

A First Look at the 2017 South African Citrus Tree Census

The South African citrus industry is South Africa's largest horticultural industry, with commercial production in all provinces. It is one of South Africa's largest fresh produce exporters, exporting 1.8 million tons in 2017. The Citrus Tree Census is derived from the online orchard registration process for special markets which takes place annually in October.

Statistics about variety, rootstock, tree age and hectares planted are gleaned from this registration process. This information is essential for guiding growers when choosing which varieties to plant, assisting the citrus supply chain with packing and logistics investment decisions and directing market access and research needs. A summary of the data is also presented in the Citrus Growers' Association of Southern Africa annual statistics booklet.

The following article is a brief initial overview of the 2017 tree census data and some of the key findings. Zimbabwean and Swaziland growers are also members of Citrus Growers' Association of Southern Africa and contribute to our annual census but they are not included in this survey as the dataset was not complete at the time of writing. Growers were urged to register all orchards this year. Some growers had previously only registered productive orchards. 76 677 hectares of South African citrus were registered in 2017, a 9% increase over

last year's 70 055 hectares. This is consistent with industry expectation as new growers enter the industry and existing growers expand their orchards, particularly in mandarins (31%) and lemons (23%). Only Navel oranges registered a marginal decrease in hectares. As one would expect, the provinces where these commodities are predominantly grown showed the most growth overall with Western Cape citrus growing 14% and Eastern Cape up by 10%.

Average orchard size in the census was 3.13 hectares with lemon orchards averaging 2.7 hectares on one end of the scale and Grapefruit orchards 4 hectares on average on the other.

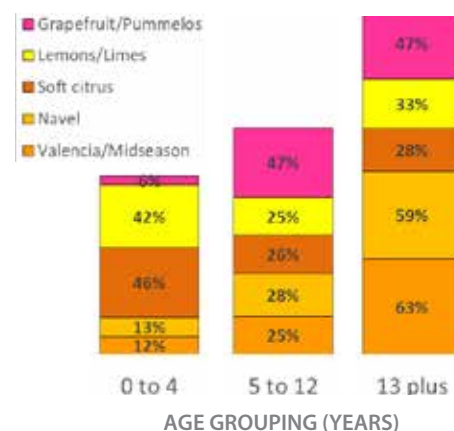
Commodity (ha)	2017	2018	Change
Valencia/Midseason	25,727	26,531	3%
Navel	16,223	16,079	-1%
Soft Citrus	11,438	14,937	31%
Lemons/Limes	9,485	11,685	23%
Grapefruit/Pummelos	7,161	7,412	4%
Kumquats	20	33	65%
Grand Total	70,055	76,677	9%

Row Labels	2017	2018	Change (ha)	% Change
S.R. Valley	12 603	13 432	828	7%
Letsitele	10 332	10 831	498	5%
Senwes	9 489	10 199	710	7%
W. Cape	8 838	9 941	1 103	12%
Hoedspruit	5 375	5 865	489	9%
Patensie	4 726	5 333	606	13%
Nelspruit	4 156	4 921	765	18%
Limpopo River	3 885	4 113	228	6%
Boland	3 289	4 089	800	24%
Onderberg	2 609	2 757	149	6%
E. Cape Midlands	1 648	1 941	293	18%
Nkwalini	1 078	1 101	23	2%
Oranje Rivier	1 114	1 016	-98	-9%
S-KZN	465	479	14	3%
VaalHarts	251	283	32	13%
Pongola	196	193	-3	-2%
Grand Total	70 055	76 493	6 438	9%

The Western Cape and Eastern Cape province's registered soft citrus areas each grew by over a thousand hectares; around thirty percent. Looking at lemons, the Western Cape, Limpopo, Eastern Cape and Mpumalanga all experienced double-digit percentage growth whilst North West province doubled its area from a small base.

As can be seen in the chart right, almost half of the lemon and soft citrus orchard area could be seen as currently non-bearing and only one third as mature. In comparison, two thirds of the orange orchards are mature trees. Overall, half of the South African citrus orchard area is less than thirteen years old.

AGE DISTRIBUTION PER CITRUS COMMODITY

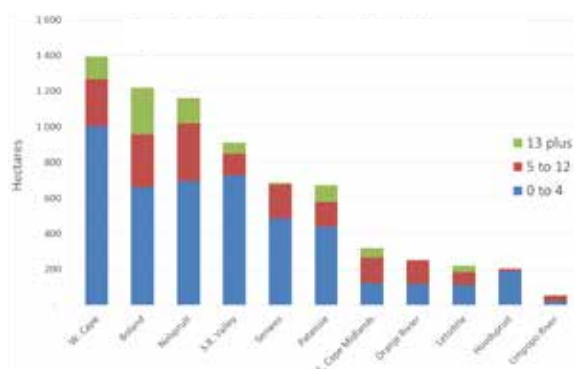


The Citrus Growers' Association of Southern Africa is making efforts to contact newcomers (farmers) in the citrus industry.

