Compiled for the Citrus Logistics Forum (CLF)
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All data supplied by PPECB

Citrus Logistics Report 2013 – YTD Week 20

DATA REFLECTED IN THIS REPORT IS BASED ON DATA COLLECTED AS OF THE PREVIOUS WEEK

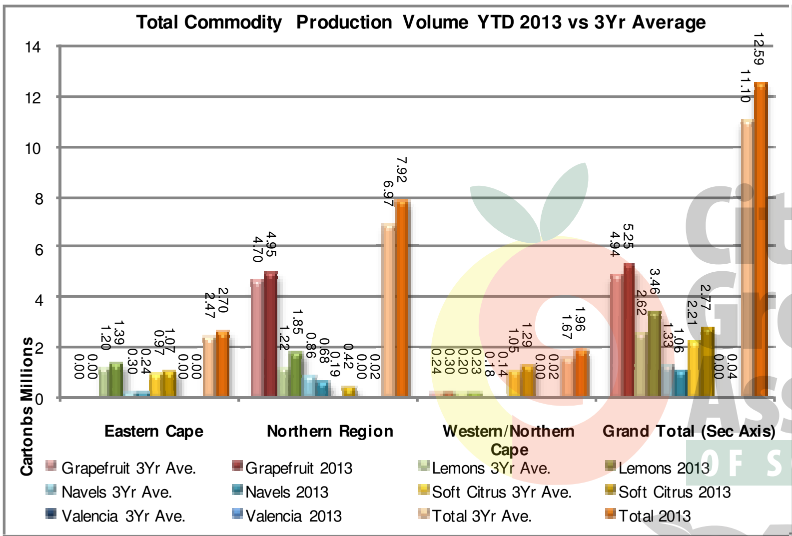
1. Regional Field Production Volume YTD vs. 3 Year Average (Cartons):

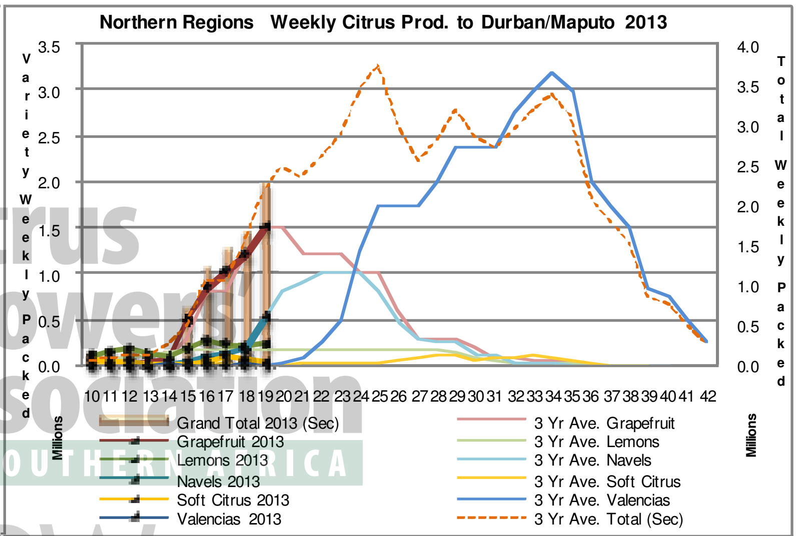
I. Supply from all the regions is still tracking on a higher projectory compared to the 3 year average. Total production appears to be up by 1.5m cartons YTD. GF, LE and SC varieties are coming out earlier than the norm.

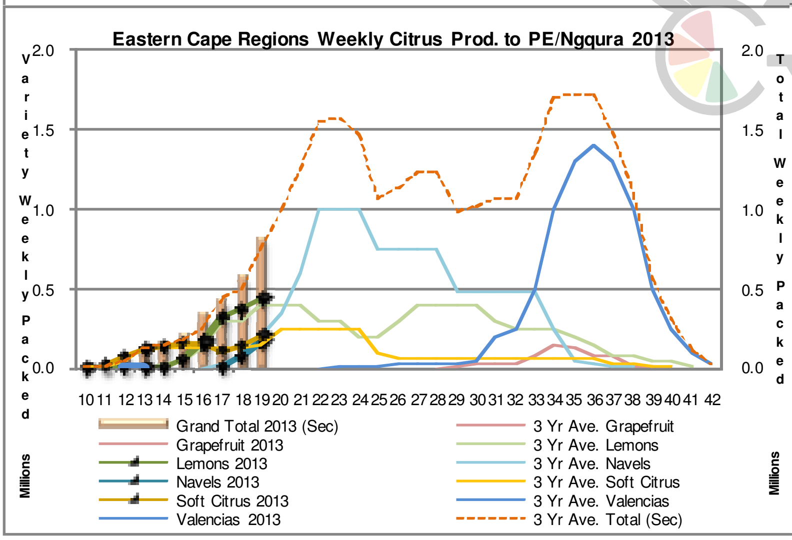
II. Northern regions to Maputo/Durban: GF volume ought to peak out this week while beginning to decline as of next week Navel production should have arrived in port this week and will peak over the next few weeks. LE production continues to track higher than the 3 year average YTD.

