various role players on this matter.
- The relevant government departments are being engaged on this matter.
- New export markets are being developed.
- Additional funds allocated to CRI for research on CBS.
- Trade lawyers have been engaged to prepare a case for a WTO dispute.
- A risk management system has been developed and implemented.

False Codling Moth (FCM)

- An FCM Management Committee has been established to assess, monitor and manage this risk.
- A possible expansion of the Xsit programme to new regions is being considered.
- Discussions with government representatives are taking place.
- The FCM Management System has been developed and implemented.

Bactrocera Dorsalis (BD)

- It has been determined that BD has established in some regions of South Africa, therefore movement of fruit from these regions is being controlled.
- The CGA and CRI steering committee action plan is in place and being managed by the committee.
- Other fruit groups have provided contributions towards the management of this risk.

Biosecurity – Huang Long Bing (HLB)

- A biosecurity manager position has been created at CRI to manage this risk.
- The HLB Steering Group convened and an HLB action plan has been developed.

Logistical constraints on export volumes and levy income

- The CGA employs a logistics development manager to address this risk.
- A logistics risk committee has been formed to assist the logistics development manager.
- Work is being done to:
 - decrease supply chain costs;
 - monitor and advise on reducing congestion and improving port efficiency;
 - increase exports through alternative ports;
 - address shipping costs and container cost escalations;
 - address national roads legislation; and
 - develop rail transport options.

Socio-political constraints on export volumes and associated levy income

Land Expropriation without Compensation (EWC)

The CGA is communicating and engaging frequently and extensively with the industry body, Agbiz, on this matter. It is also engaging the Minister of Trade and Industry, and submissions have been made to the parliamentary review committee.

Transformation

The CGA Grower Development Company is focused on developing black growers and has

developed good relationships with DALRRD and other government departments. The Citrus Academy continues to focus on human capital development for the industry. The CGA received approval from the Jobs Fund to implement a project to develop black citrus growers, from April 2020 to March 2023.

Effect of BEE status on future levy approvals

The CGA underwent a BEE verification audit in March 2022 and obtained a level 5 compliance rating under the AgriBEE Sector Codes. The fact that the CGA is compliant will strengthen future CGA statutory levy applications.

Constraints that buy-in from producers may have on future levy approval and income

To mitigate this risk, grower representation and effective communication with growers is essential. The CGA holds the CGA Citrus Summit every two years and conducts roadshows to each citrus-producing region in alternate years. The CGA communicates regularly with growers through weekly newsletters and various other publications. To ensure better grower representation, Burgersfort/Ohrigstad was added as a new region in 2019.

Mismanagement of company expenditure and corruption putting company assets and funds at risk

- A two-person release system is being used on the banking system, having all payments checked and authorised by the

finance manager and the CEO.

- All expenditure is checked to ensure that it is in line with the approved budget.
- Regular reporting is provided to the FRRC, CGA board and executive committee.
- Annual audits are conducted.
- Regular review of internal controls, policies and procedures are conducted.

IT systems failure putting industry data at risk and resulting in the company being unable to operate

- The CGA employs an information manager to address this risk.
- A cyber risk review was undertaken in 2021 and the recommendations from this review were implemented in order to improve and strengthen IT and cyber security.
- Regular data backups are done.
- Offsite backups and storage of company data is in place and constantly monitored.
- Finance and accounting data is backed up to an offsite location daily.
- The CGA has taken steps to ensure compliance with the new Protection of Personal Information Act (POPIA).

The effect of COVID-19 on 2022 citrus season and exports

- A COVID-19 Response Committee was established to assess and deal with matters arising from the pandemic.
- The committee engages with government through Agbiz.



LOGISTICS

Mitchell Brooke,
Logistics Development Manager

The 2021 export season has been acknowledged as having been one of the most challenging faced by citrus growers in many years. In terms of logistics it was a season with many unique challenges, the most significant being:

1. The vessel, Ever Given, ran aground in the Suez Canal, blocking vessel traffic for weeks.
2. ITAL Libera's captain passed away from COVID-19, with the vessel carrying 50 000 cartons of lemons that could not be discharged at the intended market.
3. Four conventional vessels loaded from Durban for Shanghai were not permitted to discharge due to COVID-19.
4. Trucks were burned and looted on the N3 KwaZulu-Natal corridor to Durban.
5. The unrest in KwaZulu-Natal in early-July, which resulted in road transport and port disruptions.
6. The Transnet cyberattack essentially stopping shipping from South Africa for three weeks.

Despite these major events, an estimated 161.5 million 15kg equivalent cartons were exported. In November 2020, the CGA met and identified the following key logistics strategies as the core of its logistics portfolio.

Railing of citrus to ports for export in refrigerated containers

The CGA has previously emphasised the need for a minimum of 15 000 containers to be railed to ports for export. This is primarily for the purpose of improving efficiency and minimising road truck trips. There is a strategy in place to identify the specific origin to destination routes with the number of reefer containers that could possibly be transported. During the

2021 season close to 3 000 reefer containers were transported to ports by rail to Durban from Tzaneen, Bela Bela and Johannesburg. The massive challenges facing the rail network – primarily the theft of overhead cables – meant that this was a phenomenal achievement. The CGA continues to pursue the goal of shipping 15 000 reefer containers by rail to ports by 2025, despite the challenges faced by the rail network.

Port container terminal operational performance

It was very clear during the 2021 season that container terminal operations are volatile. The decline in performance has been attributed to aging and malfunctioning equipment, and poor maintenance. The CGA has communicated widely to all levels of government, Transnet senior management and the CGA board to raise awareness of the issue. If millions of Rands are not spent on a large-scale fleet replacement, container terminal performance will remain as is, or worsen. Transnet is pursuing public private partnerships with international terminal operators to partner and invest in new equipment. The partnership process was rolled out late in 2021, with results expected during the 2022 or 2023 seasons.

Increased volume of citrus exports from Maputo port

With long term crop projections indicating a 25% increase in production over the next few years, it is imperative that citrus is diverted from Durban to Maputo to ease bottlenecks and congestion that have become common in recent times, a problem that will only heighten as more citrus is produced for export. Since 2016, there have been no citrus shipments from Maputo due to, among other things, increased shipping in reefer containers and the Rand-USD exchange rate, making it more expensive to export citrus from Maputo. During the 2021 season, significant efforts were made to coordinate a shipping programme from Maputo for the 2022 season. Much scoping work has been done, highlighting the fact that a cold store needs to be developed on the corridor, supported by railing of reefer containers from the port to the facility and back. A coordination effort is also required to ensure that production

matches container-availability and ship-capacity for each market. For Maputo, we propose replicating the USA export model coordinated by Summer Citrus to optimise the supply chain from the northern regions.

Increased shipping of citrus in conventional specialised reefer vessels

The growth in citrus exports has projected reefer container demand to increase from 94 000 units in 2021 to approximately 115 000 units by 2025. While landside challenges will persist during peak season, our predictions indicate that the shipping lines are unlikely to meet this demand. To combat this dilemma, the only effective solution is to increase shipments in conventional specialised reefer ships. When compared to container vessels, these ships operate more efficiently and effectively, allowing products to arrive in the market sooner.

In May 2021, the world's largest reefer ship, mv Cool Eagle, loaded citrus from Durban, Gqeberha, and Cape Town for Rotterdam and St Petersburg.



The CGA arranged publicity around this event to highlight the importance of this mode of shipping. There are several routes that are ideal for these types of ships:

1. Co-loading and discharging Europe, UK and Russia.
2. Loading and discharging in USA – Summer Citrus chartered and loaded twelve reefer ships for discharge in the USA, which is a record.
3. Co-loading and discharging in South Korea, China and Japan.

The CGA is in the process of evaluating the feasibility of

chartering six new-generation reefer ships to serve the fruit industry, which could load Cape Town and discharge in Rotterdam and London. These vessels would ideally operate all year round, shipping quality fruit from South Africa to Europe and UK, South Africa's two biggest destinations for fruit exports. In this way, a continuous and efficient supply to the main market could be ensured, while fruit producers would find shipping to be more sustainable.

Development of information and communication mechanisms

The CGA has identified system and information development as being a critical component in permitting the long-term viability and sustainability of the citrus sector. Those that manage and coordinate supply to global markets must have real-time, accurate and meaningful information, to be in a better position to maximise the value and return on exports.

This is seen as a key enabler during the phase of rapid growth in export volume. The CGA has been pursuing several different mechanisms to develop information resources.

Coupled to this, information sources are also seen as critical to keep value chain stakeholders up to date with key information through implementation of various communication structures and mechanisms, including:

1. Weekly logistics status update meetings held in conjunction with Transnet and PPECB.
2. Weekly logistics reports.
3. Various workshops and conference platforms.
4. Port WhatsApp groups.

In March 2022, the CGA appointed Hesti Botha, a qualified industrial engineer and daughter of the late Dr Hennie Le Roux of the CRI, to work alongside Mitchell Brooke, primarily to develop and implement systems and mechanisms to optimise the citrus export supply chain. Hesti is also completing an analysis of the production and export value chain to determine the extent of industry growth, evaluating specifically the facility capacity, infrastructure, resources, and shipping capacity demands based on the long-term crop projection model.



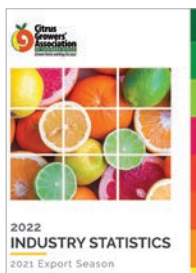
INFORMATION

Portia Magwaza,
CGA Research Economist

The CGA and Fresh Produce Exporters' Forum (FPEF) jointly fund the procurement of citrus information from two sources. The Perishable Products Export Control Board (PPECB) supply weekly data on volumes of citrus packed and passed for export. Agrihub, an independent entity established between the South African fruit exporting industries and four competing software solution providers, supplies shipping data and reports on a real-time basis. This information is made available to all members of the Citrus Marketing Forum (CMF).

Tree Census

The annual tree census was compiled from data collected during the Department of Agriculture, Land Reform and Rural Development's (DALRRD) orchard registration process for exports in November 2021. Additional information was also provided by Zimbabwe and Eswatini growers. Of the 99,969 hectares accounted for in the 2021 census, Valencia and Midseason oranges made up 31%, soft citrus 24%, lemons 18% and navels 16%, while grapefruit remains at 9%. The tree census data is used for many purposes, including the CGA's Industry Statistics booklet and updates to the long-term citrus production predictions.



Citrus Statistics Booklet

The annual Industry Statistics booklet provides an overview of exports, crop distribution and growth trends of the different citrus commodities. Export-related data is supplied by Agrihub and the PPECB. Tree census data, as well as

data on export and local market sales, processing volumes and revenue are obtained from DALRRD. Budwood sales data supplied by CRI is also published in this booklet.

The 2021 Industry Statistics booklet has been printed and posted to all registered citrus growers. It is also available on the CGA website under publications.

Packed Figures

Information on volumes packed is supplied by PPECB on a weekly basis. These figures are posted in the member section of the CGA website. The packed figures reflect the actual volumes packed to date, previous years' packed figures and the estimated packed figures for the current season and is presented on a weekly and cumulative basis.

Shipped Figures

Information on volumes shipped was supplied by Agrihub in 2021 and are posted on the website on a weekly basis under the member section. These reports show volumes shipped per variety, per week and per market, with comparisons to previous years. Several additional reports were added in 2021. The reports can be drawn at any time directly from the Agrihub website and a selection of these are on the CGA website.



Citrus Marketing Forum (CMF)

The CMF is a joint forum between growers and export agents. It provides a platform for the sharing of information, initiating research and investigations, and making recommendations on a wide range of industry issues. During the year under review, the CMF met twice. In October 2021 the closing season's events and lessons were discussed and in March 2022 the forthcoming season was the main consideration. The input to the CMF from the variety focus groups with respect to estimates, projections and growers' feedback was facilitated by the CGA.

Variety Focus Groups

The 2021 Southern African citrus export crop estimate was assembled by the regional variety focus representatives in March 2021. Regular Zoom meetings were held during the season to update the crop projections and discuss the markets. The variety focus groups' updated crop projections were communicated to the industry in the CEO's weekly newsletter and in minutes published on the CGA website. The table below shows the original 2021 estimates, the actual volumes achieved, and the estimates for the 2022 season. All figures are in 15kg carton equivalents.

The variety focus groups aim to estimate within 10% of final volumes inspected and passed for export by PPECB inspectors. Overall the 2021 estimate was 99% accurate.

Type	2021 Estimate (CGA)	2021 Actual	% Actual vs. Estimate	2022 Estimate
Valencia	57 946 231	54 971 544	-5%	58 153 698
Navels	26 293 133	27 162 969	3%	28 735 653
Grapefruit	18 031 324	17 528 706	-3%	16 789 367
Lemons	30 224 748	30 965 370	2%	32 255 722
Soft Citrus	30 478 091	30 879 206	1%	34 544 044
Total	163 073 527	161 507 795	-1%	170 478 484



International Information Exchange

Southern Hemisphere Association of Fresh Fruit Exporters (SHAFFE)

The major southern hemisphere fresh citrus-exporting countries participate in a joint initiative whereby members supply information of citrus shipped by volume and destination to the SHAFFE secretariat who collates and supplies this information to the participating SHAFFE members. The weekly information is published on the CGA website and used in the Citrus Variety Update, SHAFFE graphics reports and others.

World Citrus Organisation (WCO)

During the year under review, the WCO continued to grow from strength to strength with more members joining the WCO, while the Steering Committee continued to promote membership. Representatives from Israel and Peru joined Spain and South Africa on the Steering Committee. In May 2021, the WCO held its Annual General Meeting where information was shared about the global citrus industry, with a focus on the forthcoming southern hemisphere season. The WCO held its second Global Citrus Congress in November 2021, which was a great success.

VARIETY FOCUS GROUPS

The variety focus groups set the initial season's estimate for exports, monitor the packed and shipped information provided by the service providers, discuss market conditions and update export predictions during the course of the season. Minutes of the regular variety focus group meetings are published on the CGA website and summarised in the CEO's weekly newsletter. The variety focus groups also give opinions on dispensation requests referred to them by DALRRD when called upon to do so, from time to time. The

variety focus groups met regularly during the 2021 season via Zoom Conferencing, with the CGA convening the meetings and acting as secretariat. The CGA extends its appreciation to the variety focus group regional representatives for giving their time to serve their fellow growers. Thanks are due to Richard Allen and Kobus van Staden who stepped down from their roles as variety focus group representatives at the end of the 2021 season. They had both been variety focus group representatives for their regions since 2006.

The CGA would also like to express its gratitude to the Fresh Produce Exporters' Forum representatives for their contribution to the variety focus groups.

The regional representatives of the variety focus groups for the 2021 season were as follows:

Regions	Grapefruit	Lemon	Soft Citrus	Valencia/Navel
Boland		R. Allen	S. Bruwer	B. Mildenhall
EC Midlands		E. de Villiers	J. Danckwerts	T. Landman
Hoedspruit	K. van Staden	J. Meintjes	J. du Preez	B. Landman
Letsitele	B. Landman	B. Landman	D. Fourie	J. Joubert
Limpopo River	F. Dillman*	F. Dillman	J. Joubert	A. Muller
Nelspruit		A. Muller	P. Pretorius	
Nkwalini	M. Wafer			M. Wafer
Onderberg	M. Neethling			C. van der Merwe
Oranje Rivier	D. Steyn	M. Hamman	M. Bester	R. Van Zyl
Patensie		S. Meeding	M. Odendaal*	T. Meyer/S. Meeding
Pongola	A. Rouillard	A. Barnard		
S.R. Valley	H. de Waal	L. Venter*	A. Janse van Rensburg	D. Joubert/K. Terblanche
Senwes		H. Schoeman	G. Smit	P. Nortje
S-KZN		P. Button		P. Button
W. Cape		B. Mouton	H. Warnich	S. Engelbrecht*/P. Hough
Eswatini	S. Geldenhuys			G. Brown
Zimbabwe	P. Bristow			P. Bristow

* Chairman

The variety focus groups held meetings as follows:

Month	Grapefruit	Oranges	Lemons	Soft Citrus	Total
February	2		1	1	4
March	-	1	-	1	2
April	2	-	-	2	4
May	2	-	1	1	4
June	2	1	1	1	5
July	2	1	1	1	5
August	3	3	1	1	8
September	1	1	1	1	4
Total	14	7	6	9	36



CONSUMER ASSURANCE

Paul Hardman,
Industry Affairs Manager

There has been meaningful adaptation and progress within the CGA Consumer Assurance portfolio over the past year. The actions taken have assisted citrus producers during the 2021/22 season, and where possible, helped prepare the industry for an uncertain future. The CGA Food Safety and Sustainability Strategic Plan has been a blueprint to direct CGA efforts and has guided the CGA team to work on the issues most critical to citrus growers.

