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

Citrus Logistics Report 2013 – YTD Week 23

PPECB DATA REFLECTED IN THIS REPORT IS BASED ON DATA COLLECTED TO END OF WEEK 22

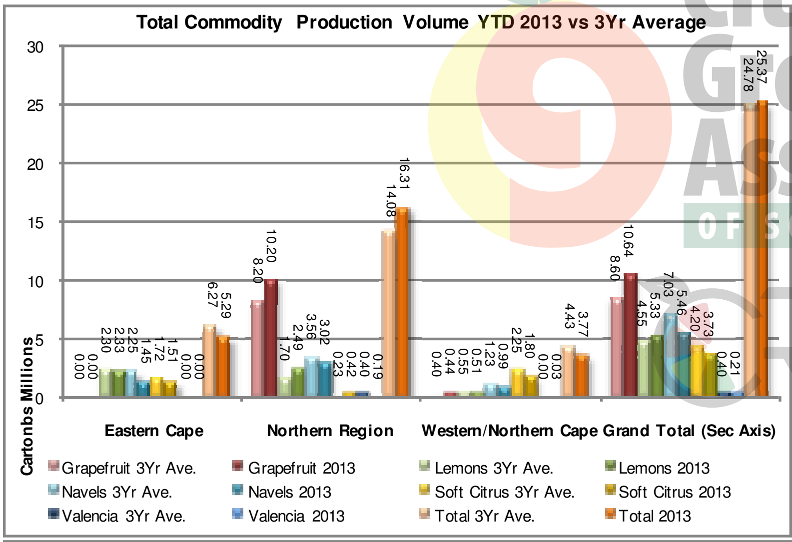
1. Regional Production Output Volume YTD vs. 3 Year Average (Cartons):

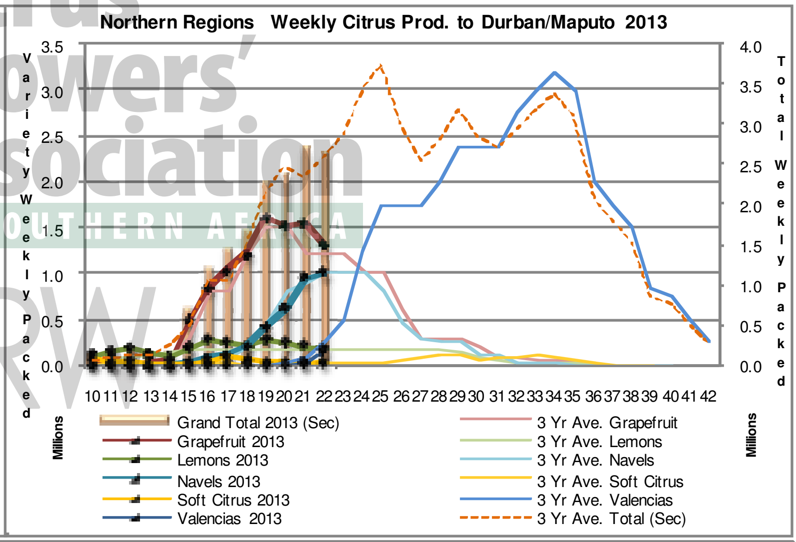
I. Overall the earlier production seen has declined as output moved between GF and LE to Navels. The over production output from SA is up 600,000 cartons YTD against the 3 year average.

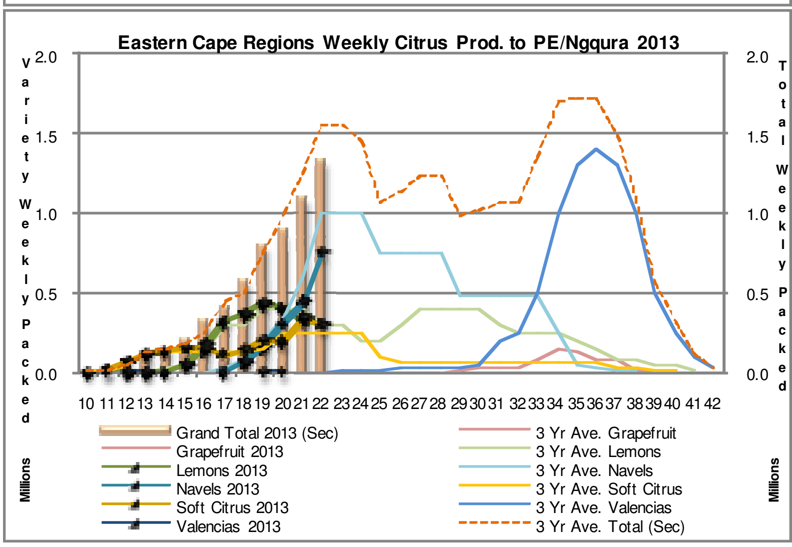
II. Northern regions to Maputo/Durban: GF production output volume has started to decline but interestingly has continued to track higher compared to the 3 year average. LE production output has declined on the earlier season's volume and is tracking normally at this time. Navel production from the north commenced slower this year but the peak production output has normalized. The Valencia production output has started somewhat slower but will start to peak from next week. The total northern regions production output indicates 2million cartons higher on GF, 800,000 higher on LE, 500,000 lower on Navels, 300,000 lower on Valencia's and the SC volume has declined down to 400,000 lower.

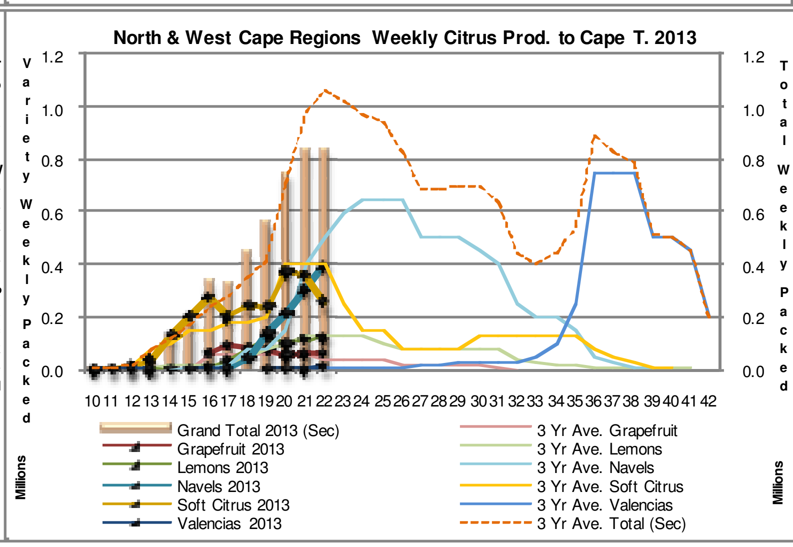
III. Eastern Cape regions to PE/Ngqura: production output of the 1st LE cycle projected higher earlier on but fell behind over the last 3 weeks. Navel production output is tracking behind the 3 year average and appears to be 800,000 cartons down. Overall the EC regions production output is 1million cartons down on the 3 year average.

IV. Northern and Western Cape regions to Cape Town: SC production output projected higher earlier on in the season but seems to have fallen off. Navel production output appears to also be tracking behind the 3 year average. Overall the production output from the NWC region appears to be down by 600,000 cartons YTD.









