Durban Port Friday Report

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

Week 22

Data Supplied by PPECB

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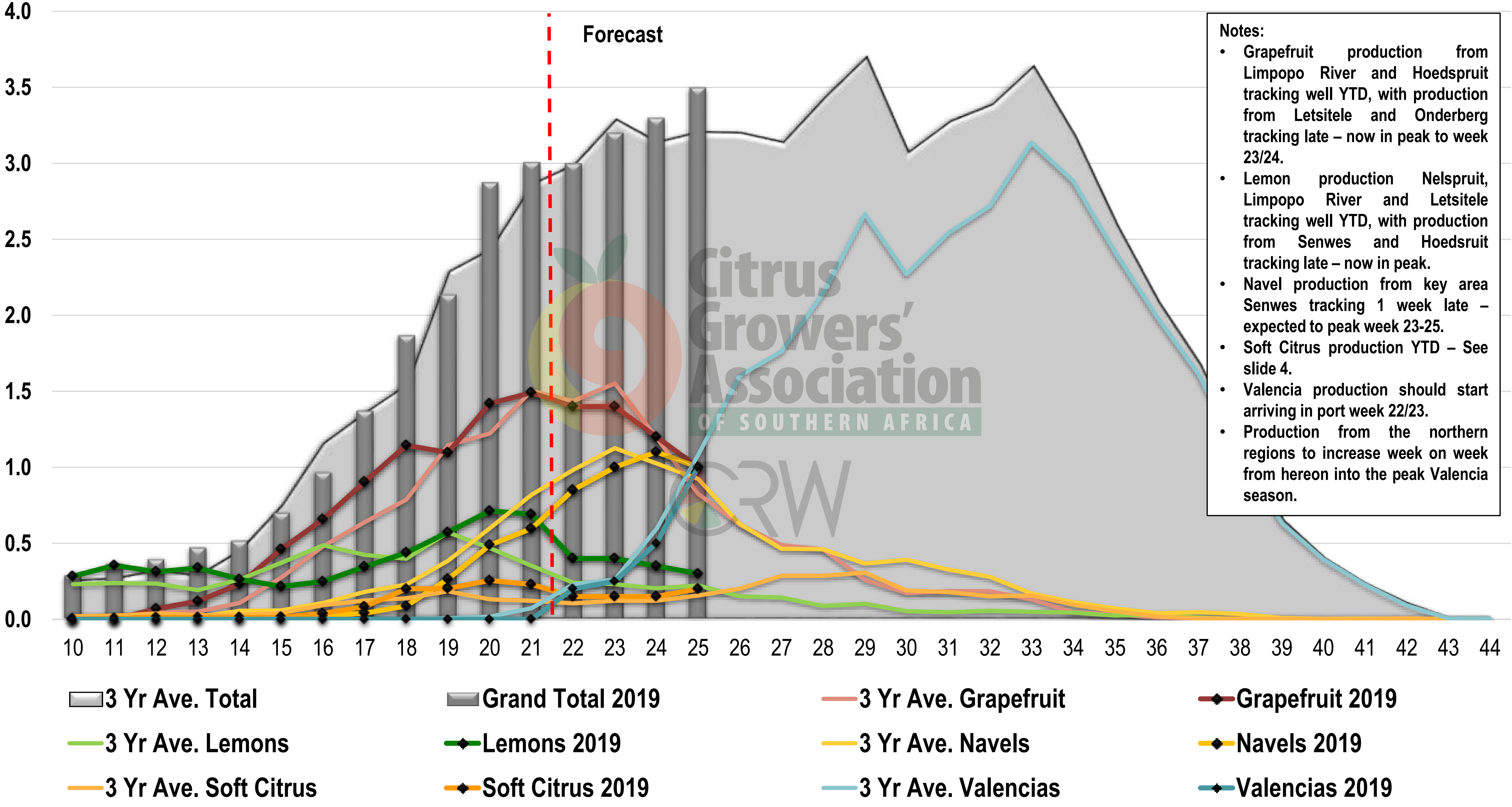
Citrus Growers' Association OF SOUTHERN AFRICA

Northern Regions Weekly Citrus Export Production YTD 2019 vs. 3 Yr Ave.