CGA Food Safety and Sustainability Strategic Plan

This Strategic Plan seeks to address the five key focus areas identified by the CGA board regarding food safety and board sustainability issues. The key activities over the last twelve months were:

- 1) **Better CGA-DALRRD engagement:** The CGA engages with DALRRD: Directorate Food Safety and Quality, on an ongoing basis to align the maximum residue level (MRLs). Discrepancies have led to trade problems, particularly where the RSA MRL is deemed “provisional” subject to the publication of the MRL by the Department of Health. The DALRRD Food Safety Forum meetings have not taken place as regularly as in the past, but direct CGA engagement with the relevant officials from DALRRD and other government institutions has been pursued.
- 2) **Backlog of Plant Protection Product (PPP) registrations in South Africa:** At an operational level, there has been very little improvement in the processing of registration application by the Registrar of Act 36 of 1947 and a backlog remains. In the medium-term, the appointment of additional staff will help to improve throughput. However,

interventions by the Strategic Agricultural Inputs Forum (SAIF) to restructure and modernise the entire registration system is likely to yield long-term benefits. This will involve amendments to the Fertiliser, Farm Feeds, Seed and Remedies Act 36 of 1947. The CGA participates in and supports the work of SAIF, to see these changes come about.

- 3) **European Union (EU) PPP Policy:** The first direct impacts of the EU policy on plant protection products (PPP) were observed in 2021 with Imidacloprid essentially excluded as an orchard treatment option. The CGA and CRI were prepared to generate data to defend the Imidacloprid MRL, but the prospects of success were severely compromised when the main supplier indicated they would not support the Import Tolerance application. The value of Imidacloprid lay in the fact that it supported IPM programmes and would be a vital tool if psyllid carrying HLB were to spread southwards in Africa. Extensive work is now being undertaken by CRI to find alternatives. The pressure on the EU Dithiocarbamate MRL also increased as work began in December 2021 to review the status of this group of active substance. This review will be undertaken, using the hazard-based criteria that became recently applicable. For Mancozeb, the CGA and CRI are working with key stakeholders to make an Import Tolerance application to retain the on-going use of Mancozeb. This project will be completed in the second half of 2022. The CGA continued to provide information about MRL changes in the *Recommended Usage Restrictions on Plant Protection Product on Southern African Export Citrus* (editions released in July and November 2021) and topic specific *Cutting Edge* publications.
- 4) **Green Deal and Farm-to-Fork (F2F) Strategy:** While the Green Deal and F2F strategy have conceptually appealing environmental goals, some clear examples from 2021 suggest these lofty objectives are being replaced with confusion and protectionism. To illustrate, the complex and conflicting labelling requirements between EU member states has made compliance extremely challenging. The idea of

a “common market” is disintegrating. The CGA is becoming increasingly concerned that the Green Deal is being used as an opportunity to review all existing policies and, in turn, make trade more difficult. Citrus growers should expect a range of market access issues to develop as various strings of EU regulations are updated through the lens of the Green Deal.

- 5) **Retailer requirements:** The CGA engagement with retailers has not been as successful during the period under review as in previous years. This can be attributed to COVID-19 travel restrictions and the postponement of Fruit Logistica to April 2022. Online meetings were held with a few retailers but the range of engagement needs to be extended in the next year. These engagements covered consumer assurance matters but also provided an opportunity to gain internal EU support for market access challenges faced by the Southern African citrus industry.

Appointment of a Sustainability Champion

Paula Bester was appointed as sustainability champion in July 2021. This position was created to increase capacity in the consumer assurance portfolio, and to create institutional backup for the industry affairs manager. Paula works out of the Western Cape, expanding the CGA regional coverage but also pioneering the remote working concept within the CGA.

The Citrus Sustainability Forum (CSF)

The CSF was initiated as a platform to bring growers and citrus industry stakeholders together to engage on food safety and sustainability topics. The CSF has grown from strength to strength with three online meetings held between April 2021 and March 2022 with approximately 130 participants on each occasion. Considering pressure to reduce pesticide use, the core focus of the CSF is to keep the industry updated on MRL developments and future status of key plant protection products. Subject-matter experts were invited to share knowledge and solutions on topics such as packaging and labelling requirements, solar system options, and ongoing developments at consumer assurance schemes like GLOBALG.A.P and SIZA.

Sustainability Initiatives

SHAFFE Sustainability Task Team

South Africa, represented by Paul Hardman, participated in the Task Team that was set up to investigate and respond to emerging international global sustainability requirements that impact on all southern hemisphere suppliers. The task team identified ten major areas of opportunity and challenges and provided recommendations to SHAFFE members in a White Paper. The task team is likely to become a permanent SHAFFE subcommittee and their activities will be reported to stakeholders.

Confronting Climate Change: A fruit and wine initiative (CCC)

Citrus industry players are key users of the Carbon Calculator. As energy costs continue to rise, producers will look at all possibilities to reduce energy consumption. The CCC alignment and configuration of the carbon calculator will also help producers prepare for the introduction of carbon taxes in 2023.

Sustainability Initiative of South Africa (SIZA)

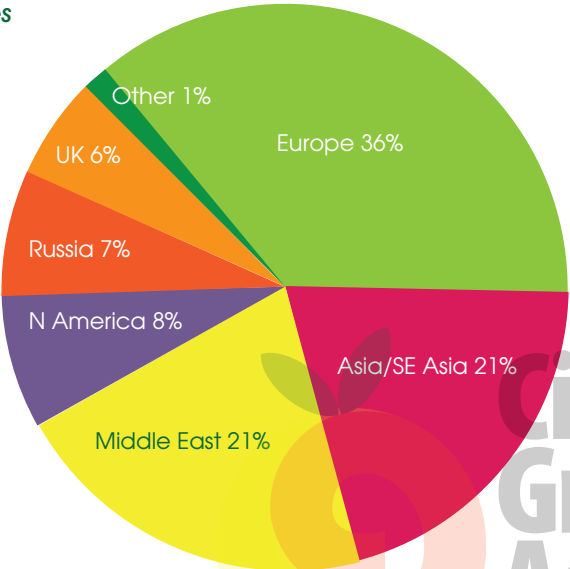
SIZA is a world class consumer assurance scheme with increasing global recognition, which is evident in retailer engagements. However, while SIZA should remain sensitive to global sustainability trends, the financial and practical impact of new requirements on members' operations equally need to be taken into account. Too often, new requirements come at a high cost to the producer. The launch of the data capturing module will assist in creating transparency in the supply chain about key sustainability matrices. Trends emerging from this high-level data will be monitored and included in relevant discussions.

The Cost of Compliance

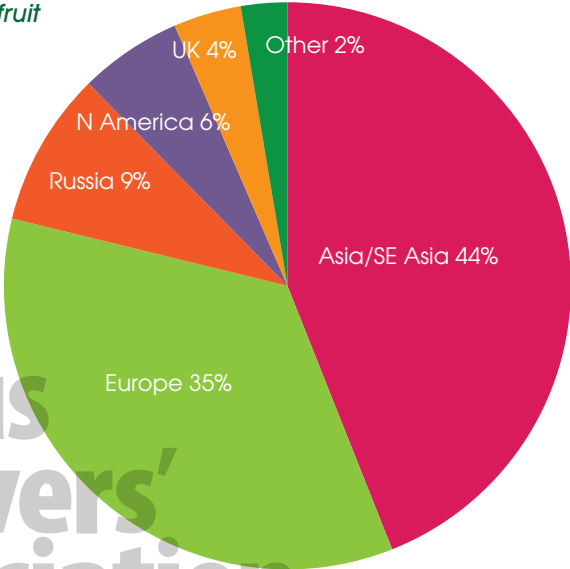
Along with Fruit South Africa partners, the CGA commissioned a study to look at the typical costs faced by producers to comply with the various certification schemes. These results can be expected early in the next financial year.

EXPORTS 2021

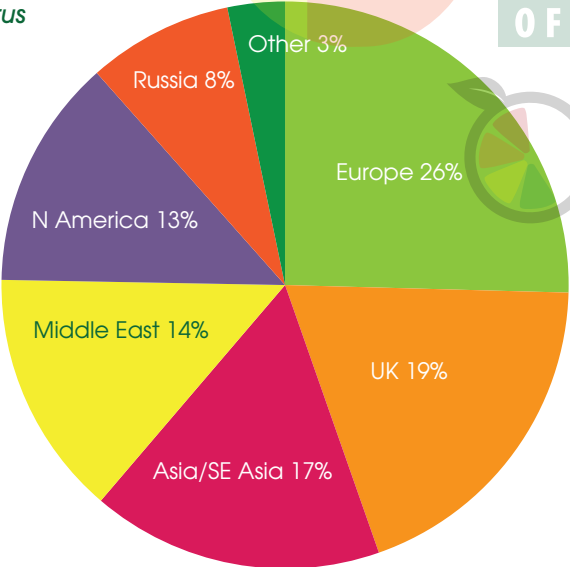
Oranges



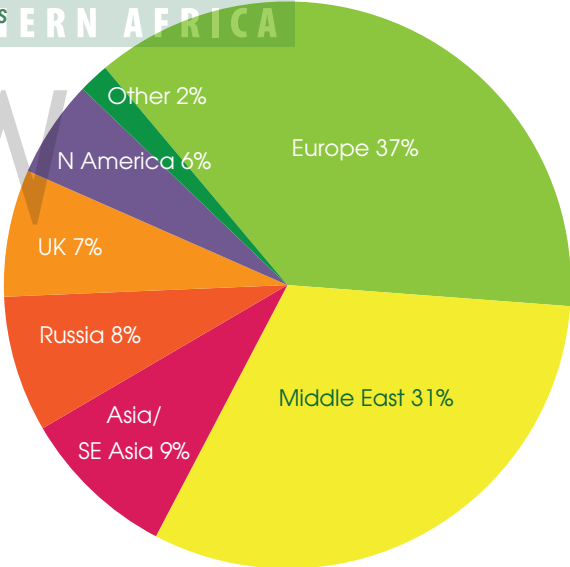
Grapefruit



Soft Citrus



Lemons





MARKET ACCESS

Justin Chadwick

Dr Vaughan Hattingh

Dr Elma Carstens



Philippines

On the 31st of August 2020, South Africa received the signed workplan from the Philippines Bureau of Plant Industry (BPI) after negotiations for market access for all fresh citrus fruit types from South Africa to the Philippines started in 2009. The administrative procedures for implementation were concluded in March 2021.

In South Africa, the cut-off date for registration for export to the special citrus markets, including the Philippines, was the 31st of March 2021 and on the 7th of April 2021 the Department of Agriculture Land Reform and Rural Development (DALRRD) submitted the first list of approved PUCs and orchards to the BPI, as well as a list of approved packhouses. On the 15th of April 2021, DALRRD submitted to the BPI a list of exporters approved by DALRRD to export fruit to the Philippines. Despite initial problems with the issuing of permits, which were resolved after numerous engagements between DALRRD and BPI, the first consignment destined for the Philippines was inspected on the 8th of June 2021.

Excerpt from the CGA Newsletter dated the 11th of June 2021:

The market is not open until the first fruit flows – and this week we witnessed the first fruit destined for the Philippines being inspected at FPT Durban. It was fitting that Ambassador Martin Slabber was there to witness the first fruit being readied for export, as he played a leading role as South African Ambassador to the Philippines in meeting with The Philippines Bureau of Plant Industry (BPI), retailers and importers, and accompanying fruit industry representatives to the Trade Shows and markets in Manila.

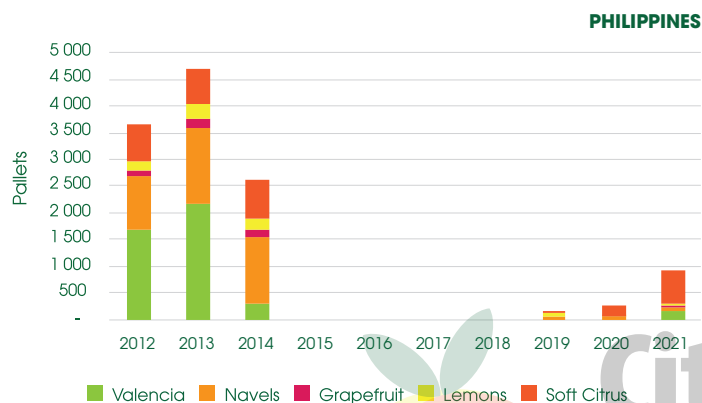
Dr Mono Mashaba led a Fruit South Africa delegation to Manila every year from 2014 until international travel was curtailed by COVID-19 in 2020. This persistence eventually paid off. The access pathway was opened by the Department of Agriculture, Land Reform and Rural Development (DALRRD) and Citrus Research International (CRI).

Dr Vaughan Hattingh of CRI recounts that there were 32 official technical engagements between the two countries in the twelve years that it took to finalise the protocol. It was fitting that during the last visit to the Philippines in 2019, it was Mr Ramasadi (DALRRD) and Dr Carstens (CRI) who accompanied the Fruit South Africa delegation, and took us to the end game.

The Fresh Produce Exporters Forum – with Anton Kruger as part of the Fruit SA delegation – provided artwork and all the organisation necessary for the AgriLink trade show – where South Africa exhibited its commitment to the Philippines market.

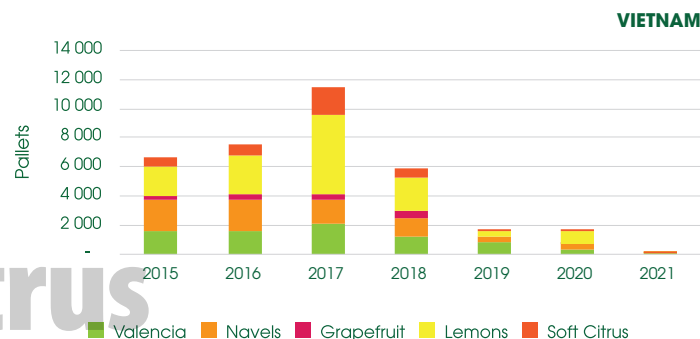
The Fruit SA visits to the Philippines revealed that they are all about fun – from the Jeepneys that provide public transport to the island style living, the young, vibrant population makes it an exciting place. South African citrus will now add to their ability to enjoy life to its fullest. While export volumes will probably be modest as we test the market and develop the demand for South African citrus, the goal is to build up to 20 000 tonnes of exports to the Philippines – this will secure much needed jobs in South Africa, and lead to additional foreign exchange earnings.

Volumes – 2021 was the first year that South Africa exported citrus to the Philippines under the new protocol. The volumes shipped varied between 1 000 and 2 000 pallets depending on the information source.



In March 2022, during a meeting between South Africa and Vietnam, PPD advised that they wish to proceed with the site visit. A proposed itinerary was submitted to DALRRD on the 31st of March 2022.

Volumes – Without an official protocol in place, exports to Vietnam are negligible.