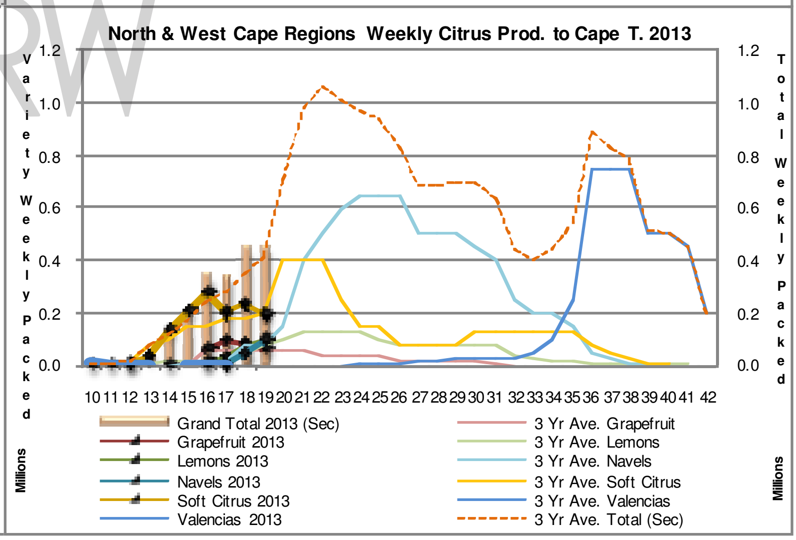
III. Eastern Cape regions to PE/Ngqura: production of the 1st LE cycle is projecting slightly higher than the 3 year average. Navel production will peak as of next week.

IV. Northern and Western Cape regions to Cape Town: SC and GF seem to be peaking out above the 3 year average. Navels will begin to peak out as of next week.









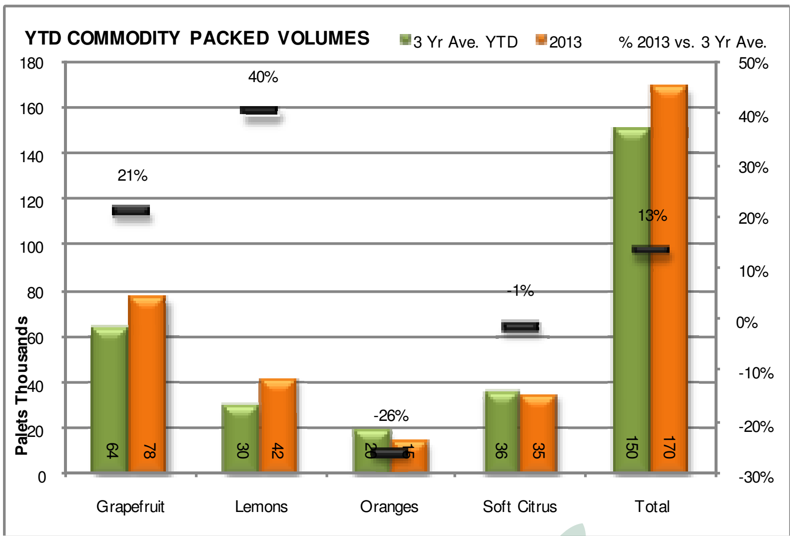
2. Total Commodity Packed and Shipped YTD vs. 3 Year Average (Pallets):

