





Durban Port Friday Report

An assessment of the northern regions citrus production volume, Durban export volume & synopsis of Durban port operations

Week 31

Data Supplied by PPECB

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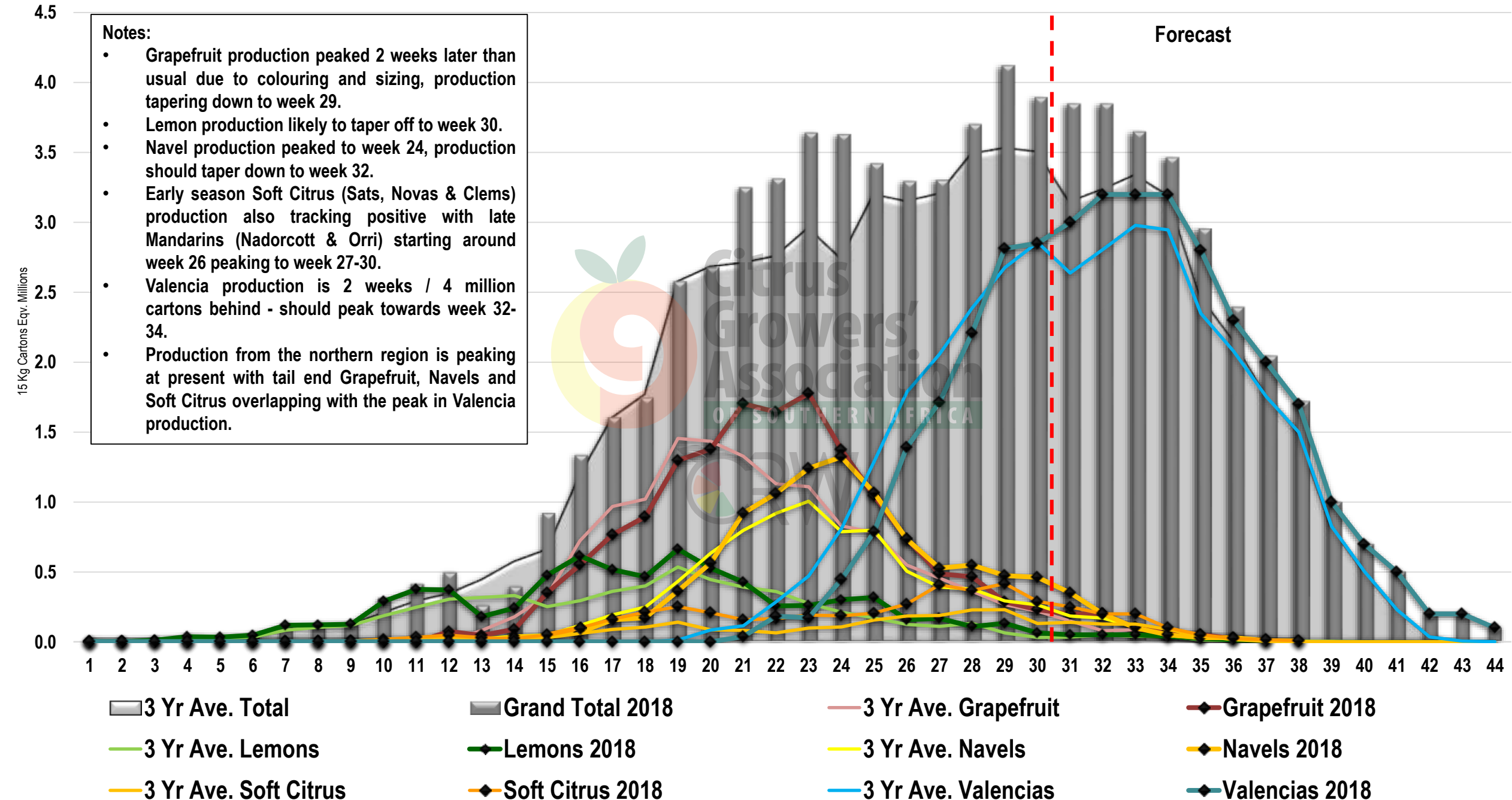


