Southern African **Citrus Export Estimates** for 2019 Season

The Southern African citrus growers will export a record crop of 137 million boxes of citrus fruit to more than 100 countries this year, less than 1% up on last year.

This estimate was finalised jointly between the Citrus Growers' Association of Southern Africa (CGA) variety focus group representatives and exporters and other industry role players at the Citrus Marketing Forum (CMF) in Port Elizabeth. The exporters were represented by the Fresh Produce Exporters Forum (FPEF), who reviewed the estimate that was finalised on Friday 15 March.

According to the Department of Agriculture, Forestry and Fisheries (DAFF) statistics, citrus export revenue for 2018 amounted to just under R19 billion.

Southern African citrus estimate in 15 kg carton equivalents, with exports from the previous four years:

	Valencias	Grapefruit	Navels	Lemons	Soft Citrus	Total Citrus
2015	52.7 m	15.7 m	24.5 m	15.1 m	10.0 m	117.9 m
2016	42.1 m	13.8 m	26.2 m	15.1 m	12.2 m	109.4 m
2017	54.0 m	15.6 m	21.1 m	19.0 m	13.4 m	123.0 m
2018	54.4 m	18.8 m	26.7 m	19.9 m	16.2 m	136 m
2019 est.	52.9 m	17.1 m	26.9 m	22 m	18.3 m	137.2 m

The main drivers of growth are in the soft citrus and lemon categories. However, the net growth in these categories is somewhat muted due to a 3% decline in Valencia oranges, which comprise the biggest portion of the citrus export market at 39%, followed by navel oranges (20%), lemons (16%), soft citrus (13%) and grapefruit (12%).

Grapefruit

A good grapefruit crop is expected, with exports from Southern Africa estimated at 15,1 million cartons (17 kg equivalents), almost 9% down on last year's 16,5 million cartons. Pigmented varieties account for the bulk of the export with an expected 13,9 million carton crop; 10% down on last year. White grapefruit volumes are expected to be up 6% to 1,2 million cartons. As for the bigger producing regions, Letsitele expects an 11% decrease on last year's 5,3 million cartons to 4,7 million cartons; Hoedspruit a 6% decrease over last year to 3,8 million cartons; and Limpopo River a 23% decrease from last year's 1,5 million cartons.

Valencia

Expected exports from the Southern African regions at 52,9 million cartons (15 kilogram equivalents) are 3% down on last year's 54,4 million cartons.

Letsitele, which accounts for a volume of almost one third, anticipates 14,7 million cartons, compared to last year's 14,6 million cartons. Senwes, the second largest player in 2018, expects a drop of 15% to 6,9 million cartons. However, Sunday's River Valley sees a recovery to 6 million cartons in 2019 (rain dependent). The Limpopo River growers expect a 9% smaller export crop (6,1 million cartons), whilst Hoedspruit sees a 3% increase to 5,6 million cartons. Western Cape volumes are 6% down on last year to 3,75 million cartons. Patensie also expects a recovery in volume to 1,9 million cartons after a poor 2018 season. But this is still below the volumes of around 2,3 million cartons seen in 2014 and 2015. Northern neighbour, Swaziland expects a similar crop to last year, whilst Zimbabwe expects a 17% reduction.

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Navels

The estimated navel export volume is expected to be the same as last year at 26,9 million cartons: 3% up on 2015.

It's expected that the shift to late maturing varieties will continue. The biggest navel exporting region, Senwes had an extraordinary 2018, packing 8,9 million cartons compared to the previous two seasons of just over 6 million cartons. This year they expect 8 million cartons: 10% down. Sunday's River Valley's navel export crop returns to normal levels at 6 million cartons after two consecutive poor seasons. Staying in the Eastern Cape, Patensie is 12% up compared to last year's season. The Western Cape remains unchanged at 6,1 million cartons.

Lemons

For lemons the 21,98 million cartons estimate is eleven percent up on last year's final volume. Sunday's River Valley, the biggest lemon-growing region, expects a 14% increase to 10 million cartons, peaking on 100 to 138 counts. Whereas Senwes, the second largest lemon producing region, continues its strong growth to 4,6 million cartons (and this is taking into account production of smaller fruit). Timing is the same as last year.

The expected increase for Hoedspruit is around 10%, to 1,47 million cartons.

The Boland region shows an unexpected downturn of almost 30% to 850 000 cartons. The lighter crop of the existing orchards' fruit set is bearing the brunt of high temperatures and strong winds early in October last year. Similar conditions account for the Western Cape region's muted 4% growth in expected lemon exports.

Soft Citrus

As in the case of lemons, the growth in soft citrus continues unabated. An overall growth of 13% to 18,3 million cartons is expected, which is driven by the late mandarin types, increasing by almost 22% to 8,5 million cartons. Showing more modest changes are satsumas (down 2%), Clementines (up 9%) and Novas (up 3%).