Durban Port Friday Report

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

Week 21

Data Supplied by PPECB

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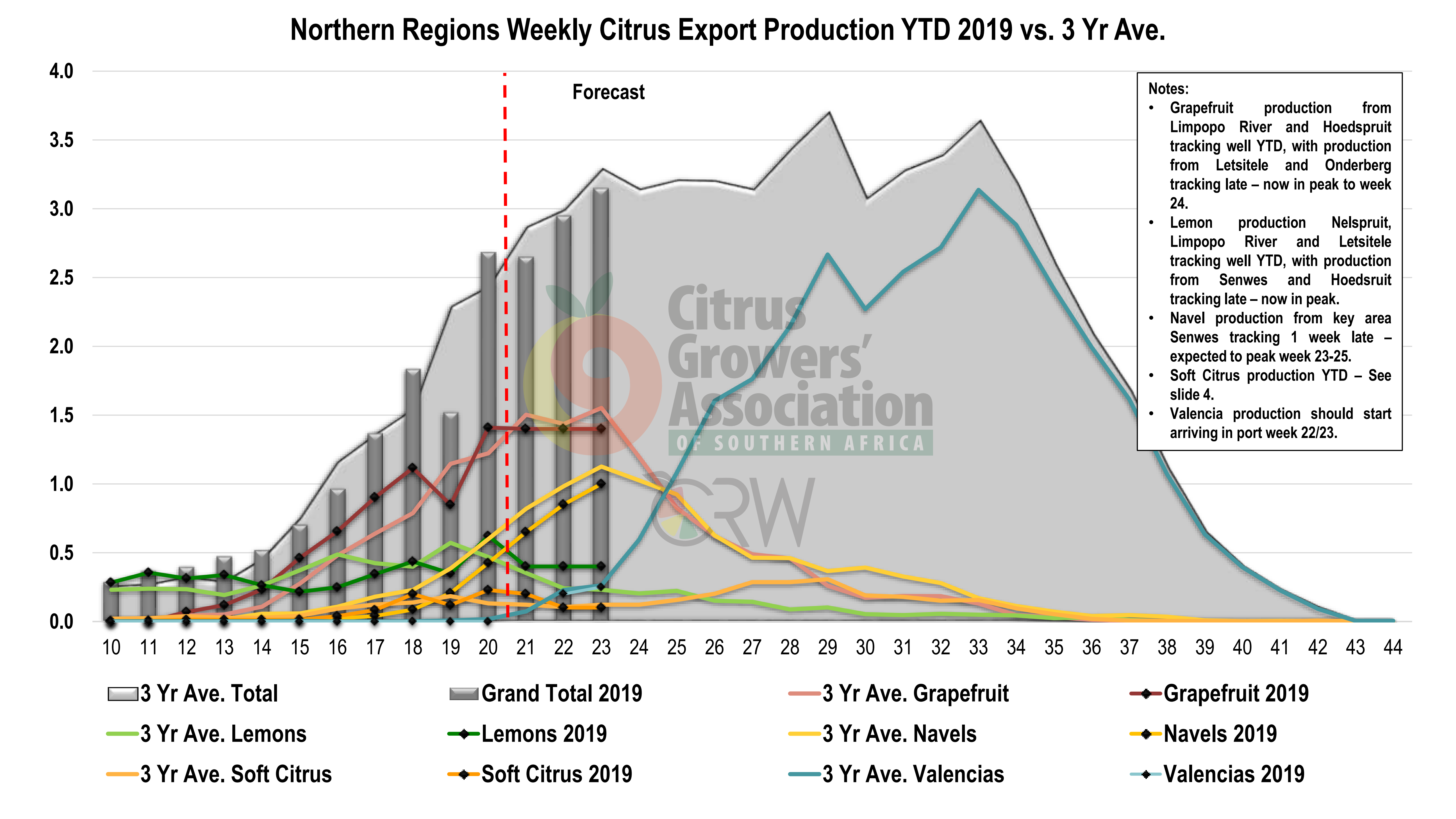
Northern Regions Weekly Citrus Export Production YTD 2019 vs. 3 Yr Ave.
Forecast
Notes:
• Grapefruit production from Limpopo River and Hoedspruit tracking well YTD, with production from Letsitele and Onderberg tracking late – now in peak to week 24.
• Lemon production Nelspruit, Limpopo River and Letsitele tracking well YTD, with production from Senwes and Hoedsruit tracking late – now in peak.
• Navel production from key area Senwes tracking 1 week late – expected to peak week 23-25.
• Soft Citrus production YTD – See slide 4.
• Valencia production should start arriving in port week 22/23.
