

SOUTH AFRICAN ORCHARD REGISTRATION RESULTS

November 2021 analysis

The South African citrus industry is the country's largest horticultural industry (with commercial production in all provinces) and the largest fresh produce exporter, exporting 2.4 million tonnes in 2021. By Portia Magwaza



The SA Citrus Tree Census data is compiled from the online orchard registration process for special markets, which takes place annually in October/November. The data gathered from this exercise includes statistics about variety, rootstock, tree age and hectares. This information is essential in the guidance of growers when choosing which varieties to plant. In turn, this steers the citrus supply chain decisions regarding packing and logistics investment, directs market access, and helps to identify research needs. A summary of this data set can also be found in the CGA annual statistics booklet. What follows is a brief analysis of the November 2021 orchard registrations and some of the key findings. And though growers from Zimbabwe and eSwatini are also members of the CGA who contribute to the annual census, their statistics have been excluded due to the level of detail and resultant difficulty in presenting accurate comparisons. In 2021, 97 450 ha of SA citrus was registered – a 4% increase on the previous year's 93 289 ha. Although this increase may be partly due to better cooperation from growers in registering all their orchards, including those not yet in production, the growth is still

Table 1: Hectares planted per citrus commodity (2017-2021)

Commodity	2017	2018	2019	2020	2021	2020 vs 2021 (ha)	2020 vs 2021 (%)
Valencia/midseasons	26 522	26 956	26 971	27 690	29 235	1 545	6%
Mandarins	13 183	16 308	16 388	23 635	26 094	2 459	10%
Lemons/limes	11 711	14 616	14 630	17 647	17 742	95	1%
Navels	16 064	16 141	16 158	16 204	15 864	-340	-2%
Grapefruit/pummelos	7 393	7 625	7 625	8 112	8 515	403	5%
Grand total	74 873	81 646	81 772	93 289	97 450	4 161	4%

Table 2: Hectares planted per province (2017-2021)

Province	2017	2018	2019	2020	2021	2020 vs 2021 (ha)	2020 vs 2021 (%)
Limpopo	31 483	34 770	34 704	37 842	40 329	2 487	7%
Eastern Cape	19 384	21 160	21 249	24 648	25 217	569	2%
Western Cape	13 930	14 882	14 964	17 938	18 914	976	5%
Mpumalanga	6 254	6 363	6 367	7 639	7 877	238	3%
KZN	1 904	2 131	2 131	2 432	2 440	9	0%
Northern Cape	1 492	1 773	1 785	1 956	1 838	-117	-6%
North West	426	554	559	823	822	-1	0%
Free State		13	13	13	12	-0	-3%
Grand total	74 873	81 646	81 772	93 289	97 450	4 161	4%

Table 3: Hectares planted per CGA region (2017 - 2021)

CGA region	2017	2018	2019	2020	2021	2020 vs 2021 (ha)	2020 vs 2021 (%)
Sunday's River Valley	12 940	13 856	13 924	16 361	15 941	-420	-3%
Letsitele	10 747	11 303	11 130	11 924	13 355	1 431	12%
Senwes	10 085	11 002	11 090	11 357	13 083	1 725	15%
Western Cape	9 608	10 232	10 237	13 433	12 596	-837	-6%
Patensie	5 470	5 345	5 346	6 224	7 073	849	14%
Hoedspruit	5 793	6 368	6 368	6 297	6 805	508	8%
Nelspruit	4 723	5 700	5 649	6 444	6 515	71	1%
Boland	3 363	4 698	4 794	4 505	6 318	1 813	40%
Limpopo River	4 297	4 599	4 649	4 979	4 754	-225	-5%
Burgersfort Ohrigstad				3 513	3 216	-297	-8%
KwaZulu-Natal	1 780	1 941	1 941	2 432	2 440	8	0%
Eastern Cape Midlands	1 751	1 875	1 875	2 063	2 204	141	7%
Northern Cape	1 492	1 786	1 798	2 232	1 851	-381	-17%
Onderberg	2 824	2 971	2 971	1 526	1 300	-227	-15%
Grand total	74 873	81 676	81 772	93 289	97 450	4 161	4%

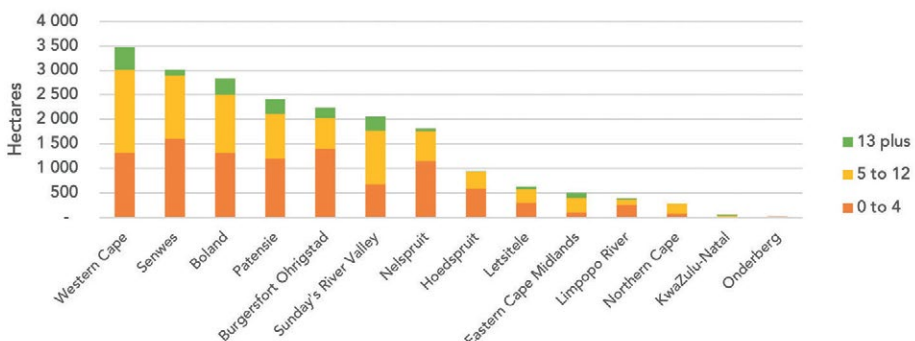


consistent with industry expectations. Growth has continued in mandarins (up 10%), Valencia (up 6%) and grapefruit (up 5%). Lemons showed marginal growth, whilst the area under navel oranges shrunk by 2%.

