

South African orchard REGISTRATION RESULTS

Tree census data analysis from November 2022 reflects the beginning of a plateau in the growth rate of tree plantings in the citrus industry of SA. By **Precious Kunota**



The South African tree census data is compiled from an online orchard registration process for special markets conducted each year in October/November. Data from this exercise includes statistics on variety, rootstock, tree age, and hectares. These statistics provide critical guidance in growers' variety selection. In turn, the citrus supply chain gains information that informs packing and logistics investment decisions, and directs market access and research needs. This data set is also summarised in the CGA annual statistics booklet.

As part of the Citrus Growers' Association (CGA), growers from Zimbabwe and eSwatini also contribute to the annual tree census, but the statistics reflected include the rest of the membership region only.

The preliminary tree census data indicate a total of 96 277 ha of citrus, a 1% decrease from the previous census. This is consistent with industry expectations, which saw growers remove some orchards during the 2022 season. Eighty-four percent of these

trees are bearing and therefore, producing fruit. The remaining 16% are non-bearing (not yet having reached fruit-producing maturity). Thus, we can still expect production growth in the coming years, as the non-bearing tree comes into production.

Table 1 shows that other than mandarins, the area under other fruit commodities shrank by no more than 3%. Mandarins experienced a 2% increase.

Limpopo Province has the largest citrus production area in the country, accounting for 41% of total planted area, followed by the Eastern Cape (25%), and Western Cape (20%). The Western and Eastern Capes have cooler climates that are ideal for growing navel oranges, lemons and mandarins. Limpopo, Mpumalanga, and KwaZulu-Natal have warmer climates that are ideal for growing grapefruit and valencia oranges. Mpumalanga and the Western Cape showed the highest overall growth rates – 3% and 2%, respectively (Table 2). North West Province had the highest percentage of orchards removed (11%).

Table 1: Hectares planted per citrus commodity (2017 - 2022)

Commodity	2017	2018	2019	2020	2021	2022	2021 vs 2022 (ha)	2021 vs 2022 (%)
Valencias	26 522	26 956	26 971	27 690	29 235	28 228	-1 007	-3%
Mandarins	13 183	16 308	16 388	23 635	26 094	26 678	584	2%
Lemons	11 711	14 616	14 630	17 647	17 742	17 555	-187	-1%
Navels	16 064	16 141	16 158	16 204	15 864	15 440	-424	-3%
Grapefruit	7 393	7 625	7 625	8 112	8 515	8 377	-138	-2%
GRAND TOTAL	74 873	81 646	81 772	93 289	97 450	96 277	-1 173	-1%

Table 2: Hectares planted per province (2017 - 2022)

Province	2017	2018	2019	2020	2021	2022	2021 vs 2022 (ha)	2021 vs 2022 (%)
Limpopo	31 483	34 770	34 704	37 842	40 329	39 524	-805	-2%
Eastern Cape	19 384	21 160	21 249	24 648	25 217	24 508	-709	-3%
Western Cape	13 930	14 882	14 964	17 938	18 914	19 208	294	2%
Mpumalanga	6 254	6 363	6 367	7 639	7 877	8 127	250	3%
KwaZulu-Natal	1 904	2 131	2 131	2 432	2 440	2 350	-90	-4%
Northern Cape	1 492	1 773	1 785	1 956	1 838	1 818	-20	-1%
North West	426	554	559	823	822	730	-92	-11%
Free State		13	13	13	12	12	-	0%
GRAND TOTAL	74 873	81 646	81 772	93 289	97 450	96 277	-1 173	-1%

According to the CGA regional breakdown (Table 3), the Onderberg region in Mpumalanga Province experienced the greatest percentage increase of 164% over the previous year's census. Hoedspruit, Burgersfort Ohrigstad, and Boland all increased by slightly more than 10%. Overall, however, there was a marginal 1% decrease recorded for the entire country.

Table 3: Hectares planted per CGA region (2017 - 2022)

CGA Region	2017	2018	2019	2020	2021	2022	2021 vs 2022 (ha)	2021 vs 2022 (%)
S.R. Valley	12 940	13 856	13 924	16 361	15 941	15 105	-836	-5%
Letsitele	10 747	11 303	11 130	11 924	13 355	11 803	-1 552	-12%
Senwes	10 085	11 002	11 090	11 357	13 083	13 415	332	3%
W. Cape	9 608	10 232	10 237	13 433	12 596	12 204	-392	-3%
Patensie	5 470	5 345	5 346	6 224	7 073	7 240	167	2%
Hoedspruit	5 793	6 368	6 368	6 297	6 805	7 828	1 023	15%
Nelspruit	4 723	5 700	5 649	6 444	6 515	4 357	-2 158	-33%
Boland	3 363	4 698	4 794	4 505	6 318	6 956	638	10%
Limpopo River	4 297	4 599	4 649	4 979	4 754	3 946	-808	-17%
Burgersfort Ohrigstad				3 513	3 216	3 598	382	12%
KwaZulu-Natal	1 780	1 941	1 941	2 432	2 440	2 350	-90	-4%
E. Cape Midlands	1 751	1 875	1 875	2 063	2 204	2 176	-28	-1%
N. Cape	1 492	1 786	1 798	2 232	1 851	1 865	14	1%
Onderberg	2 824	2 971	2 971	1 526	1 300	3 434	2 134	164%
GRAND TOTAL	74 873	81 676	81 772	93 289	97 450	96 277	-1 173	-1%

Tree census statistics provide critical guidance in growers' variety selection.