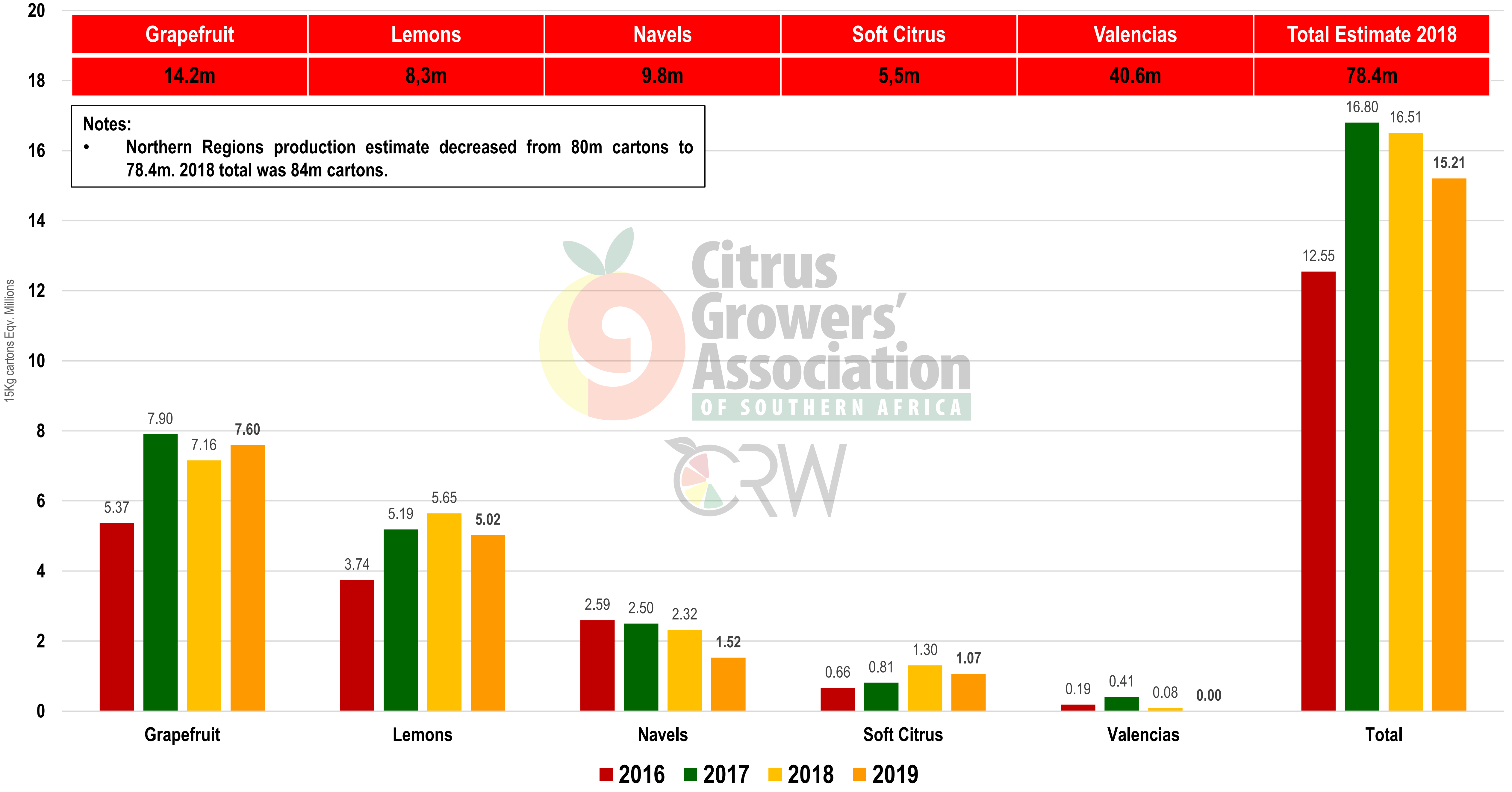


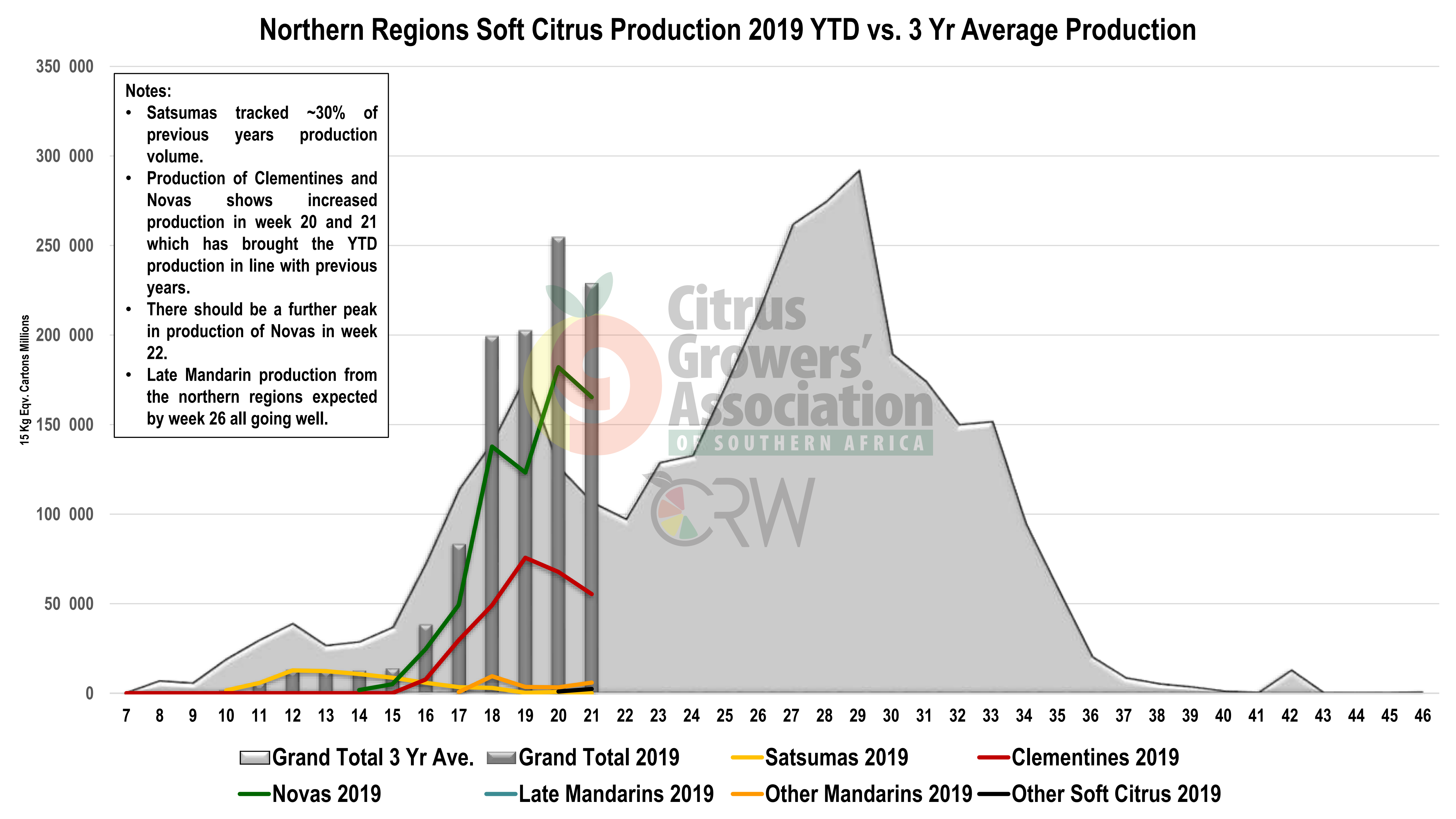
Notes:
- Grapefruit production from Limpopo River and Hoedspruit tracking well YTD, with production from Letsitele and Onderberg tracking late – now in peak to week 23/24.
- Lemon production Nelspruit, Limpopo River and Letsitele tracking well YTD, with production from Senwes and Hoedsruit tracking late – 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.
- Production from the northern regions to increase week on week from hereon into the peak Valencia season.