Northern Regions Weekly Citrus Export Production YTD 2018 vs. 3 Yr Ave. Production Volume

Notes:

- Grapefruit production peaked 2 weeks later than usual due to colouring and sizing, production tapering down to week 29.
- Lemon production likely to taper off to week 30.
- Navel production peaked to week 24, production should taper down to week 32.
- Early season Soft Citrus (Sats, Novas & Clems) production also tracking positive with late Mandarins (Nadorcott & Orri) starting around week 26 peaking to week 27-30.
- Valencia production is 2 weeks / 4 million cartons behind - should peak towards week 32-34.
- Production from the northern region is peaking at present with tail end Grapefruit, Navels and Soft Citrus overlapping with the peak in Valencia production.

Forecast

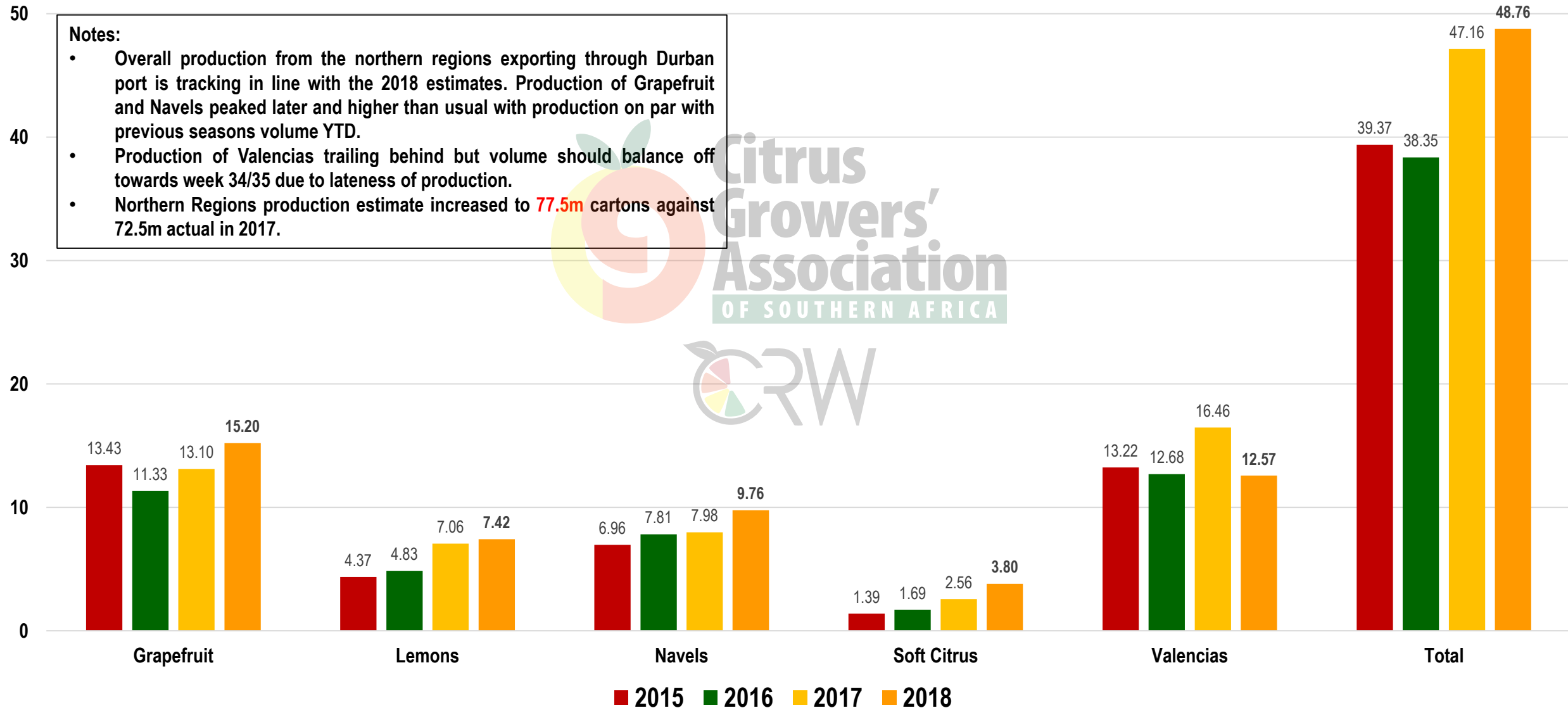
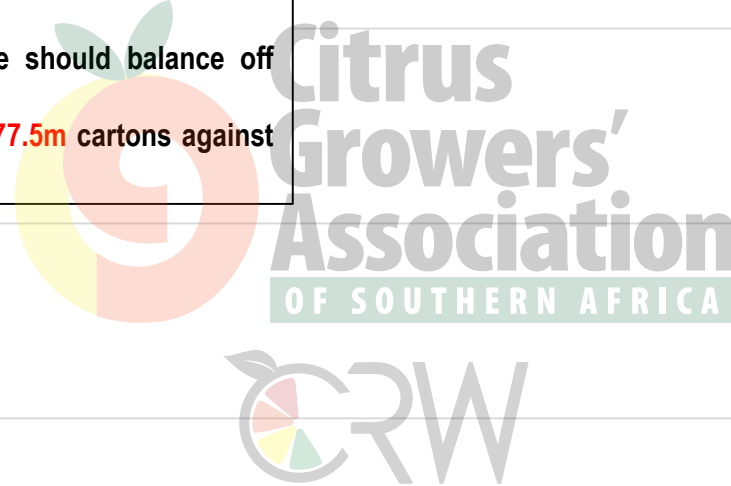


