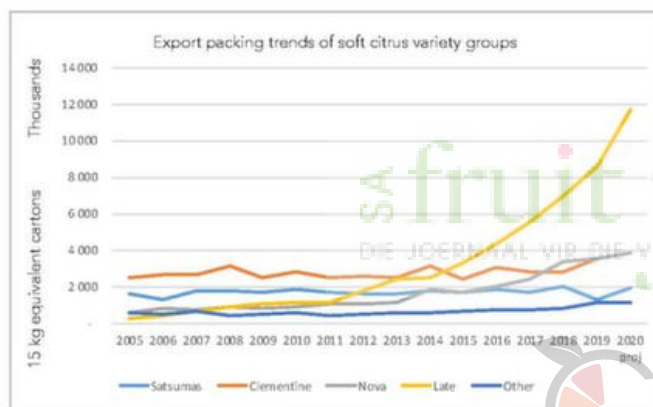


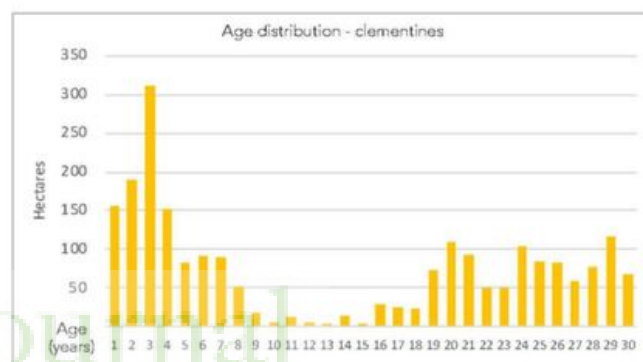
Overview of clementines in SA

JOHN EDMONDS

South African annual clementine exports remained relatively stagnant around 2.5 million cartons for the last 13 years. There has been modest growth to around four million cartons in the last two years. Novas have seen stronger growth since 2016 and are now level-pegging with the clementines. Both are dwarfed by the exponential growth in late maturing mandarin cultivars, as illustrated in the chart below.



As much as 52% of the orchards are under five years old; 17% are between five and 13 years old; and 31% were planted before 2006. This is indicative of the recent revival in clementine production.



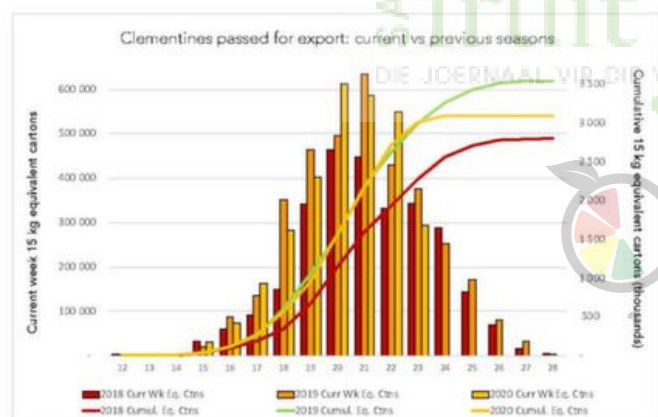
The Citrus Growers' Association of Southern Africa's growing regions of Boland and Western Cape account for almost 70% of SA's total clementine volumes. The Western Cape Province accounts for 60% of area planted, the Eastern Province for 25% and Limpopo 13%. (See table below.)

Production region	Sub-region	Area planted (ha; 2019)	% of Area	Export volume (Ave. 2015-2019)	% of Vol
Western Cape	Boland	747	32%	1 187 479	39%
	W. Cape	655	28%	973 440	32%
Eastern Cape	S.R. Valley	235	10%	261 881	9%
	E. Cape Midlands	233	10%	199 375	7%
	Patensie	134	6%	135 748	4%
Rest of South Africa	Burgersfort/Ohrigstad	156	7%	217 546	7%
	Senwes	117	5%	77 653	3%
	Nelspruit	32	1%		
	Hoedspruit	16	1%		
	Vaalharts	13	1%		
	S-KZN	3			
	Limpopo River	3			
Total		2 343		3 042 895	

The clementine harvest starts towards the end of March in the earliest regions in Burgersfort/Ohrigstad area and ends mid- to late-July in the Western Cape. Thus, SA has an 18-week supply window with an eight-week peak, as illustrated in the chart below.

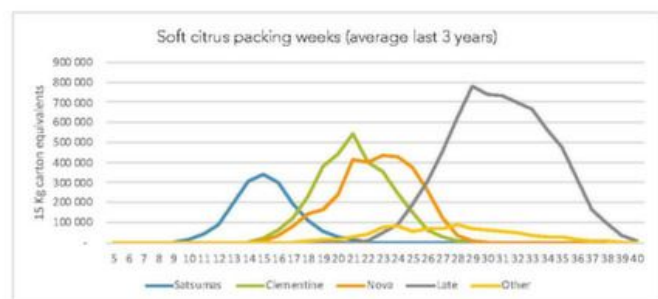
	March			April					May					June				July		
	12	13	14	15	16	17	18	19	20	21	22	23	24	25	26	27	28	29		
Burgersfort/Ohrigstad																				
W. Cape																				
Senwes																				
Patensie																				
S.R. Valley																				
Boland																				
E. Cape Midlands																				

The clementine supply period typically has a six-week peak from weeks 18 to 25 (i.e. end-April to beginning-June), with about 80% of volumes shipped at a rate of over 1 200 cartons per week during this period. The early period from week 14 to week 17 (i.e. end-March to late-April) accounts for only 8%, whilst the later period from weeks 24 to 29 (i.e. early-June to mid-July) accounts for the remaining 12%.

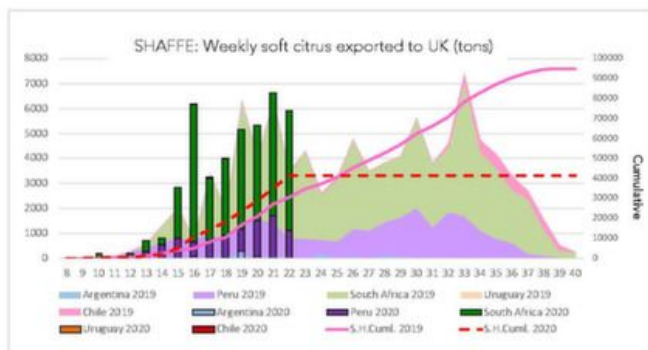


Soft citrus weekly shipments

Clementine harvesting has a significant overlap with other mandarin varieties in the country: starting together with Nova harvesting as satsuma harvesting reaches its peak, and still being in the mix together with Novas, late-maturing and other mandarin cultivars around week 25, as illustrated below.



Analysing the previous two seasons' data reveals that two markets buy over 70% of the SA clementine export volume namely, UK/Ireland around 50% or 1.5 million cartons, and the Netherlands, about 20%. The US and Russia absorb most of the rest with a little under 10% each.



South Africa competes head-on with Peru in export of all soft citrus in our two main markets.

Whilst they are vulnerable to rind issues, they are easier to peel than Novas and are still preferred in Europe, whilst Novas are enjoyed in Eastern markets. Thus, clementines are still perceived as a premium eating fruit and look to have a secure place in the marketing calendar.