Revised export protocol to exempt lemons from the 24-day cold treatment requirement

South Africa applied for access for oranges in 2012. The first response from the Vietnam Plant Protection Department (PPD) since January 2018 was received on the 14th of January 2020, requesting arrangements for a site visit to the South African citrus industry. South Africa proposed June 2020 for the site visit, but PPD did not proceed with the arrangement. In addition to the pending site visit, the Pest Risk Assessment (PRA) had not been completed.

DALRRD received the final amended protocol from the General Administration of Customs of the People's Republic of China (GACC) and provided the document to CRI on the 6th of October 2020. The amended protocol reflected all the requested changes. A virtual technical meeting between GACC and DALRRD was scheduled for the 9th of November 2020 to sign the amended protocol, but the meeting was cancelled.

On the 11th of June 2021, CRI requested DALRRD to propose to PPD that the site visit could be in a virtual format. On the 29th of July 2021 PPD responded by declining the proposal due to the absence of regulations in Vietnam that would enable them to conduct such a visit in a virtual format. They also advised that COVID-19 precluded them from undertaking a physical site visit. The outstanding PRA issue remained unresolved, in terms of the final list of quarantine pests; the cold treatment protocol for FCM; and the packhouse procedures.

The South African Minister of Agriculture, Land Reform and Rural Development signed the amended protocol on the 18th of June 2021 during a virtual meeting. The counter-signed protocol was received on the 2nd of September 2021, concluding negotiations that was initiated in October 2015. The amended protocol provides a cold treatment for lemons for 18 days at $\leq 3^{\circ}\text{C}$.

Excerpt from the CGA Newsletter dated the 25th of June 2021:

It is not often that I get into a suit to attend a virtual meeting – but last Friday was one of those days. The 18th of June 2021 will forever be an important day for lemon growers in South Africa – because that morning, Minister Didiza signed the revised citrus protocol. Industry was honoured to attend the virtual signing – with Dr Mono Mashaba (Fruit SA) and Justin Chadwick in attendance.

The People's Republic of China was represented by His Excellency Ambassador Chen. Ambassador Chen spoke about the important trade ties between the two countries, and particularly the importance of the citrus trade. Minister Didiza added that there were many other important ties between the two countries. The protocol will now be signed by the Minister in China, before coming into effect.

The revised citrus protocol has important revisions with regard to the cold disinfestation treatment for lemons which will open the way for lemons to enter the Chinese market. The previous protocol's cold disinfestation treatment in essence precluded lemon exports to China, as lemons were at risk of cold damage.

China has become a leading importer of South African citrus – in 2020 over 130 000 metric tons of citrus fruit was exported to China (6% of total exports). Lemons will now complete the citrus basket offered to Chinese consumers.

Apart from the amended shipping temperature for lemons, the amended protocol also included a change to the carton labelling requirements. The new carton label must state "Exported to the People's Republic of China", in English or Chinese. After an initial phase in, the new labelling requirements became mandatory on the 1st of October 2021.

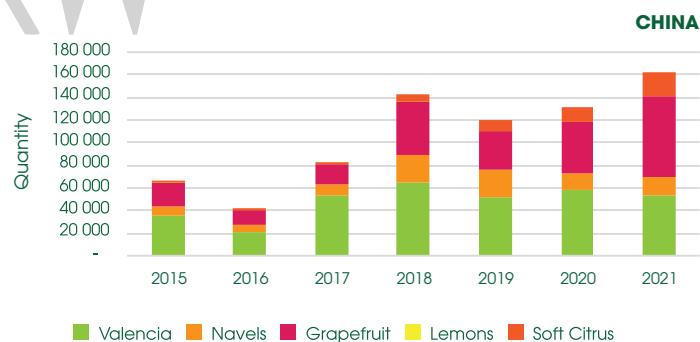
2021 China list: PUCs, PHCs, orchards and storage facilities

DALRRD submitted the draft list of facilities that are registered by DALRRD for export to China to the GACC in March 2021. The GACC responded that due to the COVID-19 situation, they were not able to conduct on-site inspections for the

new facilities on the list. They requested live video inspections to be conducted. The GACC selected the production units and packhouses to be visited for the inspections. Problems were experienced before the final three packhouses were identified. The services of Lucentlands were contracted for the live video inspections as well as a private translator. The video inspections took place on the 9th and 10th of June 2021. One of the packhouses was in the Western Cape and the other two packhouses were in Limpopo.

On the 22nd of June 2021, DALRRD received an approved list from GACC, but when the list was circulated it was found that not all packhouses had been included. A meeting took place between CRI and DALRRD and the decision was taken that a phase in period will be allowed until the 30th of June 2021 for PPECB to use both the 2020 list and the approved 2021 list to approve fruit destined for China. To address the problems, DALRRD communicated to GACC with a request to approve the list of facilities sent to them in March 2021 and on the 29th of June 2021, the GACC approved the March 2021 list.

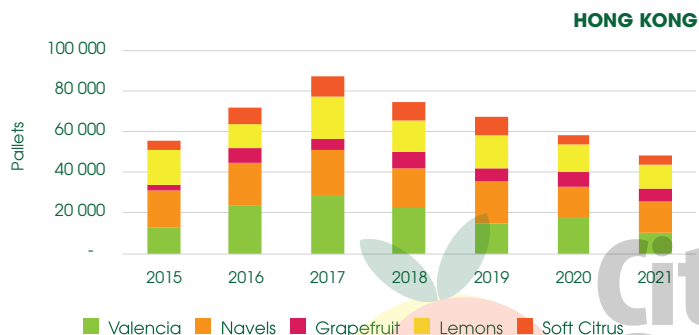
For the 2022 season, DALRRD submitted the draft list of facilities registered by DALRRD for export to China to the GACC in March 2022. Feedback is pending from the GACC on the selected facilities for the live video inspections to approve the list of facilities for the 2022 export season.



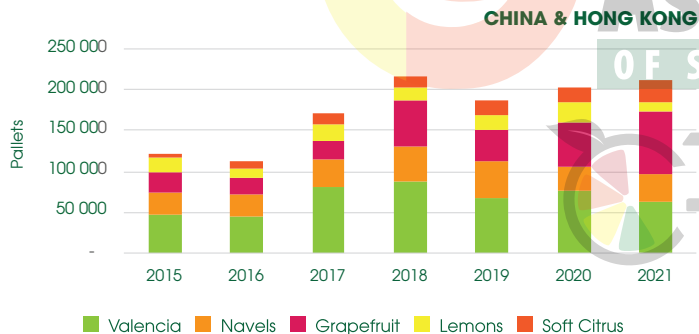
Volumes – Record volumes were exported to China in 2021 at 162 809 pallets, a 24% increase over the previous year.

The growth was significant in mandarins (almost double) and grapefruit.

Export volumes into Hong Kong continued to decrease from the highs of 2017. The market decreased from 87 000 pallets in 2017 to 48 000 pallets in 2021. All citrus categories showed decreasing export volumes.



The combined volumes into Hong Kong and China have been static at around 200 000 pallets since 2018.



A bilateral protocol to export fresh citrus fruit from Zimbabwe to China was signed between the NPPO of Zimbabwe and the NPPO of China. In March 2022 training was provided to the NPPO of Zimbabwe and Zimbabwean growers regarding implementation of the protocol.

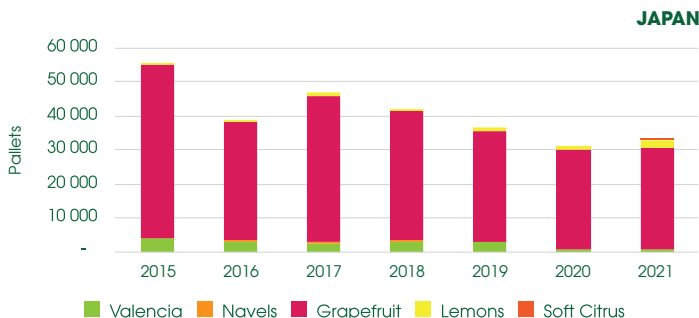


Optimising access conditions for all citrus types; Access for all mandarins, excluding Satsumas; Access for all navel oranges and amendments to the bilateral protocol

As Japan-Ministry of Agriculture, Forestry and Fisheries (MAFF) only deals with one market access request from a country at a time and the South African request to export avocados to Japan has not been concluded, no feedback was received on any of the outstanding citrus issues.

Amendments to the current bilateral protocol

DALRRD received a request from Japan-MAFF to review the current protocol and to include all changes since the protocol was signed between the two countries. A meeting took place between DALRRD, CRI and PPECB on the 2nd of August 2021. CRI provided inputs and DALRRD submitted the information to Japan-MAFF on the 16th of November 2021. They responded that feedback will be provided before the start of the 2022 export season. They also indicated concern about the number of interceptions of quarantine pests on the citrus from South Africa. They requested that export inspections in South Africa be conducted more carefully. During the CRI Workshops in January and February 2022, the industry was informed that PPECB and DALRRD will monitor mealybug rejections at packhouses and in the ports and if the rejections are unacceptably high, corrective action will be taken. In February 2022 Japan-MAFF indicated that they are examining the proposed changes to the current protocol.



Volumes – Export volumes showed a marginal increase in 2021. This was attributed to a slight increase in grapefruit exports, and an increase in lemon exports. The export levels are still considerably lower than those of 2015.



United States of America (USA)

FCM Control in orchards: Fruit infestation monitoring

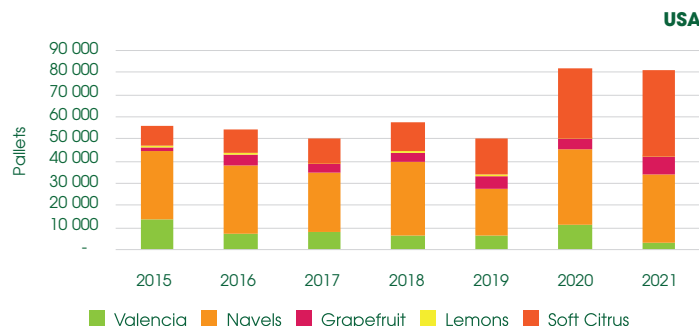
CRI updated the CRI Production Guidelines for FCM Control on Citrus in February 2022 to include the new improved method to conduct pre-harvest fruit infestation monitoring for FCM. This development was necessitated to strengthen the FMS for exports to the EU. DALRRD approved the updated version of the CRI Guidelines for use during the 2022 orchard verification process. However, for the US Department of Agriculture – Animal and Plant Health Inspection Service (USDA-APHIS) programme, DALRRD must inform the USDA-APHIS of any changes to the guidelines, as the checklists to determine whether pests are managed according to these guidelines, are attached to the Workplan. DALRRD sent a letter to USDA-APHIS with the request to include both fruit infestation monitoring methods in Appendix 19. On the 15th of March 2021, USDA-APHIS agreed that both fruit infestation monitoring methods can be included and used.

CGA Representative in USA – Nick Gutierrez continues to engage with USA, USTR and other US government authorities. He has also built a network within the South African and Eswatini Embassy in Washington. He sends through a very detailed monthly report outlining progress and activities which is sent to the CGA board and other interested parties.

Eswatini (Swaziland) – CGA and CRI continued to assist Eswatini growers and authorities with the access process.

Volumes – 2021 volumes were slightly lower than the 2020 record levels, with a noticeable increase in mandarin exports

(31 007 to 38 351 pallets), an increase in grapefruit volumes and a decrease in orange volumes. This now puts South African exports to the USA on the 80 000 pallet level.



India

Optimising access conditions (cold treatment protocol for citrus shipments) for all citrus types

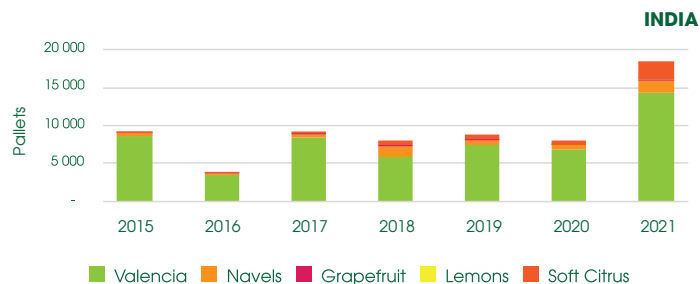
DALRRD sent a letter to the Special Secretary at the Indian Plant Protection Division in June 2020 to again request feedback on the trial shipments sent. Although the Indian authorities acknowledged receipt of the letter, there was no feedback on the trial shipments and acceptance of the in-transit cold treatment procedure. In March 2021, DALRRD received a request from the Plant Protection section of the Government of India requesting the information wherein they requested South Africa to conduct trial shipments for the in-transit cold treatment. DALRRD submitted the requested information on the 10th of March 2021.

No response was received from the Indian authorities and in July 2021 DALRRD International Relations (IR) wrote letters to the High Commissioner. The High Commission acknowledged receipt and indicated that the letters will be sent to the High Commission in India, and also forwarded to the South African High Commission in Delhi for the attention of the High Commissioner. On the 20th of September 2021, DALRRD received a letter from India indicating that the trial shipment

sent in May 2018 was considered unsuccessful due to a logger failure and the detection of *Elsinoë australis*, a pest known not to occur in South Africa. In the letter it was indicated that the trial shipments of apples and pears were regarded as successful. On the 11th of October 2021, DALRRD indicated that the matter was discussed with the Department of Trade, Industry and Competition (DTIC) attaché in India, and he has undertaken to take the matter up with the Indian authorities. DALRRD also requested DALRRD-IR to take this matter up with the Department of International Relations and Cooperation (DIRCO) Asia desk. During a courtesy meeting between the two countries the issue was also discussed.

On the 2nd of November 2021, DALRRD undertook to request a bilateral meeting with Indian authorities to discuss this matter. The Indian authorities indicated that a survey will be conducted to determine the presence and spread of *Phyllosticta citricarpa* in India. DALRRD sent a letter to the Indian authorities on the 13th of February 2022 to inquire about all the outstanding issues. No response was received and on the 2nd of March 2022, DALRRD sent another letter to request a technical bilateral meeting to discuss all the outstanding matters. DALRRD also included DIRCO and DTIC in the communication. The Indian authorities responded, and a meeting was scheduled for the 7th of April 2022.

Volumes – Despite the long outstanding conclusion to the in-transit cold treatment issue, export volumes in 2021 more than doubled when compared to 2020. However, this is still far below the potential of the Indian market. The biggest increase was in the Valencia orange category.



South Korea

Management of mealybugs for citrus fruit intended for export to South Korea

During the last two export seasons, concerns were raised by South Korea about rejections for mealybugs and incorrect carton markings. Citrus mealybug is the most abundant species in South Africa, but is not a quarantine pest for South Korea. However, identification of mealybugs to species-level is not always possible at the phytosanitary inspection point, requiring laboratory analysis and causing logistical bottlenecks.

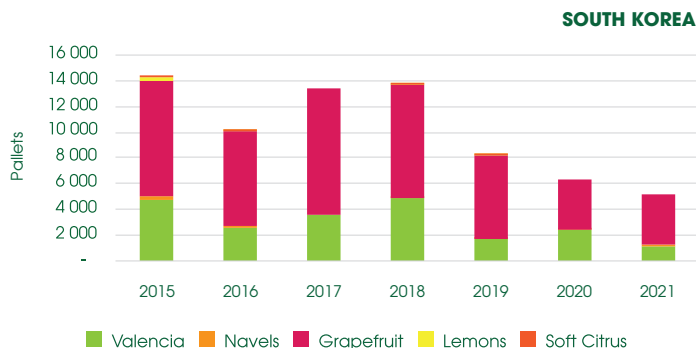
In April 2021, DALRRD called for a meeting to discuss the rate of mealybug interceptions in the port and on the 23rd of April 2021 a communication was sent to all role-players in the South Korea export programme. In the communication, all stakeholders were urged to conduct a thorough review of the procedures agreed upon, as detailed in the following documents:

- 1) Requirements for the management of mealybugs on citrus fruit exported to South Korea; and
- 2) Corrective actions to safeguard the South Korean citrus export programme's future.