Northern Regions Citrus Export Production Volume YTD

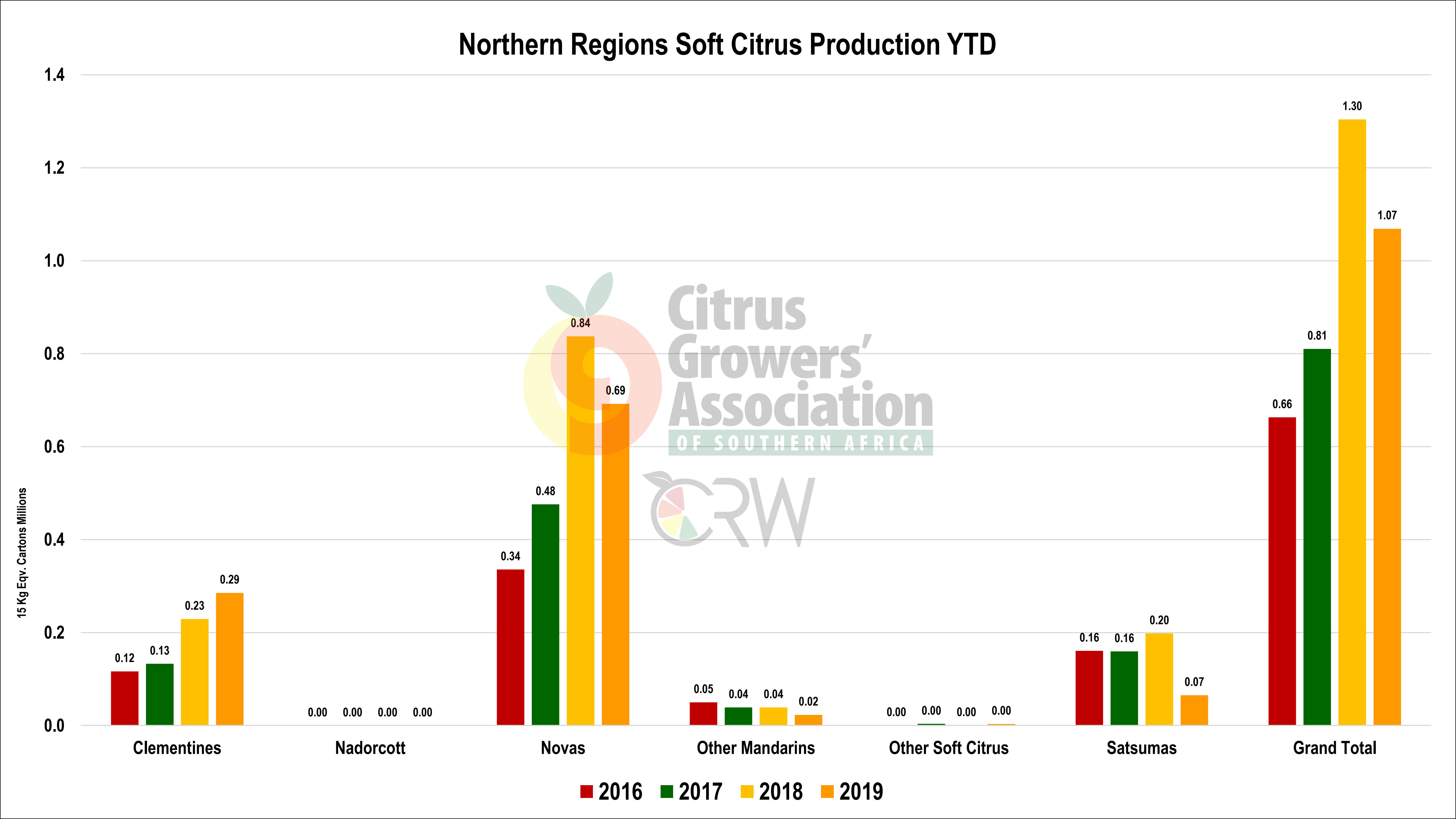
Grapefruit	Lemons	Navels	Soft Citrus	Valencias	Total Estimate 2018
14.2m	8,3m	9.8m	5,5m	40.6m	78.4m