Northern Regions Citrus Export Production Volume 2015 -2018 YTD

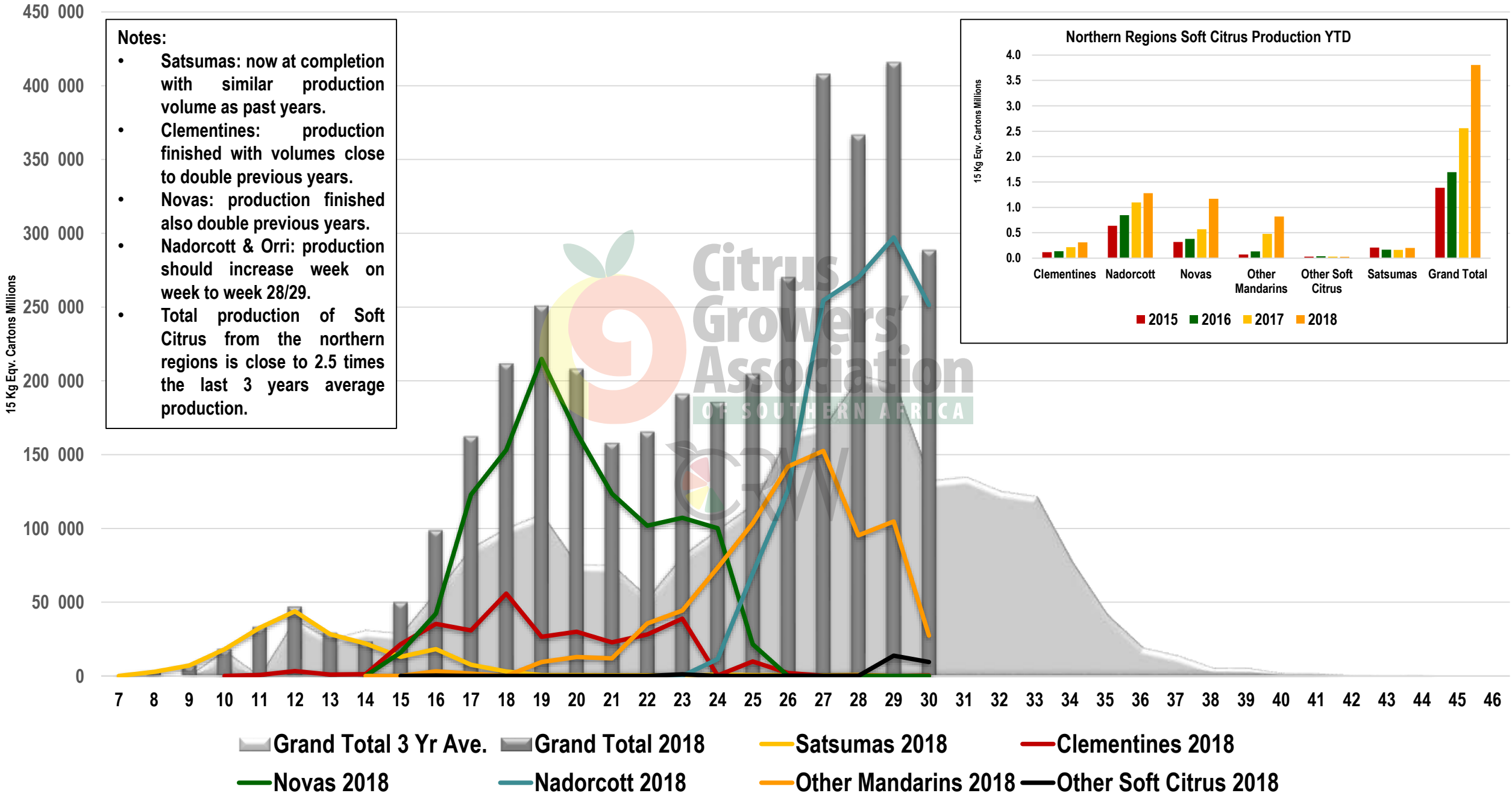
Grapefruit	Lemons	Navels	Soft Citrus	Valencias	Total Estimate 2018
16m	8,2m	9,5m	4,8m	39m	77.5m

