

ANALYSIS NOVEMBER 2019

SA Orchard Registration Results

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The SA citrus industry is the country's largest horticultural industry (with commercial production in all provinces) and the largest fresh produce exporter, exporting almost 2 million tons in 2019. The SA Citrus Tree Census data is compiled from the online orchard registration process for special markets, which takes place annually in October/November.

Data gathered from this exercise includes statistics about variety, rootstock, tree age and hectares. 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. The CGA annual statistics booklet also includes a summary of this data.

The following article is a brief analysis of the November 2019 orchard registrations and some of the key findings. Zimbabwean and eSwatini growers are also members of the CGA and

they contribute to the annual census. But they are not included in this article, as the level of detail does not allow for accurate comparisons.

In 2019 85 736 hectares of SA citrus was registered, a 2% increase over last year's 81 805 hectares. Growth continues in mandarins and lemons albeit at a slower rate than previous years. Mandarins grew year on year by 17% compared to the previous year's 24%. Lemon hectares grew by 10% compared to the previous year's 25%. Valencias and grapefruit showed no growth, whilst the area under navel oranges shrunk by 2%. (See left above).

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

Commodity	2016	2017	2018	2019	2020	Change %
Valencia/ midseasons	25 728	26 521	26 956	26 971	26 987	16 0%
Navels	16 223	16 064	16 141	16 158	15 845	-314 -2%
Soft citrus	11 439	13 183	16 308	16 388	19 127	2 739 17%
Lemons/limes	9 485	11 710	14 616	14 630	16 100	1 470 10%
Grapefruit/pummelos	7 161	7 393	7 625	7 625	7 649	24 0%
Kumquats	20	33	33	33	30	-4 -11%
Grand Total	70 057	74 903	81 679	81 805	85 736	3 931 5%

Province	2016	2017	2018	2019	2020	Change %
Limpopo	30 513	31 513	34 802	34 734	36 039	1 305 4%
Eastern Cape	18 970	19 384	21 160	21 249	22 080	831 4%
Western Cape	12 136	13 930	14 883	14 968	16 125	1 157 8%
Mpumalanga	5 173	6 254	6 363	6 367	6 985	619 10%
KZN	1 739	1 904	2 131	2 131	2 018	-113 -5%
Northern Cape	1 365	1 492	1 773	1 785	1 877	92 5%
North West	161	426	554	559	599	40 7%
Free State			13	13	13	- 0%
Grand Total	70 057	74 903	81 679	81 805	85 736	3 931 5%



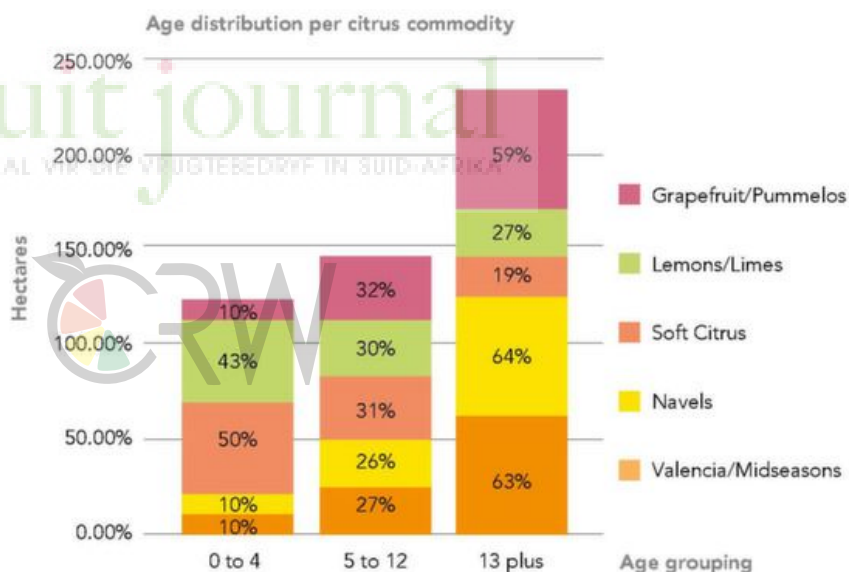
CGA Region	2016	2017	2018	2019	2020	Change	%
Sundays River Valley	12 605	12 940	13 856	13 944	14 417	474	3%
Senwes	9 489	10 085	11 002	11 007	11 893	886	8%
Letsitele	10 332	10 747	11 136	11 102	11 146	44	0%
Western Cape	8 838	9 608	10 232	10 242	10 874	632	6%
Hoedspruit	5 375	5 793	6 368	6 368	6 799	431	7%
Patensie	4 726	5 470	5 345	5 346	5 745	398	7%
Boland	3 289	3 363	4 698	4 794	5 459	665	14%
Limpopo River	3 885	4 327	4 579	4 579	4 422	-157	-3%
Nelspruit	4 156	4 723	5 700	5 649	4 086	-1 563	-28%
Onderberg	2 609	2 824	2 971	2 971	3 039	68	2%
Burgersfort Ohrigstad					2 270	2 270	
KwaZulu-Natal	1 739	1 780	1 941	1 941	2 018	77	4%
Eastern Cape Midlands	1 648	1 751	1 875	1 875	1 895	21	1%
Northern Cape	1 365	1 492	1 786	1 798	1 672	-125	-7%
Grand Total	70 057	74 903	81 489	81 615	85 736	4 121	5%