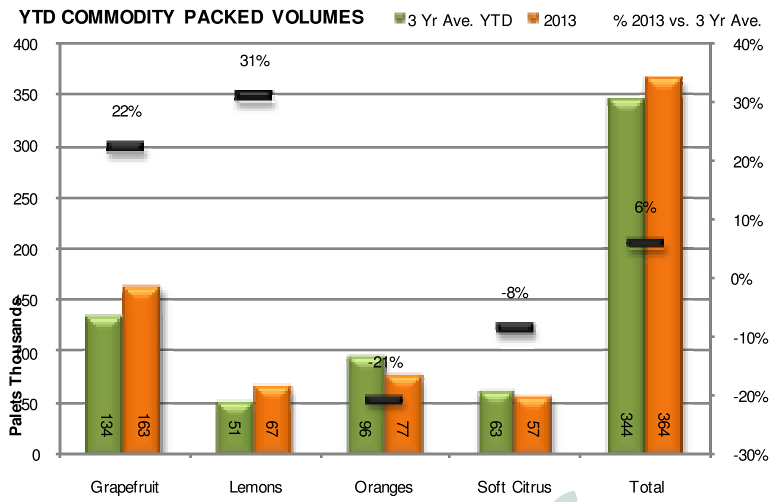
2. Total Commodity Packed and Shipped YTD vs. 3 Year Average (Pallets):

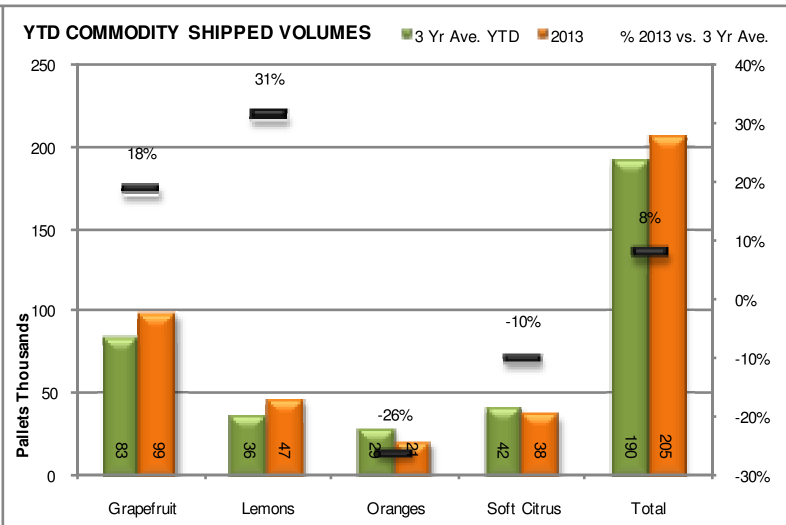
I. YTD production of GF up by 22%, LE up by 31%, OR (Navels) down by 21% and SC down by 8% against the 3 year average.

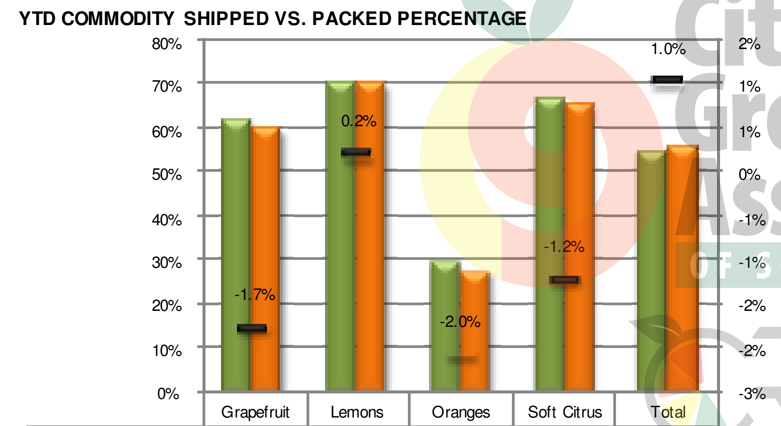
II. YTD shipping of GF up by 18%, Lemons up by 31%, OR (Navels) down by 26% and SC down by 10%.

III. The commodity Shipped vs. Packed % appears to indicate that the stock is moving through the ports sufficiently at this time.

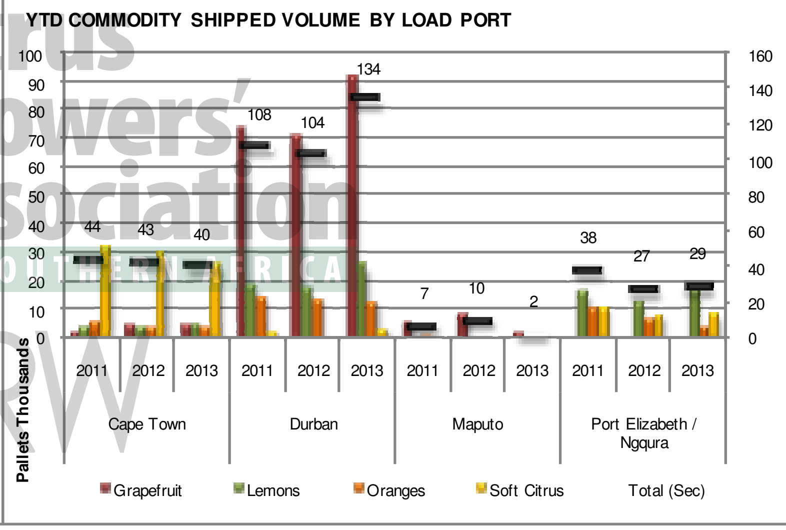
IV. It appears that the export volume through Durban is up by 30,000 pallets YTD. This is in line with the GF and LE production volume. Export volume out of Cape Town and PE in line with the lower output of Navels at this time.





