

The past year has seen a shift in our activities, as we move from a start-up cultivar Company establishing itself in the industry to one that is now preparing to manage the release, evaluation and commercialisation of cultivars that have come through the CIS ‘Clean-up’ pipeline.

Identification of cultivar requirements and opportunities however, remains a key focus. Budwood Sales over the last 5 years in the recently published CGA’s “Key Statistics” Booklet makes interesting reading.

Accumulative Bud Sales over last 5 years, 2009-2013 (descending order)			
	Bud Sales	Est. Ha's	Est. tree/Ha's
Mandarins	3 919 141	5 885	666
Navels	3 324 687	5 990	555
Lemons & limes	3 106 229	5 597	555
Valencia's	3 055 662	5 506	555
Grapefruit & Pommelo's	891 520	1 606	555
Satsuma	518 017	778	666
Clementine	402 976	605	666

The process of identifying requirements of the market and the opportunities they present to farmers is constantly changing. In the last 5 years, Mandarins and Navels have taken first and second place from Grape fruit and Valencia's in the 5 years before. (See table below). From a low base, Mandarins have been on a steep upward curve in the last 2 years; this has largely been driven by the availability of new Cultivars in place of the Late Mandarins that were not available to all growers.

Surprisingly Navels in second place have remained steady over the 5 years, despite all the negative talk of Oranges becoming a commodity fruit. This steady demand has probably been sustained by the strong market demand for Late Navels in recent years, as well as being the only option on offer for growers who had little access to Mandarins. We have several Late Navel and Mandarins that are soon to be released.

Valencia's in third place might have maintained its high placing had there been more promising new varieties. This remains one of our focus areas, including disease tolerant varieties.

Lemons in 4th place, although not having any new options, has maintained a high sale rate and Eureka Lemon an Open Variety, at 508 460 buds last year, remains the single largest supplied cultivar in the industry by about 50% clear of the next cultivar in 2nd place. Potential disease tolerance of CBS hybrids is another focus area. Star Ruby enjoyed this no. 1 position 6 years ago and if the market becomes oversupplied in 5 years' time the same could apply to lemons, Late Mandarins and Late Navels. 5 years being the time it takes for the buds supplied last year to come into bearing! Do not get in a comfort zone with any cultivar going forward, lateral thinking required.



Future Trends, left field thinking: With this in mind the crystal ball is probably the most polished item in our office and probably in every industry players mind as well. During this year's CGA road shows, I concluded my presentations with the question: "any answers", instead of the normal, "any questions". Inputs from growers and industry players are appreciated and key to the success of our industry, (CGACC is a CGA, grower, owned company).

Going against prevailing wisdom and norms can be risky. However, it is necessary in this industry in order to come out ahead. I was recently asked by a respected grower what was the most unpopular variety available. I asked why he wanted to know; he responded that he wanted to plant that variety to be sure that he was planting varieties nobody else was planting and less likely to be oversupplied. With that same kind of thinking we are evaluating varieties that are out of favour, as well as the current popular varieties. The long period of clean up and evaluation could mean that something that was popular at the beginning of its evaluation and development is out of fashion when ready for release 6 years later. We need to cover all bases.

It is difficult to read the markets 5 & 10 years ahead let alone one season ahead. As difficult as the grape fruit market is at present, given the changes displayed in the table above, it is possible that new cultivars or new markets might bring it back into play. The health benefits, improved flavour, sweetness and colour of new GF hybrids could help increased consumption by the younger generation and the health conscious. As a result, included with evaluation of popular new soft citrus and Late Navels, we are continuing focus on Grape Fruit, Valencia's and Lemons with new characteristics as well as potential disease tolerance.

Open Varieties and rootstocks; One of our mandates from CGA is to Act as Spokesman on Cultivars on behalf of Growers. Little promotion is carried out of open Cultivars that perform well against Protected (Royalty) Cultivars. It is interesting to note that an Open cultivar, (no royalty), such as Lane Late, came 2nd in an accumulated production trial over 10 yrs. It outperformed 8 'Royalty' varieties. These days it is unlikely that this fact would be highlighted by Cultivar Management companies, it is a competitor. It will be a focus of ours to highlight and promote Open varieties that perform well on our web site and newsletters. The same focus will be applied to root stocks that display the required improved tolerance to tougher environmental conditions and disease tolerance that can be expected going forward.

Sourcing, internationally and locally continues to be our main activity.

Locally: CGACC currently has over 60 varieties at various stages of, selection, 'Clean Up', evaluation and interim release. Varieties that have come through Clean-up still require sufficient evaluation in order to prevent costly mistakes to Nurserymen and growers who might plant a variety not proven true to type. There have been several cases of this in recent years. The first promising Cultivars for release will be displayed on our Web Site that will be completed shortly.

Internationally: CGACC has successfully negotiated agreements to evaluate the following:

- 7 new cultivars with NVDMC in Florida. NVDMC, similar to CGACC, is a Florida grower based Cultivar Management Company, The varieties they represent are from the University of Florida breeding programme at CREC Lake Alfred. The CREC



breeding Programme is a key focus due to their cultivars that are bred in a climate similar to the warmer humid climate in the northern regions of our industry. Our warmer northern regions have not had new alternatives to Cultivars that made an impact such as Star Ruby for several decades now. Our focus therefore has been to source cultivars, especially Soft Citrus that have the potential to provide new options to growers in these regions.

- We have also signed agreements with two Spanish companies for varieties that could provide earlier and mid-season Soft Citrus options.
- We continue with negotiations for new rootstock alternatives, and some of these are now through quarantine and clean up and due to go into evaluation.

Managing the processes and procedures from Quarantine to release; one of the frustrations of cultivar management is the extremely long development phase of Clean-up and evaluation after one has procured new cultivars. However, recent mishaps in releasing cultivars, not proven true to type have caused serious losses to growers and Nurseries, as mentioned. This, along with the danger of introducing diseases, sometimes not entirely eliminated in 'Clean-up' requires patience through the phases of development. This is a long term business!