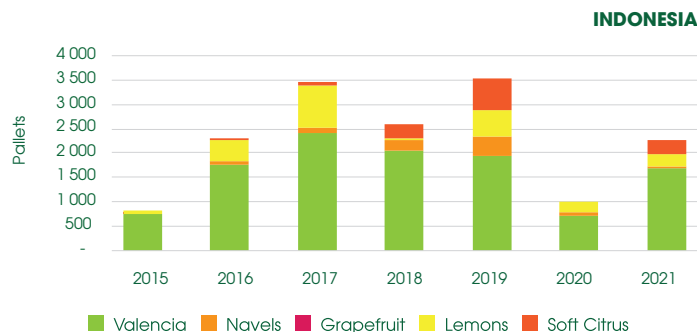
It was also highlighted that PPECB will be inspecting fruit with a strict requirement of no actionable mealybugs and placing consignments with unidentifiable mealybug on hold, pending mealybug identification. The programme ran smoothly for the remainder of the season with no rejections in the port.

At the Annual Citrus Coordinating Meeting held on the 18th of November 2021, a decision was taken that additional rules would be applied with respect to rejection of consignments which could result in disqualification of exporting for the remainder of the season.

Volumes – The decreasing trend in export volumes to South Korea continued in 2021.



Volumes – Export volumes in 2021 increased from the previous year, but were still at low levels given the potential of the market.



South Africa has signed a Mutual Country Recognition Agreement (MCA) in which the Indonesian authorities recognise equivalence in food safety activities in South Africa. This agreement then permits the entry of consignments into the port of Tanjung Priok (Jakarta) and releases South Africa from certain food safety requirements. On the 12th of April 2021, the MCA was reviewed and signed for a further three years.

Excerpt from the CGA Newsletter dated the 7th of May 2021:

Countries that trade with Indonesia have a big advantage, should they conclude a Mutual Country Agreement (MCA). Amongst other advantages, the MCA allows exporters to discharge in the port at Jakarta, and also recognizes food safety certification from the country of origin. The MCA is valid for a three-year period. South Africa had a MCA from 2018 which expired in April 2021. Despite a timeous application for renewal, and lodging of all the documents the MCA lapsed without a renewal being granted. This was of great concern to those wanting to export to Indonesia. The good news is that South Africa has concluded the MCA with Indonesia for a further 3 years. Thanks to the Department Agriculture, Land Reform and Rural Development (DALRRD), the Fresh Produce Exporters Forum (FPEF) and Ambassador Fisher at the Embassy in Jakarta for getting this concluded.



Russian Invasion of Ukraine

On the 24th of February 2022 Russian forces invaded Ukraine.

Excerpt from the CGA Newsletter dated the 4th of March 2021:

When it comes to the Russian market, the country accounts for approximately 7-10% of the total South African citrus exports annually, with 11.2 million (15kg) cartons of fruit having been exported to Russia in 2021. With no fresh produce having been shipped to the region over the past few weeks by most countries, early shipments of lemons destined for the Russian market have been impacted. Should this situation continue, when the export season officially kicks off in April, other varieties such as grapefruit and soft citrus will also be impacted.

Morocco, Turkey and Egypt all export significant quantities of citrus to Russia. The conflict has impacted the ability of these countries to supply the Russian market, resulting in the diversion of fruit to other markets. The concern is that these markets could suffer from an oversupply and a build-up of stock, which could impact early season South African supplies.

In addition, the depreciation in the rouble will make imported fruit more expensive, while payments could be difficult due to restrictions on money flows. This increases the risk of exporting

to Russia. Although South African exports to Ukraine are still developing, the conflict will put a hold on exports to that country. Exporters had started to build some momentum in direct exports to Ukraine.

This turn of events highlights the importance of access to multiple markets in order to divert fruit when necessary. The CGA calls on government to redouble their negotiations with trading partners in order to optimise present market access conditions, to retain access where this is threatened and to gain access to new markets.

Over the past year, there has been a major increase in a number of input costs, including fertiliser prices almost doubling and agrochemical prices increasing on average by 50%. Rising fuel prices and freight costs, which increased by approximately 30-40% in 2021, have also severely squeezed growers' profit margins. The current situation, with a sharp increase in the price of crude oil, will increase shipping costs further.

The major European ports used by the South African fresh produce industry for on-shipping to Russia, are heavily congested as all containers need to be scanned. This results in fresh fruit from South Africa, in some cases, remaining in transit for up to 90 days – when it usually takes around 24 days.

With 14% of global fertiliser exports currently being stuck in Russia and the price of oil and gas continuing to climb as a result of the current conflict, we can expect even further increases in fertiliser, fuel and agrochemical prices, which will place more strain on growers.

The CGA remains committed to working with government, exporters and other stakeholders across the value chain to help mitigate these threats and the impact of the Russia-Ukraine conflict on the upcoming citrus season. It will take our collective effort to help ensure the continued profitability and sustainability of our local citrus industry, which sustains over 120 000 jobs and generates R30 billion in export revenue for the country, particularly following a tough 2021 season.

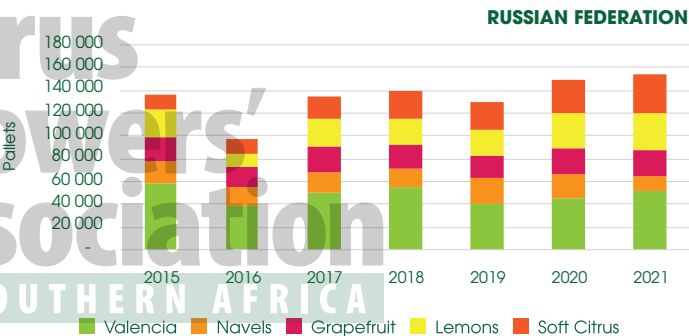
CGA Representative in Russia – Mikhail Fateev continued to represent Southern African citrus interests in Russia. Mikhail

used all opportunities to engage on issues facing the industry, and in building links between South Africa and Russia. Mikhail prepares a weekly newsletter which is distributed to the Russian Interest Group.

BRICS – Mikhail used his position on the BRICS Business Chamber to raise South African citrus issues.

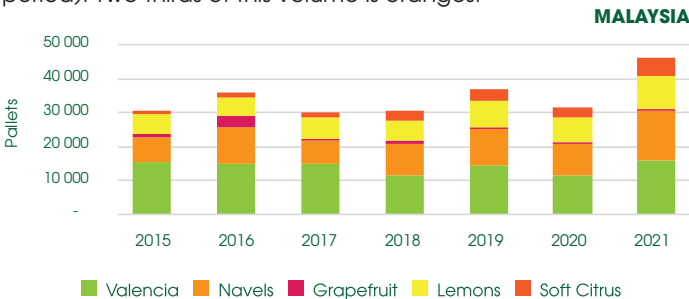
Labelling – This remains an issue in Russia. Anton Kruger (FPEF) and Mikhail Fateev (CGA) continue to use every opportunity to raise the issue and bring about a workable solution.

Volumes – Russian exports hit record levels of almost 150 000 pallets in 2021 – an increase of 6 000 pallets (4%) from 2020.



 Malaysia

Volumes – Malaysia is a significant importer of South African citrus, now at 45 915 pallets (up by a third over the 2021 period). Two thirds of this volume is oranges.





Thailand

Interpretation of current FCM Cold Treatment Protocol

Concerns about the reasons for rejection of table grape and citrus consignments in Thailand resulted in exporters terminating further fruit exports to this market.

On the 12th of April 2021, DALRRD sent a letter to the Thailand Department of Agriculture (DOA) to seek clarification on the interpretation of the cold treatment. On the 21st of June 2021, the DOA responded, inviting further exchanges to resolve the situation. A meeting took place between DALRRD, CRI, HORTGRO, PPECB and SATI to discuss a response to DOA and CRI coordinated a consolidated position.

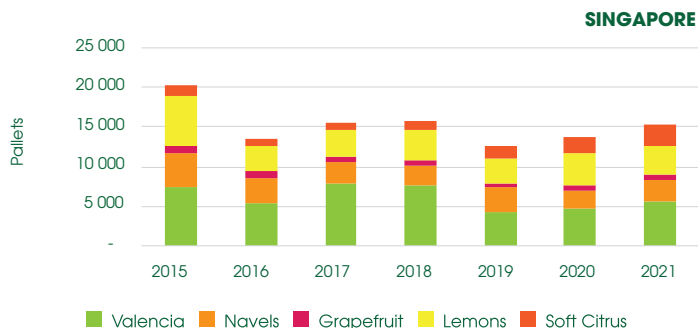
In the response, information on the improved FCM cold treatments was included, as well as a request to remove the mandatory FCM cold treatment for lemons due to the non-host status.

The consolidated response for citrus and table grapes was submitted to DOA on the 7th of October 2021. The DOA acknowledged receipt on the 18th of October 2021.



Singapore

Volumes – Singapore remains an important destination for South African citrus, with 15 000 pallets annually. Half of this volume is oranges.



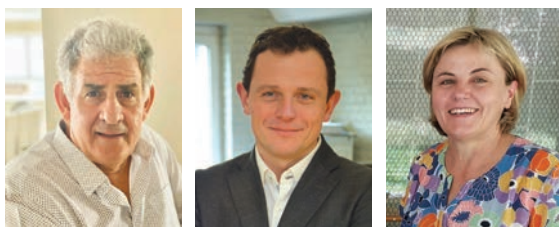
General

Citrus One-Pagers

CRI provided inputs to the Phytosanitary Requirements and Working Procedures for Export of Citrus from RSA to Taiwan, Thailand, Philippines, China and Japan. The documents were circulated to the industry.

Botswana

A request was received from the Botswana NPPO and producers to assist with technical information pertaining to potential export markets. Information was provided on how to compile a pest list and to conduct surveys to determine the presence of pests in the country.



EU/UK

Deon Joubert

Rocco Renaldi

Dr Elma Carstens



The EU and UK received 42% of the 155 million cartons of the Southern African citrus crop during the 2021 season.

This represented 65 million 15kg-equivalent cartons. These two markets therefore remain by far the biggest export destinations for southern African citrus. The export growth of 57% over a 7-year period remains impressive considering the market access challenges over the same period, and this while the consumer-base has remained stable since the 2014 season, comprising the UK and 27 countries in the European Union.

This again is testimony to the capacity and ability of the southern African citrus growers to adapt and adjust to the access scrutiny and ever-more complicated rules, especially for the EU market. In their assessment of the EU market access opportunity cost with regards to Citrus Black Spot (CBS) and False Codling Moth (FCM), BFAP (Bureau for Food and Agricultural Policy) calculated it to be more than R3.2 billion annually.

Fortunately, after BREXIT the UK abandoned the requirement of phytosanitary certification on citrus fruit in their market. This resulted in easier access for South African citrus, but also meant that fruit diverted to the UK from the EU because of access challenges, created an oversupply and resulted in unsuitable fruit being supplied to the UK, which undermined prices in that market.

World Citrus Organisation (WCO)

The CGA jointly created the World Citrus Organisation (WCO) with Spanish producer organisations in late 2019. Due to COVID-19 travel restrictions, the WCO initially operated virtually, which included its second Global Citrus Congress in

November 2021. The congress was however well-attended, with overall figures indicating a growing interest in the citrus sector and the work of the WCO. More than 1 400 participants from 74 countries followed the congress during the two days.

The excellent analytical work and contracted reports provided by Cirad's Eric Imbert and colleagues, allowed for a first real analytical assessment of global citrus information regarding production and consumption figures. This led to an in-depth discussion of opportunities and challenges facing citrus-producing countries. The WCO also produced a world citrus statistics handbook in July 2021. The WCO has shown the benefit of working together for a better citrus future.

EU Market Access

The relationship between EU's DG Santé and South Africa, Zimbabwe and Eswatini remained strained, mainly due to the increased politically-motivated agendas and decisions being pursued. Instead of data, facts and arguments based on science, politics drive decision-making in the Standing Committee on Plants, Animals, Feed and Food Health (SCOPAFF). There has been open acknowledgement from stakeholders in the Spanish fraternity that political re-election was a far greater consideration than facts when dealing with third country market access.

Fortunately, access to other agencies and EU member state NPPO's in the EU remained open and warm, which allowed South African citrus representatives to state its case.

The 43 CBS and 15 FCM interceptions recorded during the 2021 EU citrus market season did not aid the already difficult relationship.

The new Farm-to-Fork and Green Deal EU policies are complex and can easily be restrictive for third country market access. This will require dedicated focus from the CGA on potential new import controls and existing market access requirements. Fortunately, these requirements are now seriously impeding on EU producers' production capacity and costs, resulting in them becoming the focus of EU internal farm lobbies. This issue is the production-restrictive nature of the new policies on fertiliser usage, greenhouse gasses and environmentally-friendly practices. Calls for abandoning, or seriously extending, implementation dates of these policies have grown substantially, especially since the war in Ukraine, which is bringing food security concerns to the fore. While the European Commission continues to defend the Green Deal, delays, and possibly less ambitious rules in some areas, are on the cards.

South Africa has proactively identified actions around green issues, sustainability and development. This will be leveraged to align South Africa with new EU green and sustainable developmental goals. This will not lower South Africa's risk mitigation on plant health matters, but may assist with eliminating some of the current unsustainable environmental compliance requirements.

FCM

On the 10th of February 2022 a proposed new EU FCM regulation was notified by the EU on the WTO Portal, with a 60-day period for submission of comments.

The proposed new regulations included numerous problematic aspects, such as: 1) separate special requirements for oranges, including navels and Valencias; 2) destructive sampling of 10% of the visually inspected fruit before export; and 3) when cold treatment has been applied during transport, the consignment must be accompanied by a phytosanitary certificate and documentation extracted from the data loggers to prove the cold treatment. Numerous

consultations ensued between DALRRD, PPECB, CGA, FPEF and CRI, as well as other implicated industries. Many affected parties posted comments on the European website prior to the input closure date of the 10th of March 2022. The overwhelming majority did not support the proposed regulatory changes.

South Africa, Eswatini and Zimbabwe governments used the WTO notification procedure (with closing date of the 11th of April 2022) to submit written objections to the proposed new regulations.



EFSA

The European Commission (EC) requested EFSA to provide an opinion on the FCM systems approach used by South Africa. EFSA engaged with DALRRD, who in turn referred the matter to CRI to prepare a response to the questionnaire received from EFSA, for return to EFSA by the end of January 2021. CRI prepared the response and provided the first draft to DALRRD on the 13th of January 2021. A virtual meeting was held on the 19th of January 2021 to discuss the draft. The revised response to EFSA was supplied to DALRRD on the 29th of January 2021. DALRRD submitted the completed questionnaire to EFSA.

On the 29th of June 2021, DALRRD forwarded a request from EFSA to CRI for additional information. CRI submitted the

information on the 2nd of July 2021 and DALRRD submitted the information to EFSA.

EFSA released their opinion on the FMS in July 2021. A review of the FMS opinion was obtained from two expert reviewers. Both reviewers found the EFSA assessment to contain numerous misunderstandings and errors, and concluded that the EFSA opinion was technically flawed and could not be used as a reliable assessment of the FMS. A meeting between CRI and DALRRD took place on the 30th of November 2021 to discuss the reviews. The documents were provided to DALRRD on the 1st of December 2021. Due to technical problems, DALRRD did not receive the documents and these were resent on the 14th of January 2022. Another meeting was held on the 26th of January 2022 in preparation for a bilateral EU-SA meeting on the 26th of January 2022 to further discuss the CBS and FCM interceptions and the EFSA response. DALRRD submitted the South African response on the 3rd of February 2022.