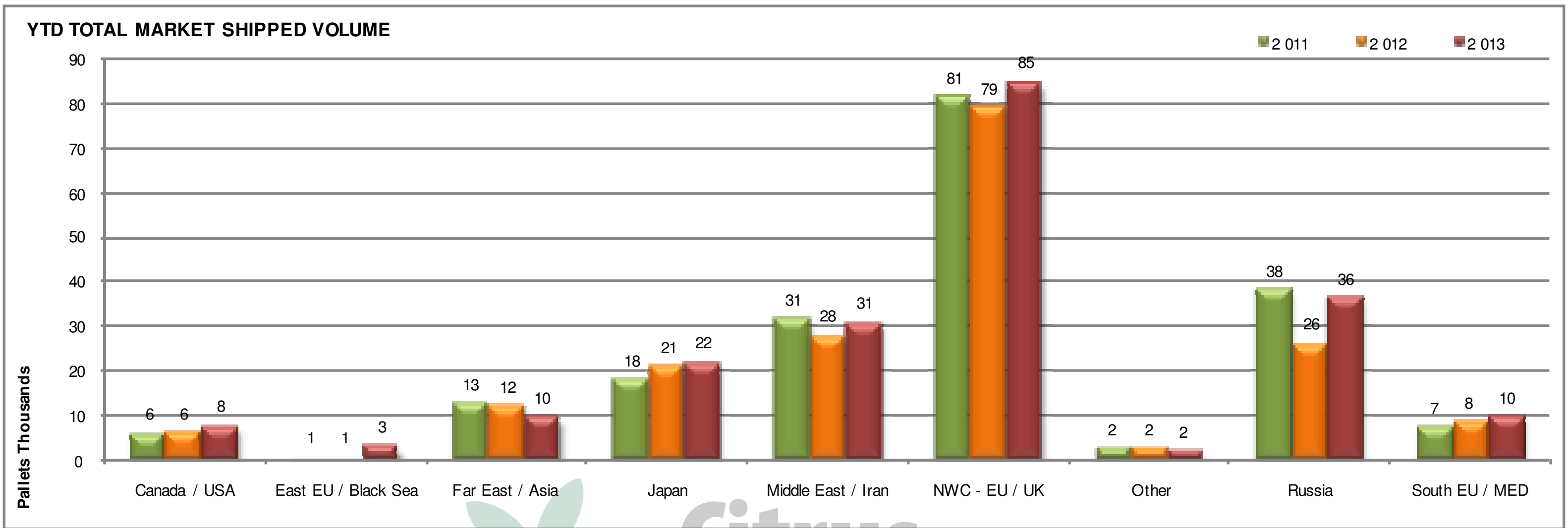


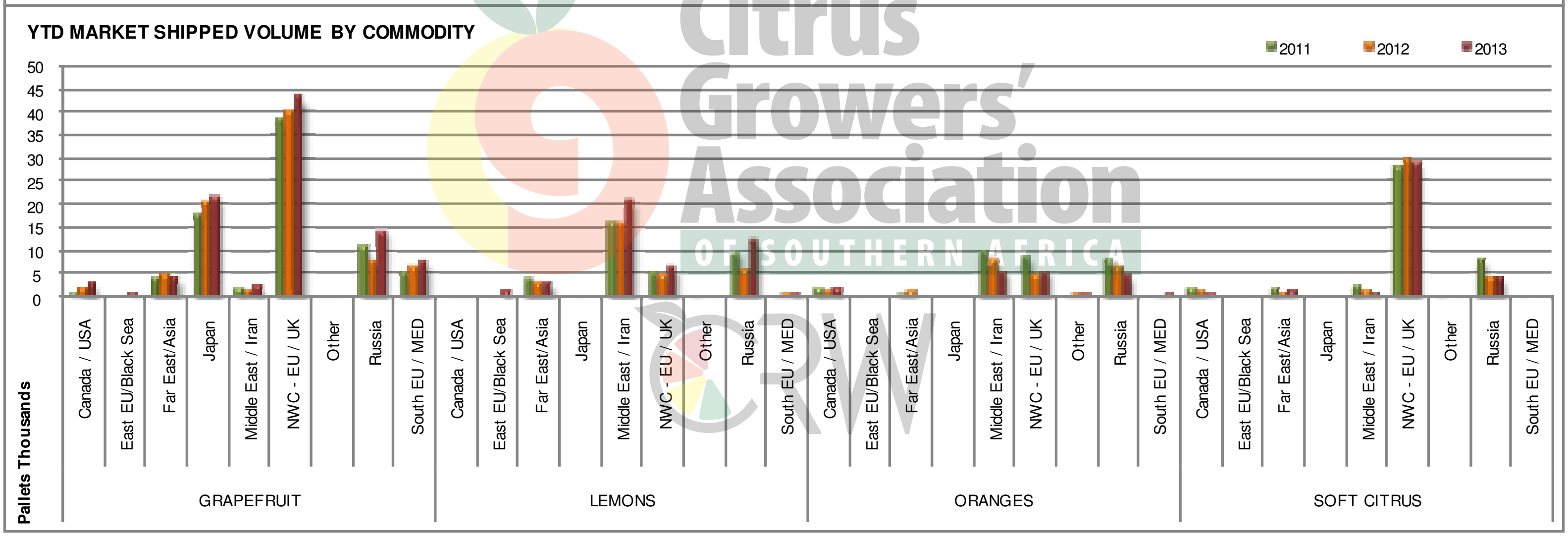
	Grapefruit	Lemons	Oranges	Soft Citrus	Total
3 Yr Ave. YTD	62.14%	70.73%	29.98%	67.00%	55.29%
2013	60.39%	70.94%	27.94%	65.80%	56.34%
% 2013 vs. 3 Yr Ave.	-1.7%	0.2%	-2.0%	-1.2%	1.0%



3. Citrus Commodity Export Market Volume (pallets):

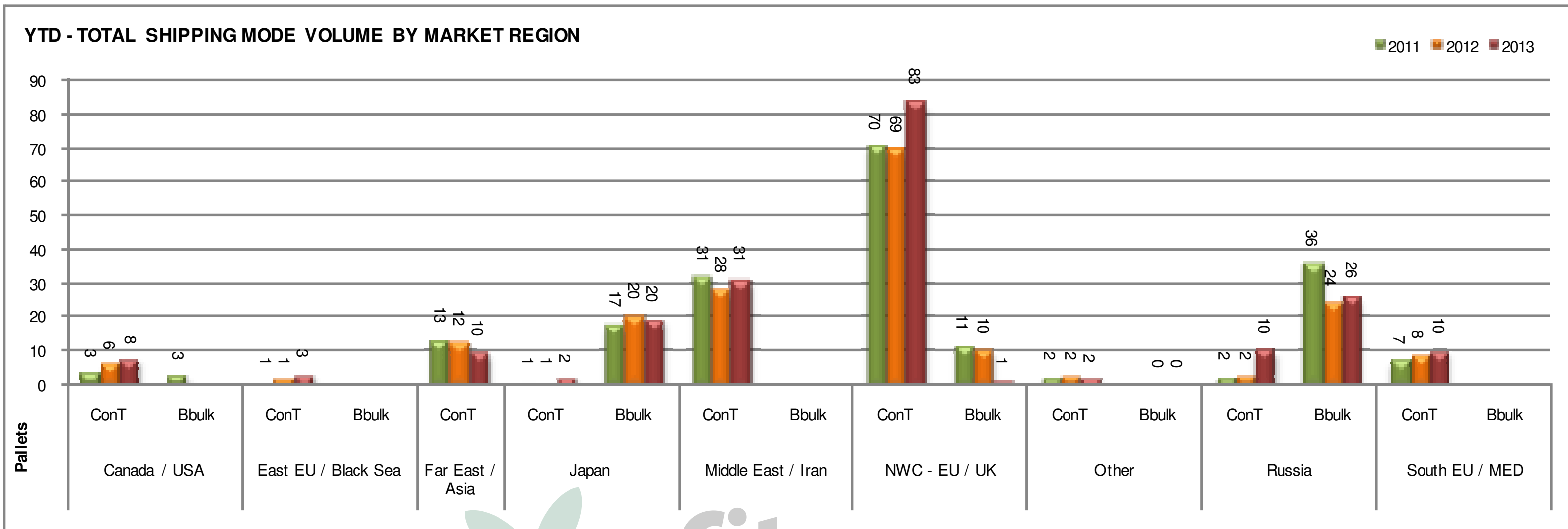
I. The overall market spread of citrus appears to be consistent with previous years.
II. The higher production of Grapefruit it typically being sent into Japan, Europe and Russia.
III. Similarly with the higher Lemon production being sent into Middle East and Russia.
IV. The lower production of Navels from the Western and Eastern Cape regions can be seen through the lower spread of Orange exports to most regions.