Notes:

- Overall production from the northern regions exporting through Durban port is tracking in line with the 2018 estimates. Production of Grapefruit and Navels peaked later and higher than usual with production on par with previous seasons volume YTD.
- Production of Valencias trailing behind but volume should balance off towards week 34/35 due to lateness of production.
- Northern Regions production estimate increased to **77.5m** cartons against 72.5m actual in 2017.



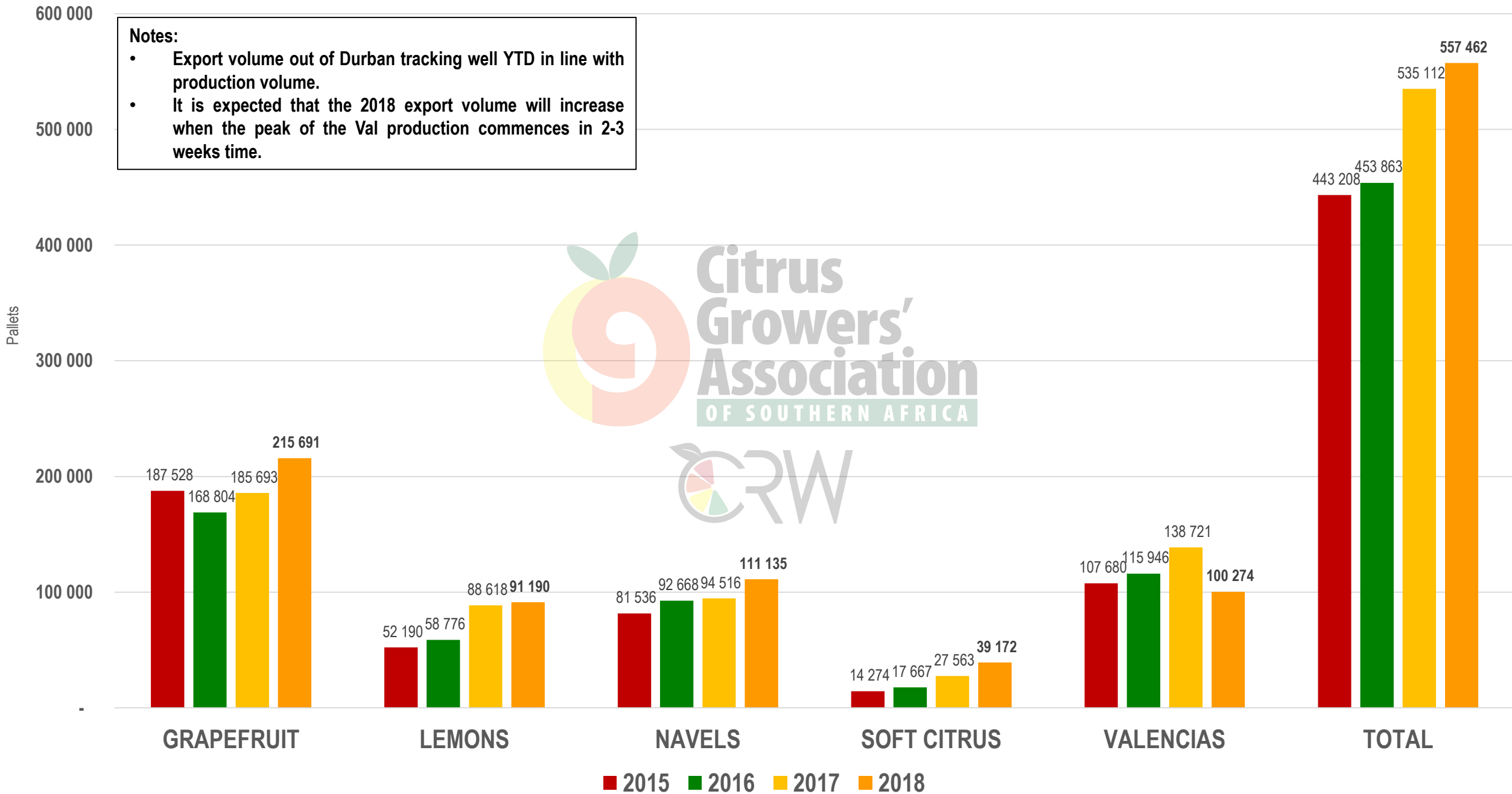
Northern Regions Soft Citrus Production 2018 YTD vs. 3 Yr Average Production