CBS

CRI received the new draft regulations for CBS from DALRRD on the 1st of February 2022. The new draft temporary measures are for citrus from Argentina, Brazil, South Africa, Uruguay and Zimbabwe. The EU requested trading partners to provide feedback before the 10th of February 2022. CRI discussed the implications of the new draft regulations with DALRRD on the 4th of February 2022 and provided a document to DALRRD in preparation for the meeting, detailing the implementation issues. The problematic issues were: a) an additional phytosanitary inspection between packhouse and export; b) a requirement to provide a list of approved orchards before the start of the export season and immediately provide updates related to the changes to that list, including the reason for those changes; and c) the requirement to verify CBS-free status in all orchards belonging to a PUC when CBS is detected in one orchard belonging to that PUC.

A bilateral meeting took place between South Africa and

the EU on the 10th of February 2022. DALRRD provided a document to industry, highlighting the discussion points. On the 22nd of February 2022, CRI received the final CBS regulations from DALRRD. The final draft CBS regulations reflected all the changes proposed by South Africa – deletion of (a) and (c) and the need to provide the reasons for changes to the list.

A meeting between CBS RMS working group and DALRRD took place in March 2022 to align the amendments of the regulation with the CBS RMS and the changes were communicated during the DALRRD and PPECB pre-season workshops.

BREXIT

The final implementation of BREXIT took effect at 23h00 GMT on the 31st of December 2020 and signalled the departure of the UK from the EU. This was problematic in dealings with the SCOPAFF, since the UK's big voting allotment provided much needed allegiance to South Africa for access to the EU.

However, South Africa did gain virtually unhindered access to the UK retail sector as a result. From April 2021, no phytosanitary certification was required on South African citrus exported to the UK. This transition occurred seamlessly and even the exception of Northern Ireland, which remains subject to EU import requirements, did not complicate matters.

There was again, some confusion about UK tariffs for South African citrus. South African citrus exports to the UK is subject to the UK Global Tariff regime, but the UK-SACUM EPA, which applies to Botswana, Eswatini, Namibia, Lesotho, Mozambique and South Africa, has been in force since the 1st of January 2021. The agreement is a rollover of the EU-SADC EPA in terms of tariff liberalisation commitments.

This means that all citrus belonging to the categories oranges, except for fresh, sweet, Clementines, Monreales and Satsumas, Mandarins and Wilkings, Tangerines, other, grapefruit (including pomelos), and limes are fully liberalised.



For fresh, sweet oranges UK import duties under the UK-SACUM EPA are as follows:

- 1 June to 15 October: 0%
- 16 October to 31 October: 2%
- 1 November to 31 November: 7.2% (the duty will be gradually phased out in the next 5 years at the same pace included in the EU-SADC EPA)
- 1 December to 30 April: 10%
- 1 May to 30 May: 2%

For lemons:

- 1 January to 30 April: 6%
- 1 May to 30 October: 0%
- 1 November to 31 December: 6%

On fresh sweet oranges and lemons from South Africa, some of the UK import duties are lower than those applied by the EU. This is because while maintaining tariffs, the new UK tariff regime has slightly lowered duties on a limited number of products and simplified the tariff structure by getting rid of the EU entry price system and additional duties that could be imposed when there is a surplus in the EU market.

Lastly, the UK has also launched an application process for UK-based companies to request partial or complete temporary duty suspensions on products for which production in the UK is inadequate or non-existent, for which, theoretically, UK citrus importers can apply. Normally, the products benefiting from duty suspensions are used in manufacturing, but exceptions may be considered. The UK out-of-season tariff on oranges will track the EU tariff reduction resulting from the EPA tariff on imported citrus.

Direct Shipping to Spanish Ports

The CGA-FPEF project was once again approved for the 2021 season, although only a limited shipping programme to Vigo and Algeciras ports was approved.

A total of 906 containers were shipped to Spanish ports during 2021. This represented less than 1% of South African citrus exports worldwide and 2.2% of the EU-UK exports. Unfortunately, six FCM and four CBS interceptions were recorded in Spanish ports, all in the last two weeks of exports. Again, the feedback and information were insufficient and inconclusive, compared to feedback and detail received in other EU harbours. CRI concluded that there was a 50 times greater probability of a non-compliance interception in a Spanish port, and this risk is unacceptable. Furthermore, the six FCM interceptions (out of a total of fifteen in the EU) in Spain, was the main driver for the Spanish-induced call for a cold-sterilisation provision for all citrus imported from third party countries. As a result, the CGA board has excluded Spanish ports as destination for South African citrus in the 2022 season, which was ratified by the FPEF board as well.



CRI - RESEARCH & TECHNICAL

Dr Vaughan Hattingh



Governance and Funding

The 2021 year was the first year of the CRI 4-year plan supported by the new levy. The increased funding enabled CRI to take significant steps towards ensuring its value-add to the industry, in line with its mandate *to maximise the long-term global competitiveness of the southern African citrus growers through research and technical support services*. CRI was able to upscale research from 75 projects in 2020/21, to 114 projects in the 2022/23 budget, through both an increase in internal CRI capacity and expansion of the research collaboration network. CRI initiated expansion of the research infrastructure as envisaged in the 4-year plan, through significant investment in research equipment and a research facility that was purchased in Gqeberha. Upscaling CRI's operations resulted in a cash-flow constraint in the first part of the 2021/22 financial year, which resulted in delays in the upscaling earmarked for year one of the 4-year plan. Despite the delay in initiation, the CRI 4-year plan is on track to achieve the upscaling of operations as provided for in the plan within the current levy cycle.

The structure of the CRI board of directors remained unchanged, and the CRI executive committee still comprise Piet Smit (chairman), Deon Joubert (vice-chairman), Mike Woodburn and Eddie Vorster, with Piet Engelbrecht serving as the most recently appointed director. The CRI advisory committees were chaired by the following directors: IPM – Fanie Meyer; Disease Management – Eddie Vorster; Citriculture – Piet Smit; Cultivar and Rootstock Evaluation – Deon Joubert; and Citrus Improvement Scheme Advisory Committee (CISAC) – Fanie Meyer. The balance of the board consisted of: Steve Turner

(Citrus Exporters Forum), Nthabiseng Motete (ARC), Chris Kellerman (citrus consultants), Nigel Barker (University of Pretoria), Danie Brink (Stellenbosch University, replacing Karen Theron), Martin Hill (co-opted) (Rhodes University) and Louisa Mogotsi (co-opted as observer) (Citrus Growers Development Chamber).

Market Access

In addition to the market access section of this publication, the following items are highlighted here. An amended protocol for citrus to China was signed, which included improved shipping temperatures for lemons. Live video inspections were conducted for the first time in the South African citrus industry, to enable China to approve the list of production units, packhouses, cold storage facilities and inspection points for export in the 2021 season. Citrus was successfully shipped to the Philippines under the new protocol, after initial problems with issuing of permits were resolved. Requirements to prepare fruit for export to South Korea were revised and resulted in a significant reduction in the rejections during pre-shipment inspections. Agreements were reached to continue pre-clearance inspections for exports to the USA, South Korea and Japan on the same basis as for the 2020 season. Some longstanding market access issues remained outstanding, such as: wider access for USA exports, wider and improved access to Japan, improved conditions for access to India, and a bilateral agreement with Vietnam. CRI continued to play a key role in preserving market access to the EU despite reported interceptions of CBS and FCM. The FCM Management System (FMS) was significantly strengthened after the 2021 season to support sustained access to the EU

market. The CBS Risk Management System was revised to align with the new EU CBS regulations.

Research

In 2021, there were still some negative effects from COVID-19 lockdowns at some institutions, although restrictions on travel were largely lifted. Citrus industry research still benefited from Department of Science and Innovation funding during the reporting period, through the programmes Research for Citrus Exports 2 and Postharvest Innovation 4. The new levy will make research independent of government funding in future.

In the Citriculture portfolio, projects on various preharvest and fruit quality challenges and cold chain research were completed or resulted in industry-relevant information. In the adaptive nutrition project, the use of foliar analysis to make in-season adjustments to N, P and K fertilisation programmes was shown to have limited to no value. This is due to a lack of short-term changes observed in leaf nutrient concentration in response to both under- and over-fertilisation, as well as increments thereof. Furthermore, it was shown that when leaf analysis results are interpreted, a level just above the minimum norm should be regarded as optimal, i.e., not the middle to high range between the minimum and maximum norms. Results from the cold chain research projects have been applied to improve ventilation in cartons and shipping

containers, enabling more homogenous temperature profiles during export. Cultivar and rootstock evaluation and research have identified the increased risk of oleocellosis under 20% shade netting, especially for trees grafted on Rough Lemon rootstock. In addition, a renewed focus on rootstock evaluation has been implemented with semi-commercial plantings of new rootstocks to illustrate the potential of alternative rootstock cultivars. Some of these alternative rootstocks may have tolerance to Huanglongbing (HLB).

Although good nutrition and rootstocks can help maximise orchard production, graft transmissible diseases can shorten the productive life of a citrus orchard. Research within this programme in the disease management portfolio links closely with the CIS. A new single-strain CTV isolate has been approved as a new pre-immunisation source for grapefruit, pending a comparative assessment with the current source in semi-commercial trials. The sensitivity of rootstocks to viroids is also being evaluated as these pathogens are easy to transmit and can stunt growth. High throughput sequencing (HTS) based detection is being evaluated to detect known viruses and viroids for routine detection. HTS was shown to be more comprehensive than any assay previously used. Using HTS, citrus virus A was found to be associated with Impietratura in grapefruit and a blotchy rind disorder of Valencia. In the HLB programme, a loop-mediated isothermal amplification (LAMP)



assay was developed to detect *Candidatus Liberibacter asiaticus* (CLas) and *Ca. L. africanus* (CLaf). The assay was validated to detect extracted DNA from *Diaphorina citri* containing CLas and *Trioza erytreae* containing CLaf. Significant strides were made towards field application and the assay was validated on crude extracts from plants.

Researchers investigated the reproductive capability and viability of *Phyllosticta citricarpa* (Citrus Black Spot) under simulated conditions in which whole fruit, peel segments, or citrus pulp with CBS lesions were discarded. These fruit and by-products were subjected to packhouse treatments and subsequent cold storage, as is common for export fruit. Research confirmed that standard packhouse treatments and shipping conditions render most CBS infections non-viable and prevented pycnidiospore release. Processed citrus fruit was also shown to be an epidemiological dead-end. These results affirm that fruit is not a pathway for CBS spread. A molecular technique was developed to test for benzimidazole resistance in CBS involving direct isolation of *P. citricarpa* from fruit or leaf lesions followed by PCR and sequencing assays. This molecular assay is currently used by the CRI Diagnostic Centre (CRI-DC) to test for benzimidazole resistance on fruit, and yields results within three days, compared to a minimum of 21 days for the previously used bioassays. A multiplex qPCR that simultaneously detects *Phytophthora nicotianae* and *Phytophthora citrophthora* was also developed. This assay will greatly enhance the quick identification of these two pathogens in disease management trials and routine diagnostics.

In the postharvest diseases programme, two projects focused on the optimisation of postharvest fungicides that could be used in the place of imazalil, should its use be terminated in future. Results obtained have contributed greatly to the development of guidelines that can be used for the optimal use of imazalil-alternative fungicides. This will enable the industry to still export successfully despite any threats to continued authorisation of imazalil use. Another project focused on fungal decay of wooden pallet bases and

how to mitigate this problem. The fungi involved are of a saprophytic nature and have no phytosanitary implications. Two chemical treatment options for pallet wood were identified that prevent the fungal decay from occurring and do not leave a detectable residue like the OPP currently used for the treatment of pallet wood. The aim of another project is to determine whether biocontrol treatments can be used together with GRAS chemicals in pre-packhouse drenches to provide sufficient control of *Penicillium*-decay and sour rot of citrus. Some promising results have been obtained with the GRAS-alternative treatments.

In the Integrated Pest Management research portfolio, most resources continued to be focused on False Codling Moth (FCM), with fruit flies being the second most important pest group. Both these pests are phytosanitary challenges for existing markets and new markets, and new control strategies are required to reduce dependence on postharvest cold treatments. In the warm northern production regions, it has been found that FCM activity can start as early as July, so earlier use of mating disruption is being evaluated in that region. Mating disruption effects have also been found in the field as an additional benefit from applications of insecticidal diamides such as Coragen. FCM larval gut yeasts appear to both improve the efficacy of granulovirus biopesticides, and serve as female oviposition attractants, thus having potential for monitoring female moths. An ability to monitor female moths rather than males will give a much more accurate indication of the threat to the crop. Synergism has also been found between a baculovirus and Neem oil for improved control of FCM. It has long been known that levels of FCM infestation are lower in organic orchards than in conventionally-managed orchards. This has been the topic of a recent research investigation, and various factors have been found that may be partially responsible for these variable infestation levels. The development of the FCM Management System (FMS) is aligned with research results, and the preharvest monitoring protocol was recently

improved to more accurately determine the threat to the crop posed by FCM in individual orchards.

Some new attract-and-kill devices were recently registered for the control of fruit flies in citrus in South Africa. These were evaluated in field and semi-field studies, and were all found to effectively suppress populations of all fruit fly species. These devices may prove to be useful in the future if residue restrictions on the toxicants used in fruit fly bait sprays become more severe. Studies carried out on fruit fly cold disinfestation treatments showed that treatments for Medfly would be equally effective against other fruit fly species, and a treatment of 3.5°C for 24 days would effectively mitigate risk of fruit fly pests in citrus from South Africa.

Concerning other citrus pests that are problematic for some markets, a two-year survey in different citrus production regions showed that oleander scale (*Aspidiotus nerii*) does not infest commercial citrus in South Africa, therefore supporting exports to certain Asian markets. Some mealybug species have become more problematic, especially under shade netting. Recently the negative impact of three species of hyperparasitoids that attack natural enemies of mealybug has been investigated. A parasitoid and a predatory beetle were able to attack mealybug through 20% shade net, so it would appear that the reason for an increase in mealybug (and mite) infestation under 20% shade may be due to a more suitable micro-climate at the leaf surface rather than reduced biocontrol activity.

In preparation for the arrival of the Asian citrus psyllid, *Diaphorina citri*, and the Huanglongbing disease that it vectors, CRI biosecurity field officers and CRI entomologists have been paying more attention to the taxonomy of psyllids likely to be trapped on sticky yellow traps in citrus orchards, or seen on new citrus growth. Some undescribed species are extremely similar to *D. citri* and need to be readily recognised. Adult specimens, other than the known citrus pests, that are sometimes observed on citrus will be investigated for their ability to feed on citrus.

Extension

The 2021 season was very challenging for extension, due to the compounding effects of COVID-19 and the unexpected major disruptions in the industry. Extension continued to operate with virtual meetings. The integrated pest and disease management workshops of September 2021 were replaced by pre-recorded presentations on the CRI website, that could be downloaded by the growers and relevant role players. The postharvest workshops for February 2022, however, could again be hosted in the six main production regions and it was a roaring success. Record attendance attest to how highly the industry values these regional workshops. There is definitely an overwhelming preference for physical events where the interaction with other role players is key to effective technology transfer and sharing of information. The accreditation process for carton manufacturers continued despite difficulties with power failures and COVID-19 regulations. The overall results of the carton tests were good, which indicated that cartons continue to comply with the minimum specifications. There were only minor packaging-related challenges reported from the markets. A significant matter related to packaging was the finalisation and implementation of a new A15C carton design with improved ventilation to support continued access to Europe. The Exporters Technical Panel meeting and Cooling Working Group meeting was again combined into one physical meeting, which was very well attended with good input and discussions amongst the attendees. The Citrus Research Symposium, which was postponed from 2020 to August 2021, was once again postponed to August 2022. The Extension division is on track with implementation of the CRI's 4-year plan with the appointment of four new staff members, two area extension managers and two postharvest extension officers. Study group meetings and packhouse forum meetings in the production regions became active again as COVID-19 restrictions were eased. The implementation of the Customer Relationship Management (CRM) communication system

is a welcome improvement and enables more effective communication and technology transfer. This system also allows for easy access to practical YouTube video's, pre-recorded presentations, and regular short webinars, part of the efforts to continuously improve and modernise technology transfer.