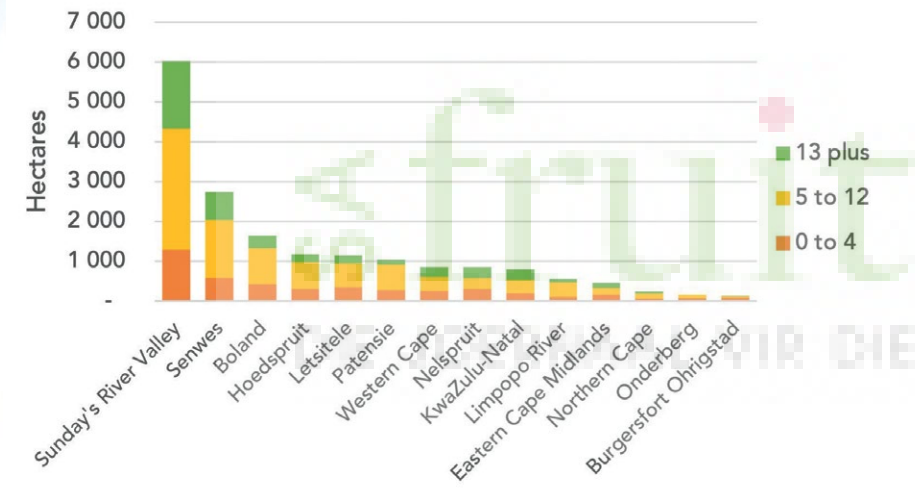
The provinces that showed the biggest area of growth overall were Limpopo and Western Cape as can be seen in the **table 2**.

Looking at the CGA regional breakdown (**table 3**), the Boland region in the Western Cape Province showed the biggest percentage increase of 40% on last year's census. Senwes (15%), Patensie (14%) and Letsitele (12%) all grew by over 800 ha.

Graph 1 illustrates that 47% of the mandarins area, and 25% of the lemons area can be viewed as currently non-bearing (trees below four years) and about one third as mature. In comparison, around two-thirds of the orange and grapefruit orchards are mature trees. Overall, 58% of the SA citrus orchard area is younger than 13 years old.



Graph 2: Age distribution of mandarin hybrid types per region



Graph 3: Age distribution of lemons per region

Table 4: Valencia's planted

Valencias	0 to 4	5 to 12	13 plus	Grand total
Letsitele	1 385	2 758	4 792	8 935
Senwes	610	612	2 350	3 572
Sunday's River Valley	589	375	2 493	3 457
Hoedspruit	702	732	1 479	2 913
Limpopo River	216	695	2 002	2 913
Western Cape	522	350	1 873	2 745
Nelspruit	238	497	1 289	2 024
Patensie	116	230	628	974
Northern Cape	131	262	106	499
KwaZulu-Natal	165	32	278	475
Onderberg	65	117	212	394
Burgersfort Ohrigstad	24	3	128	155
Boland	58	20	71	149
Eastern Cape Midlands	3	3	27	33
Grand total	4 821	6 686	17 728	29 235
% of total	16%	23%	61%	

Table 5: navels planted

Navels	0 to 4	5 to 12	13 plus	Grand total
Senwes	426	1 022	2 183	3 631
Sunday's River Valley	562	925	2 403	3 890
Western Cape	260	418	3 001	3 679
Patensie	324	659	930	1 913
Nelspruit	115	325	294	734
Eastern Cape Midlands	81	99	487	667
Burgersfort Ohrigstad	105	111	166	382
Northern Cape	35	46	166	247
KwaZulu-Natal	43	20	172	235
Boland	-	62	96	158
Limpopo River	22	28	215	265
Letsitele	-	12	11	23
Hoedspruit	40	-	-	40
Grand total	2 013	3 727	10 124	15 864
% of total	13%	23%	64%	

Table 6: Grapefruit planted

Grapefruit	0 to 4	5 to 12	13 plus	Grand total
Letsitele	448	616	1 568	2 632
Hoedspruit	234	257	1 238	1 729
Nelspruit	182	253	635	1 070
Onderberg	189	169	374	732
KwaZulu-Natal	232	69	573	874
Limpopo River	121	121	391	633
Northern Cape	86	314	154	554
Sunday's River Valley	2	11	92	105
Patensie	62	46	32	140
Western Cape	5	10	24	39
Senwes	-	-	2	2
Boland	5	-	-	5
Grand total	1 566	1 866	5 083	8 515
% of total	18%	22%	60%	

In 2021, 97 450 ha of SA citrus was registered – a 4% increase on the previous year's 93 289 ha.

Looking at the development of the mandarin hybrids (Nova, Nadorcott, Tango, Leanri etc.) category, 48% (9 971 ha) of the country's mandarin hybrids (20 648 ha) are not yet in production (see graph 2). About 4 405 ha of lemons – which is 25% of the country's 17 742 ha – is not yet in production. Almost 34% of the Sunday's River Valley's 3 051 ha of lemon trees is between five to 12 years old. The smaller regions all have about half their lemon areas as entering

the productive stage (see graph 3). Oranges show growth with Valencia increasing by 6% to 29 235 ha and navels declining to 15 864 ha. Only 16% of Valencia (see table 4) and 13% of navels (see table 5) are immature trees. For grapefruit, only about 18% of the area is under five years old. Areas registered in SA showed a 5% increase to 8 515 ha in November 2021 (see table 6). The growth in mandarin hybrid production continues unabated. There are significant amounts of lemon trees coming into production now, and 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 a likely resultant drop in prices. 🍊