

SOFT CITRUS FOCUS GROUP

DRAFT

MINUTES OF MEETING OF THE SOFT CITRUS FOCUS GROUP HELD AT 10:00 ON MONDAY 17TH MARCH 2014 AT BIRCHWOOD HOTEL AND CONFERENCE CENTRE, ORT, JHB.

Present:

Martina Odendaal	(Patensie)
Andrew Cooper	(Letsitele)
Charl Tibshreany	(Sunday's River Valley)
Lawrence Mgdale	(Citrus Development Chamber).
Graham Barry	(observer – CGA)
John Edmonds	(CGA – secretariat)
Paul Hardman	(CGA)
Ista Upton	(Senwes)
Andrew Muller	(Nelspruit, for AJ Esser)

Observers:

Deon Joubert (SRV)
Peter Nicholson (Limpopo River)
Piet Smit (Letsitele)

1. Welcome

Martina Odendaal welcomed all to the meeting.

2. Apologies

Jock Danckwerts	(Eastern Cape Midlands)
AJ Esser	(Nelspruit)
Stefan Bruwer	(Boland)
Gerrit vd Merwe (jr)	(Western Cape)

3. Verification of the Soft Citrus FG representatives and election of chair and vice-chair

The meeting noted the representatives that had been elected in each region summarized in the table here. Martina Odendaal was re-elected chair. Stefan Bruwer was nominated as vice-chair, which will be confirmed when Stefan has been approach to determine his willingness to stand, otherwise this nomination will be resolved at the next Soft Citrus meeting.

<u>Region</u>	<u>Representative</u>
Nelspruit	A J Esser
Letsitele	Andrew Cooper
Senwes	Ista Upton
E.C. Midlands	Jock Danckwerts
S.R. Valley	Charl Tibshraeny
Patensie	Martina Odendaal
Boland	Stefan Bruwer
W. Cape	Gerrit vd Merwe jun
C.D.C	Lawrence Mgdale

4. Approval of Minutes of Meeting held on 15 August 2013.

The minutes were duly approved, nominated by Andrew Cooper and seconded by Charl Tibshreany.

5. Matters Arising from Minutes

- 5.1. UNECE document: The meeting noted that the UNECE discussions around their standards were reaching a final stage and it was critical to have the appropriate representation at these meeting to discuss the issues. While DAFF have the official seat at UNECE meeting, this task may be assigned to PPECB (Shawn Coetzee). The meeting felt that besides preparing Shawn for the meeting the following are also requested:
- 5.1.1. Determine if an observer may accompany PPECB to the meeting
 - 5.1.2. Determine who would be in a position to attend the meeting – the proposal being for Graham Barry to attend
 - 5.1.3. Determine from CGA whether funds are available to send the representative to the meeting.
- 5.2. Ribbing on Nadorcotts: Martina Odendaal noted that a packhouse had proposed there be a separate standard for ribbing on Nadorcotts. It was noted that the packhouse had withdrawn the proposal realizing an error had been made in interpretation of the standard. Nevertheless, Graham Barry approached Citrigold to ascertain their view on the matter. Graham reported back that it was the view of Citrigold that:
- .1. Clemengold (class I): no change, maintain status quo with photo 3 of Set No. 22.
 - .2. Nadorcott (class): change from photo 3 of Set No. 22 to photo 4 of Set No. 22 – however, this would require approval by the Soft Citrus Focus Group, the Quality Standards meeting, and DAFF since this would then be the only cultivar with this specification.
 - .3. Nadorcott (class II): no change, maintain status quo with photo 6 of Set no. 22.
- With that background the meeting decided it is unnecessary to apply for a change in the Standard for ribbing on nadorcotts.

6. Estimates for 2014 (see Annex1)

The meeting then proceeded to provide estimates per region. The overall summary is given in the table here while more details can be found in Annex 1. The overall estimate is up by approximately 9%.