Figure 1 shows that 27% of the mandarin area and 9% of the lemons area are currently non-bearing (trees younger than four years). Just over half are now in the five-to-12-year bearing phase. Comparatively, approximately 70% of orange and grapefruit orchards are mature aging trees. Overall, 55% of the citrus orchard area in SA is less

than 13 years old.

In terms of mandarin hybrid development (Nova, Nadorcott, Tango, Leanri, etc.), Nadorcotts are still the most common variety in SA. The 2022 season saw a 2% increase in area, which is lower than the significant annual increase that has been associated with mandarins in previous years. Figure 2

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depicts the development of the mandarin hybrids category, with just over half of the mandarin hybrids in the five-to-12-year production phase. In total, 84% (22 302 ha) of all mandarin trees are still under 13 years old.

About 11 450 ha of lemons – the national lemon hectareage being 17 555 – is now in the five-to-12-year production phase. The Sunday's River Valley is home to 32% of the country's lemon trees and the smaller regions have the majority of their lemon planted areas now in the productive five-to-12-year age range (see Figure 3).

The 2022 season saw a 3% decrease in orange tree plantings for both valencias and navels, with the total area falling to 28 228 ha and 15 440 ha, respectively. Only 14% of valencia trees and 10% of navel trees have not yet matured. Most of the trees in the orange category are 13 years or older (Table 4 and 5).

Only about 15% of the grapefruit trees are under five years old (Table 6). Due to the global decline in grapefruit demand, there was a 2% decrease in registered areas planted in SA to 8 377 ha in November 2022, as expected. The majority of the trees are still producing, but are in the ageing stage.

There are still opportunities for growth in citrus production, particularly in mandarins and lemons, where a large proportion of the trees are under five years old. However,

the rate of growth in tree planting appears to be levelling off. Stakeholders in these industries will almost certainly need to put effort and resources into identifying, exploring, and improving export opportunities for these commodities as increased production meets consumer demand while maintaining the balance to avoid price drops.