4.0
3.5
3.0
2.5
2.0
1.5
1.0
0.5
0.0
10 11 12 13 14 15 16 17 18 19 20 21 22 23 24 25 26 27 28 29 30 31 32 33 34 35 36 37 38 39 40 41 42 43 44
3 Yr Ave. Total
Grand Total 2019
3 Yr Ave. Grapefruit
Grapefruit 2019
3 Yr Ave. Lemons
Lemons 2019
3 Yr Ave. Navels
Navels 2019
3 Yr Ave. Soft Citrus
Soft Citrus 2019
3 Yr Ave. Valencias
Valencias 2019
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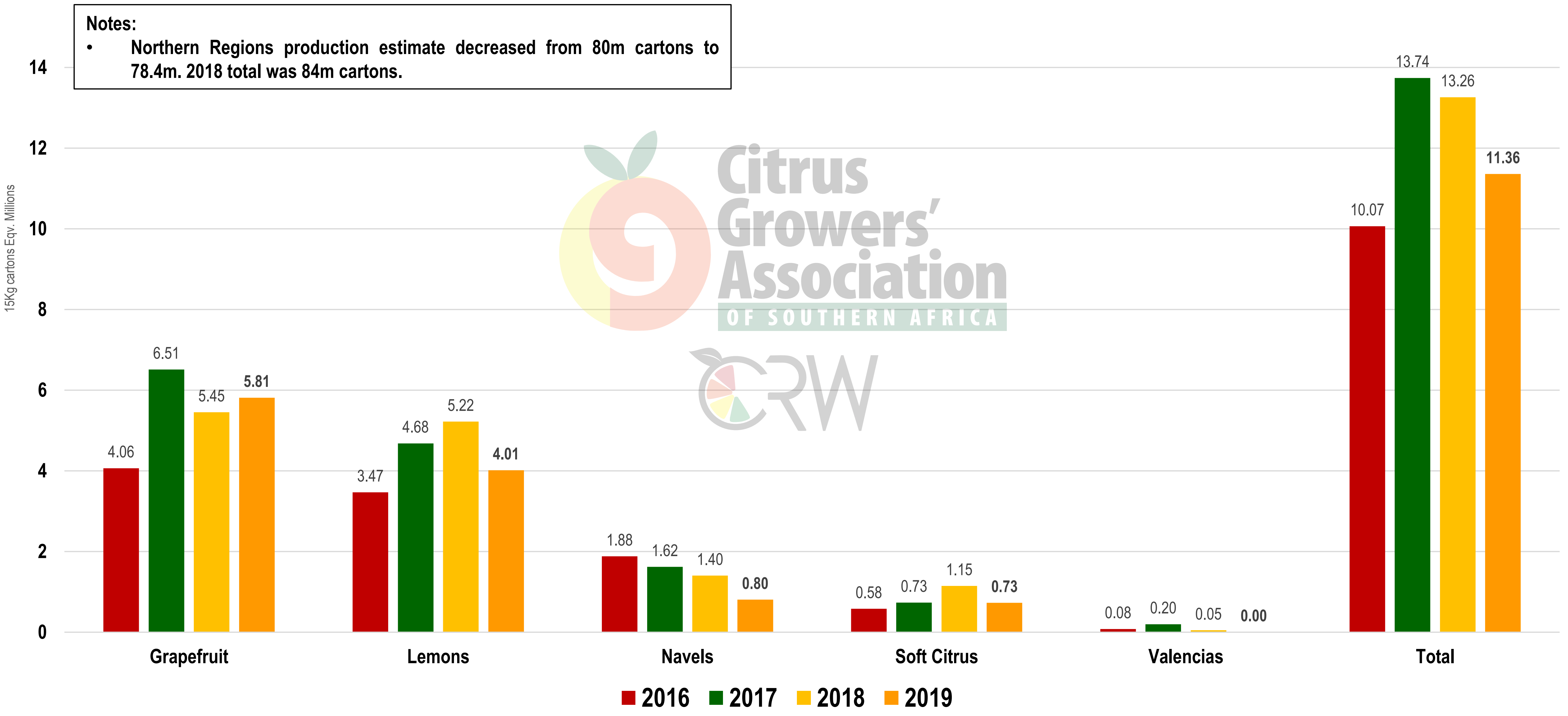
Northern Regions Citrus Export Production Volume YTD

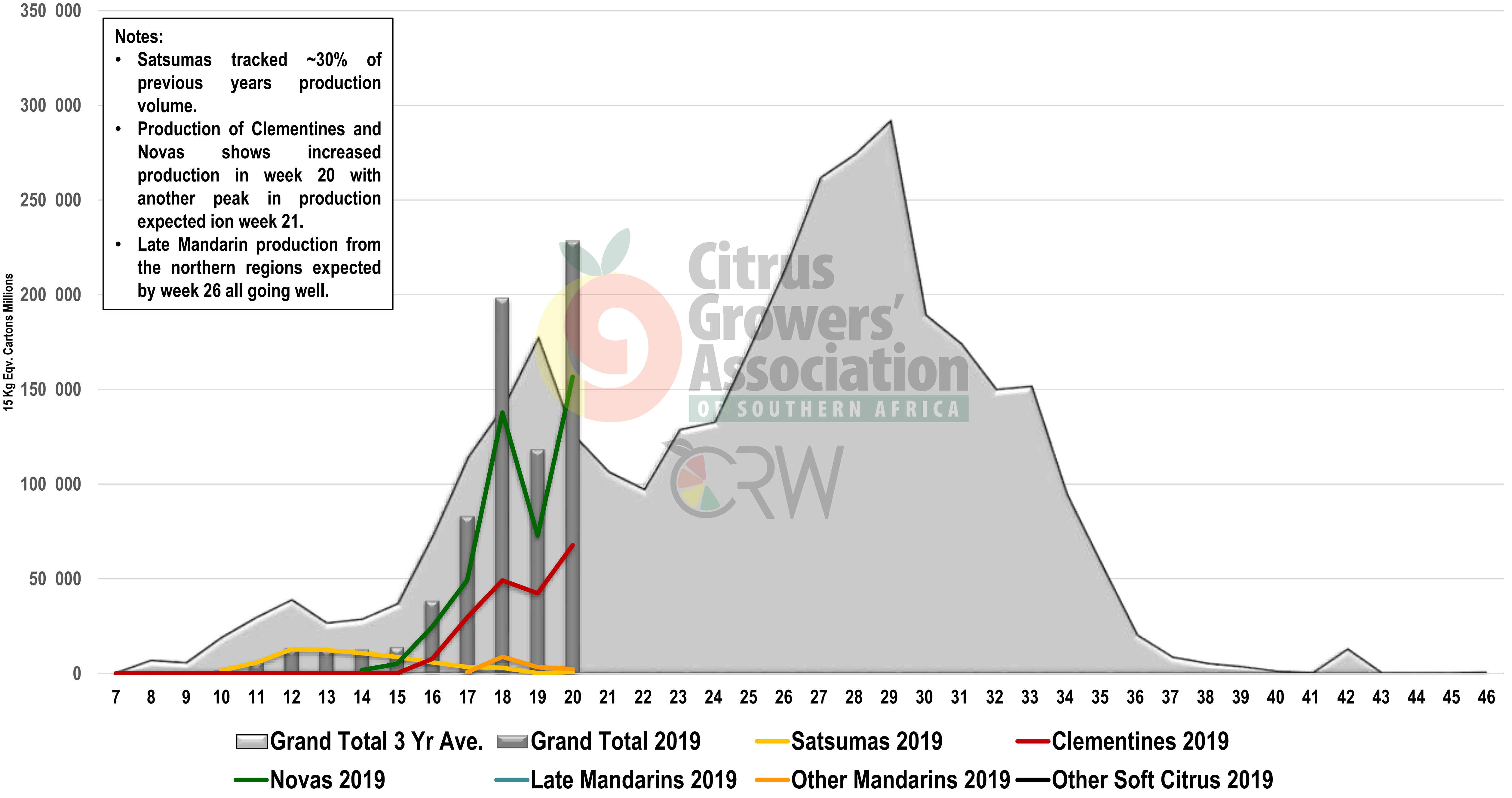
Grapefruit	Lemons	Navels	Soft Citrus	Valencias	Total Estimate 2018
14.2m	8,3m	9.8m	5,5m	40.6m	78.4m

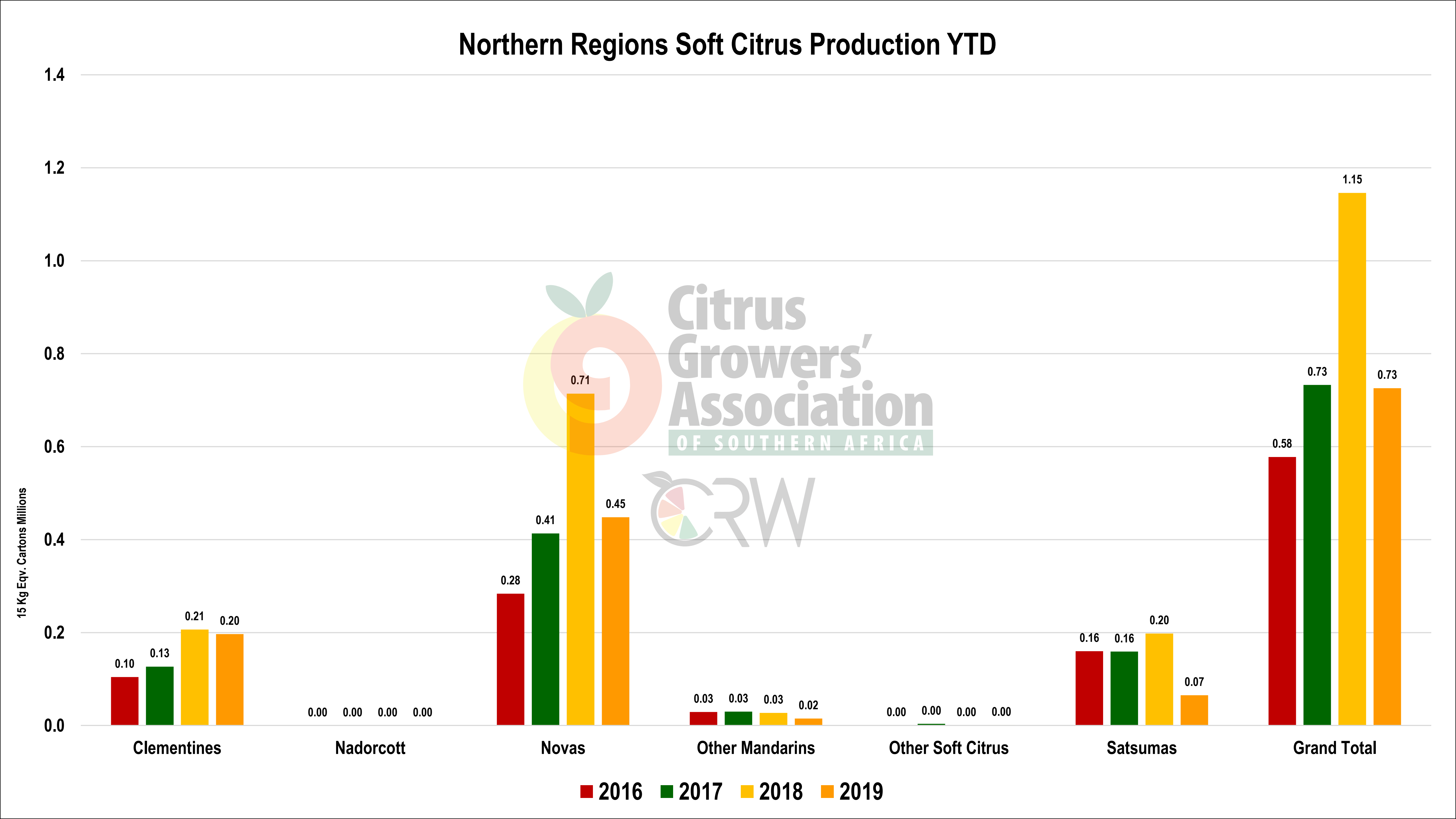
Notes:

- Northern Regions production estimate decreased from 80m cartons to 78.4m. 2018 total was 84m cartons.



