

Analysis of the October 2018 South African Orchard Registration Results

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The South African citrus industry is SA's largest horticultural industry, with commercial production in all provinces. It's also SA's largest fresh produce exporter, with exports totalling almost two million tons in 2018. 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, assist-

ing 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 (CGA) of Southern Africa annual statistics booklet.

The following article is a brief initial overview of the 2018 tree census data and some of the key findings. Zimbabwean and Swaziland growers are also members of the CGA 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.

Commodity	2016	2017	2018	Change	%
Valencia/Midseasons	25 728	26 521	26 946	425	2%
Navels	16 223	16 064	16 141	77	0%
Soft Citrus	11 438	13 182	16 307	3 125	24%
Lemons/Limes	9 485	11 710	14 616	2 907	25%
Grapefruit/Pummelos	7 161	7 393	7 444	51	1%
Kumquats	20	33	33	-	0%
Grand Total	70 056	74 903	81 488	6 585	9%

South African registered citrus for 2018 totalled 81 488 ha, a nine percent increase over last year's 74 903 ha. Although some of this increase may be due to better cooperation from growers in registering all their orchards, including those not yet in production, the growth is still consistent with industry expectations. Growth continues in mandarins (24%) and lemons (25%). The other commodities show little growth.

The provinces that showed the biggest area growth overall were Limpopo Province and the Western Cape, as can be seen in the table below.

Hectares	Census Year				
Province	2016	2017	2018	Change	%
Limpopo	30 293	32 334	34 802	2 467	8%
Eastern Cape	18 969	20 171	21 159	989	5%
Western Cape	12 136	12 960	14 883	1 923	15%
Mpumalanga	5 393	5 739	6 363	624	11%
KZN	1 739	1 780	1 941	160	9%
Northern Cape	1 365	1 492	1 773	281	19%
North West	161	426	554	128	30%
Free State			13	13	
Grand Total	70 056	74 903	81 488	6 585	9%

Looking at the CGA's regional breakdown, the Boland region in the Western Cape province showed the biggest increase of 1 335 ha, up 40% on last year's census. Nelspruit (21%), Sunday's River Valley (7%) and Senwes (9%) all grew by over 900 ha. (See table right).

Hectares	Census Year				
CGA Reg.	2016	2017	2018	Change	%
S.R. Valley	12 604	12 939	13 855	916	7%
Letsitele	10 332	10 747	11 136	389	4%
Senwes	9 489	10 085	11 002	917	9%
W. Cape	8 838	9 608	10 232	624	6%
Hoedspruit	5 375	5 793	6 368	575	10%
Patensie	4 726	5 470	5 345	-124	-2%
Nelspruit	4 156	4 723	5 700	977	21%
Limpopo River	3 885	4 327	4 579	251	6%
Boland	3 289	3 363	4 698	1 335	40%
Onderberg	2 609	2 824	2 971	148	5%
E. Cape Midlands	1 648	1 751	1 875	124	7%
Oranje Rivier	1 114	1 215	1 511	296	24%
Nkwalini	1 078	1 101	1 168	68	6%
S-KZN	465	486	580	94	19%
VaalHarts	251	277	275	-2	-1%
Pongola	196	193	192	-1	-1%
Grand Total	70 056	74 903	81 488	6 585	9%

Lemons/Limes Census Year					
Province	2016	2017	2018	Change	%
Eastern Cape	4 514	5 317	6 148	831	16%
Limpopo	3 027	3 907	4 730	823	21%
Western Cape	933	1 290	1 956	666	52%
KZN	448	496	642	147	30%
Mpumalanga	333	412	773	361	88%
Northern Cape	189	203	255	52	25%
North West	41	84	112	27	33%
Grand Total	9 485	11 710	14 616	2 907	25%

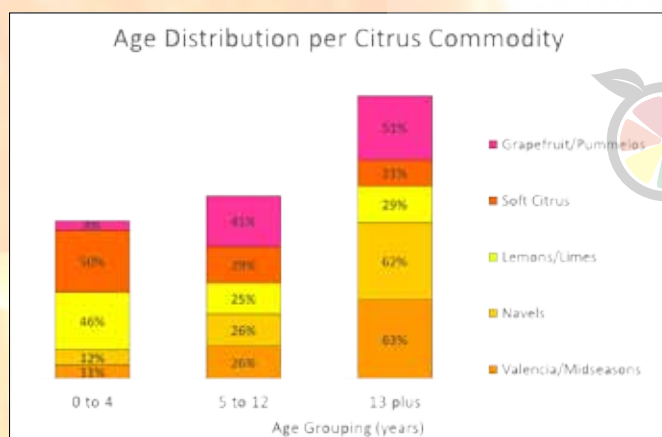
Average orchard size in the census was 3.34 ha, with lemon orchards averaging three ha, on one end of the scale and Grapefruit orchards averaging four ha on average, on the other. The Western Cape and Limpopo provinces' registered

Soft Citrus Census Year					
Province	2016	2017	2018	Change	%
Western Cape	4 689	5 152	6 336	1 183	23%
Eastern Cape	3 502	3 942	4 341	399	10%
Limpopo	2 353	3 094	4 313	1 219	39%
Mpumalanga	611	488	747	259	53%
Northern Cape	204	286	311	25	9%
North West	50	181	200	19	10%
KZN	30	38	60	22	58%
Grand Total	11 438	13 182	16 307	3 125	24%