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



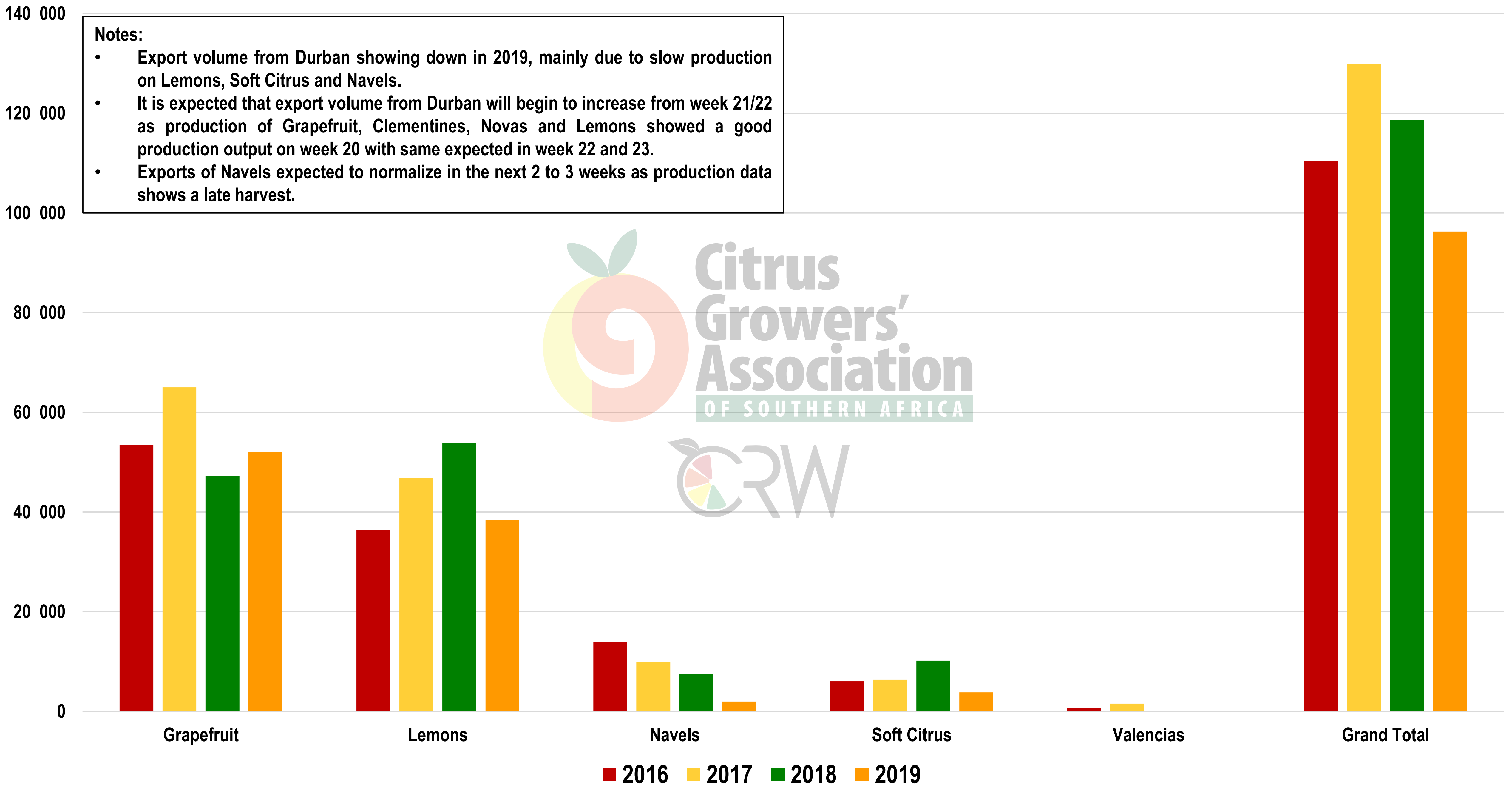


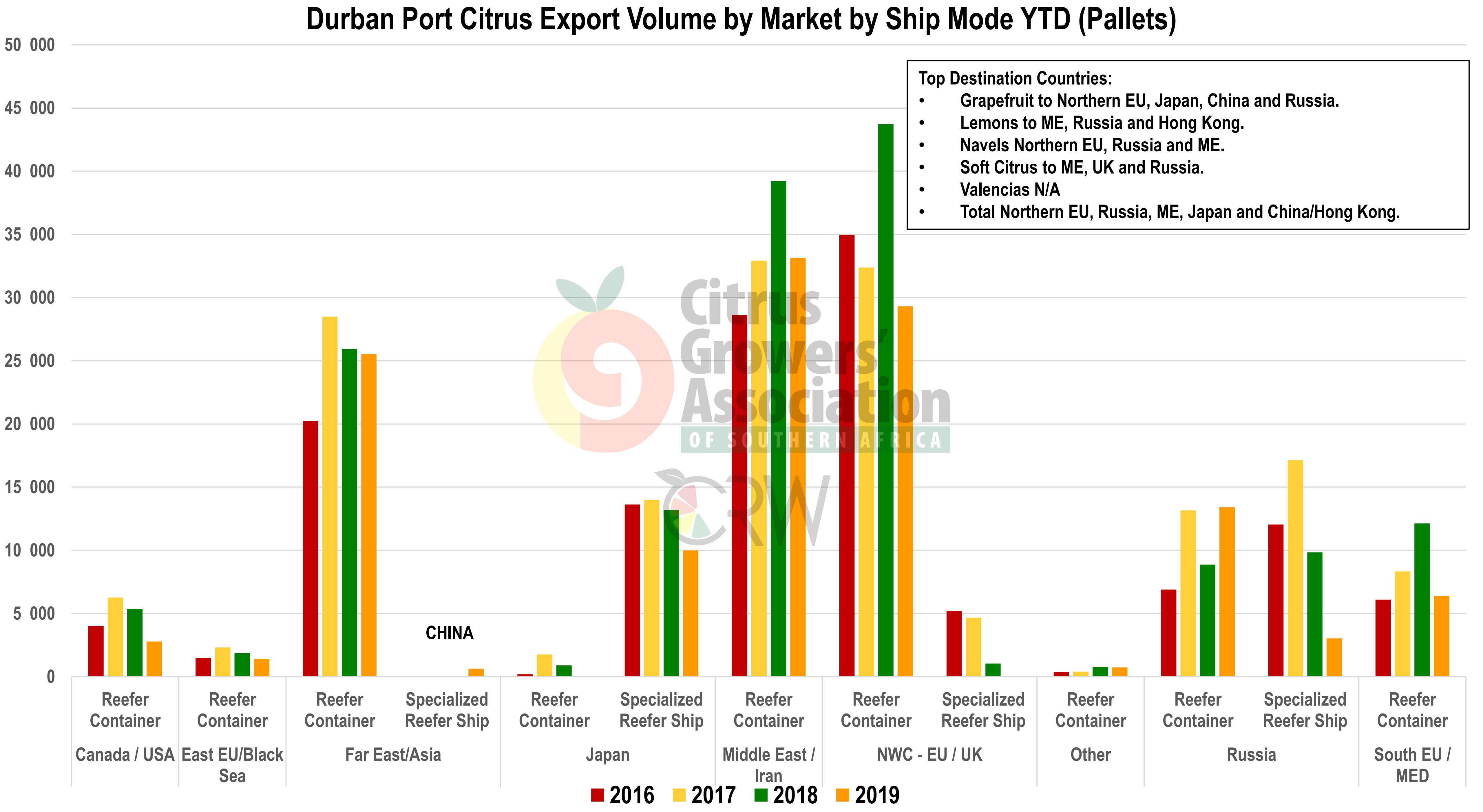
Northern Regions Soft Citrus Production 2019 YTD vs. 3 Yr Average Production
Notes:
• Satsumas tracked ~30% of previous years production volume.
• Production of Clementines and Novas shows increased production in week 20 and 21 which has brought the YTD production in line with previous years.
• There should be a further peak in production of Novas in week 22.
• Late Mandarin production from the northern regions expected by week 26 all going well.
15 Kg Eqv. Cartons Millions
350 000
300 000
250 000
200 000
150 000
100 000
50 000
0
7 8 9 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 45 46
Grand Total 3 Yr Ave.
Grand Total 2019
Satsumas 2019
Clementines 2019
Novas 2019
Late Mandarins 2019
Other Mandarins 2019
Other Soft Citrus 2019
Citrus Growers' Association of Southern Africa
CRW



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
0.12
0.13
0.23
0.29
0.00
0.00
0.00
0.00
0.34
0.48
0.84
0.69
0.05
0.04
0.04
0.02
0.00
0.00
0.00
0.00
0.16
0.16
0.20
0.07
0.66
0.81
1.30
1.07
Clementines
Nadorcott
Novas
Other Mandarins
Other Soft Citrus
Satsumas
Grand Total
2016
2017
2018
2019

Durban Citrus Export Volume by Commodity YTD (Pallets)




