

Weekly Logistics Report 2010 – Week 25

The charts associated with this report can be found on the following link otherwise on the CGA Logistics Website:
<http://www.cga.co.za/site/awdep.asp?dealer=5438&depnum=30494>

Statistics are based on data reflected at the end of the previous week

1. Packed and Shipped Volume (15kg Eq cartons):

- 1.1. The total volume of citrus Packed and Shipped is very similar to the 2009 season where at this time 30.9m cartons have been packed and 23m shipped. The difference between Packed and Shipped has narrowed to within a reasonable level, although the difference between Packed and Shipped is still higher on GF. Refer charts 1.1 and 1.2
- 1.2. The Commodity Percentage Shipped vs. Packed is in line with 2009 at 75%. OR varieties seem to be slow moving at this time of year, where other commodities are at 80% shipped to packed, OR are at 66%. Refer chart 1.3
- 1.3. The port shipped volume is showing the same result although PE gain has subsided and DBN recovered slightly from -20% to -16% compared to 2009 YTD. Refer chart 1.4

YTD Port Export Volume Comparison 2010 vs. Previous Seasons				
Year	Cape Town	Durban	Maputo	Port Elizabeth
2009	38% up	-16% down	8% up	7% up
2008	16% up	-17% down	80% up	-8% down

2. Port Stock Dwell Time, Fruit Age and Port Total Stock Volume:

- 2.1. Apart from MPT – which stock should subside by Saturday, all the ports stock levels are in a good position at the moment. The DBN port is in the best possible position to receive the Valencia's from the northern production areas. Refer charts 2.3 – 2.10.

Notes:

1. According to the packing charts, GF production is set to decrease and reduce to week 30. The first phase of LE production has come through and the second phase should begin by week 27. The Navel varieties are fairing well and production looks set to continue to week 29/30, production from the north through Durban seems to be lower than previous years while WC & EC production seems better this year. Valencia production is slightly behind on previous years but this is still early season volume, Val's look set to commence full production from now until week 36 when production starts to decrease to week 40. SC had a very good start to the season (CLEM & SATS) which can be seen out of the WC, peak volume flows through between week 20 – 24 with early and late shoulder periods, the latter extending to week 34.
2. Logistics mail recipients may not receive a copy of 'The Desk of the CEO' which has been highlighting the **Global Citrus Conference** being held in Cape Town on the 8th and 9th July. More info can be found on the CGA website www.cga.co.za. Delegates from around the world will gather to receive presentations from various speakers – yours truly was persuaded to appear on the agenda of which the topic of Containerization and Specialized Reefer shipping modes (within the Southern African context) will be briefly discussed.
3. A point of interest – been travelling around the country side a fair bit this year, one thing that was concerning was the completion of strategic road works in time for the World Cup. A lot of the previous scepticism can be put to bed as most of the road works have now completed, those that have not completed are either set aside or continue on a smaller scale. In Limpopo the junction on the R71 and N1 (outside Polokwane) still continues which seems to be hovering at the same point seen earlier in the year. In Mpumalanga, the Nelspruit airport road works have completed with some minor aesthetics needed, the N4 Nelspruit bypass road has completed which cuts the travel time anything up to an hour off your trip (peak hour traffic). In KZN there are extensive road works still in progress on the N3 between Durban and Harrismith (various places) and N2 at Springfield Bridge which is being widened in expectation of airport traffic. Road works around the Durban city has completed although M4 north to Gateway and Umhalanga is being totally reworked. In EC, the PE airport junction is complete and works well; no other major road works can be seen around PE. An area that requires important consideration is the R335 to Addo (Sundays River); the community should create a platform to engage with DOT to reform this road – if not already in progress. In WC, CPT road works continue and looks set to remain for some time waiting for the completion of major bridges and via ducts. The general condition of roads in the WC are good (authors perception may be biased) – one wonders how come? The general condition of roads where citrus travels is considered stable, apart from R335 to Addo. This not considering minor secondary roads and farm roads leading to Packhouses.