Northern Regions Soft Citrus Production 2019 YTD vs. 3 Yr Average Production




Northern Regions Soft Citrus Production YTD
15 Kg Eqv. Cartons Millions
1.4
1.2
1.0
0.8
0.6
0.4
0.2
0.0
0.10
0.13
0.21
0.20
0.00
0.00
0.00
0.00
0.28
0.41
0.71
0.45
0.03
0.03
0.03
0.02
0.00
0.00
0.00
0.00
0.16
0.16
0.20
0.07
0.58
0.73
1.15
0.73
Clementines
Nadorcott
Novas
Other Mandarins
Other Soft Citrus
Satsumas
Grand Total
2016
2017
2018
2019
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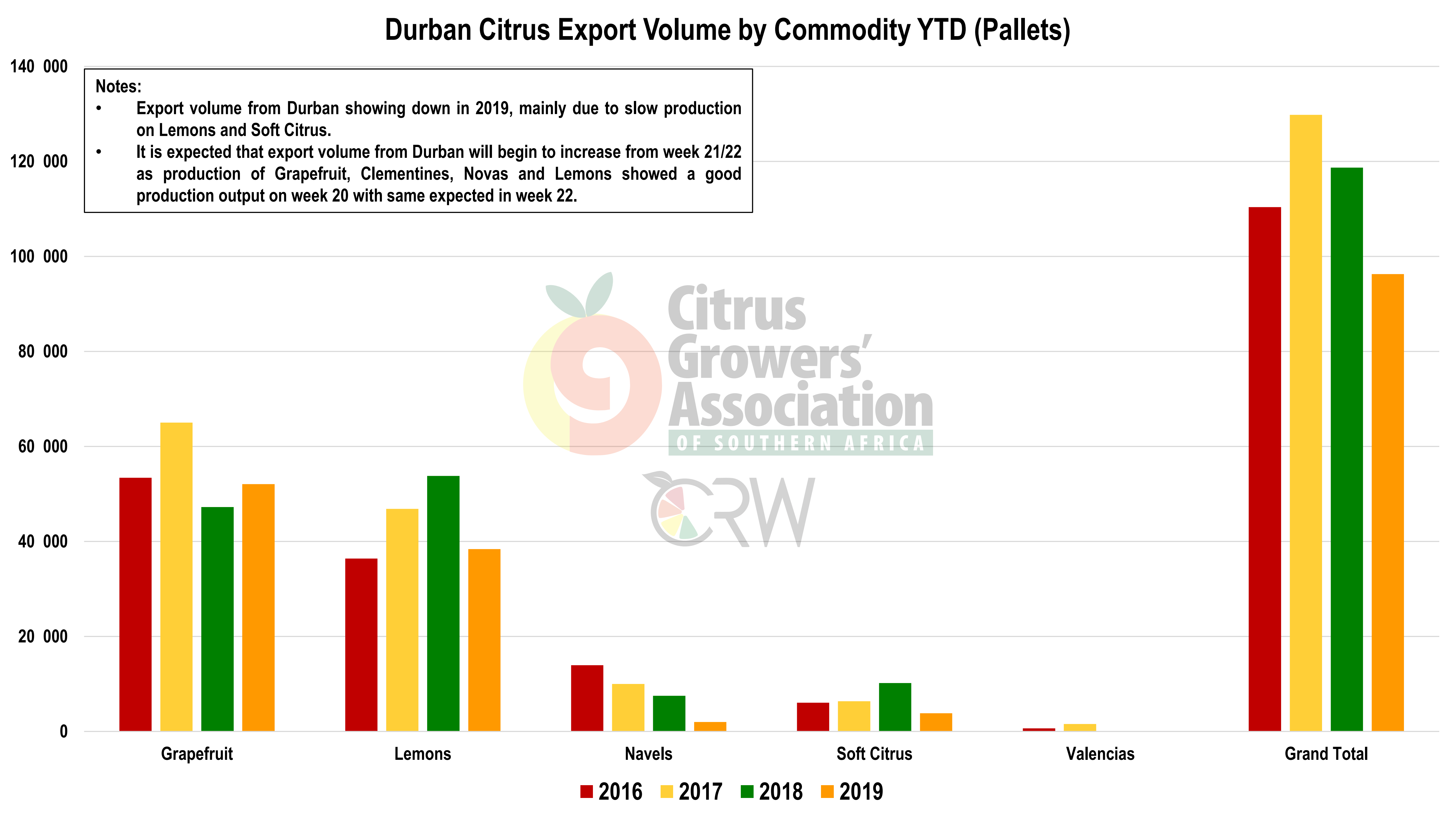
Durban Citrus Export Volume by Commodity YTD (Pallets)
Notes:
• Export volume from Durban showing down in 2019, mainly due to slow production on Lemons and Soft Citrus.
• It is expected that export volume from Durban will begin to increase from week 21/22 as production of Grapefruit, Clementines, Novas and Lemons showed a good production output on week 20 with same expected in week 22.