Durban Port Citrus Export Volume by Market by Ship Mode YTD (Pallets)
Top Destination Countries:
• Grapefruit to Northern EU, Japan, China and Russia.
• Lemons to ME, Russia and Hong Kong.
• Navels Northern EU, Russia and ME.
• Soft Citrus to ME, UK and Russia.
• Valencias N/A
• Total Northern EU, Russia, ME, Japan and China/Hong Kong.
50 000
45 000
40 000
35 000
30 000
25 000
20 000
15 000
10 000
5 000
0
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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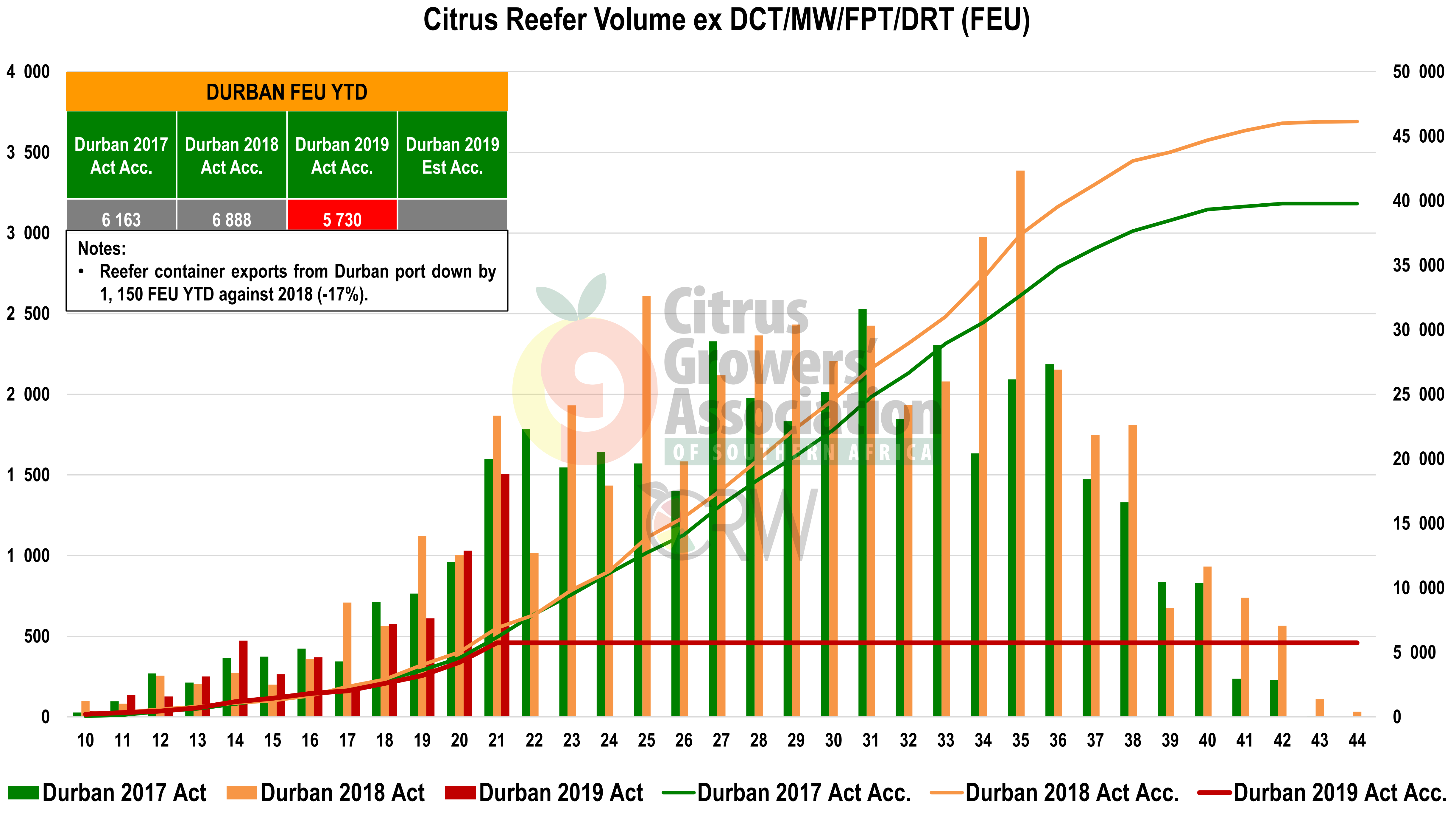