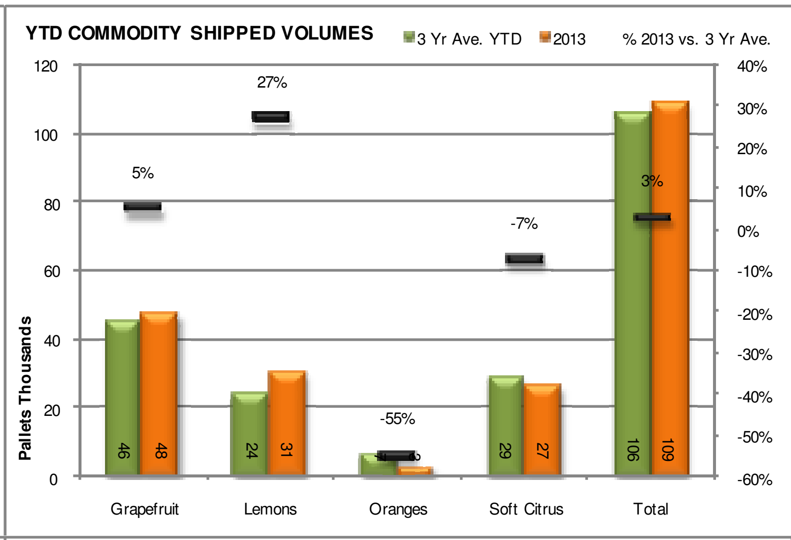
I. Production of GF up by 21%, LE up by 40%, OR down by 26% and SC on par with the 3 year average.

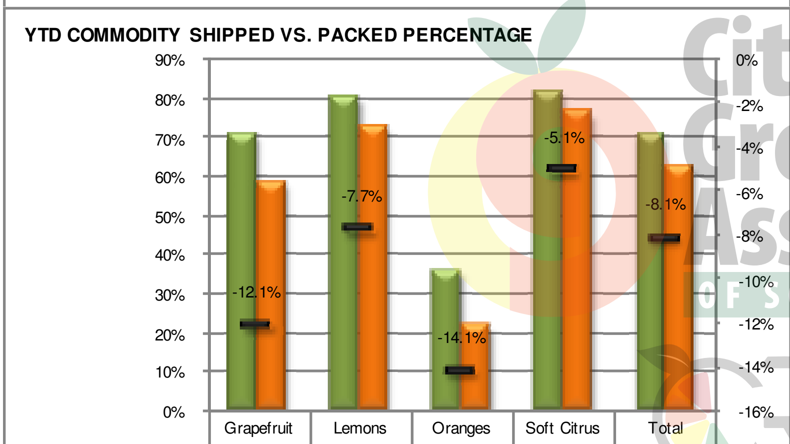
II. There lag on the shipping side has been mainly attributed to the stock build-up on GF which should fall away drastically as the 3rd vessel for Japan commenced today.

III. Specific attention for shipping space should be made on GF, LE and SC commodities in Durban. LE in the Eastern Cape and SC in the Western Cape as these commodities appear to be projecting a higher production output thus far this year.

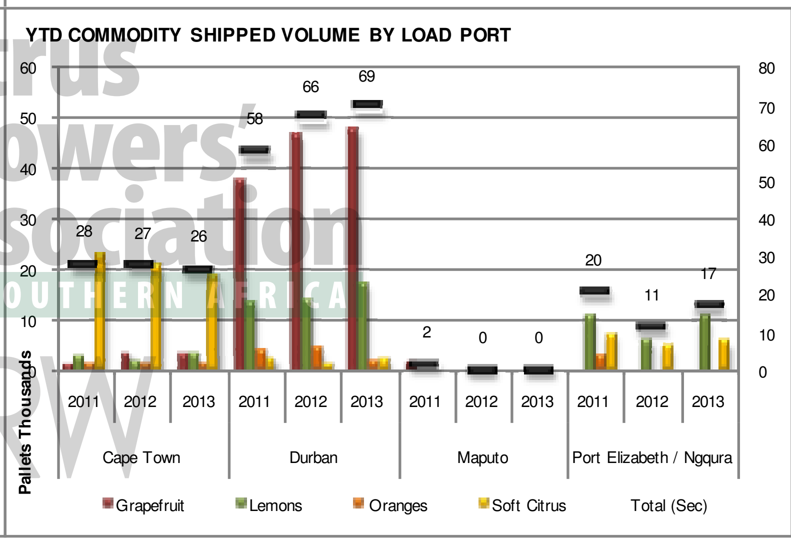
IV. Consider that Navel production from all the regions will be coming out strong as of next week over and above the shipping requirements for the early peak in production of other commodities.