140 000
120 000
100 000
80 000
60 000
40 000
20 000
0
Grapefruit
Lemons
Navels
Soft Citrus
Valencias
Grand Total
2016
2017
2018
2019
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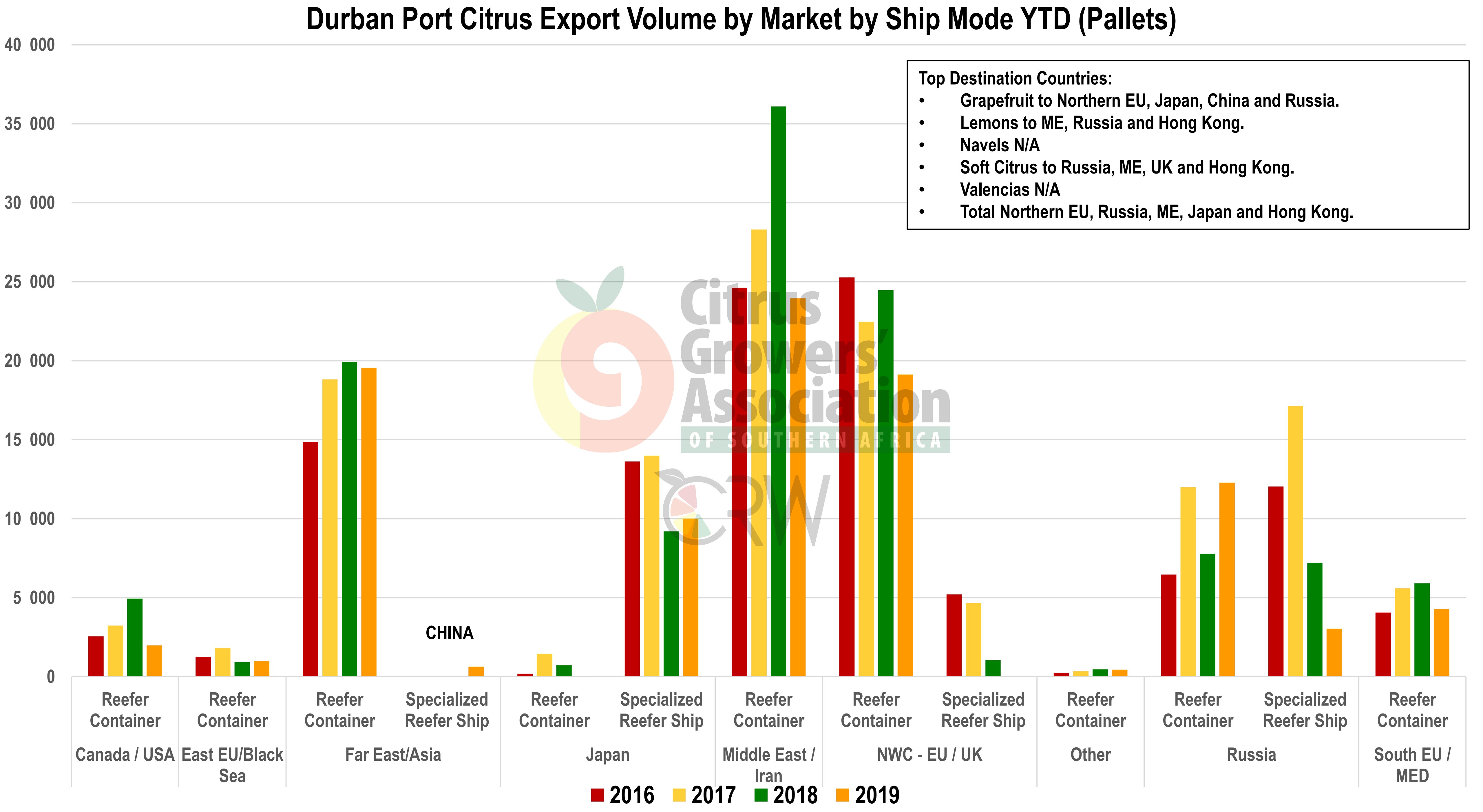
Durban Port Citrus Export Volume by Market by Ship Mode YTD (Pallets)
40 000
35 000
30 000
25 000
20 000
15 000
10 000
5 000
0
Top Destination Countries:
• Grapefruit to Northern EU, Japan, China and Russia.
• Lemons to ME, Russia and Hong Kong.
• Navels N/A
• Soft Citrus to Russia, ME, UK and Hong Kong.
• Valencias N/A
• Total Northern EU, Russia, ME, Japan and Hong Kong.
CHINA
Reefer Container
Specialized Reefer Ship
Canada / USA
East EU/Black Sea
Far East/Asia
Japan
Middle East / Iran
NWC - EU / UK
Other
Russia
