Good 2020 citrus crop expected

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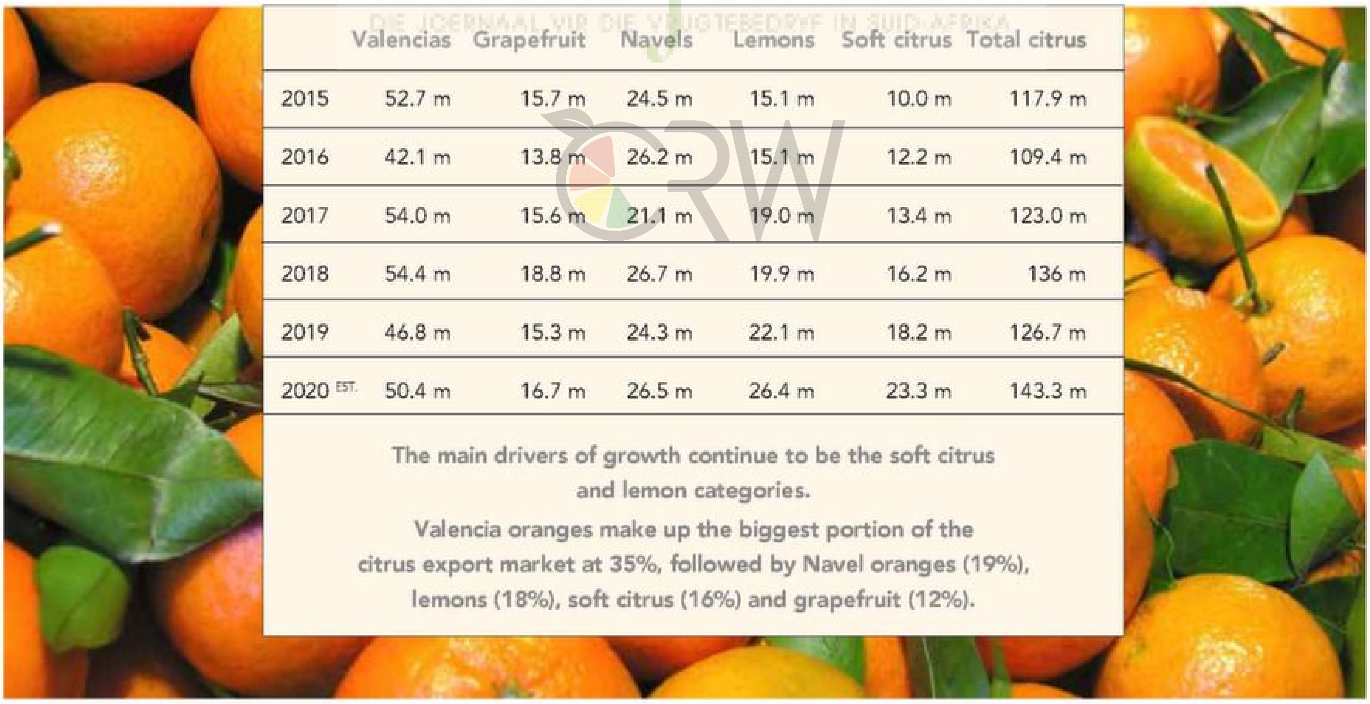
In March 2020, the Citrus Growers' Association of Southern Africa's (CGA) Variety Focus Group representatives compiled their estimate of Southern African citrus exports for 2020. This was shared with exporters and other industry role players and ratified at the Citrus Marketing Forum (CMF) on 11 March in Johannesburg.

The citrus growers from Southern Africa are expected to export a record crop of 143 million boxes of citrus fruit to more than 100 countries this year, 13% up on last year.

According to the Department of Agriculture, Land Reform and Rural Development (DALRRD) statistics, the 2019 citrus export revenue amounted to around R20 billion.

The table below compares the Southern African citrus estimates for 2020 with exports from the previous five years (in 15 kg carton equivalents):



	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	46.8 m	15.3 m	24.3 m	22.1 m	18.2 m	126.7 m
2020 EST.	50.4 m	16.7 m	26.5 m	26.4 m	23.3 m	143.3 m

The main drivers of growth continue to be the soft citrus and lemon categories.

Valencia oranges make up the biggest portion of the citrus export market at 35%, followed by Navel oranges (19%), lemons (18%), soft citrus (16%) and grapefruit (12%).

Valencias: The Southern African Valencia export crop estimate is 50.36 million (15 kg equivalent cartons) in 2020, a normal volume (2% higher than the average for the last 10 years and 8% up on last year). Overall, the crop looks good with marketable fruit sizes.

Letsitele, the biggest regional exporter of Valencias is expected to be 6% down on last year, with 11.4 million cartons of exports anticipated in 2020. Packing is expected to run from week 21 to week 38.

Recent good rains may push up the volume of late Valencias, but the dam level is still low. Fruit size is bigger than last year. Senwes are up 18% to 6.16 million cartons. The Limpopo River valley (5.6 million cartons, up 22%) is comparable to 2017. In certain areas, the seedless Valencia types are under pressure with poor set, especially Delta, while other areas set a good crop throughout. Their seedless varieties are back to a normal sizing distribution peaking on 72,88. Hoedspruit (5.7 million cartons, up 19%) have a normal volume with good sizes. Nelspruit expects to be 21% down on 2.3 million cartons, but have a good, clean crop with a good size distribution (64, 72, 56). In the Eastern Cape, Sunday's River Valley (6.25 million cartons estimated) anticipates a 3.2% increase on last year, attributed to better sizes of fruit. Patensie also has better sizes yielding a 12% increase in their export expectation. The Western Cape (4.5 million cartons, up 21%) returns to normal after a poor 2019.