Growers of citrus who are not currently members of the Citrus Growers' Association of Southern Africa and intend exporting citrus in the future are urged to contact the association telephonically **031 7652514** or by e-mail **info@cga.co.za**. Growers only pay levies based on cartons which have been packed and passed for export, but will benefit from technical and other know-how in the years prior to exporting.

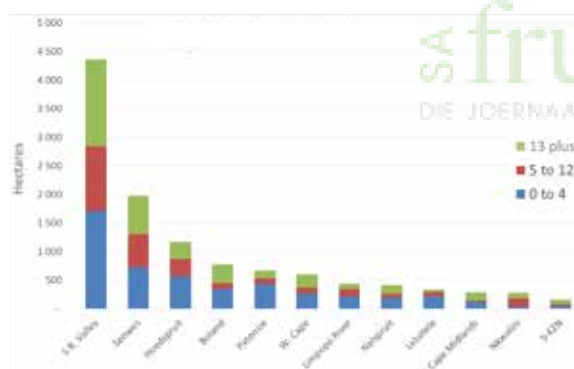
JOHN EDMONDS

AGE DISTRIBUTION FOR LATE MANDARINS



Looking at the development of the late mandarin category, about 65% of all the country's late mandarins (7 100 hectares) are not yet in production. 72% of the Western Cape region's 1400 hectares is under five years old as are 80% of Sunday's River Valley's late mandarins.

AGE DISTRIBUTION FOR LEMONS



About 42% of all the country's lemons (11 684 hectares) are not yet in production. Almost 40% of Sunday's River Valley's lemon trees (4360 hectares) are less than five years old. The smaller regions all have around half their lemon areas in this immature stage (see graph above).

The picture for oranges is relatively static with Valencia's increasing 3% to 26 529 hectares and Navels decreasing by 1% to 16 061 hectares. Nelspruit region saw a 21% increase in their Valencia area.

Grapefruit also shows a mature face with only about 7% of the area being under five years old. There is a 4% increase in area to 7 412 hectares nationally.

The continued growth in late mandarins and lemon production is prompting stakeholders in the citrus industry to put more effort into identifying, exploring and enhancing export opportunities for these commodities. The question which will be answered in the next decade is whether the increased production will be matched by consumption at sustainable profit levels to maintain the South African growth trajectory.

Valencia	2017	2018	Change (ha)	% Change
Letsitele	7 826	8 108	283	4%
S.R. Valley	3 115	3 147	32	1%
Senwes	3 087	3 082	-5	0%
Limpopo River	2 800	2 833	33	1%
Hoedspruit	2 636	2 709	73	3%
W. Cape	2 207	2 355	148	7%
Nelspruit	1 143	1 381	237	21%
Onderberg	1 022	1 099	76	7%
Patensie	1 052	1 028	-24	-2%
Oranje Rivier	304	246	-57	-19%
Nkwadini	197	196	-1	-1%
Boland	115	121	6	5%
S-KZN	113	113	-	0%
VaalHarts	41	41	-	0%
Pongola	41	41	-	0%
E. Cape Midlands	29	29	-	0%
Grand Total	25 727	26 529	801	3%

Navels (ha)	2017	2018	Change (ha)	% Change
S.R. Valley	4 068	4 063	-5	0%
W. Cape	3 879	3 799	-80	-2%
Senwes	3 786	3 719	-67	-2%
Patensie	1 830	1 802	-28	-2%
Nelspruit	1 135	1 166	31	3%
E. Cape Midlands	668	658	-10	-1%
Boland	276	262	-14	-5%
S-KZN	210	200	-10	-5%
VaalHarts	187	199	12	6%
Limpopo River	113	119	6	5%
Letsitele	32	36	4	11%
Hoedspruit	15	22	7	44%
Oranje Rivier	23	12	-11	-47%
Onderberg	2	4	2	100%
Grand Total	16 223	16 061	-162	-1%

Grapefruit Ages	0 to 4	5 to 12	13 plus
Letsitele	9%	57%	34%
Hoedspruit	9%	43%	48%
Limpopo River	0%	38%	62%
Nkwadini	0%	15%	85%
S.R. Valley	0%	63%	37%
W. Cape	0%	88%	12%
Patensie	1%	84%	15%
Senwes	100%	0%	0%
Grand Total	6.6%	46.7%	46.8%

Grapefruit (ha)	2017	2018	Change	%
Letsitele	1 992	2 083	92	5%
Hoedspruit	1 655	1 726	71	4%
Onderberg	1 556	1 614	58	4%
Limpopo River	613	613	-	0%
Nkwadini	601	597	-4	-1%
Oranje Rivier	416	394	-23	-5%
S.R. Valley	114	108	-7	-6%
Pongola	100	98	-2	-2%
W. Cape	37	98	60	161%
Patensie	77	81	4	5%
Senwes		1	1	
Grand Total	7 161	7 412	251	4%