South EU / MED
2016
2017
2018
2019
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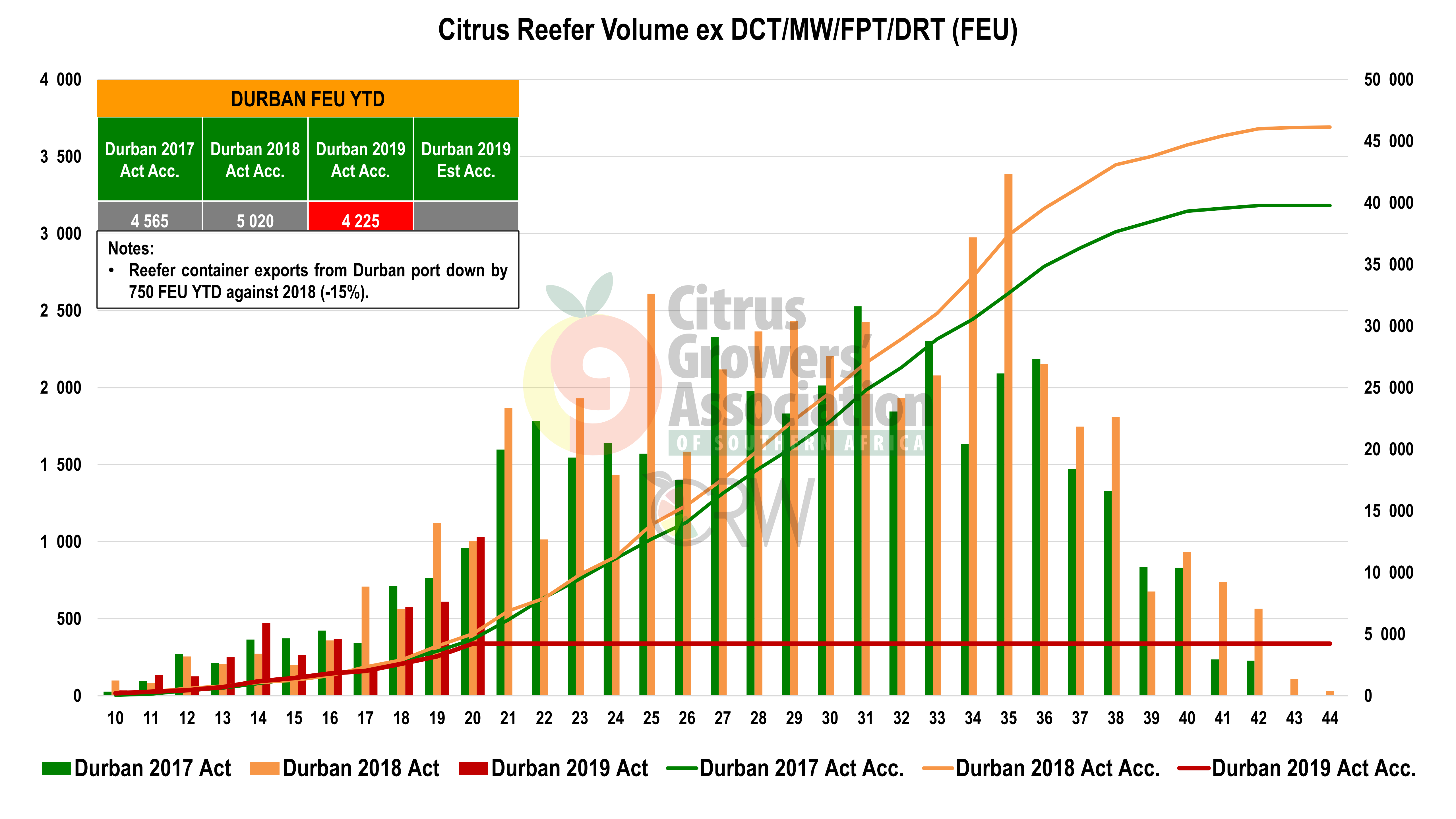

Citrus Reefer Volume ex DCT/MW/FPT/DRT (FEU)
DURBAN FEU YTD
Durban 2017 Act Acc.
Durban 2018 Act Acc.
Durban 2019 Act Acc.
Durban 2019 Est Acc.
4 565
5 020
4 225
Notes:
• Reefer container exports from Durban port down by 750 FEU YTD against 2018 (-15%).
4 000
3 500
3 000
2 500
2 000
1 500
1 000
500
0
50 000
45 000
40 000
35 000
30 000
25 000
20 000
15 000
10 000
5 000
10 11 12 13 14 15 16 17 18 19 20 21 22 23 24 25 26 27 28 29 30 31 32 33 34 35 36 37 38 39 40 41 42 43 44
Durban 2017 Act
Durban 2018 Act
Durban 2019 Act
Durban 2017 Act Acc.
Durban 2018 Act Acc.
Durban 2019 Act Acc.
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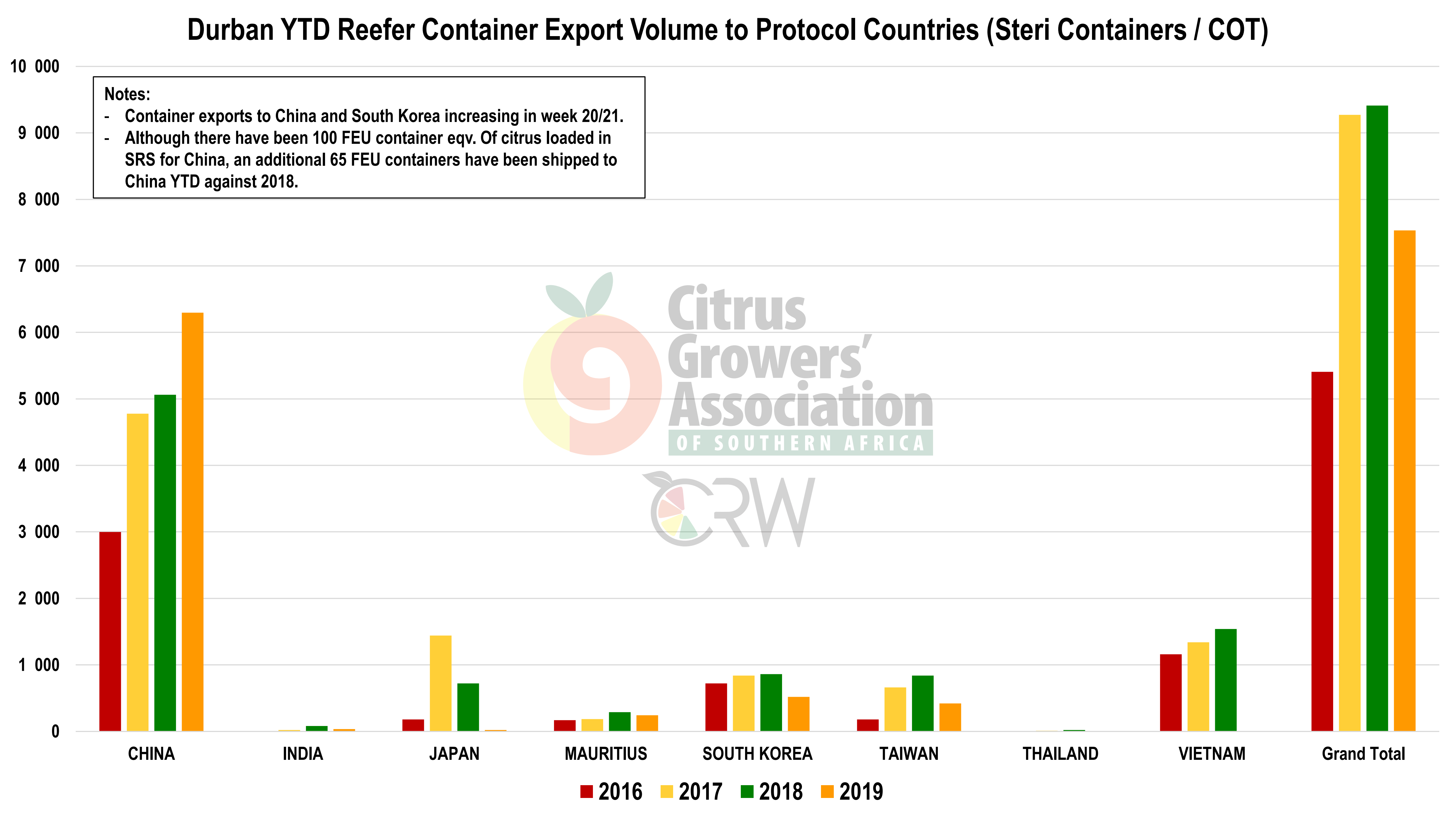