	Grapefruit	Lemons	Oranges	Soft Citrus	Total
3 Yr Ave. YTD	70.88%	80.54%	36.18%	81.84%	70.93%
2013	58.79%	72.86%	22.04%	76.79%	62.81%
% 2013 vs. 3 Yr Ave.	-12.1%	-7.7%	-14.1%	-5.1%	-8.1%



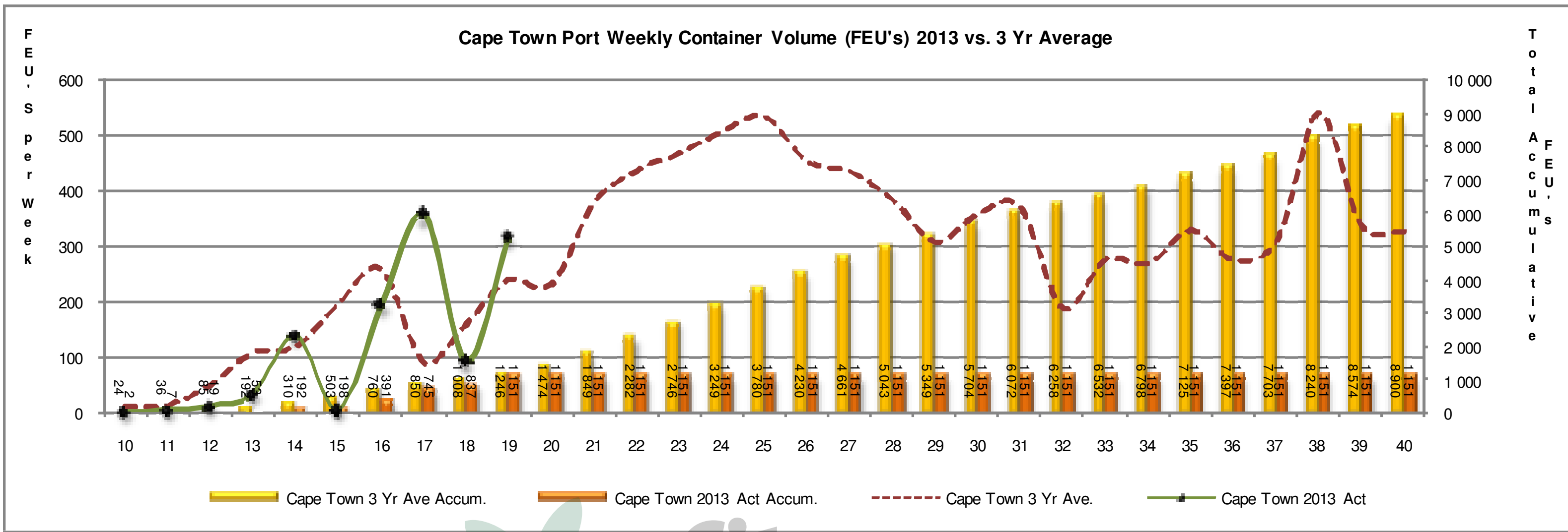
3. **Port Container Weekly Shipped Volume (Pallets):**