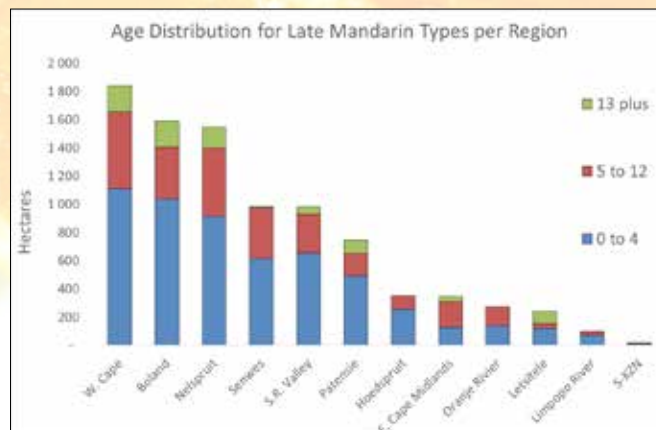
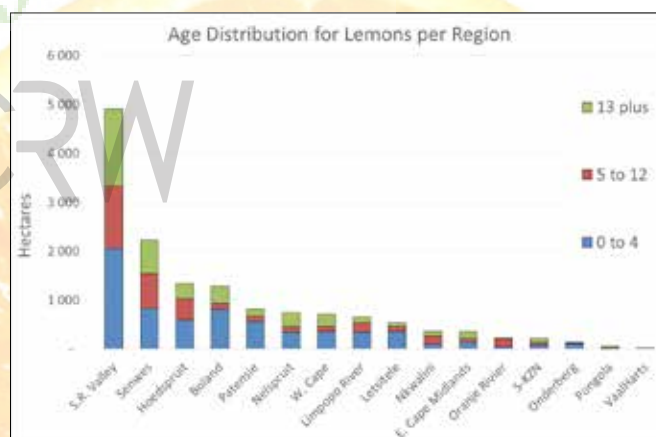
soft citrus areas each grew by over 1 000 ha. For lemons, all regions experienced double-digit percentage growth with Limpopo and the Eastern Cape expanding by more than 800 ha each.

As can be seen in the chart below, about half of the lemon and soft citrus area could be seen as currently non-bearing and less than one third as mature. In comparison, more than two thirds of the orange orchards are mature trees. Overall, 53% of the South African citrus orchard area is less than 13 years old.

About 6 750 ha; 42% of all the country's 14 616 ha of lemons are not yet in production. Almost 42% of Sunday's River Valley's 4 914 ha of lemon trees are less than five years old. The smaller regions all have about half their lemon areas in this non-productive stage (see graph below).



Looking at the development of the late mandarin category, two thirds (5 539 ha) of all the country's late mandarins (9 000 ha) are not yet in production (see graph right).



CONTINUED ON PAGE 18

Oranges show small growth with Valencias increasing by 2% to 26 946 ha and Navels static on 16 141 ha. Only about 11% of Valencias and 12% of Navels are immature trees.

Valencias	0 to 4	5 to 12	13 plus	Grand Tot
Letsitele	1 410	2 531	4 267	8 207
Senwes	144	1 012	1 976	3 132
S.R. Valley	233	612	2 242	3 086
Limpopo River	143	808	2 009	2 960
Hoedspruit	349	802	1 635	2 786
W. Cape	196	298	1 838	2 332
Nelspruit	87	139	1 051	1 276
Onderberg	218	263	692	1 172
Patensie	73	235	683	992
Oranje Rivier	70	269	97	436
Nkwalini	6	32	165	203
Boland	47	11	99	156
S-KZN			110	110
Pongola		10	29	39
VaalHarts			30	30
E. Cape Midlands	3	18	7	28
Grand Total	2 978	7 038	16 930	26 946

Navels	0 to 4	5 to 12	13 plus	Grand Tot
S.R. Valley	498	1 053	2 318	3 870
Senwes	456	1 127	2 279	3 861
W. Cape	357	548	2 922	3 827
Patensie	269	556	987	1 812
Nelspruit	175	468	530	1 172
E. Cape Midlands	39	195	432	665
Boland	36	105	121	262
S-KZN	23	10	188	221
VaalHarts	36	11	159	206
Limpopo River	39	7	93	138
Oranje Rivier		34	11	44
Onderberg	5	5	15	24
Hoedspruit		11	10	22
Letsitele		12	4	16
Grand Total	1 932	4 142	10 067	16 141

For Grapefruit, only about 8% of the area is under five years old. There was a 1% increase in area registered in SA to 7 444 ha in October 2018.

Grapefruit Ages	0 to 4	5 to 12	13 plus	Grand Total
Letsitele	221	1 060	812	2 093
Hoedspruit	145	606	981	1 733
Onderberg	156	525	941	1 622
Limpopo River	5	229	362	596
Nkwalini	17	64	487	569
Oranje Rivier	8	385	112	504
S.R. Valley		62	45	108
Pongola	2	48	47	97
Patensie	8	66	13	87
W. Cape		10	24	34
Senwes	1			1
Grand Total	564	3 055	3 825	7 444
% of Grand Total	8%	41%	51%	



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