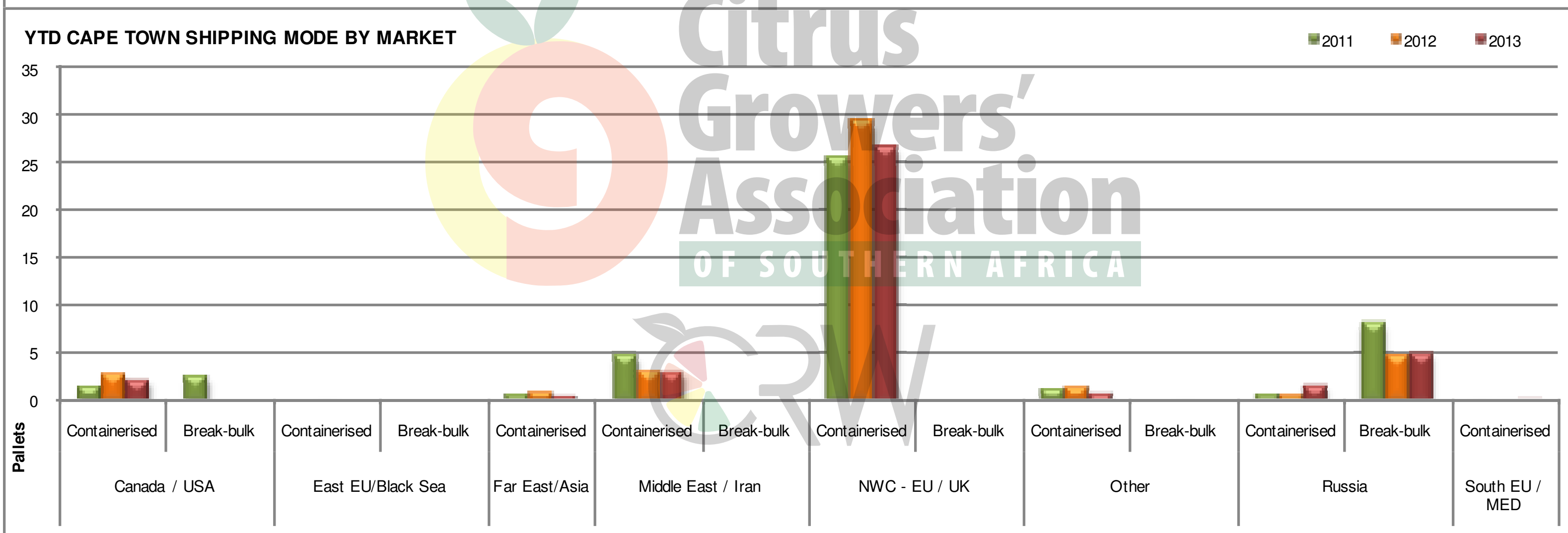


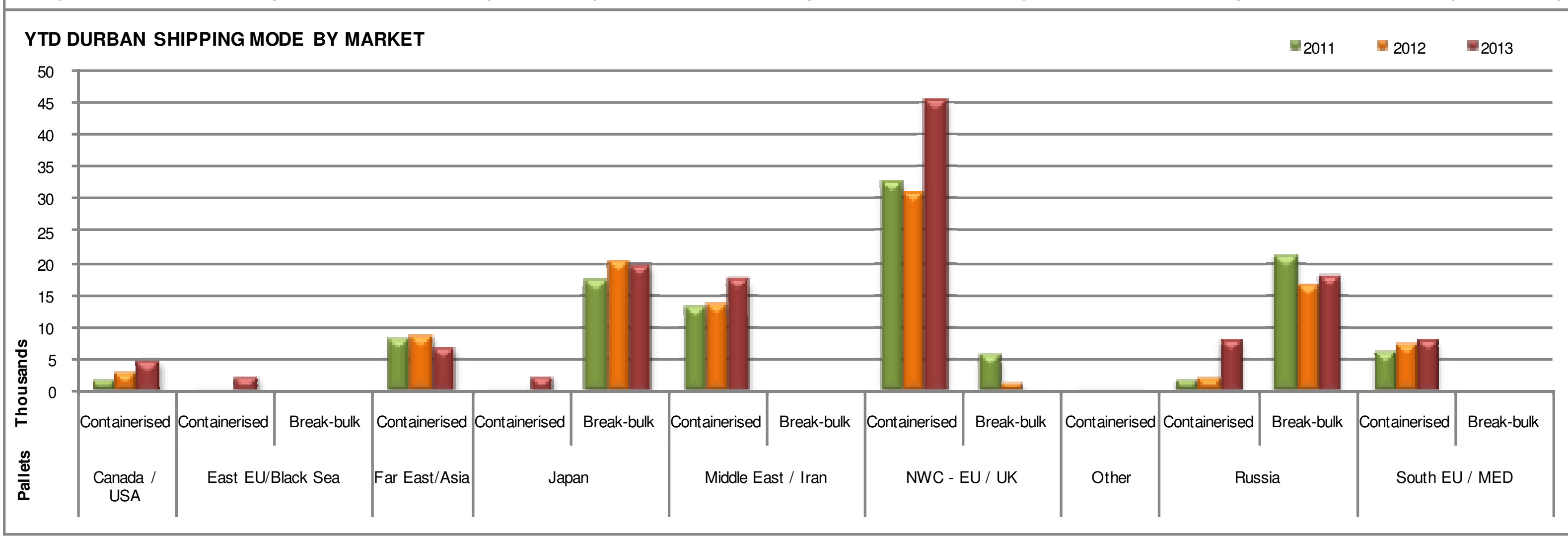


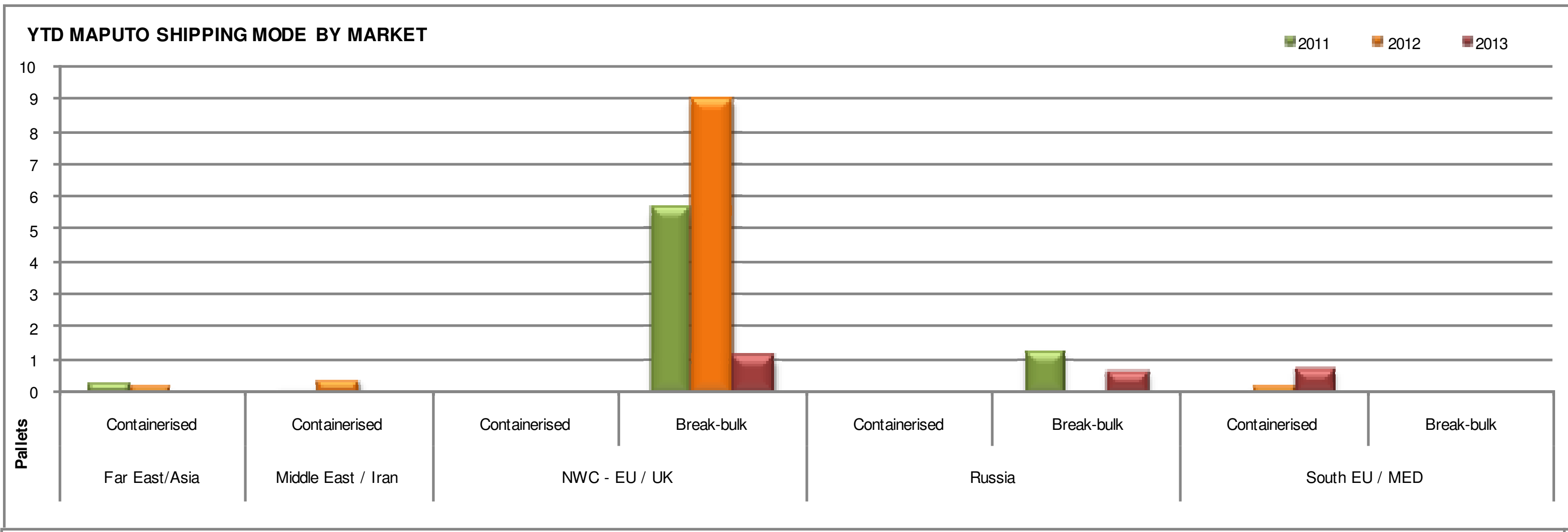
4. Citrus Shipping Mode Volume by Markey by Port (pallets)