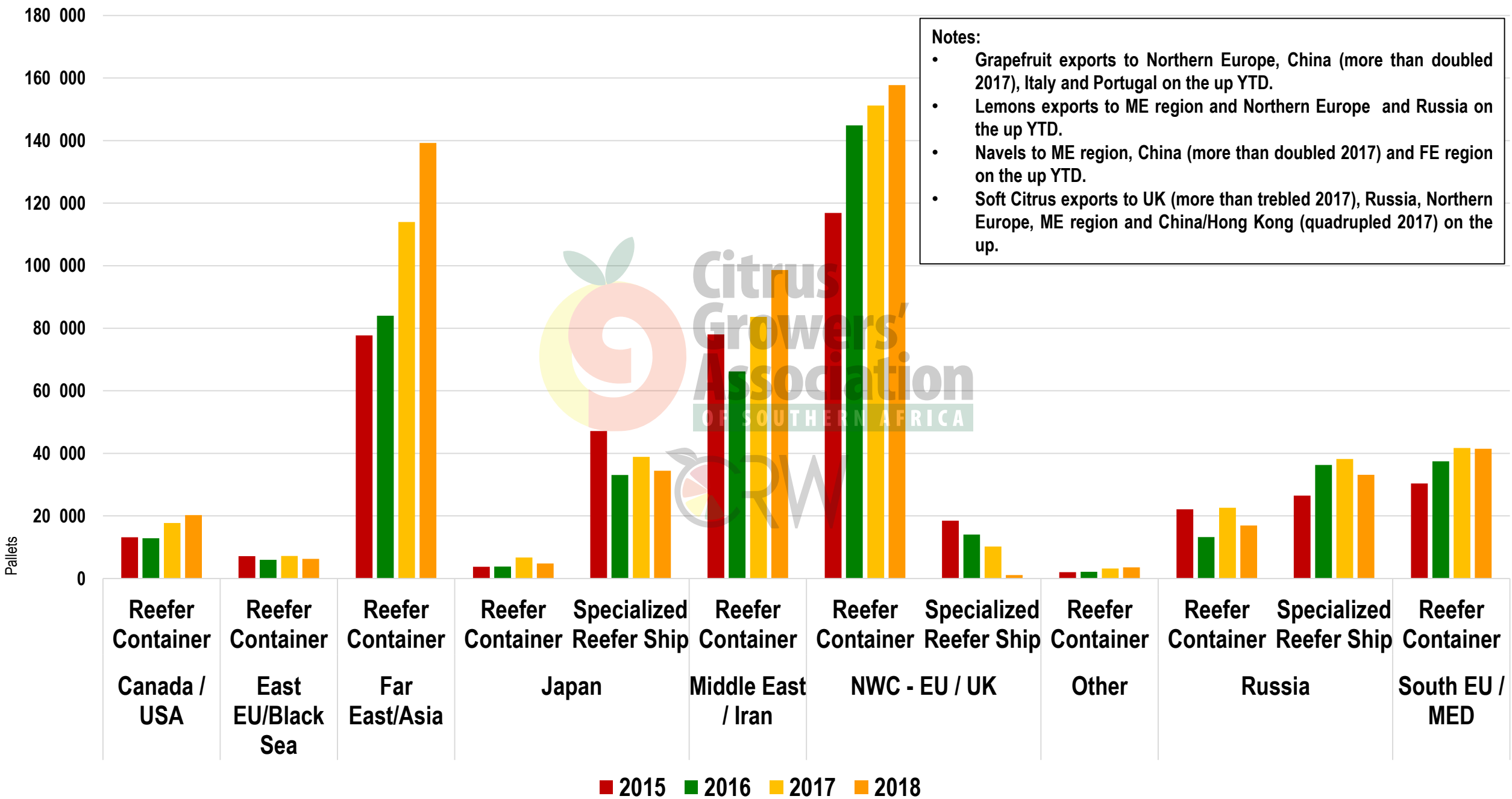
Durban Port Citrus Export Volume by Commodity YTD