CGA Region	2011	2012	2013	2014est	% Change
Boland	2 230 559	2 263 098	2 222 436	2 303 612	4%
W. Cape	1 439 230	1 774 962	1 925 982	2 183 775	13%
Patensie	980 746	1 131 541	1 129 029	1 453 600	29%
Nelspruit	391 430	667 038	1 108 442	1 055 467	-5%
S.R. Valley	1 076 930	848 280	945 585	960 000	2%
E. Cape Midlands	465 356	599 800	597 786	655 000	10%
Senwes	203 846	184 420	359 279	450 000	25%
Letsitele	70 669	99 199	75 129	75 000	0%
Other	49090	72374	78537	68 000	
Grand Total	6 907 855	7 640 712	8 442 205	9 204 454	9%

7. Markets

Satsumas: The markets seem to be typical for this time of the year, although the warmer weather recently has slowed citrus sales compared to other summer fruit. There appears to be northern hemisphere late mandarins on the market now, which was not the case in 2013, although other if one looks at historic data the markets seem to be “normal”.

8. General

Long-term forecast: The meeting discussed the likely future growth in the Soft Citrus sector based existing new plantings and future plantings. Given this sector has largely focused on the EU market (>60% of volume) a concern was raised about improving access to other markets. Paul Hardman was able to indicate that processes are in place to look at new markets and to priorities these. This process was to continue at the CMF the following day where a SWOT-type report would be given on the new potential markets. The meeting also agreed it would be useful to update the long-term projection model so that everybody would have the right information to know what the “future may look like”. The tree census has been updated and will be used in the projection model.

CBS: It was noted that this sector is particularly vulnerable to the threat of EU market closure due to CBS given the volumes that enter that market. Although no interceptions have occurred on mandarin-types they could be implicated in any additional measures taken by the EU. These matters would be discussed again at the RMS and engagement between DAFF and DG SANCO.

Fruit Quality: The Chair appealed to the focus group members to take the message back to their regions that supplying quality product (with good internal quality) to the market remains an important priority. Growers should strive to deliver a high-quality product to maintain or enhance the competitiveness of the industry.

9. Date of next meeting

It was decided to hold the next meeting on Thursday 3rd April 2014 at 2pm via teleconference and thereafter revert back to a monthly meeting pattern starting 24th April.



Annex 1: 2014 Soft Citrus Estimate

Satsumas	2011	2012	2013	2014*	Comments:
Boland	603 751	524 575	532 311	540 000	
Patensie	302 517	288 296	304 264	357 500	Just started. High acids, internals good, counts good. Hail
W. Cape	227 064	230 405	239 536	263 490	
E. Cape Midlands	198 274	267 081	223 977	250 000	Start end March
S.R. Valley	178 590	167 679	136 900	125 000	Started this week, size better than 2013
Nelspruit	176 400	152 531	180 545	172 789	wk 8 to 16; peaking 1X. Rain problems
Senwes	6 560	11 794	13 533	15 000	
Other	3 100	7 713	4 679	5 000	
Grand Total	1 696 256	1 650 074	1 635 745	1 728 779	

Clementine	2011	2012	2013	2014*	Comments:
Boland	1 136 284	1 162 799	1 040 500	1 100 000	
W. Cape	663 117	856 086	800 128	920 147	Size 3 to 2 (smaller than last year)
S.R. Valley	365 688	192 543	254 664	220 000	
E. Cape Midlands	147 814	173 322	152 299	180 000	
Nelspruit	55 821	35 211	99 822	78 876	wk 15 to 22; peaking on 2,3,1
Senwes	26 749	25 731	45 616	45 000	
Patensie		127 000	114 000	135 100	Start w 18, counts 3,2,1
Other	7 062	5 042	5 046	5 000	
Grand Total	2 504 480	2 704 529	2 626 988	2 684 123	