Left: Looking at the CGA regional breakdown, the Boland region in the Western Cape Province showed the biggest percentage increase of 14% on last year's census, although Senwes showed the biggest increase in hectares at 886.

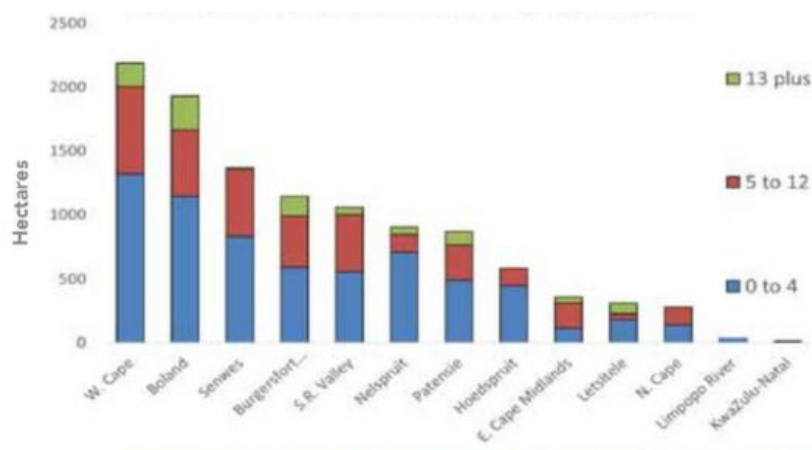
The creation of a new CGA region, Burgersfort/Ohrigstad had the effect of cannibalising Nelspruit's hectares. However, together they grew by 12% over the last year.

The average orchard size in the census was 3.4 hectares, with lemon orchards averaging 3 hectares on one end of the scale and grapefruit orchards averaging 4 hectares on average on the other.

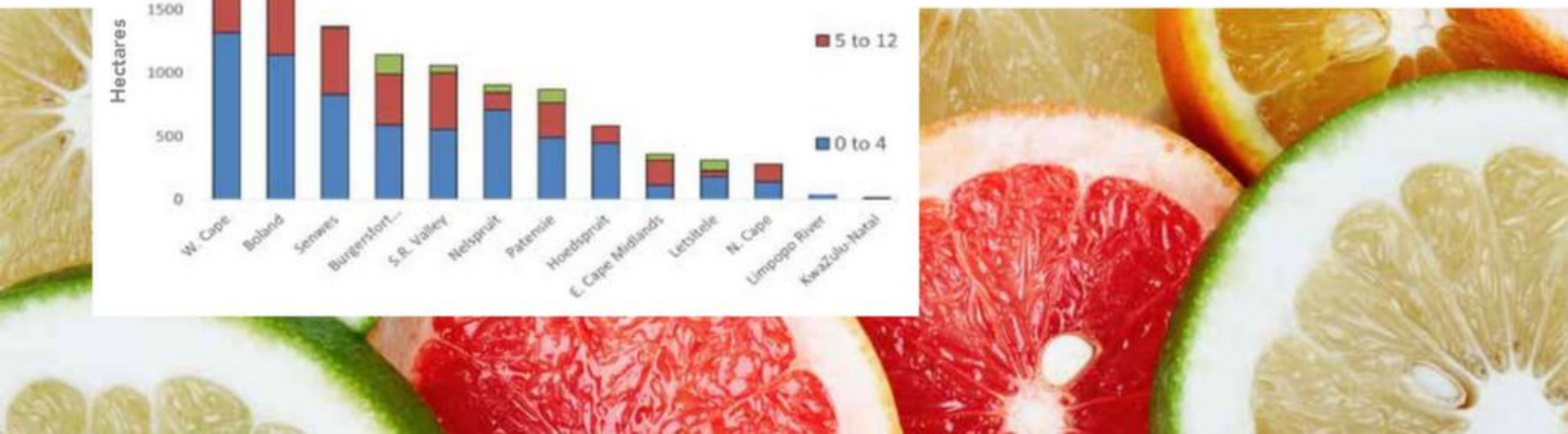
The chart right illustrates that about half of the soft citrus area and over 40% of the lemons can be viewed as currently non-bearing, and about one third as mature. In comparison, around two-thirds of the orange and grapefruit orchards are mature trees. Overall, 54% of the SA citrus orchard area is younger than 13 years old.