Biosecurity

CRI continued its African biosecurity collaborations as part of the proactive actions to prepare for the inevitable incursion of the Asian citrus greening, Huanglongbing (HLB), and its primary vector, the Asian Citrus Psyllid (ACP). In addition to ongoing biosecurity activities in South Africa, Zimbabwe and Eswatini, CRI engaged with contacts in Mozambique, Namibia, Botswana, Tanzania, Kenya and Ethiopia in pursuit of collaboration and regional awareness relating to the threats posed by HLB and ACP. CGA grower members in Zimbabwe were provided with answers to technical questions as they engaged the government of Zimbabwe to work towards updating the relevant legislative and regulatory framework, in response to concerns about potential biosecurity risks associated with any potential introduction of citrus planting material from China. High-risk regions for potential incursion of HLB or ACP into Zimbabwe, possibly from Mozambique, have been identified and prioritised for survey and monitoring actions. Likewise, work is underway to finalise the mapping

of high-risk entry pathways and corridors for HLB or ACP into South Africa, with the intention to focus survey, monitoring, and scouting efforts to increase the chances of early detection that would enable quick and decisive delimitation, containment, and eradication response actions.

CRI continued to follow up with DALRRD to progress engagement with their Kenyan counterparts, Kenya's Plant Health Inspectorate Service (KEPHIS), to pursue a joint scoping exercise of the spread of HLB/Las and ACP in coastal Kenya where it was first reported in early 2020. KEPHIS has communicated willingness to engage in technical cooperation and a joint scoping mission with CRI and ICIPE. However, progressing this to implementation has not yet been achieved, but continues to be pursued through various channels.

The HLB Steering Committee held quarterly virtual meetings. Revisions made to the HLB-ACP Action Plan to align with new regulations gazetted by DALRRD in February 2021 (Regulation no. 44188 of 12 Feb 2021), as well as aspects of detection and delimitation surveys to make the plan more practically feasible, were approved by the committee. Revisions to the HLB Safe System for nurseries to give effect to practical considerations relating to nursery operations, ensuring minimum disruptions to nursery operations while using appropriate and transparent risk assessment and compliance management measures, were adopted. Both these revised documents have been subjected to international peer review and appropriate adjustments will be made.

CRI hosted training on the identification and taxonomy of psyllids, conducted by an international psyllid taxonomist. The training placed emphasis on distinguishing between the target pest, ACP, and indigenous psyllids that have very close resemblance to ACP, presenting significant challenge in accurate identification of ACP. Accurate identification of ACP is critical for early detection of HLB/Las since it is known that the spread of Las into new areas is primarily facilitated through the movement of ACP that have acquired HLB/Las.



CRI has established a network of traps and monitoring stations across selected frontier commercial orchards in Limpopo and Mpumalanga that are serviced monthly. The more than 500 trapping points deployed by DALLRD and CRI are analysed and read at CRC, Nelspruit. CRI's Diagnostic Centre in CRC, as a DALRRD accredited lab, has continued analysis of ACP traps and citrus leaf samples, as well as insect specimens.

Farms in the Sundays River Valley affected by Citrus Leprosis (CL), were audited for compliance with the Citrus Leprosis Response Plan in July 2021 and will be audited again in July 2022. The audits focussed on pruning, spray programmes, weed control, mite presence, controlled movement of people and recordkeeping. Three new cases of Leprosis were reported in the Sunday's River Valley in 2021, all on, or with ties to, farms previously implicated. The Response Plan has been implemented in all three new cases with the objective of achieving eradication.

Follow up delimiting and detection surveys for African Greening (*Candidatus Liberibacter africanus*, Laf) were conducted in Knysna in October and November 2021. This area is recognised as an African Greening-free buffer zone between the citrus production regions of the Eastern and Western Cape provinces.

Due to the continued detection of Laf positive trees in this zone, it was necessary to revise the buffer zone. Accordingly, a survey was conducted in the region between the Keurboom and Groot rivers and the Uniondale Magisterial District, to support the establishment of a new buffer zone and protect the ongoing pest-free status of the Eastern Cape province. The proposal is currently under consideration by the HLB SC.

Citrus Improvement Scheme

Certified budwood supply declined in the 2021/22 season to 5.46 million buds from the record levels in the prior five years, with a 5-year average of 6.53 million buds. The ability of the Citrus Foundation Block (CFB) to meet the demand increased

to over 75% in the past three seasons, with the remainder of buds authorised for cutting in nurseries.

Of the 9.22 million buds supplied in the past three seasons, the top cultivar types were mandarin hybrids (34.2%), Valencia (24.4%), lemon (12.6%), navels (9.3%), Clementines (8.6%) and grapefruit (7.2%). CFB cultivar stock stands at 490 cultivar lines, but the top thirty varieties comprised 88.6% of total number of buds supplied in the past season. Midnight Valencia was the most popular cultivar, followed by Royal Honey Murcott mandarin, ARC Nadorcott LS (ARCCIT9) mandarin, Eureka lemon, Tango mandarin, Star Ruby grapefruit, Turkey Valencia, Octubrina Clementine, 2PH Eureka SL lemon, and Jasi Valencia.

The rootstock orchards at CFB planted in 2015, 2018 and 2019 have improved the CFB's ability to supply demand of most rootstock cultivars, with the exception of US812 (Sunki x Benecke), which recently became more popular. However, rootstock seed demand declined from 6 470 litres of seed in 2019/20, to 5 686 litres in 2020/21, to 4 306 litres in 2021/22.

The CIS nursery certification criteria were improved by expanding the audit criteria and developing a more objective and quantifiable rating system. Nursery audit scores are now used to give a star-grading to nurseries. Thirty-five nurseries were certified in the last audit in November 2021, with nine achieving a 5-star rating, six the 4-star rating, and seventeen rated 3-star. Only three nurseries were 2- or 1-star rated.

A CRI Cutting Edge with the certified nursery list including the star-gradings, was sent to growers. The industry's cultivar gene source is currently being duplicated at CFB in a state-of-the-art polycarbonate greenhouse.

Major objectives for the coming year include the promulgation of the compulsory statutory CIS, which is awaiting the signature of the Minister, the readiness and participation of the CIS and nurseries in the HLB/ACP Action Plan, with one nursery already being certified as HLB-safe, and the development of a bio-secure CIS Seed Farm.



CGA CULTIVAR COMPANY

Jon Roberts,
General Manager



Budwood authorised for delivery to nursery

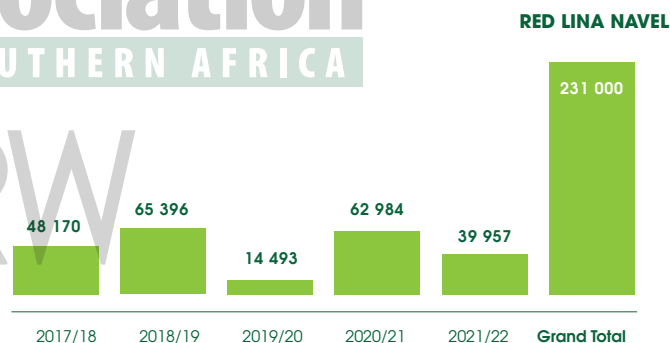
Varieties released	2017/18	2018/19	2019/20	2020/21	2021/22	Grand Total
CGACC cultivar	296 459	385 391	343 078	675 598	597 269	2 297 795

The list of commercial cultivars continued to grow as more cultivars came through clean-up and evaluation. Bud sales during the year under review, driven by the Valencia's and red oranges, is expected to match the 2020/21 season, which indicates a flattening in demand. The impact of the current challenges faced by the industry have already been felt in bud sales in the past year, as reported by the Citrus Foundation Block (CFB). This trend is expected to continue in the coming year.

Commercially released varieties and varieties being planted in semi-commercial experimental trials

Red Lina, (Rosalina): First commercial crop of Red Lina from a semi-commercial site in the Sundays River Valley achieved export pack-outs of about 50% class 1 fruit and 20% class 2 fruit. At this site, there are no windbreaks and wind blemish appeared to be the main cull factor observed before picking, which is consistent for a young tree frame. There was too little critical mass to market the variety on its own, but it is hoped that in the 2022 season it will be exported to different markets. In the second commercial planting in Ohrigstad, there was also not the critical mass to pack separately. However, in week 22, 4 000 cartons were packed and consigned with CaraCara navels, but labelled as Red Lina. The consignment travelled well and arrived on white label with no waste issues. Colour

was noted as good, with a deep orange compared to the yellow orange of CaraCara. The marketer noted that the variety could have been packed in week 17 to 18. Bud sales have been satisfactory, with a decrease in the last year due to a pause in releases between the first and second phases, which targets an additional 1 000 ha.



Valentine Late Red: Bud multiplication has been slow in the last year and it was decided to hold back at the end of the 2021 growing season to make sufficient multiplication trees for the interest that was received. Even in the very tough conditions of the past year, these two red navel varieties have received a lot of attention, especially in the Cape areas with exposure to the USA market, where red navels are sold at a premium over ordinary navels.

Florida C41519: Initially, the Florida Early also gave a good crop set at the Eastern Cape Midlands site in 2021, but early season granulation was a concern at this site, and on investigation N had been over applied. In discussions, University of Florida breeders confirmed that granulation had not been noted as a problem in their trial sites pre HLB. Juice percentage reached export standard at the Gamtoos river site and the Citrus Foundation Block (CFB), where juice percentage was better. As the oldest trees are only 3 years old, we expect this issue to improve as the trees mature. Other characteristics likely to influence production positively include, the Florida Early maturing, seedlessness (including those in close proximity to pollinators), easier peeling than its parent Nova, as well as a more visible darker orange colour showing itself earlier than the Clementine. Good production and colour break, again before Clementine and Nova, has shown itself in the 2022 season, however, the juice percentage remains a concern at time of writing, which will be closely monitored in evaluation. At this stage, it appears that although colour breaks earlier than Clementine and Nova, internally, the juice percentage only reached exportable percentage at the same time as Clementine.

Clemensoon: Clemensoon continues to look promising at the sites that bore fruit in 2021 and at time of writing, production sizes and internals were looking good for the 2022 season. A WhatsApp group established for interested parties produced good results, with a number of orders received. Ultra-early timing saw ripening occur at the same time as Satsuma,



which will help spread the Clementine and Nova supply peak. In the Gamtoos River area, timing was three weeks earlier than Oronules and four weeks earlier than other competing varieties.

Tanorlate: The promising signs of last year were, unfortunately, reversed this year. Initially, crop set and production looked good but blemish and disappointing internals in 2021, as well as large fruit at the younger sites, remain a concern. The last three seasons have achieved a brix of 14-15 with good acid, making it consistently later than Nadorcott. However, at all sites, both in the Western and Eastern Cape, brix reached only 11.7-12, with acceptable acid of 0.9. The ratio was fair. At time of writing, crops looked good again, however, as the variety remains a concern, growers are being cautioned from continuing to plant, until/if juvenility stabilises and fruit quality and size show the same high quality seen in the oldest trials. The oldest trial site trees where fruit is smoother and falls in a more acceptable size.

New Releases

Additional varieties, finally through quarantine, have been added to the three promising varieties reported on last year.



These have been planted in trial sites and budwood is being multiplied at the CFB. These are:

Florida 914: As reported on last year, this variety is in evaluation in the Nelspruit and Malelane areas. The sweeter and safer hybrid of Star Ruby, which has been awaited for some time, has garnered sufficient interest, with a higher approval rating from tasting focus groups in Florida. It is currently being multiplied for budwood. Launch dates will be announced later in 2022.

KAS Early Valencia, (TS Early): Due to the apparent mix-up of plant material in clean-up, this was probably the biggest disappointment of the year and a serious setback for the 10-year forecast, delaying release by one to two years. Recipient trial sites of the incorrect material had to be cut back too. This variety has high potential, as the Early Valencia, KAS Early, and stands to be a good alternative to Turkey, being three weeks earlier. The improved internals, and internal and external colour, provide Valencia growers with more options in the early Valencia window.

RBC-01: This high potential mid-season mandarin, a low seed mutation of Clemcott, is heavy bearing with easy peeling and outstanding internals. While RBC-01 is now in trial sites, there are only a few fruit in sites around the country and so fruit quality, seed and timing will be assessed from next season. Budwood is being multiplied.

Florida 900 Mandarin: The Florida 900 is an outstanding coloured, well-sized and oblate shaped fruit, the earliest of

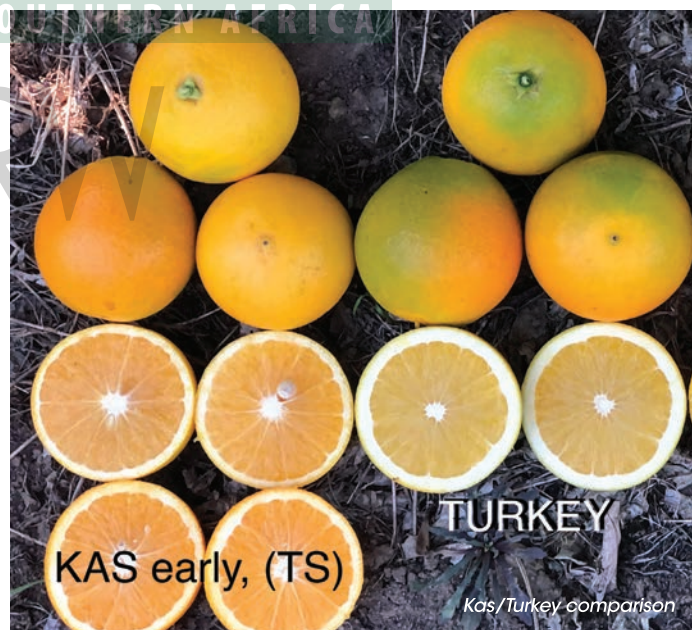
all mandarins observed in trial sites in 2021. It is seen to be breaking colour with early Clementines in early 2022 already, and is estimated to be similar to Oronules. At 13, internals were very good for a 2-year old tree in pot, and the colour stands out against other early mandarins. UF900, a Fairchild X Robinson with self-incompatible parent fruit, should be seedless if planted in isolation, like Nova and Clementine. This will need to be evaluated further for confirmation. The variety has been elevated to potential status, from experimental status.

Valencia (Beli Valencia, Ngonini early Delta, Ratho and Malinda): These are all showing promise in the earlier part of the seedless Valencia season. The trees are established in Valencia trial sites in Mpumalanga and Limpopo, and the cultivars will come into bearing in 2022 except, unfortunately, KAS Early, as explained earlier. All are planted with Valencia comparison control trees in the same site.

- KAS Early Valencia, (TS early Valencia) is in clean up again.
- Ngonini early Delta is three weeks earlier than Delta.



Florida 900

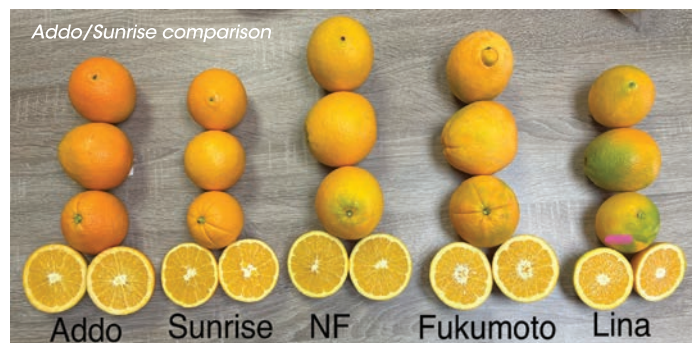


- Ratho Early SL is in week 26, and smooth with dark rind, good size.
- Beli SL before Midnight, smooth rind, good size.
- Malinda, LS-SL late Valencia season, with smooth skin.
- **NEW: Wonder why, Midnight** is high producing in hot areas. In STG clean-up.
- **NEW: Signing, Moriah Early** daughter trees have been planted in a trial site to evaluate probable value before clean-up.