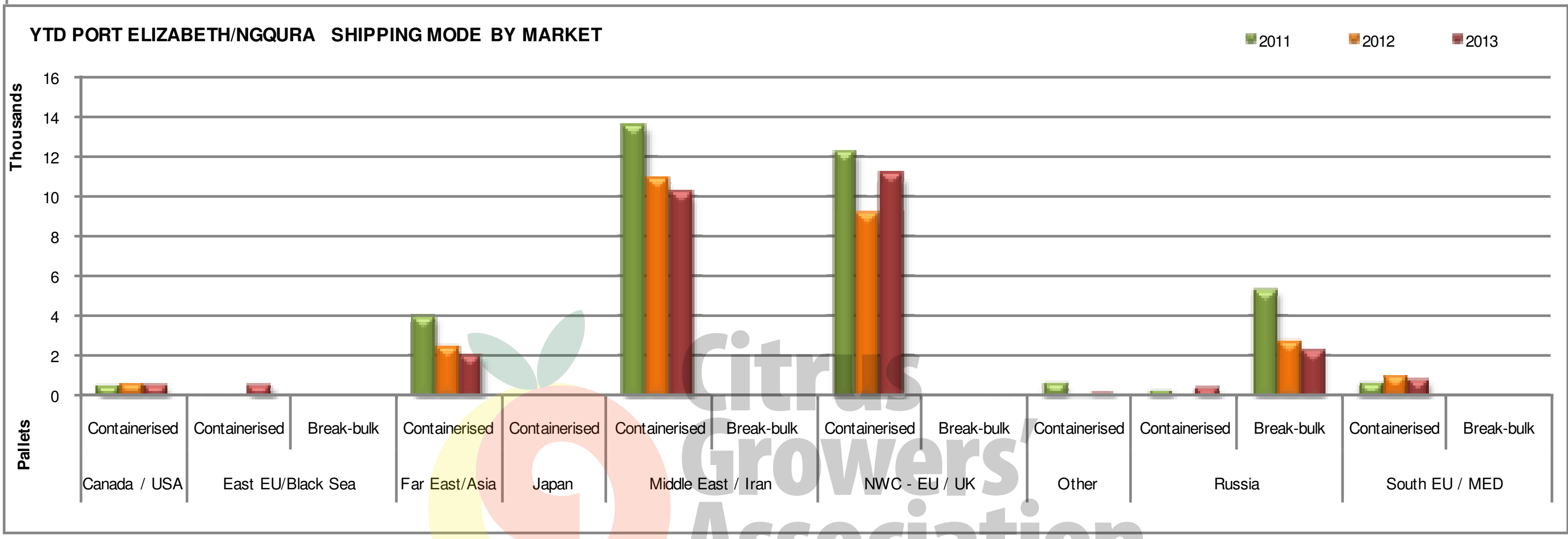
I. Evident that there are a higher number of containers being routed to Europe/UK, MED, Eastern Europe and Russia so far this year. The PPECB data shows that the MSCEU service has attributed largely to this volume.
II. Containers being loaded out to Japan have also increased quite substantially YTD.
III. The Durban port is where most of the containers sent to Europe/UK and Russia is being loaded from.
IV. There are a few containers being routed out of Maputo the MED at present.








YTD MAPUTO SHIPPING MODE BY MARKET
2011
2012
2013
Pallets
10
9
8
7
6
5
4
3
2
1
0
Containerised
Containerised
Containerised
Break-bulk
Containerised
Break-bulk
Containerised
Break-bulk
Far East/Asia
Middle East / Iran
NWC - EU / UK
Russia
South EU / MED

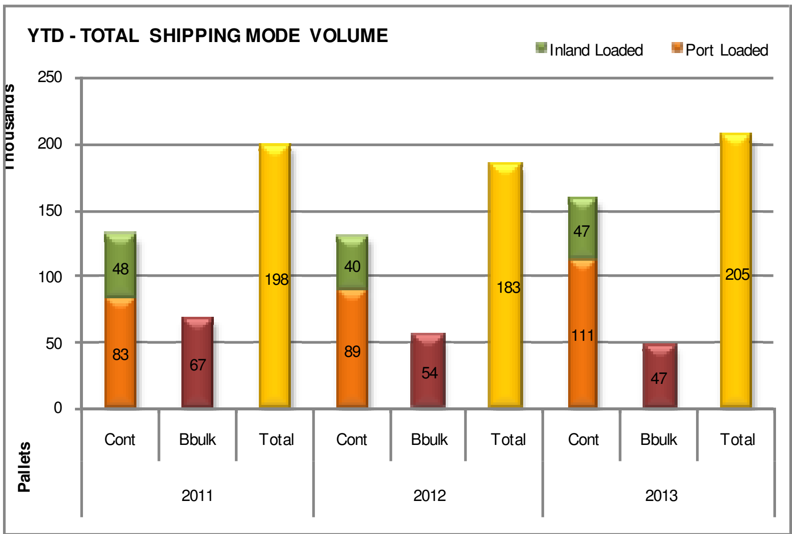

YTD PORT ELIZABETH/NGQURA SHIPPING MODE BY MARKET
2011
2012
2013
Thousands
Pallets
16
14
12
10
8
6
4
2
0
Containerised
Containerised
Break-bulk
Containerised
Containerised
Containerised
Break-bulk
Containerised
Break-bulk
Containerised
Containerised
Break-bulk
Containerised
Break-bulk
Canada / USA
East EU/Black Sea
Far East/Asia
Japan
Middle East / Iran
NWC - EU / UK
Other
Russia
South EU / MED

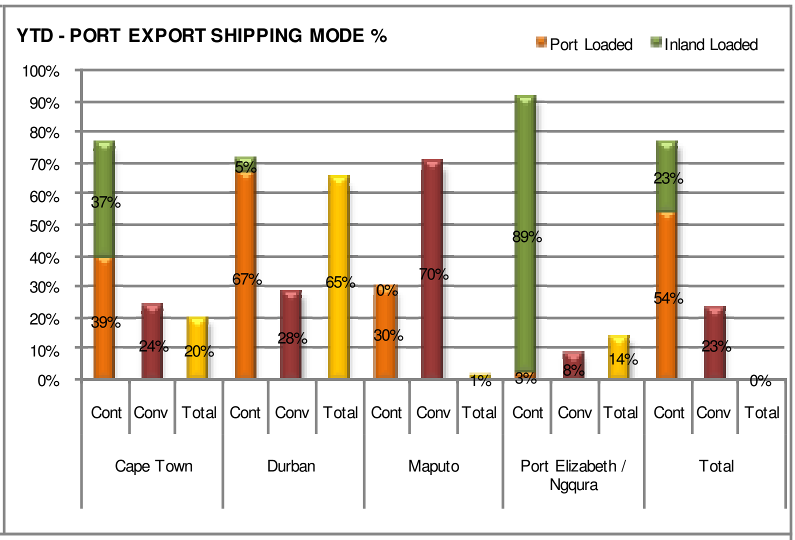
5. Port Shipping Mode Statistics (Pallets):