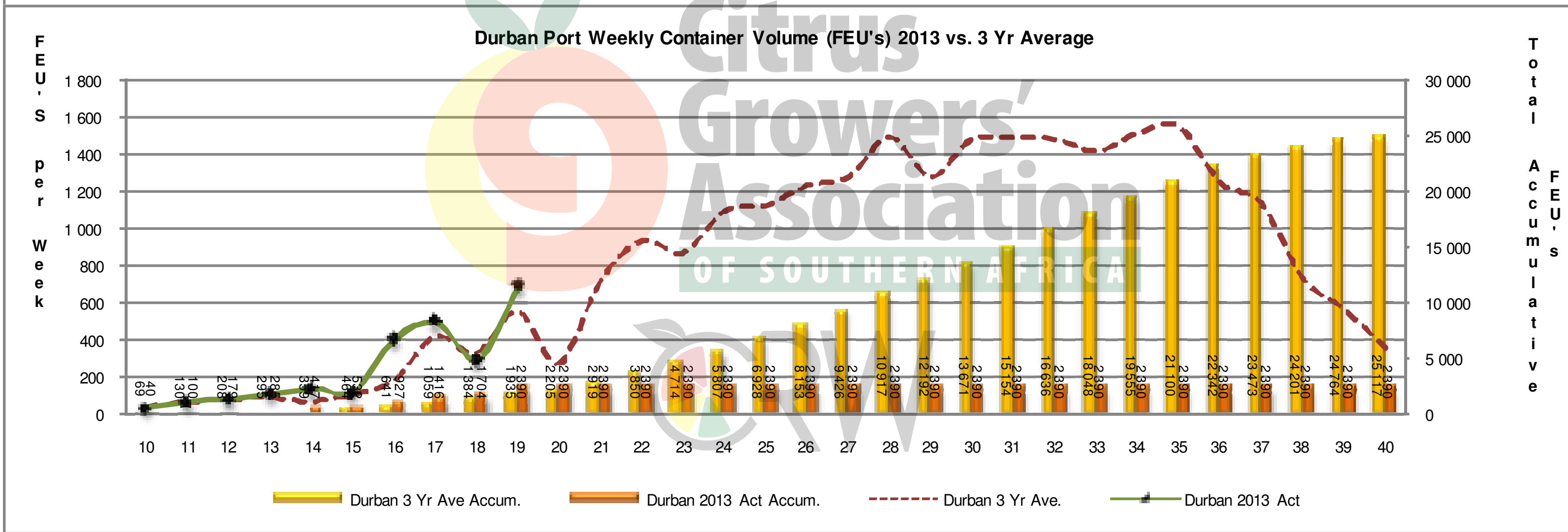
I. Container flows from the Cape Town port are slightly lagging on previous years.

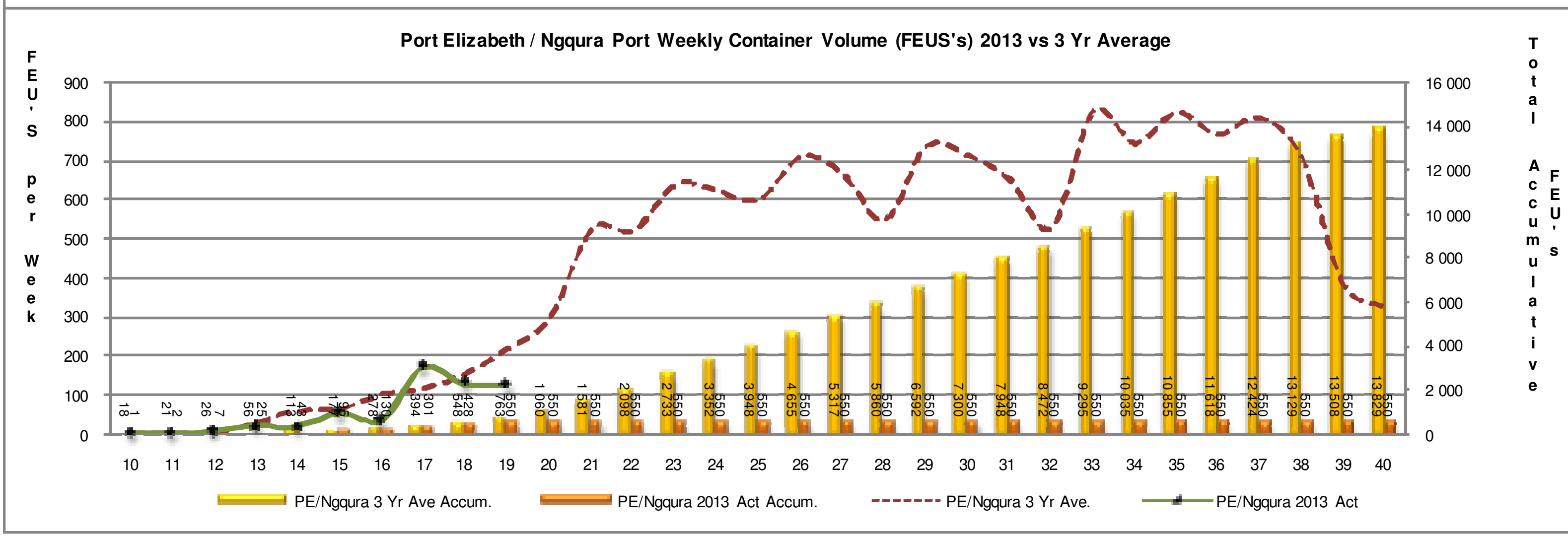
II. Although container volume from Durban is far off from the peak there is still a higher than normal flow of containers existing the port. YTD there has been 460 FEU containers that have exited the Durban port compared to the 3 year average. Most of the containers are loading on the SAECS group vessels at Pier 1 (roughly 250 FEU's pw) and the MSC EU service at Pier 2 (roughly 200 FEU's pw). Pier 2 is handling roughly 70% of all the containers in Durban thus far.