Early Navels

- **Addo and Sunrise Early Navels** are starting to show earlier colour than mainstream early navels, Lina, Fukumoto and Newhall and are both colouring evenly compared to Lina and Newhall. The early navel market remains tough as the only farmers planting them are avoiding frost. Marketing navels before week 17 remains challenging due to Egyptian fruit still being in the market.
- **DeWet Navel:** This navel showed outstanding production two years in a row at a trial site in the Eastern Cape Midlands. Quality and firmness were also better than other trial sites, with virtually zero waste and sanitation problems, leading to the best pack out per hectare of all the navel varieties trialled. With uniform size, peaking on 64, this Navel is an excellent mid- to late variety for cold navel areas, and is the navel to plant or to replace a mid-season navel.



- **Florida Mandorance (Orange x Mandarin):** Navel-like, with better colour, internals and production. Released from PEQ and going into trial sites. Mandorance was bred as a navel-like variety for improved flavour and colour over Navel orange.

Administration

A new technical manager has been appointed. Tevan Lehman joins the CGACC team and holds a BSc in Geology and Botany, and Botany (Hons) from NMU, as well as a MSc in Plant Ecology from Stellenbosch University. Tevan will be involved in the business development side and, after training, will spend his time in the field around the country.

The CGACC financial administrator took over the final operations from the CGA head office, completing the financial handover. In June 2022, the CGACC moved to new offices in Gqeberha (Port Elizabeth), together with the RBX team.

The CGACC's offshore business continues and its agents are commercialising some of the CGACC's cultivars in Spain. Business is being limited to the northern hemisphere growers so that fruit production will be counter seasonal. This will increase sales of CGACC cultivars, while at the same time, protecting the cultivars in northern and southern hemisphere countries.



CITRUS ACADEMY

Jacomien De Klerk,
General Manager



Citrus Academy Board of Directors

Representation	Name	Date of Appointment	Date of Resignation
CGA	Phillip Dempsey (chairperson)	2012/11/20	
Donors (Citrus Industry Trust)	Dr Hildah Lefophane (vice-chairperson)	2021/11/04	
CGA	Marius Bester	2017/03/09	
CGA	Bennet Malungane	2018/03/22	
CGA	Frikkie Olivier	2020/09/08	
Donors (Citrus Industry Trust)	Hlami Ngwenya	2020/11/12	2021/11/04
Service providers	Vacant		
Additional seat	Vacant		

The company secretary, Robert Miller and the chairperson of the CGA Finance and Risk Review Committee (FRRC), Rajen Govender, attend board meetings *ex officio*, while the Chief Executive Officer of the CGA, Justin Chadwick, is invited to attend board meetings as an observer.

The following board meetings were held during the year under review:

Date	Meeting	Apologies
2021/11/30	Board Meeting	None
2022/03/10	Board Meeting	Frikkie Olivier

The fourteenth annual general meeting of the Citrus Academy was held at the Beach Hotel, Summerstrand, Gqeberha (Port Elizabeth) on Monday, the 6th of September 2021.

Financial Results

The service fee from the CGA increased significantly in the year under review. This increase in funding allowed the Citrus Academy to undertake more development projects, such as the development of an audio-visual series for citrus packhouses, and advanced learning modules for citrus

production practices. Earnings for short courses and e-learning programmes were an additional income source for funding development projects.

During the 2021/22 financial year the Citrus Academy reported a surplus of R14 748, compared to the 2020/21 surplus of R125 713.

Citrus Academy Bursary Fund

Citrus Academy Bursary Fund allocations are separated into three categories, namely Postgraduate Bursary Support, Undergraduate Bursary Support, and BEE Bursary Support. The BEE Bursary Support section of the Bursary Fund supports black-owned citrus enterprises to build their internal capacity and empower self-management.

The Bursary Fund supports between 60 and 70 students every year and has done so for the past ten years. The average value of bursaries has, however, increased significantly over that time, from just under R24 000 in 2012 to just over R43 000 in 2021. This is mostly due to the rising cost of post-school education and a greater emphasis on supporting postgraduate students. The increase in the average value means that the total amount paid out as bursaries has also increased significantly, to over R2,4 million in the 2021 academic year, compared to R1,4 million in 2012.

The results of the Bursary Fund remain impressive, with all students progressing as expected with their studies in the 2021 academic year. Retention of graduates is also satisfactory, with 70% of graduates now employed in the fruit industry, academia and government departments or agencies, with more than half of those employed in the citrus industry. We constantly strive to meet the demands of the industry for graduates.

Support for emergent grower enterprises through the BEE Bursary Support category has remained steady over this period. In the 2022 academic year, sixteen students are being supported in this category to the value of R575 000, compared to nineteen to the value of R605 850 in the 2021 academic year.

The Citrus Industry Trust and the AgriSETA are still the major sources of bursary funding. During the last few years we have, however, seen a pleasing increase in the support we receive from companies within the industry. We appreciate their continued support.

Citrus Academy Bursary Fund Experiential Learning Programmes

The Citrus Academy creates opportunities for Bursary Fund students to gain exposure and experience while they are studying, and after they have graduated. Vacation work is arranged for all B-degree and diploma students, at workplaces where they can gain experience relevant to their field of study. The internship and graduate placement programmes assist Bursary Fund students to find placements at citrus enterprises where they can gain work experience. Through the industry exposure programme, current and former students are assisted to attend conferences, symposia and other events that are relevant to their field of study.

These programmes showed signs of recovery in the 2021 academic year after coming to a standstill in 2020 under COVID-19 restrictions. Four students completed internships, one student benefitted from a graduate placement, and five students were funded through the Industry Exposure Programme.

Career Fairs

The Citrus Academy takes part in regular Career Fairs at various institutions around South Africa. The aim is to create awareness about the citrus industry, and to encourage young learners to study agriculture. During the year under review, we participated in a number of events, both virtual and in person. This included the UKZN Virtual Employer Exhibition, AgriCAREERConnect, and the Career Summit 2022, hosted by DALRRD and the AgriSETA at agricultural colleges around the country.

Pick Me!

The Pick me! platform on the Citrus Academy website has proved a powerful tool to put work seekers in touch with potential employers. Work seekers are able to register their details on the platform, and recruiters can view the available candidates. A bulletin with the details of available candidates by province is also circulated to employers every second week.

Citrus Short Courses

The Citrus Academy has developed three short courses which are presented on a regional basis in citrus-growing regions. The short courses deal with citrus production, citrus packing, and the citrus export supply chain.

The year under review saw a slow recovery in face-to-face short courses, after the COVID-19 pandemic saw more learners completing these programmes through e-learning. In total, ninety-five learners attended short courses during this year.



E-Learning Programmes

In the year under review, more than three hundred learners enrolled for programmes through the Citrus Academy e-learning platform. It is pleasing to see that the investment in e-learning programme development is paying off for the industry.

The Citrus Academy constantly works on expanding their offering on tailor-made programmes on e-learning. In this year, work on development of advanced modules on citrus production management continued, while the certification programme for monitoring and inspection for phytosanitary markets was updated in line with the changes in the FMS issued by the CRI.

Learning Media – Audio-Visual Media

The Citrus Academy develops audio-visual learning modules on various aspects of citrus production. All Citrus Academy audio-visual material is available on USB, and can also be

found on the Citrus Academy YouTube channel. Audio-visual modules are also available for download from the Citrus Resource Warehouse members section.

In the year under review, a series on Citrus Packhouses was developed, consisting of nine modules covering the value chain from the pack house intake process to the harbour. The series on citrus harvesting was also updated.

Citrus Resource Warehouse (CRW)

The Citrus Academy moderates and maintains an industry information-sharing platform where documents can be found that deal with all aspects of citrus production, including research reports, extension briefs, legislation and regulations, annual reports of CGA group companies, and many more. All documents are in searchable PDF format, which means that a variety of sources linked to keywords can be searched easily.

In the year under review, the toolkits and resources for the Citrus Production Best Practice Handbook were made available through the CRW.

Economic Transformation of Black Citrus Growers Programme

In 2020, the CGA implemented the Economic Transformation of Black Citrus Growers Programme, aimed at providing support for enterprise development to black citrus growers. The programme is being implemented from April 2020 to March 2023.

The Citrus Academy is responsible for the implementation of the skills development programme, funded by the AgriSETA to the value of just under R13 million over the three-year programme period. The Citrus Academy identified six implementation sites, namely Sunday's River Valley, Patensie, Fort Beaufort, Nkwalini, Thohoyandou, and Brits. Skills programmes on citrus business administration, citrus production practices, and citrus packing are being rolled out at all of these sites, in addition to plant production and citrus business management learnerships.



CGA GROWER DEVELOPMENT COMPANY (CGA-GDC)

Lukhanyo Nkombisa,
General Manager



The establishment of proper institutional structures, such as the citrus study groups, are crucial for providing citrus growers a platform to share ideas related to production, marketing, research and other strategic issues like research priorities. The citrus study groups and information days resumed in quarter two and three of the 2021/22 financial year when COVID-19 restrictions started to ease up, with quarter one having been used for planning of the citrus study groups' activities. All the citrus study groups and information days were held in line with COVID-19 protocols to ensure the safety of all attendees.

Study Group Meetings

During the year under review, a total of 23 citrus study groups were held in all citrus-growing regions. These meetings played a major role in communicating production, technical and marketing information to the developing citrus growers. The citrus study groups were also used as a platform to communicate the CGA-GDC Enterprise Development Fund and Economic Transformation of Black Citrus Growers programme criteria and application procedures to the growers. During these study groups, growers had the opportunity to meet and share their successes and challenges.

Information Days

The aim of information days is to encourage emerging growers, extension officers and other related stakeholders in the citrus industry to come together and share citrus production and marketing information. These annual events are usually held per province and draw in large audiences. The provinces that are currently hosting information days on

an annual basis are the Eastern Cape, Limpopo, KZN and North West. The aim is to roll information days out to the other citrus-growing provinces in future. The four information days were held during the third quarter of the year under review.

New Entrant Farm Support

Farmers who are new to citrus farming are assisted by extension and business officers to do assessments of the areas they wish to plant. These assessments are done to determine whether the areas are suitable for planting citrus cultivars, with a focus on the availability and suitability of natural resources such as water, soil types and climatic conditions. During the year under review, a total of six farms were assisted (see table below).

New Entrant Farmers

Name of Farm	Ha under Citrus	Area	Province
Allendale	40	Bushbuckridge	Limpopo
Craighead	20	Letsitele Valley	Limpopo
Gerushom Buys	12	Buysdorp	Limpopo
Kemo Farming	8	Ramatlabama	North West
Kopano	20	Marble Hall	Limpopo
Manining Holding	40	Marble Hall	Limpopo

One-on-One Farmer Support

The purpose of one-on-one interaction with farmers is to assist them in identifying their specific citrus production and marketing challenges, and to follow-up on the challenges raised during the citrus study groups, information days and other meetings.

A total of 193 visits were conducted by the CGA-GDC extension officers in the southern and northern regions, as follows:

- **Q1:** 60 visits, with a focus on extension services, updating the Farmers' Situational Analysis, information about the ETBCG programme application process, and packing preparations.
- **Q2:** 44 visits, with a focus on extension services, the ETBCG programme implementation, and data collection.
- **Q3:** 50 visits, with a focus on extension services, Enterprise Development Fund roadshows, and the ETBCG programme implementation.
- **Q4:** 39 visits, with a focus on extension services, data collection on BFAP templates, and Enterprise Development Fund roadshows.

Value Chain Participation of Black Growers

At the end of the year under review, there were a total of 124 black citrus growers, with 7 869 ha citrus under black ownership and 252 ha new orchards planted. In the 2021 season, black growers exported around 6 million cartons (15kg equivalent), with an additional 200 000 tonnes of fruit sold in the national fresh produce markets. The number of exporting black growers have grown from 50 to 78.

Top of Class Training

The CGA-GDC, along with the Fresh Produce Exporters' Forum (FPEF), hosted training workshops on the Export Value Chain in Fort Beaufort and Sundays River Valley respectively. The course, held over four days, focused on topics related to the fruit value chain. The training was hosted at Cape College in Fort Beaufort and SSE Training Centre in the Sundays River Valley, with twelve and fourteen learners attending respectively.

Enterprise Development Fund

A total of 74 enterprise development funding applications were received of which 67 farms received support.

The first disbursement of funds took place in the last quarter of 2021/22, with further disbursements carried over to the first quarter of 2022/23. The payments were made according to the approved allocation. In some cases, deviations were accepted depending on the motivation from the grower and whether it still fell in the allocated budget. By the end of the

last quarter of 2021, R12 million had been disbursed.

The approved farms were supported with irrigation infrastructure (boreholes and irrigation material), farm equipment (tractors and sprayers), fencing, orchard establishment costs, production inputs, and trees. Items that were applied for that fell outside the enterprise development criteria included IT equipment, packhouse equipment, coldrooms, farm buildings, netting, bakkies, office furniture, quad bikes and earth moving equipment.

Farm visits were conducted to: 1) verify that fertiliser and pest control chemicals would fit into existing programmes and which application methods would be used; 2) to record details of machinery and equipment that were purchased and verify storage arrangements; and 3) to establish whether trees were needed for new plantings or for filling gaps in existing orchards.

DALRRD Project (Land and Development Support)

This programme replaced the Recapitalisation and Development programme which was suspended in 2017/18.

Its intention is to develop an integrated farmer development support programme to address the recommendations made by the DPME evaluation report on CASP, Recapitalisation and Development, and other farmer support programmes. The programme is implemented through a DALRRD and CGA-GDC partnership. In the citrus industry, it is rolled out in North West, KZN and Eastern Cape. The programme is aimed at providing comprehensive interim support, ensuring farmers have sustainable enterprises once the support is withdrawn, having built the required credit profile to enable access to finance in future. The implementation in North West commenced in the 2020/21 financial year with mechanisation support, and was rolled over to 2021/22. Implementation in KZN and Eastern Cape will commence in the 2022/23 financial year.

Progress in North West included orchard establishment (13 orchards), orchard maintenance (27 ha), infrastructure development (storage shed), worker housing, and a dam.

ECONOMIC TRANSFORMATION OF BLACK CITRUS GROWERS PROJECT

Robert Miller

During the year under review, significant progress was made with the implementation of the Economic Transformation of Black Citrus Growers programme.

A number of applications were received and these went through a technical review process before it was presented to the Project Steering Committee (PSC) for consideration.

Two PSC meetings were held during the year under review - one on the 2nd of June 2021 and one on the on the 24th of January 2022. From these meetings, a further eight applications were considered for funding and these were recommended to FNB for blended funding approval. FNB carried out site visits to all the farms and conducted further due diligence checks on all applications.

Since the project inception, 18 applications have been approved for project funding. Of these, funding has been disbursed to six and the balance will be disbursed in the 2022/23 financial year.



The skills development aspect of the project has also progressed very well during the year. The programmes currently underway in the Brits, Nkwalini, Fort Beaufort, Sundays River, Weenen,

Patensie and Thohoyandou regions of South Africa, are:

- Learnerships – Plant Production NQF2; and
- Learning Programmes – Citrus Business Administration, Farm Worker Induction and Packhouse Worker Induction.

The below table indicates the status of the ETBCG project as at the 31st of March 2022:

Indicator	Total Project Target	Achieved to Date	Variance
New Permanent Jobs	329	21	(307)
New Permanent Seasonal Jobs	1 397	65	(1 319)
Short Term Jobs	7	5	(2)
Beneficiaries Trained	2 006	635	(1 371)
Beneficiaries	30	18	(12)
Hectares Planted	1 034	37	(997)

Due to the delays experienced during the first year of the project, mainly due to COVID-19, lockdowns and having to appoint a new lending partner in FNB, The Jobs Fund at National Treasury has agreed to extend the project for an additional year. The project will now run until the 31st of March 2024, instead of the 31st of March 2023. This additional year will allow the CGA to meet the project targets indicated in the table above.