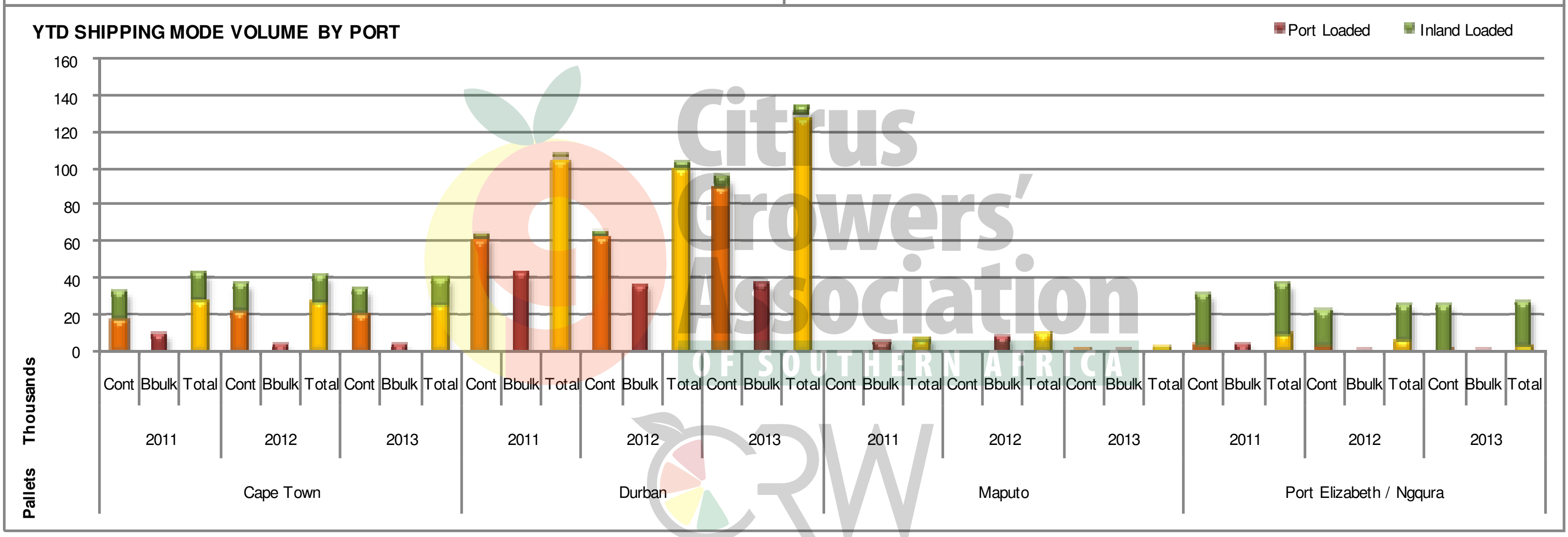
I. The current decline in containers routed out of Cape Town and PE ports is evident.

II. The substantial increase in container volume exiting Durban is evident from these charts. Also evident that there are more containers being routed from the packhouses directly into Durban this year. The two Letsitele trains came into operation from last week and this should increase the flows directed to the port from the inland.

III. The ratio of containers being packed at inland facilities in EC and WC also showing signs of an increase.





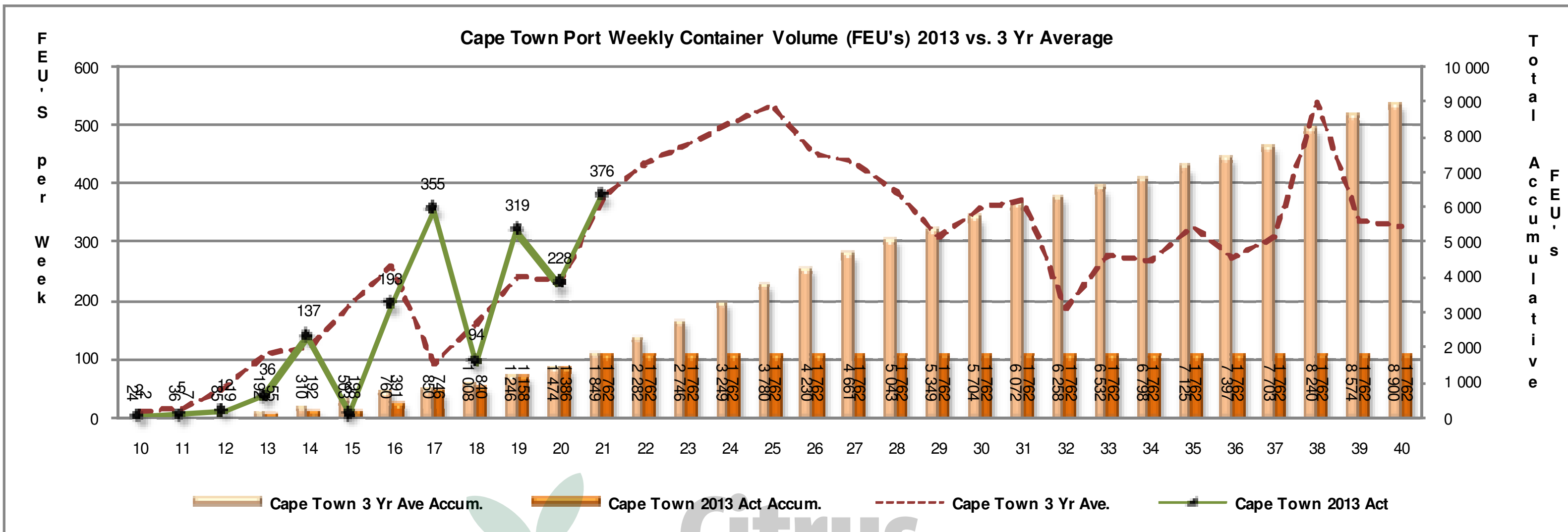


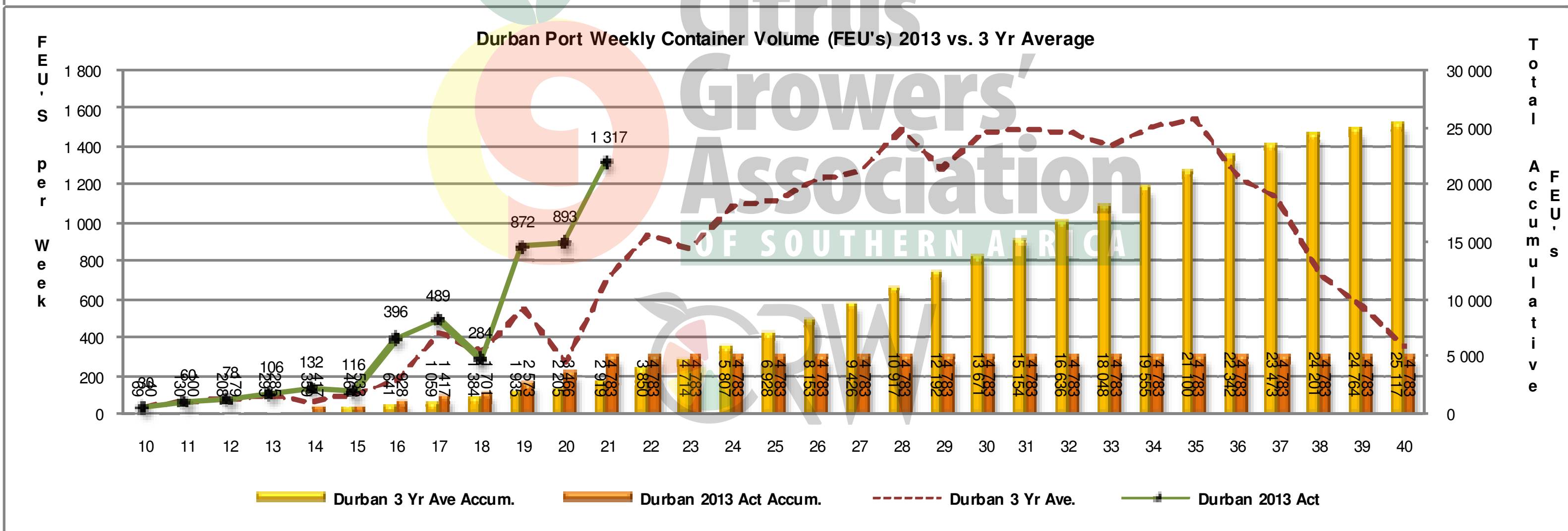
6. Port Container Weekly Shipped Volume (Pallets):