Durban YTD Reefer Container Export Volume to Protocol Countries (Steri Containers / COT)
Notes:
- Container exports to China and South Korea increasing in week 20/21.
- Although there have been 100 FEU container eqv. Of citrus loaded in SRS for China, an additional 65 FEU containers have been shipped to China YTD against 2018.
10 000
9 000
8 000
7 000
6 000
5 000
4 000
3 000
2 000
1 000
0
CHINA
INDIA
JAPAN
MAURITIUS
SOUTH KOREA
TAIWAN
THAILAND
VIETNAM
Grand Total
2016
2017
2018
2019
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SUMMARY:

- Farm truck intakes (Fri) – truck arrivals into Durban have increased but there are no foreseeable constraints and delays expected.
- Cold storage capacity – there are no foreseen cold store capacity challenges for the coming week. MFT facility at full capacity but this should ease with the loading of 3rd vessel to Japan/China Baltic Spring expected to commenced loading pm 24/05. Vessel XIN Ri ZHAO (FAX Service) export reefer stacks have been delayed by 3 days, there are a high volume of COT containers waiting to pack for this vessel, stacks Prov 6am 25/05.
- Railed containers from inland to DCT – 1st trains arrived DCT last week. The Natcor has had 5 days shut down due to occupation from a landslide in Shongweni and maintenance. Natcor back in operation this week. DCT has ~4,000 containers to rail up to the reefer with the backlog caused by the Natcor occupation.
- Durban Container Terminal – truck TTT at DCT Pier 2 last week 20 ave. = 403 min with average 102 moves per hour. 3 container vessels at anchorage outside Durban, 1 vessel at anchorage >48 hours. This week 21, saw massive congestion on Monday to Wednesday due to 8 hours of the terminals being wind bound on Monday pm. Pier 1 plug point capacity at 100% and Pier 2 at 36%. G2 reefer stacks at Pier 1 are delayed which brings an additional ~300 plug points.
- Japan SEP week 20 – 3% rejections FCM/CBS on GF, nil On Lemons. 3rd Japan/China vessel Baltic Spring expected to commence pm 24/05.
- Korea SEP week 20 – 14% rejections for Mealy Bug. High volume of containers packing for Korea this week (See – Spotlight on South Korea week 20).

General -

- The CRI are in process of drafting as Cutting Edge circular in reference to the packing of bulk bins for export to China, this should be circulated by Monday.
- Vessel Baltic Summer 19knots IO deep showing ETA TYO 03/06, vessel Afric Star 16 knots IO deep showing ETA SIN 29/05.