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Weekly Logistics Report 2010 – Week 22

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:
   1.1. The data being accurate indicates that total volume of citrus production is 11% up on 2009 while the total shipped is an alarming 10% down on 2009. The GF variance between what has been packed against what has been shipped has resulted in the overall downturn of total shipped volume; where all other varieties have shown an outturn recovery post the strike. **GF shows a production decrease of 12% with a shipped value 44% down on 2009**. Refer charts 1.1 and 1.2
   1.2. The shipped vs. Packing percentage has shown recovery as was expected, however there is a significant various on the percentage of GF and LE shipped vs. Packed volume. As a comparison to show the severity of this, **GF Shipped vs. Packed in 2009 was 60% where is 2010 this is only 38%**. On LE Shipped vs. Packed in 2009 was 62% compared to 43% in 2010. Refer chart 1.3
   1.3. Once again the port shipped volume indicates that Cape Town, Port Elizabeth and Maputo ports are still on an upward trend while Durban is showing a 50% week on week lag for the last 3 – 4 weeks. **GF volume out of Durban started positively but tapered off from week 17 which is now 40% below 2009 volume YTD**. OR volume out Durban is also showing a lag but not as severe as GF while LE and SC volume out of Durban is stable against previous years volumes YTD. Refer chart 1.4

YTD Port Export Volume Comparison 2010 vs. Previous Seasons				
Year	**Cape Town**	**Durban**	**Maputo**	**Port Elizabeth**
2009	57.20% up	-29.89% down	8.2% up	14.85% up
2008	17.54% up	-26.13% down	75.65% up	-13.76% down

2. Port Stock Dwell Time, Fruit Age and Port Total Stock Volume:
   2.1. We can see that stock levels in CPT, PE and MPT are not a cause for concern at this point but concern should be directed at stock levels in the Durban port. The level of stock in Durban is reaching slightly below the capacity pressure point and this should be a point of focus to reduce stock levels over the next two weeks to allow for the Valencia run to ease through once the peak starts. Refer charts 2.3 – 2.10.

Note: Assessing the market shipping data, GF in general seems to be having a tough year as far as fruit flow is concerned and in particular to Europe and Mediterranean region. If the data is correct this is the factor why the volume flow out of Durban is so low and the reason for the high stock levels.