Navels: The estimate for the South African Navel orange export crop is 26.5 million (15 kg equivalent cartons). This is 9% up on last year, but a little lower than 2018's 26.7 million carton volume.

The Senwes region is this season's biggest Navel exporter. With an estimated 6.98 million cartons, they are 20% up on last year but 22% lower than their 2018 record export.

In the Eastern Cape, Sunday's River Valley expects a similar 6 million-carton export to last year. They have a good crop with good sizes. They expect to have increased production of late Navel varieties in the near future.

The Western Cape expects a 9% recovery to 6.5 million cartons without the wind scarring that affected last year's exports. Nelspruit (1.1 million cartons, 4% down) have had some hail. Some orchards have been taken out, but they expect a good crop with none of the creasing problems they experienced last year.

Patensie (3.8 million cartons, up 10%) looks very good. They had good rains during the fruit set period last year that contributed a lot. There is definitely less wind damage than last year, and better size. The presence of mealy bug is higher than this time last year. With better pack-outs they expect to be up by 10%.

Grapefruit: Southern African grapefruit exports are up 9% on last year, estimated at 14.7 million cartons (17 kg equivalents). Pigmented grapefruit makes up 91% of this with white grapefruit only at 1.3 million cartons.

Hoedspruit (3.9 million cartons, up 14%); Letsitele (3.8 million cartons, down 5%) and Onderberg (2.5 million cartons, up 40%) are the main contributors to the estimate. Letsitele Star Ruby packing will run from week 14 until week 25, with 85% of the fruit being packed between weeks 17 - 23. Due to drought, volumes have a small decline from 2019, and sizes are a bit bigger than last year. Letsitele Marsh packing will run from weeks 17 - 23. Volumes have a growth of 25% from 2019. Total estimated volumes for 2020 is 97 436 (17 kg) cartons.

Hoedspruit expects an early (week 15) start for Star Ruby, with good sizes and very early colour.

Onderberg have a good crop of class 1. They also have a big crop of Marsh (544 460 cartons, up 65%).

Lemons: All the main lemon producing regions show significant growth in 2020 with new orchards coming into production and estimates growing by 20% to 26.4 million cartons in 2020.

Sunday's River Valley exports almost half of Southern Africa's lemons. Their 12 million-carton export crop is 18% up on last year, and is the main driver of South African growth. They have a very good crop and good sizes.

The next biggest region, Senwes expects a 23% increase in exports to 4.7 million cartons. Also in the north, Hoedspruit (1.5 million cartons, up 19%) have a very good crop with sizes peaking at 113,138. Their packing was already at an advanced stage by mid-March. Similarly, Limpopo River was halfway through packing their lemons with an estimate of 710 000 cartons in 2020, which they expect to grow to 1.5 million cartons in the next few years.

Nelspruit also expect to grow to 1.5 million cartons in the near future, but for 2020 their estimate is 1 million cartons, up 40% on last year. They have just started with packing and expect a good crop with sizes peaking on 113,138.

Patensie lemons (1.4 million cartons, up 9%) have a very good set with a decent fruit size. The volumes could kick in a bit later and it seems that there is a bigger second set than the first.

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East Cape Midlands (52 000 cartons, up 10%) have an average season with sizes peaking at 138,113 (45%). They will start packing around 11 May.

Letsitele lemons have a growth of 42% up against 2019, with a total estimated crop of 537 514 cartons for 2020. Their packing ran from weeks 5 - 24, with 70% of the fruit being packed between weeks 10 - 14.

Soft citrus: Continues its exponential growth, as anticipated with an estimated 23.3 million carton export crop, 28% up on last year.

The Boland region leads the charge with an estimate of 4.8 million cartons, 12% bigger than last year's exports. The explosive growth in the north is illustrated by the Burgersfort/Ohrigstad region (3.1 million cartons, up 77%); Senwes (2.3 million cartons, up 55%) and Hoedsruit (651 000 cartons, up 159%). Letsitele, Limpopo River and Oranje Rivier show similar percentage gains, albeit off lower bases. In terms of sub categories, Novas (4.1 million cartons, up 14%) overtake Clementines (4 million cartons, up 1%), whilst satsumas (2 million cartons, up 54%) return to normal after a poor 2019. As expected, the big growth from new plantings manifest in the late mandarin category (11.8 million cartons, up 38%).

Looking at the regional feedback, Patensie reported recovery from drought, new Clementine, Nova and late Mandarin orchards coming into production and good sizes.

There is more area under nets, so pack-outs are good and sizes about one bigger than last year for late mandarins.

Letsitele and Hoedspruit have a good crop and early colour development.

The Ohrigstad/Burgersfort region (2 million cartons, up 99%) reports a recovery from the last two years affected by hail, new trees and the extensive plantings under netting as contributing factors to its growth. This is also contributing to very good pack-outs.

Limpopo soft citrus will be up by approximately 100 000 cartons (15 kg equivalent) from the 2019 estimate. A small portion of this is new production, but the bulk are trees which are back in production after a difficult year in 2019, such as Novas (+/- 65k) and Valley Gold (+/- 25k). The new plantings coming into production are Nadorcott LS and Leanri.

So, with the stage set for a big, marketable export crop in 2020, the COVID-19 spectre raised its head, throwing a blanket of uncertainty over the entire world. It remains to be seen how our much sought-after source of Vitamin-C will find its way from the trees in Southern Africa to the tables of families around the world, locked down in their homes.