The project funders are CGA, DALRRD, AgriSeta, FNB and The Jobs Fund, with the total funding for the project remaining at the original R307 million. Project reporting takes place on a quarterly basis and all matched funders receive detailed reports and updates on the project progress every three months.

CITRUS GROWERS DEVELOPMENT CHAMBER (CGDC)

To ensure that black growers are properly represented, the CGA established the Citrus Grower Development Chamber in 2011 as a committee of the CGA board. The CGDC consist of representatives elected by the technical study groups established for emergent growers in all citrus-growing regions. The CGDC focuses on identifying challenges faced by growers and finding ways to address them. The CGDC usually meets twice a year, with executive meetings being held as necessary. At the end of the year under review, the members of the CGDC were as follows:

Province	Region	Representative
Eastern Cape	Eastern Cape Midlands	Eric Nohamba
Eastern Cape	Eastern Cape Midlands	Lawrence Mgadle
Eastern Cape	Eastern Cape Midlands	Siseko Maqoma
Eastern Cape	Patensie	Khaya Brian Katoo
Eastern Cape	Sundays River Valley	Simphiwe Yawa
Western Cape	Boland	Wayne Mansfield
Limpopo	Limpopo	Ntamiseni Thompson Mankhili
Limpopo	Letsitele	Bennet Sdumo Malungane
Limpopo	Letsitele	Octavias Masalesa
Limpopo	Letsitele	Pheladi Tlomsane
Limpopo	Letsitele	Walter Tshiane Mathidi
Mpumalanga	Nelspruit	Olivia Dikeledi Selowe
Mpumalanga	Nelspruit	Hlulekile Phonela Yoce
Mpumalanga	Nelspruit	Simona Tiisang Selowe
Mpumalanga	Onderberg	Petros Eric Shiba
KwaZulu-Natal	KwaZulu-Natal	Mziwoxolo Makhanya
North West	Senwes	Louisa Maloka-Mogotsi

The CGDC executive committee is elected by the CGDC and comprises as follows:

- Mziwoxolo Makhanya (chairperson)
- Ntamiseni Mankhili (vice-chairperson)
- Eric Nohamba
- Bennet Malungane
- Lawrence Mgadle
- Lukhanyo Nkombisa (general manager, CGA-GDC, *ex officio*)
- Justin Chadwick (CEO, CGA, *ex officio*)
- Jacomien de Klerk (general manager, Citrus Academy, *ex officio*)

The Citrus Academy was contracted by CGA to act as secretariat for the CGDC.



Meetings: *The following meetings were held during the year under review:*

21 September 2021	CGDC executive committee	Virtual
7 October 2021	CGDC executive committee	Virtual
17 February 2022	CGDC executive committee	Face-to-face
18 February 2022	CGDC	Face-to-face



RBX GROUP

Rob Elfick,
Group Managing Director



River Bioscience (RB) and X Sterile Insect Technique (XSIT), wholly-owned subsidiaries companies of the CGA, have had another successful year in 2021/22, with operations continuing on the significant growth path we have paved over the last few years.

Strategic Review

The sustained growth and development of River Bioscience and the consistency of delivery by XSIT created a solid foundation from which a review and realignment of the group's strategic positioning could be undertaken. A workshop including the executive committee and the board of directors covered market developments over the years and key threats and challenges that face the citrus and other fruit export industries in South Africa. With this background and the number of potential products that RBX has on its planning horizon, both internally and in conjunction with collaborators, the strategic mandate below was agreed on to help steer the companies to deliver the maximum impact for its stakeholders.

Development, commercialisation and distribution of sustainable crop protection technology focusing on key pests via holistic and accurate programmes to support sustainability, competitiveness and market access for citrus growers and other crop industries.

The above process and subsequent detailed planning of short-, medium- and longer-term objectives under this mandate have challenged all involved to use the foundation laid by recent successes to look for the ideal structure and process in which we can secure the sustainable success of our shareholders.

Virus Products of the Future

A key part of RB's long-term future is our virus pipeline, with the CrpeNPV, a novel baculovirus, being a cornerstone product not only in South Africa, but also as our first significant export product. This virus has the potential to contribute substantially to sustainable agriculture in many key markets around the world.

The identification of this novel virus was a combination of research activities in collaboration with Rhodes University (RU), Citrus Research International (CRI), and RB. The CrpeNPV is so unique that a global PCT was filed, and subsequently regional and country-specific patent applications followed around the world, which required a significant financial investment and resource allocation. Whilst there was celebration over being granted a patent in Europe for the CrpeNPV for use as a biopesticide, this was unfortunately short-lived as the patent was challenged on various fronts by an opposition virus manufacturer.

The successful defence of our patent in the EU again bore testament to the world-class scientists at RU, CRI and RB. The team was able to substantiate their initial filings and countered all arguments put forward by the challenging party. The result was that all challenges were dismissed with the patent standing as granted. This is a major victory for all collaborators involved and reinforced our commitment to sound science driving our innovation pipeline.

Products to Support IPM

The official launch of SAGA™ during the year under review is another building block in the foundation of sustainable and

environmentally-friendly integrated pest management (IPM) systems. It is the only ant bait registered in South Africa to control both brown house ants and pugnacious ants in orchards.

The importance of ant control in managing honeydew-producing pests is reemphasised every year at the CRI IPM workshops. CRI research led to the commercialisation of SAGA™, a novel ant control product that assists growers in managing ant infestations in the orchard canopy and thereby assist with controlling honeydew-producing pest insects. There has been significant interest in this product.



Crop Protection Evolution

Pressures from multiple fronts impacting the availability of inputs and the ability to use certain crop protection options,

indicate that crop protection strategies will continue to evolve in the immediate future. The RBX team has the pest management experience and product portfolio that can assist with the mounting challenges of balancing food safety, while at the same time needing to control phytosanitary pests to a detection level of zero.

This past season has seen a significant increase in product package offerings that give the producer the ability to use multiple levels of protection in a programme that covers the whole season and multiple pest life stages at a previously unattainable competitive price.

To gain maximum benefit from inputs used to control phytosanitary pests such as False Codling Moth (FCM), timing is critical when structuring an IPM programme and to do this effectively, growers should rely on both current and historical monitoring data. The monitoring experience gained in XSIT over the last fifteen years has been used to set up area-wide monitoring stations in areas where our products are widely used. This information, enhanced by data supplied by producers, is being shared so that everyone in an area is aware of the levels of pest activity and know when products are to be used. Based on the positive feedback, work on making this information more easily available and rolling networks out to other areas has already been initiated, to be implemented in the next season.

Managing growth and development

One of the biggest challenges of sustained growth is endeavouring to make sure that the right level of resources needed to support the company and business streams are available. This not only means that several new people have joined the team in recent times, but also sees each level of management needing to adjust to the enhanced structure. Making sure that the correct activities are managed and implemented at the optimal level is an ongoing task that is well supported by our corporate philosophy, culture and values, launched in 2020.

Although adding to the team is important, emphasis is placed on developing talent from within. This has not only seen numerous promotions within the company, but also the launch of our Management Development Programme where high-performing supervisors are identified and assisted to follow a programme aiming to equip them to progress to middle-management in the future.



An exciting development this year was the promotion of Sean Thackeray to Chief Commercial Officer. Sean's development over the years has been enabled not only by the Citrus Academy and the Centre for Biocontrol at Rhodes University, but also by working for CRI for a few years. Since joining RB in 2017, Sean has become an integral part of the executive committee at RBX and the extension of his responsibilities to include sales, marketing, communication, regulation and research will see the learnings from his MBA being put to full use.

New Era

Regrettably, Dr Craig Chambers informed us that he and his family are relocating to New Zealand. Craig was the first employee of River Bioscience and, over his 17 years of service, has not only been a critical member of the RBX team, but a



massive contributor to the industry and its future. A testimony to this is the protocols, structures and processes that Craig leaves behind, enabling the team to continue to support the industry with virus products. We thank Craig for his service and wish him and his family well in their future endeavours.

It has also been a time for change at a board level. The board chairman for the past five years, Dr Hoppie Nel, stepped down during the year, and was replaced by Jan-Louis Pretorius. Dr Nel's leadership and steady hand during some extremely challenging and turbulent years were important factors in our growth. His continued participation in the board will assist with a seamless handover. Jan-Louis is a grower from the northern region and his insight and experience will be well-supported by Dr Andre Schreuder, who has taken up the position of vice-chairman. He brings a wealth of commercial crop protection experience to the group, and has already made valuable contributions to the strategic planning process.

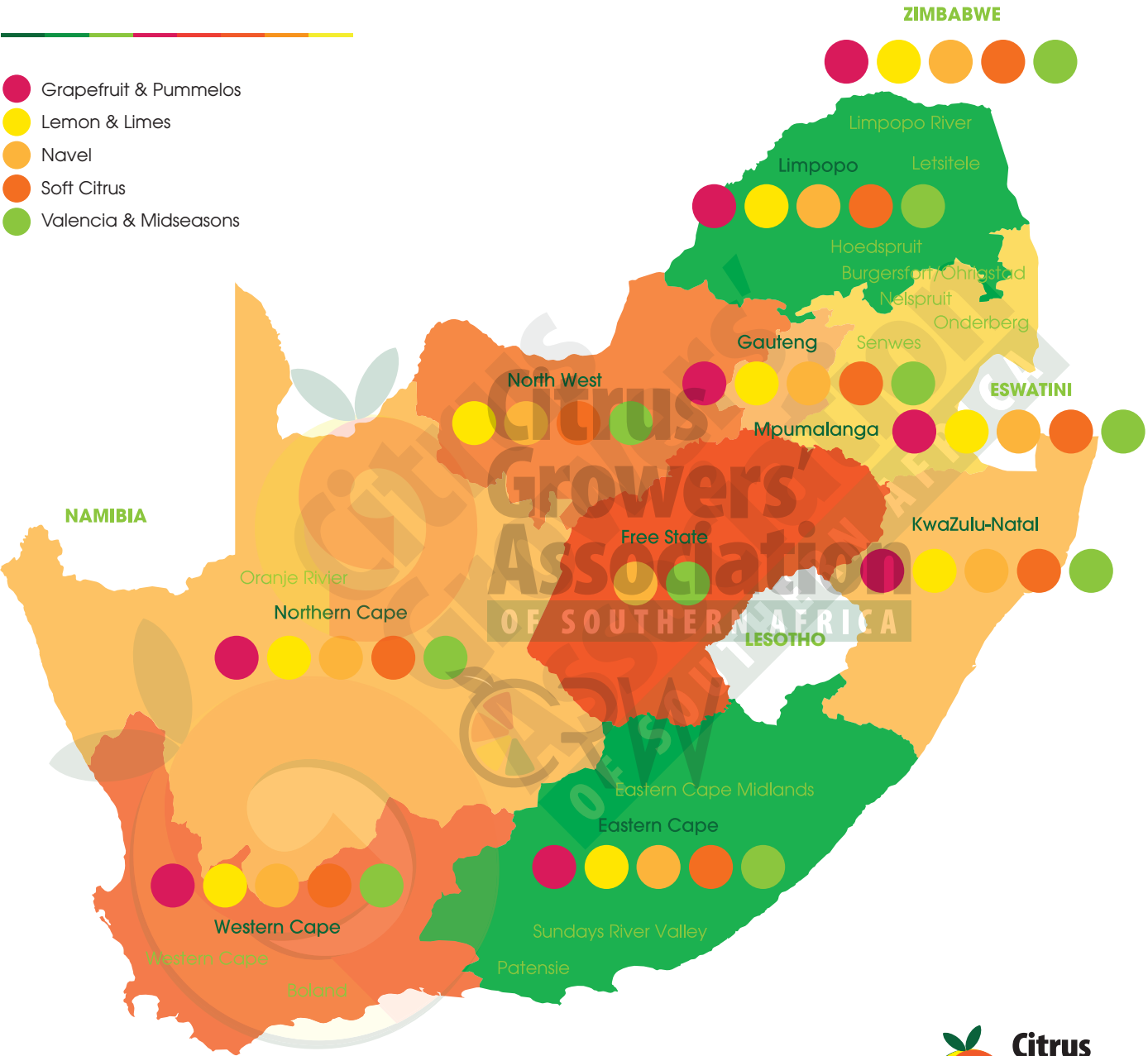
Other changes to the board during this year saw Dave Gerber retire, not only from our board but from farming as well. We wish him well with his new conservation efforts in the Drakensberg. Piet Smit, a grower from the Western Cape, also retired from the board during this year. Piet had been one of the longest-serving board members, having been on the XSIT board since it was formed. We thank Piet for his many years of dedicated service. Marius Jurgens, an organic grower from the Sundays River Valley joined the board.

The next chapter in the growth and development journey of the RBX Group is an exciting one and we remain poised and committed to serve the interests of the citrus industry and our shareholders.

The RBX board of directors wishes to express its sincere appreciation to Rob Elfick for his exemplary leadership in guiding the group to new heights during the reporting period.

CITRUS PRODUCING REGIONS

- Grapefruit & Pummelos
- Lemon & Limes
- Navel
- Soft Citrus
- Valencia & Midseasons



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ABRIDGED FINANCIAL STATEMENTS

	Actual 2020/21	Budget 2021/22	Actual 2021/22	Budget 2022/23
Income	111 429 059	234 440 000	261 077 076	256 528 000
RSA Levy	108 102 782	229 600 000	254 770 473	250 572 000
Eswatini / Zimbabwe Levy	1 862 389	3 900 000	4 345 242	5 016 000
Property Income	240 520	-	242 273	-
Interest	746 551	600 000	1 202 436	600 000
Dividends Received - River Bioscience / XSIT	334 208	340 000	351 000	340 000
Other Income	142 609	-	165 652	-
Expenditure	99 672 749	225 278 403	225 422 750	279 505 158
Staff Costs	7 586 985	5 076 500	5 748 548	5 335 000
Travel & Accommodation	107 922	210 000	409 134	210 000
Office - Rent & Equipment	231 115	180 000	196 775	180 000
Office Expenses	576 864	560 000	612 522	560 000
Board Expenses	360 316	1 014 500	659 238	718 000
Services (Accounting, Legal & Insurance)	533 742	680 000	705 440	680 000
Subscriptions	780 093	786 970	777 259	740 750
Communication	810 057	1 050 000	818 048	1 050 000
Market Access	2 655 882	5 130 000	3 854 103	7 989 000
Market Access - CBS	3 088 161	7 780 000	3 405 540	7 780 000
Fruit South Africa	1 104 862	593 600	1 092 524	666 969
Research Programmes - Citrus Research International	55 218 527	150 120 083	150 120 083	152 748 689
Research: CRT Bond	500 000	3 400 000	3 400 000	3 400 000
Transformation - CGA incl. ETBCG Programme	4 756 583	2 725 000	2 542 956	2 725 000
Transformation - CGA Grower Development Company	11 396 563	33 500 000	33 500 000	43 000 000
Transformation - Citrus Academy	5 104 960	8 000 000	8 000 000	8 600 000
Depreciation	91 034	120 000	79 667	120 000
Information	486 366	1 183 000	808 305	2 183 000
Provision for doubtful debts	358 940	-	5 026 296	-
Leave Pay Provision	102 746	-	(16 044)	-
Impairment of Loan - CGA Cultivar Company (Pty) Ltd	1 600 000	-	1 600 000	-
Infrastructure & Logistics	2 254 867	2 800 000	2 038 298	40 450 000
Market Development	(33 836)	318 750	44 058	318 750
General		50 000		50 000
NET SURPLUS / (LOSS) FOR YEAR	11 756 310	9 161 597	35 654 326	(22 977 158)



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