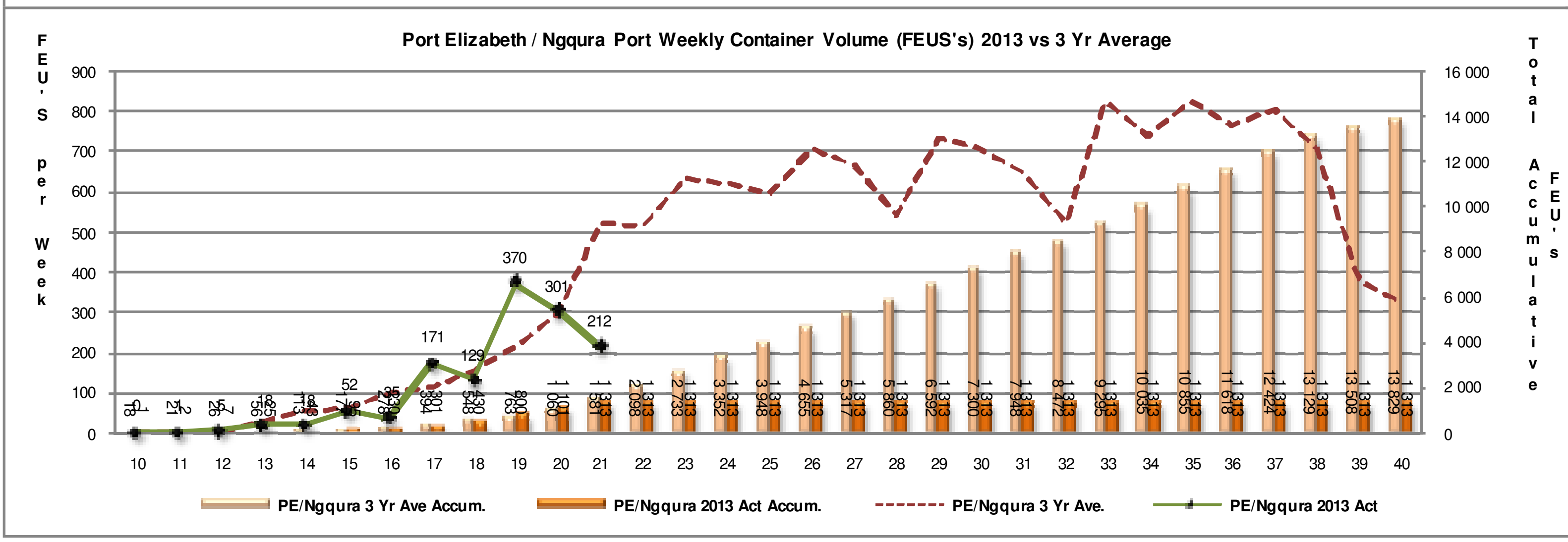
I. Container flows from the Cape Town port is lagging on previous years in line with the lower output of Navels YTD.

II. Container volumes exiting the Durban port is very high for this time of year, although not as high as the peak. At the end of week 21 there were 2,000 more containers that had exited Durban compared to previous years. It appears that the MSC EU service is receiving the majority of containers exiting Durban Pier 2 each week at 300 containers, followed by SAECS at 250, MSCME at 200.

III. The situation has changed somewhat in PE as over the course of two weeks as a high volume of containers are have been routed out of Ngqura on the MSCEU and MSCME service.







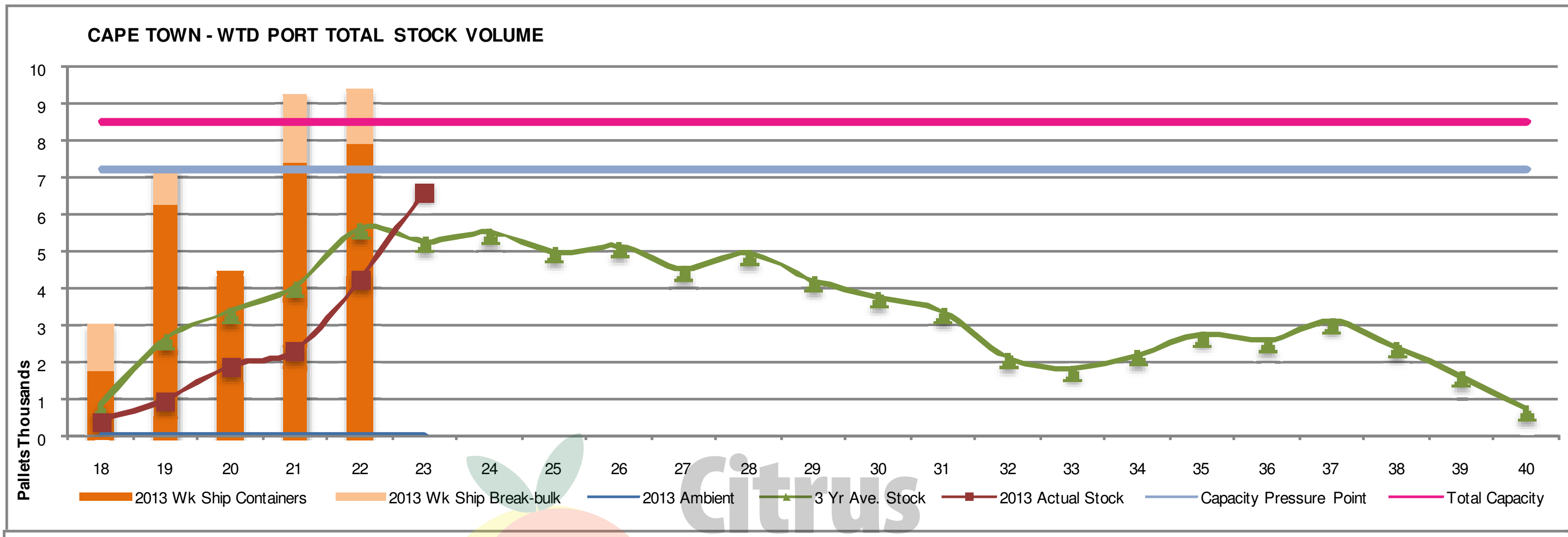
7. **Port Weekly Stock Volume and Shipping Volume (Pallets):**