Notes:

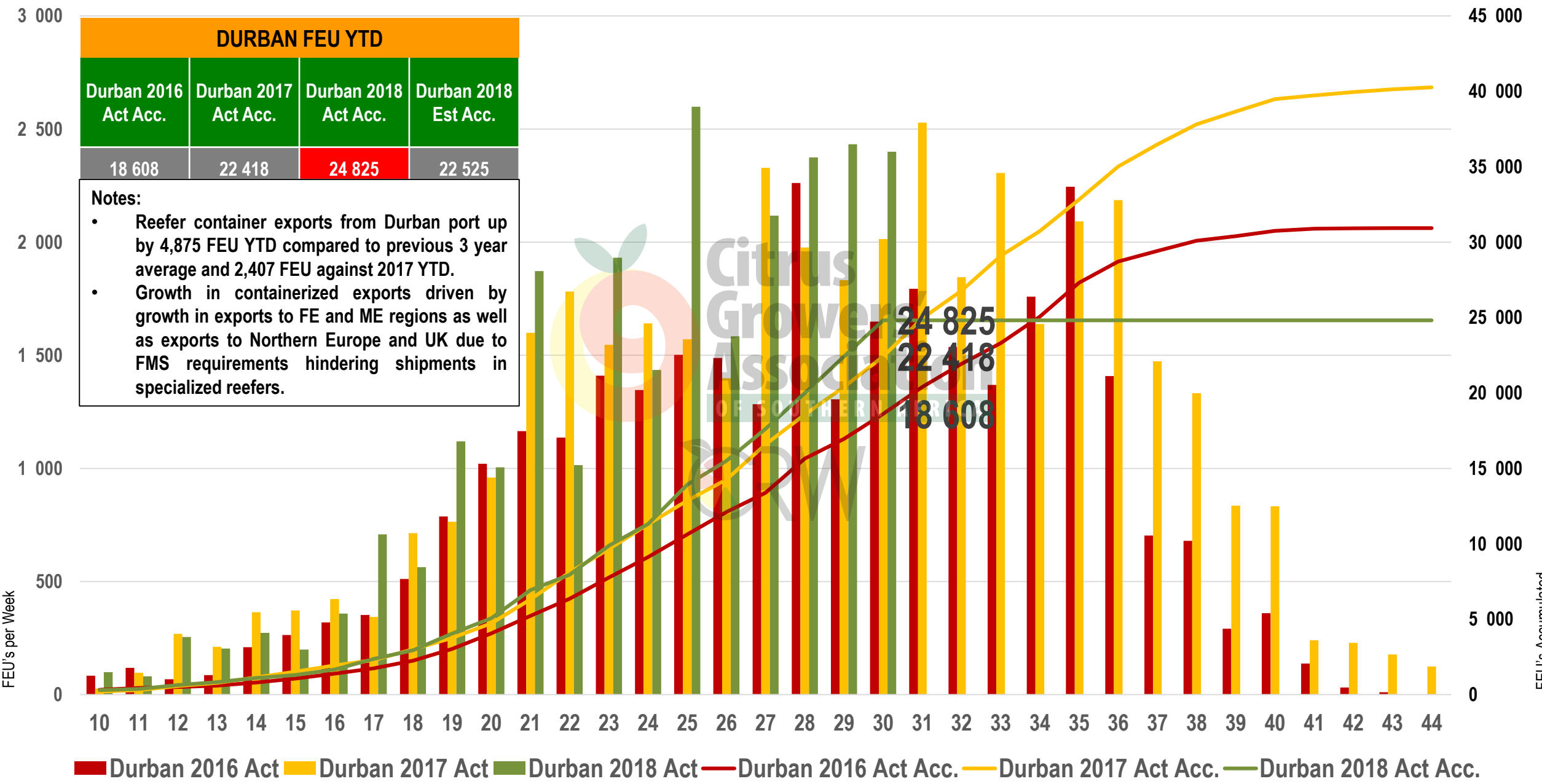
- Export volume out of Durban tracking well YTD in line with production volume.
- It is expected that the 2018 export volume will increase when the peak of the Val production commences in 2-3 weeks time.