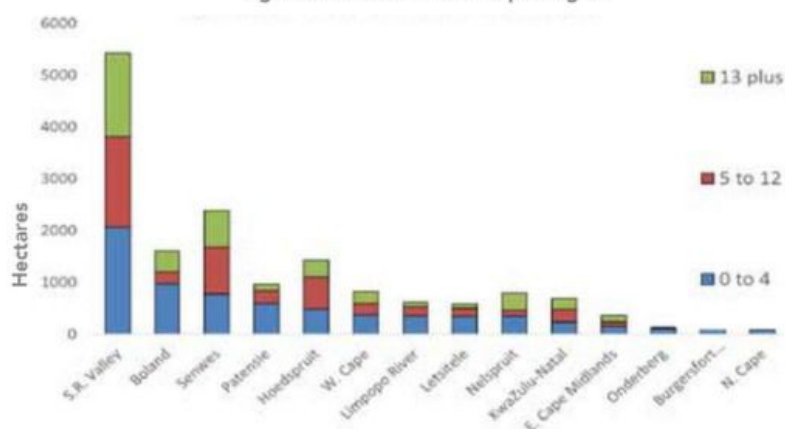
Age distribution of late mandarin types per region



Looking at the development of the late mandarin category, 60% (6 631 ha) of all the country's late mandarins (11 145 hectares) are not yet in production.



Age distribution of lemons per region



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

Oranges show no growth with only 10% being immature trees (see tables left and right below).

Similarly for grapefruit, (see table bottom) only 10% of the area is five years old.



Valencias	0 to 4	5 to 12	13 plus	Grand Total
Letsitele	1 328	2 665	4 063	8 056
Senwes	130	983	2 118	3 231
S.R. Valley	220	601	2 325	3 146
Limpopo River	67	731	2 044	2 842
Hoedspruit	215	809	1 779	2 803
W. Cape	210	367	1 855	2 433
Nelspruit	138	151	917	1 207
Onderberg	120	374	676	1 169
Patensie	76	261	640	977
N. Cape	91	222	136	450
KwaZulu-Natal	8	35	295	338
Boland	63	10	93	166
Burgersfort Ohrigstad	6	3	133	142
Eastern Cape Midlands	3	18	7	28
Grand Total	2 675	7 229	17 082	26 987
% of Total	10%	27%	63%	

Navels	0 to 4	5 to 12	13 plus	Grand Total
Senwes	438	1 067	2 542	4 047
S.R. Valley	416	1 061	2 291	3 768
Western Cape	179	538	2 954	3 670
Patensie	246	604	986	1 836
Nelspruit	128	363	284	775
E. Cape Midlands	42	195	400	636
Burgersfort Ohrigstad	47	68	159	274
Northern Cape	18	23	189	230
KwaZulu-Natal	23	10	188	221
Boland	9	94	93	196
Limpopo River	25	20	71	117
Onderberg	5	5	18	27
Letsitele	10	12	4	25
Hoedspruit		11	10	22
Grand Total	1 585	4 071	10 189	15 845
% of Total	10%	26%	64%	

The growth in late mandarins and lemon production continues, although seemingly at a slightly diminished rate. Stakeholders in these industries will likely need to put effort and resources into identifying, exploring and enhancing export opportunities for these commodities, as increased production meets consumer demand with the likely resultant drop in prices.

This is already starting to happen as the World Citrus Organisation (WCO) was officially launched at the international fresh produce trade show Fruit Logistica, in Berlin on 5 February 2020. The founding member countries of the organisation, representing 70% of citrus growers worldwide were present namely: Argentina, Bolivia, Brazil, Chile, Dominican Republic, Egypt, France, Israel, Italy, Morocco, Peru, SA, Spain, Tunisia, Turkey, Uruguay and USA. The WCO is the first global platform aimed at increasing co-ordination, dialogue and action between citrus producing countries across the world.



Grapefruit	0 to 4	5 to 12	13 plus	Grand Total
Letsitele	243	815	1 073	2 131
Hoedspruit	129	475	1 157	1 761
Onderberg	218	411	1 065	1 693
KwaZulu-Natal	48	80	581	708
Limpopo River	54	142	387	583
N. Cape	29	331	112	471
S.R. Valley	1	35	73	108
Patensie	17	62	18	97
W. Cape		72	24	96
Senwes		1		1
Grand Total	738	2 422	4 489	7 649
% of Total	10%	32%	59%	