Citrus Reefer Volume ex DCT/MW/FPT/DRT (FEU)
DURBAN FEU YTD
Durban 2017 Act Acc.
Durban 2018 Act Acc.
Durban 2019 Act Acc.
Durban 2019 Est Acc.
6 163
6 888
5 730
Notes:
• Reefer container exports from Durban port down by 1, 150 FEU YTD against 2018 (-17%).
4 000
3 500
3 000
2 500
2 000
1 500
1 000
500
0
50 000
45 000
40 000
35 000
30 000
25 000
20 000
15 000
10 000
5 000
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
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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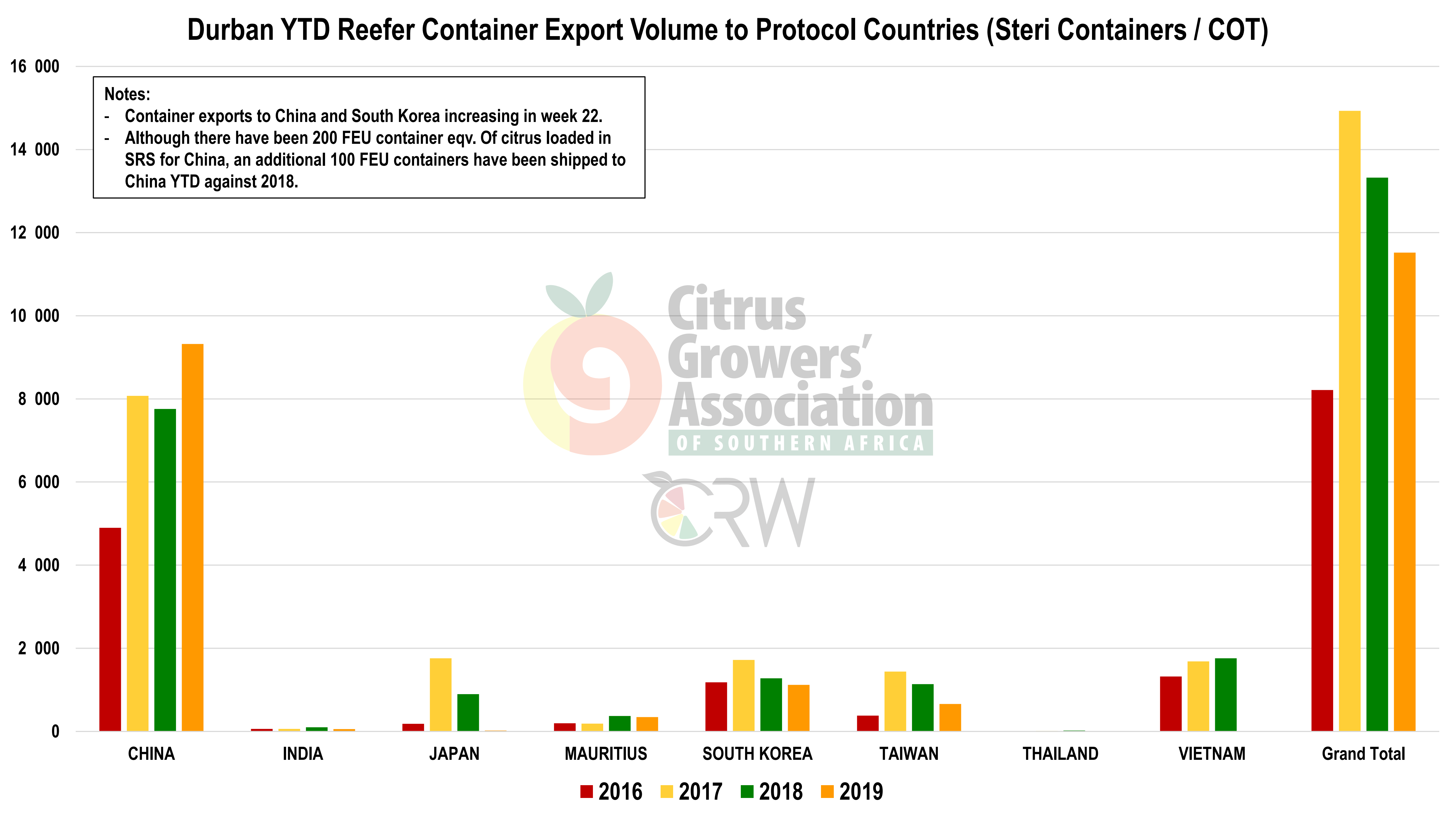
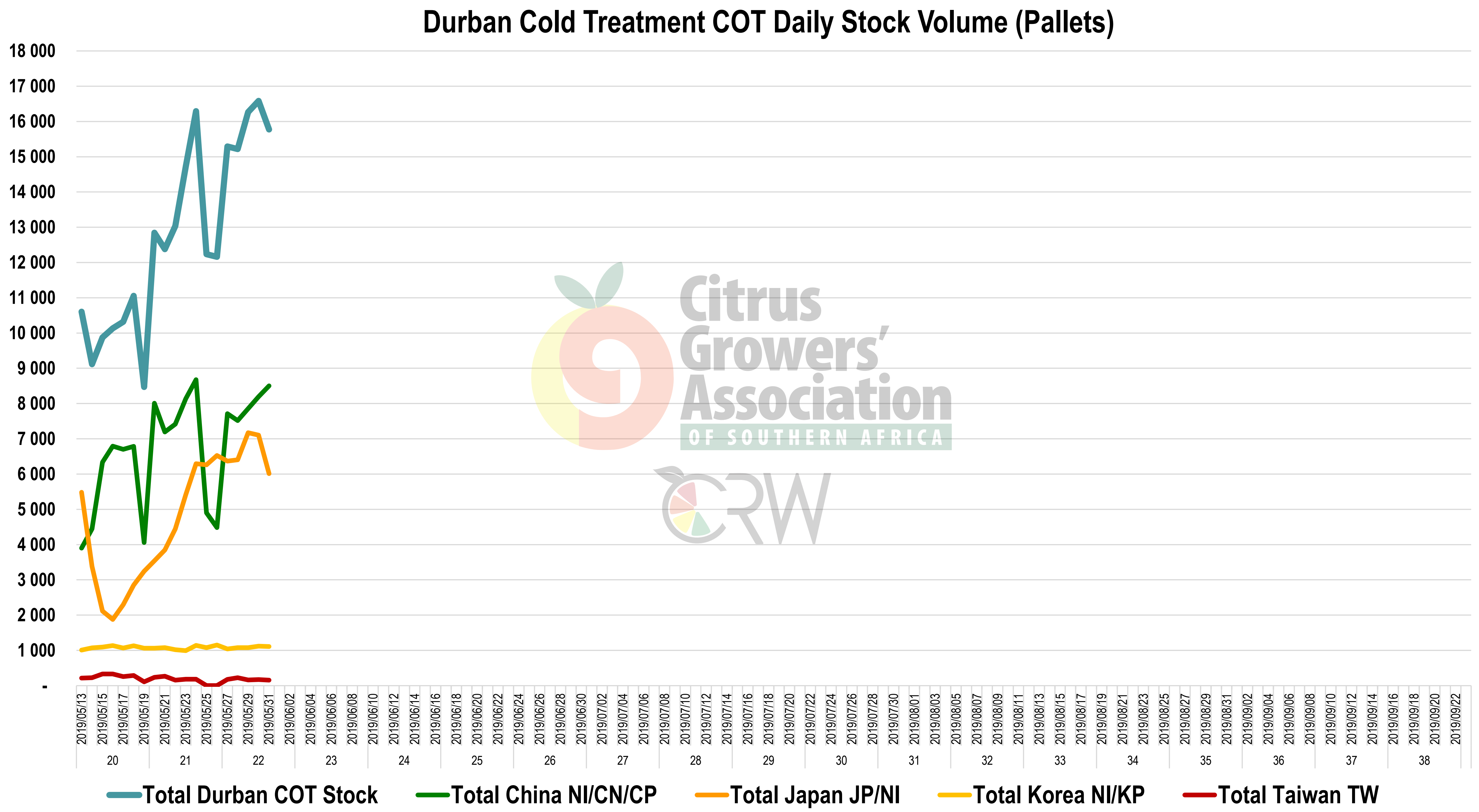