III. At this point in time the PE port is handling twice the volume of Ngqura of which most containers are loading on the MSK/SAF Mesa service followed by the SAECS group vessels into Europe/UK.

IV. At this time the SAECS group vessels are loading the majority of citrus ex all SAF ports.



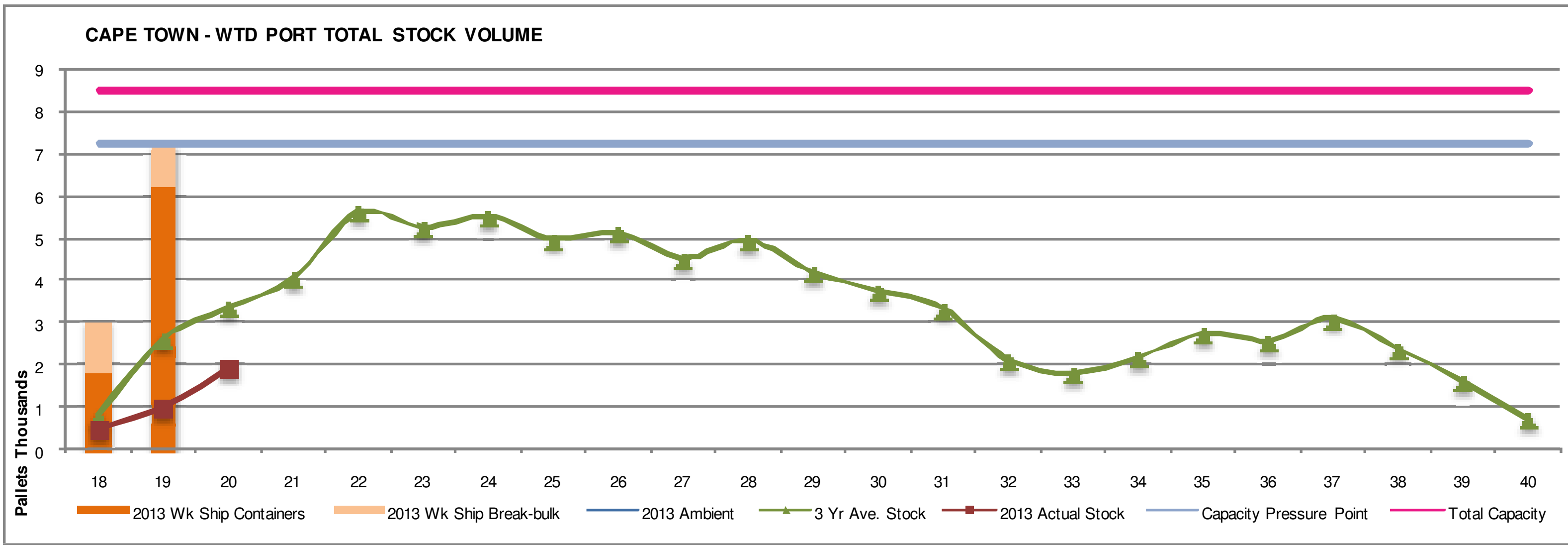


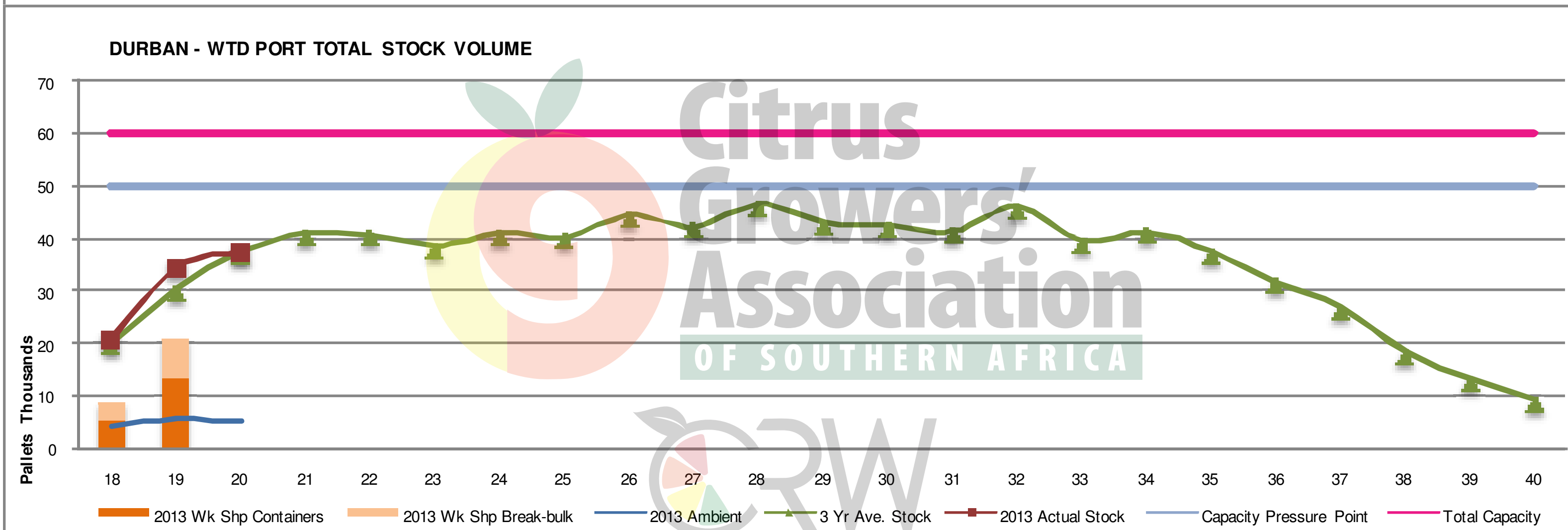


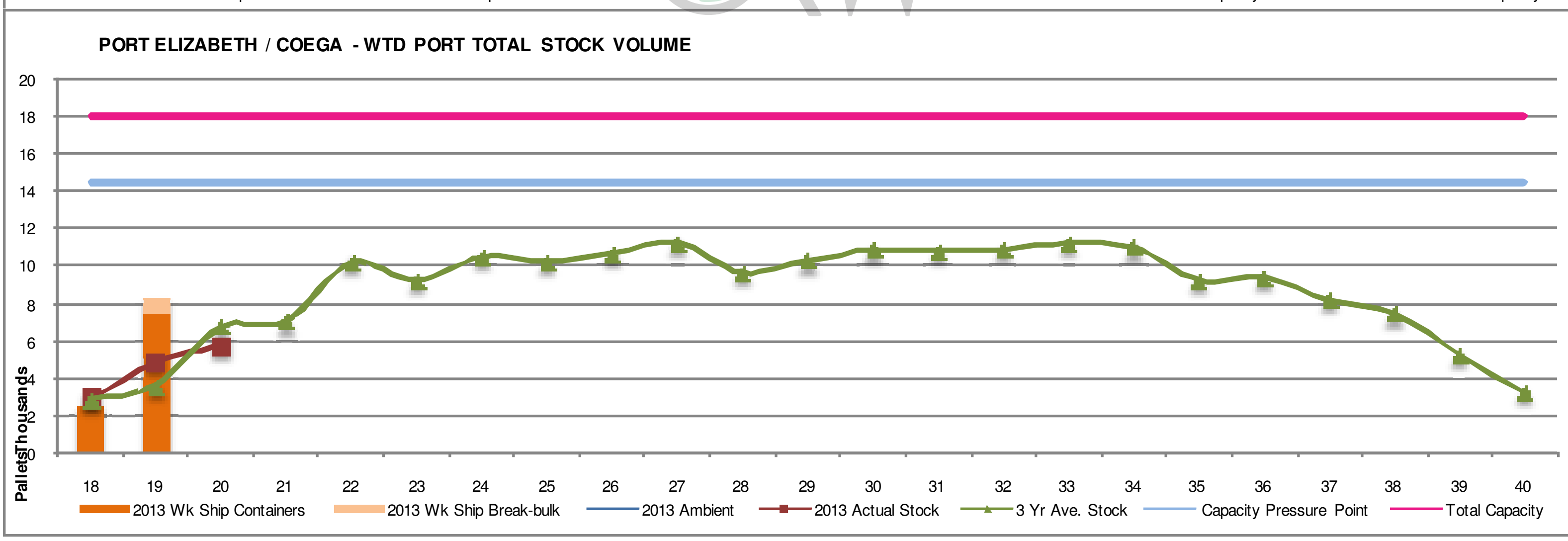
4. Port Weekly Stock Volume and Shipping Volume (Pallets):