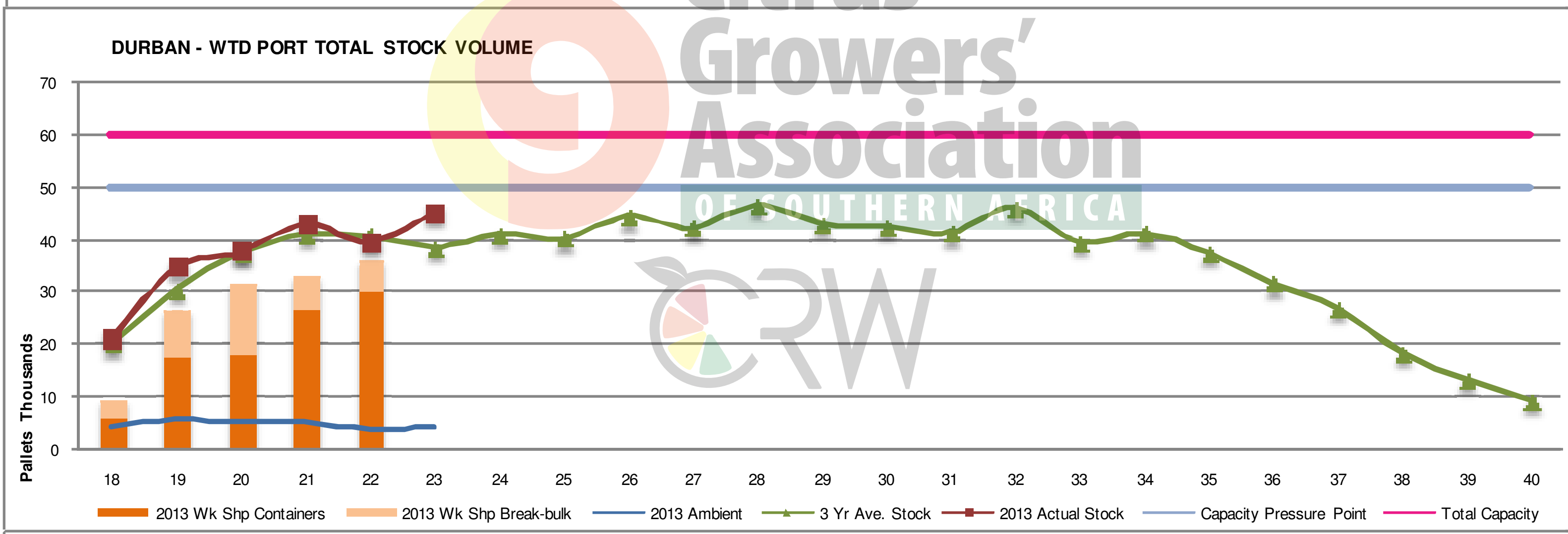
I. Stock levels in Cape Town have increased this week and associated with stock accumulation for the first USA vessel to load this week.

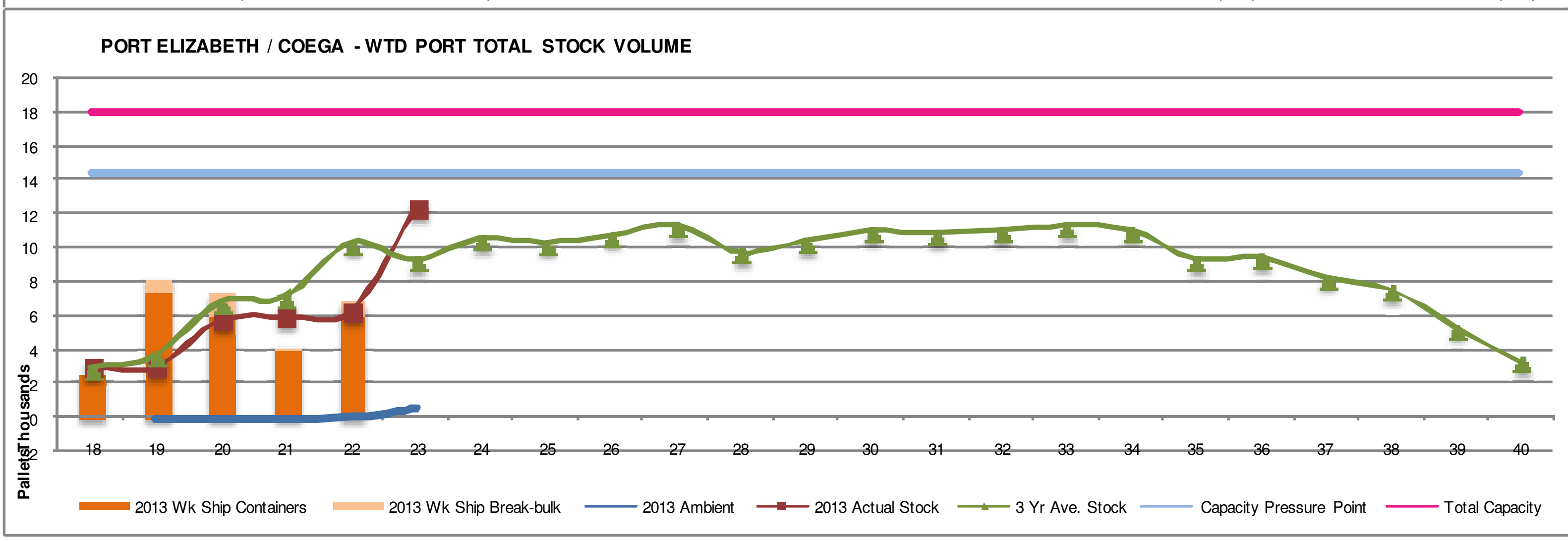
II. Stock levels in Durban are still somewhat high for this time of year. 4 of the main cold stores in Durban are at 90% capacity utilization at this time. Shipping levels out of Durban have increase dramatically and it is expected that stock levels will normalize as the GF production eases off.

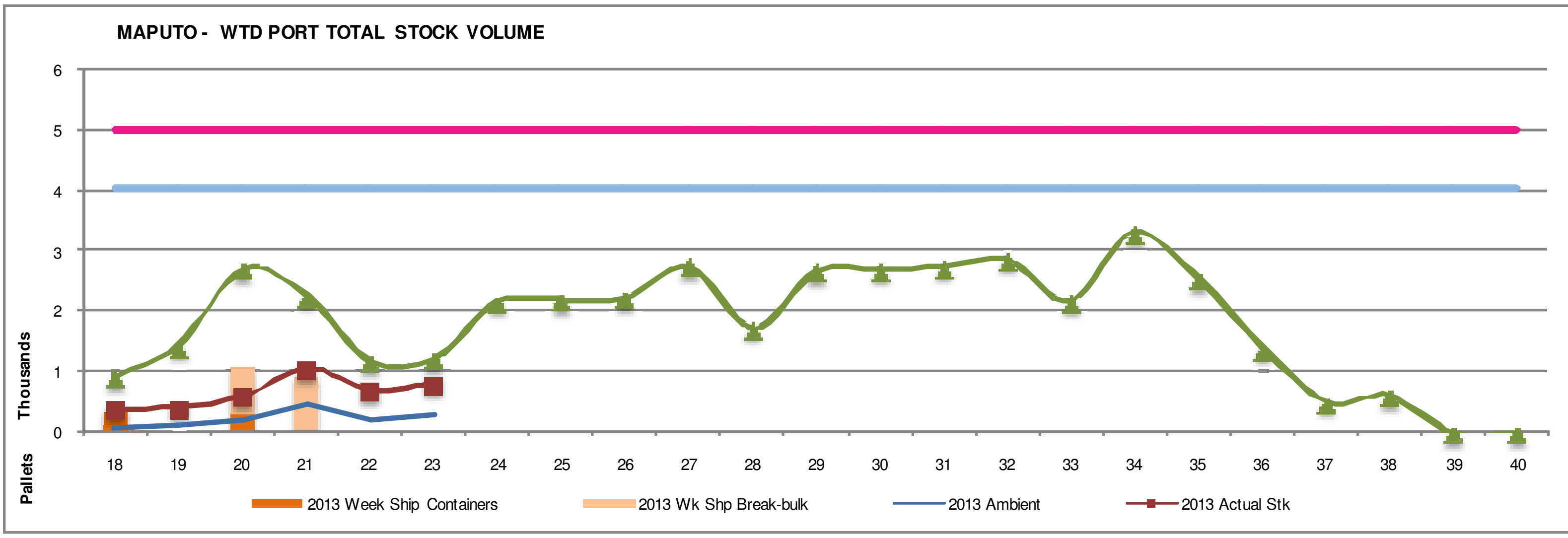
III. Stock levels at the PE cold stores are similarly unusually high for this time of year.

IV. No stock issues in the Maputo port.








MAPUTO - WTD PORT TOTAL STOCK VOLUME
6
5
4
3
2
1
0
Thousands
Pallets
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