Durban YTD Reefer Container Export Volume to Protocol Countries (Steri Containers / COT)
Notes:
- Container exports to China and South Korea increasing in week 22.
- Although there have been 200 FEU container eqv. Of citrus loaded in SRS for China, an additional 100 FEU containers have been shipped to China YTD against 2018.
16 000
14 000
12 000
10 000
8 000
6 000
4 000
2 000
0
CHINA
INDIA
JAPAN
MAURITIUS
SOUTH KOREA
TAIWAN
THAILAND
VIETNAM
Grand Total
2016
2017
2018
2019
Citrus Growers' Association
OF SOUTHERN AFRICA
CRW


Durban Cold Treatment COT Daily Stock Volume (Pallets)
18 000
17 000
16 000
15 000
14 000
13 000
12 000
11 000
10 000
9 000
8 000
7 000
6 000
5 000
4 000
3 000
2 000
1 000
-
20
21
22
23
24
25
26
27
28
29
30
31
32
33
34
35
36
37
38
Total Durban COT Stock
Total China NI/CN/CP
Total Japan JP/NI
Total Korea NI/KP
Total Taiwan TW

SUMMARY:

- Farm truck intakes (Fri) – truck arrivals into Durban have increased but there are no congestion and delays seen this week. Expecting truck arrivals into Durban to increase week 23 to 25 due to Grapefruit, Navel and Valencia production increasing.
- Cold storage capacity – there are no foreseen cold store capacity challenges for the coming week.
- Durban Container Terminal – truck TTT at DCT Pier 2 last week 21 ave. = 315 min with average 122 moves per hour. 2 container vessels at anchorage outside Durban, nil vessels at anchorage >48 hours. This week 22, operations have been relatively smooth going. We are finding reefer stack dates are aligning over the weekends causing a degree of constraint as most container depots do not open 24 hours over weekends.
- Japan SEP week 21 – 2% rejections FCM/CBS on GF, nil on Lemons. 3rd Japan/China vessel Baltic Spring expected to depart pm 31/05 and 4th vessel Andalucia Star expected to complete loading 02/06.
- Korea SEP week 21 – 13% rejections for Mealy Bug. (See – Spotlight on South Korea week 22).

GENERAL:

- 1st Japan vessel Baltic Summer sailing 20knots off Taiwan coast showing ETA TYO 03/06, 2nd vessel Afric Star sailing 17knots through Singapore Strait showing ETA TYO 07/06.
- There is 8,500 pallets of stock for China in Durban cold stores which is 425 containers worth. There are 2,000 pallets of stock to be inspected by DAFF. We are expecting a high volume of containers to be packed for China in the coming days.
- Due to length of time between 4th and 5th vessel to Japan it is expected that container shipments to Japan will increase in the interim.
- The strike notice that was issued to Transnet this week related to the tug drivers etc and not related to the container terminal. There was minimal impact on vessel berthing and by Wednesday Transnet had obtained an interdict stopping the strike action. The port is functioning normally at the moment.