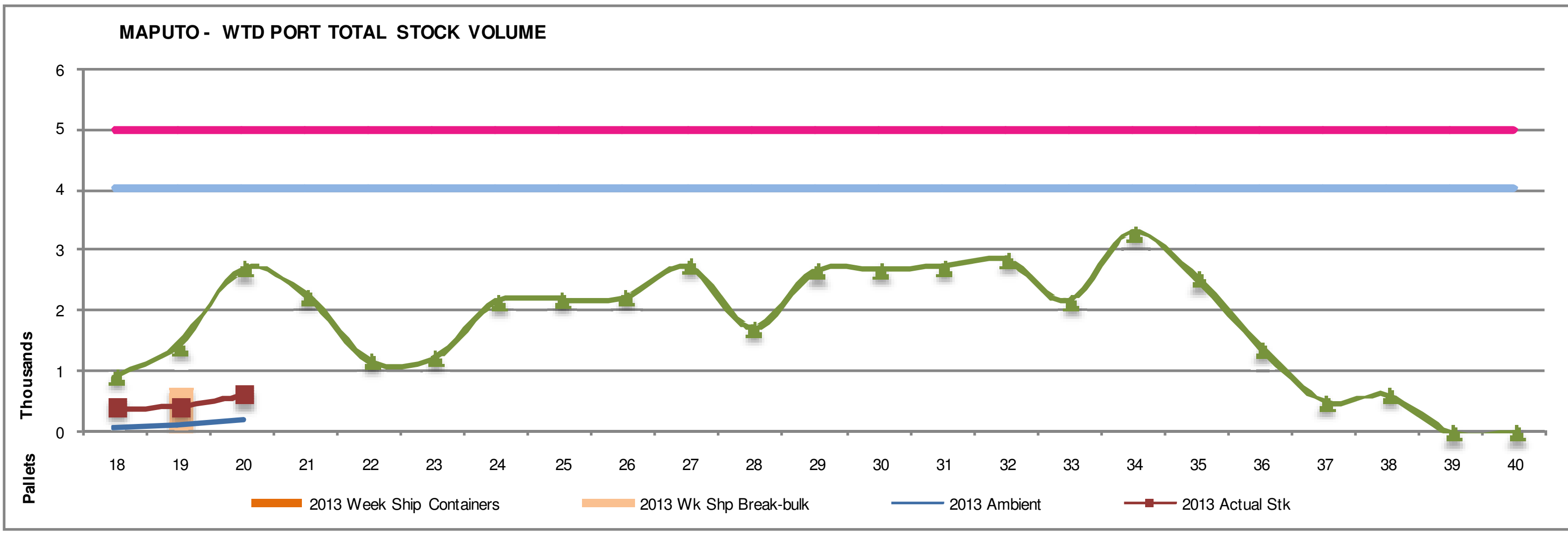
I. Stock levels in Cape Town, Port Elizabeth/Coega and Maputo are low at this time.

II. Stock levels in Durban are somewhat concerning. Some of the facilities in Durban are at 85% capacity presenting a problem for the coming weeks packing considering GF, LE and Navel types will be at peak production for the next 3 weeks. One can see from the Durban stock chart that the weekly shipping volume is grossly under the available stock levels. Presently there is close to 40,000 pallets of citrus in Durban which should be shipped out promptly to allow space for the Navel rush.








MAPUTO - WTD PORT TOTAL STOCK VOLUME
Pallets
Thousands
0
1
2
3
4
5
6
18
19
20
21
22
23
24
25
26
27
28
29
30
31
32
33
34
35
36
37
38
39
40
2013 Week Ship Containers
2013 Wk Shp Break-bulk
2013 Ambient
2013 Actual Stk