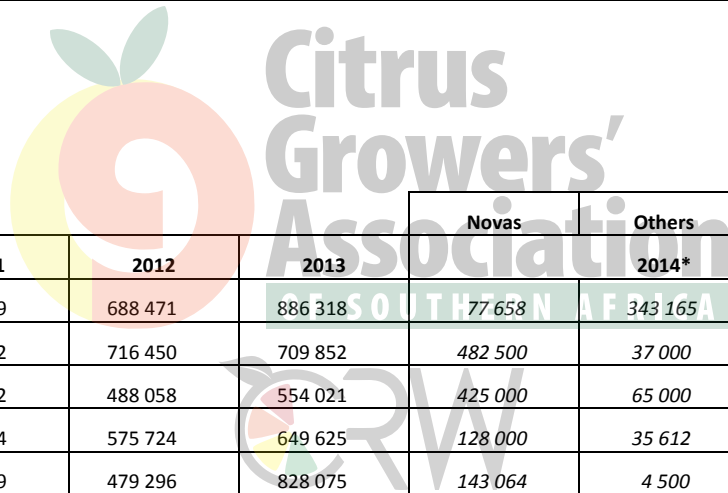
Mandarin

Novas	2011	2012	2013	2014*	Comments:
S.R. Valley	440 823	396 118	387 534	425 000	
Patensie	384 878	410 715	371 362	482 500	Starting w 20, count 2
Boland	153 813	154 111	134 068	128 000	
W. Cape	53 481	68 546	70 598	77 658	
Nelspruit	37 537	12 399	115 148	143 064	wk 15 to 20; peaking on 2,1, 1X
Senwes	23 076	12 930	58 764	110 000	
E. Cape Midlands	10 836	12 768	25 309	35 000	
Other	7 335	2 521	3 331	3 000	
Grand Total	1 111 779	1 070 108	1 166 114	1 404 222	

Mandarin

Other	2011	2012	2013	2014*	Comments:
W. Cape	211 825	244 992	311 968	343 165	
Boland	61 153	21 866	35 612	35 612	
Limpopo River	739	30 770	29 470	30 000	Needs to move
S.R. Valley	26 185	27 032	68 264	65 000	
Senwes	20 190	8 150	34 610	50 000	
Patensie	6 053	27 608	59 471	37 000	

Nelspruit	11 428	17 830	17 575	4 500	wk 29 to 30; peaking on 1XX, 1X
S-KZN	15 535	12 660	4 345		
E. Cape Midlands	6 163	14 143	10 888	10 000	
Letsitele	400	4 274	4		
Other	1 925	2 375	2 532		
Grand Total	361 595	411 700	574 739	575 277	
Mandarin					
Late	2011	2012	2013	2014*	Comments:
Nelspruit	110 244	449 067	695 259	656 238	wk 23 to 37; peaking on 1X,2,1
Boland	275 558	399 747	479 945	500 000	
W. Cape	283 743	374 933	503 752	579 315	
Patensie	185 351	278 127	279 019	306 400	Start w 27. Counts 2,3
Senwes	127 271	125 722	206 756	230 000	
E. Cape Midlands	102 270	132 486	185 313	180 000	
Letsitele	65 900	89 635	69 722	75 000	
S.R. Valley	65 644	64 908	98 223	125 000	
Other	17 764	16 676	34 630	25 000	
Grand Total	1 233 745	1 931 301	2 552 619	2 676 953	



				Novas	Others	Late	Tot Mand
Total Mandarins	2011	2012	2013	2014*			2014*
W. Cape	549 049	688 471	886 318	77 658	343 165	579 315	1 000 137
Patensie	576 282	716 450	709 852	482 500	37 000	306 400	825 900
S.R. Valley	532 652	488 058	554 021	425 000	65 000	125 000	615 000
Boland	490 524	575 724	649 625	128 000	35 612	500 000	663 612
Nelspruit	159 209	479 296	828 075	143 064	4 500	656 238	803 802
Senwes	170 537	146 802	300 130	110 000	50 000	230 000	390 000
Limpopo River					30 000		30 000
S-KZN					-		-
Letsitele					-	75 000	75 000
E. Cape Midlands	119 268	159 397	221 510	35 000	10 000	180 000	225 000
Letsitele	66 300	95 004	69 726		-	75 000	75 000
Other	43 297	63 907	74 215	3 000	-	25 000	28 000
Grand Total	2 707 119	3 413 109	4 293 472	1 404 222	575 277	2 751 953	4 731 451

110%