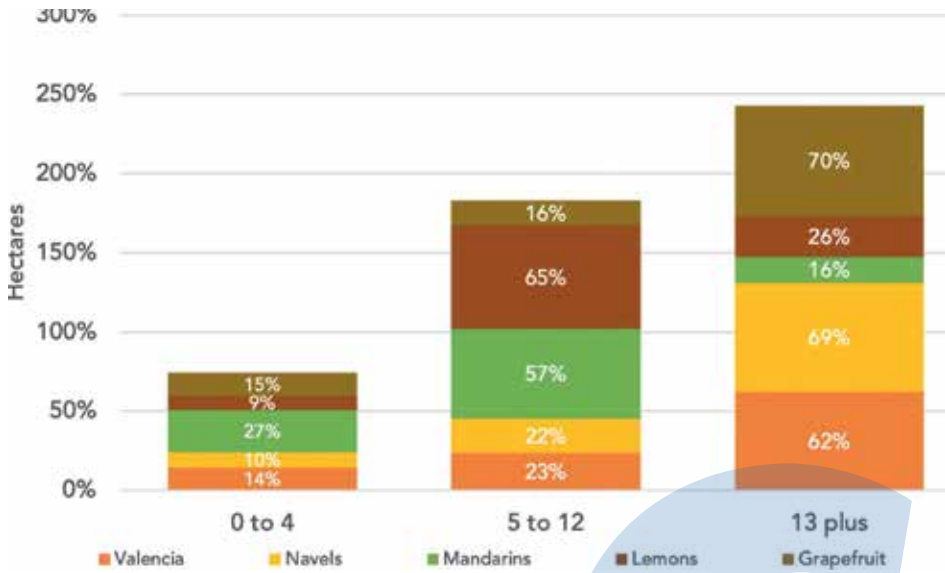


Figure 1: Age distribution per citrus commodity

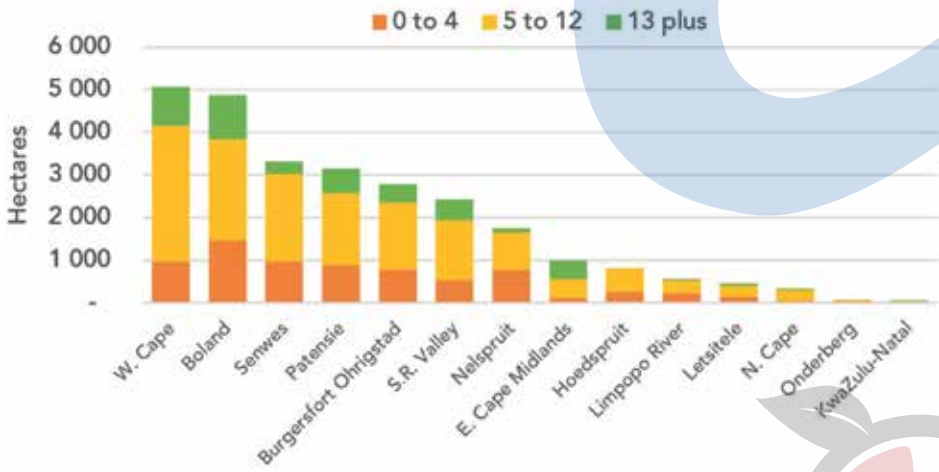


Figure 2: Age distribution of mandarin hybrid types per region

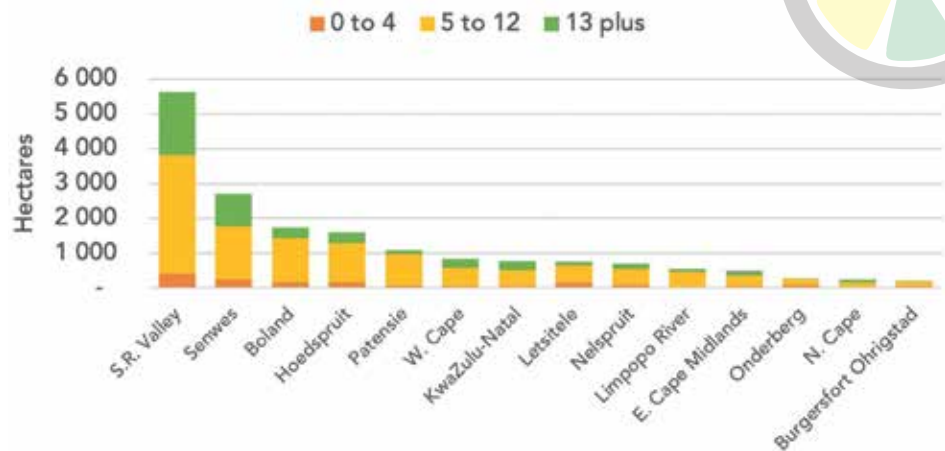


Figure 3: Age distribution of lemons per region

Table 4: Valencias planted

Valencias	0 to 4	5 to 12	13 plus	Grand total
Letsitele	1 051	2549	4533	8 134
Senwes	670	484	2429	3 584
Hoedspruit	708	907	1875	3 489
S.R. Valley	410	539	2392	3 342
W. Cape	242	515	1878	2 636
Limpopo River	157	466	1561	2 185
Onderberg	141	382	727	1 250
Nelspruit	238	171	807	1 216
Patensie	101	275	610	985
N. Cape	77	189	245	511
KwaZulu-Natal	129	78	227	435
Burgersfort Ohrigstad	23	29	192	244
Boland	54	42	76	172
E. Cape Midlands	15	5	27	47
GRAND TOTAL	4 017	6632	17579	28 228
% of Total	14%	23%	62%	

Table 5: Navels planted

Navels	0 to 4	5 to 12	13 plus	Grand total
Senwes	380	802	2 628	3 810
W. Cape	179	415	3 028	3 621
S.R. Valley	409	757	2 435	3 601
Patensie	220	683	999	1 902
Nelspruit	75	261	355	691
E. Cape Midlands	67	102	467	636
Burgersfort Ohrigstad	65	97	192	354
N. Cape	22	54	159	235
Boland	5	40	122	167
KwaZulu-Natal	16	45	77	138
Limpopo River	22	6	101	129
Hoedspruit		60	11	70
Onderberg	36	8	18	62
Letsitele	6	12	4	22
GRAND TOTAL	1 502	3 342	10 595	15 440
% of Total	10%	22%	69%	

Table 6: Grapefruit planted

Grapefruit	0 to 4	5 to 12	13 plus	Grand total
Letsitele	416	341	1 675	2 432
Hoedspruit	235	284	1 343	1 862
Onderberg	214	328	1 235	1 777
KwaZulu-Natal	153	196	588	936
N. Cape	68	101	377	545
Limpopo River	120	15	396	532
Patensie	24	47	54	125
S.R. Valley		3	98	101
W. Cape	4	5	34	42
Burgersfort Ohrigstad			22	22
Senwes			2	2
GRAND TOTAL	1 233	1 320	5 824	8 377
% of Total	15%	16%	70%	

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