Durban Port Citrus Export Volume by Market by Ship Mode YTD



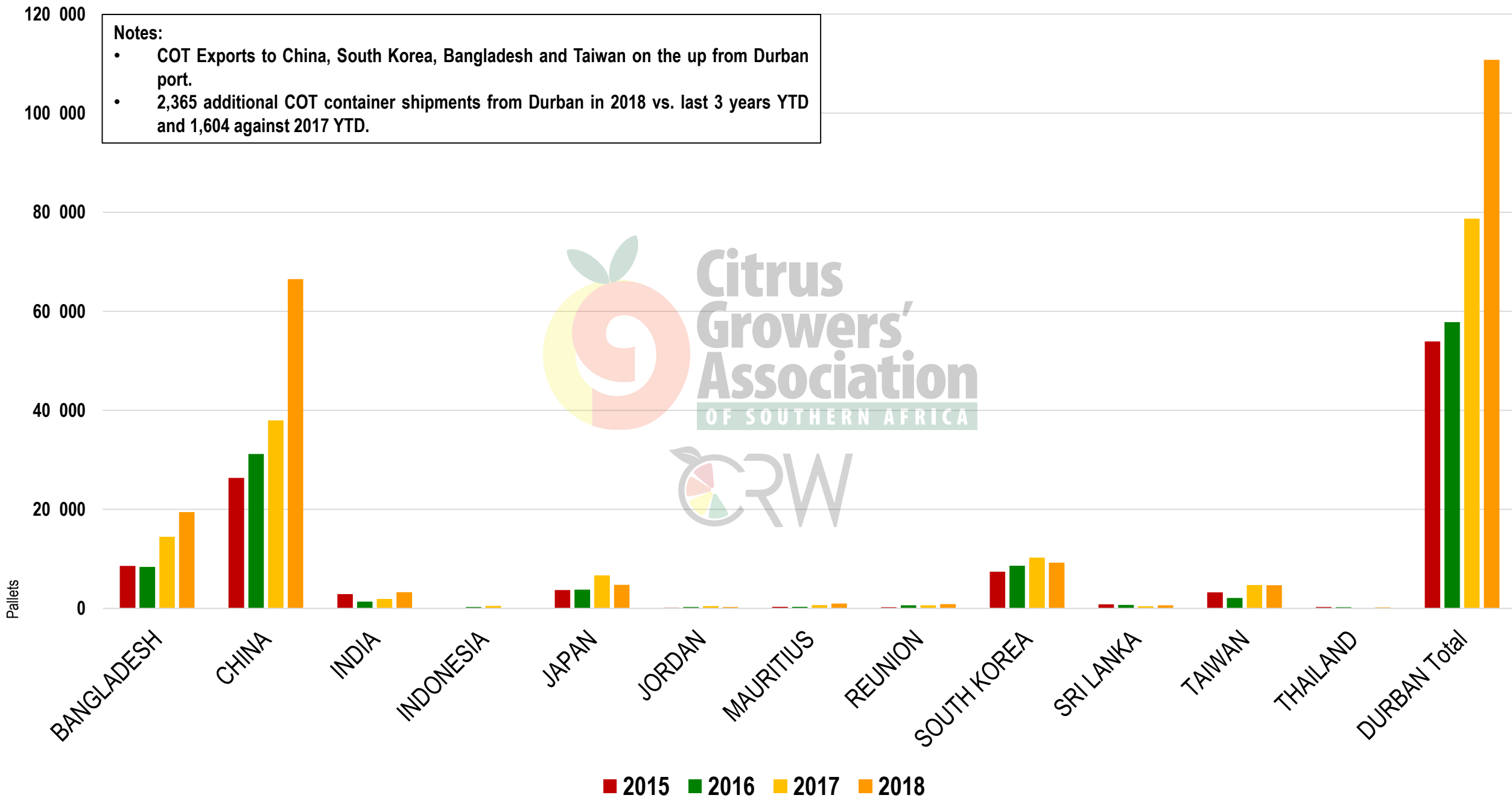
Durban Port Citrus Reefer Export Volume YTD ex DCT/MW/DRT



Durban YTD Reefer Container Export Volume to Protocol Countries (Steri Containers / COT)

Notes:

- COT Exports to China, South Korea, Bangladesh and Taiwan on the up from Durban port.
- 2,365 additional COT container shipments from Durban in 2018 vs. last 3 years YTD and 1,604 against 2017 YTD.



SUMMARY:

- Farm truck intakes (Thur) – as expected truck arrivals to Durban still very higher this week again with all Durban cold stores having high number of trucks staged awaiting off-loading. Expect delays. Truck arrivals into Durban expected to increase week on week up to week 34. Truck demand from the north will peak in week 30-34. Truck turnaround in Durban will be essential to ensure trucks return to the reef without delay.
- Cold storage capacity – stock holding in Durban roughly >80% capacity. Stock holding at some cold stores has increased over 100% causing high stock levels.
- Railed containers from inland to DCT – Tzaneen and Bela-Bela trains continue as usual with a reported 950 FEU being rail YTD. Reported no rail activity planned from City Deep and Musina as yet.
- Durban Container Terminal – truck TTT at DCT Pier 2 last week ave. = 129 min with average 118 moves per hour. This week DCT Pier 1 and Pier 2 are performing well with no delays reported. No vessels anchored >48 hours all schedules are on track.
- Japan SEP – 8th and final vessel MFT planned for mid August. Rej. 1% GF - FCM/CBS/Markings / 3% LE – CBS / 1% OR - FCM week 30. 210 Containers exported YTD with further container exports planned. DAFF Inspections on track. A balance of roughly 1,500 pallets required to complete allocation for the final vessel.
- Korea SEP – Rej. 3% GF Mealie bug/Marking requirements / OR zero rej. week 30. 462 containers exported YTD. Stock levels for South Korea at 72 containers worth. Consignments for DAFF inspection on track and no delay at present.
- The same message can be reiterated this week that very high production from the northern regions is now evident from the PPECB data. There is higher tail production of Grapefruit, Navels and Soft Citrus converging on the peak Valencia production.
- Highly imperative that exporters continue exporting at a much higher rate to avoid a capacity block out in the Durban port.
- Higher than normal shipments of COT containers persists with a big load out expected to enter Pier 2 from Saturday this week.