

FLATLINING CITRUS trend reversal



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Exploring dramatic changes to the top three citrus types over the last 11 years. By Jon Roberts

Comparatively, the area planted per fruit type in 2011 against the most recent statistics in the Citrus Growers' Association (CGA) Stats Book highlights dramatic changes in the top-three citrus types, over the last 11 years, a relatively short time in terms of fruit production.

But this was expected, given the number of buds the Citrus Foundation Block (CFB) has supplied to nurseries over the last decade. Noting the age of trees in this year's CGA Stats Book, many more Easy-peelers and lemons are likely to enter production in the next few years. Navels and grapefruit have moved to fourth and fifth positions in the percentage of area planted, but production has also grown slightly. This is largely because, to date, the citrus planted area/ha has grown from 58 101 to 99 969. Comparing these production stats with

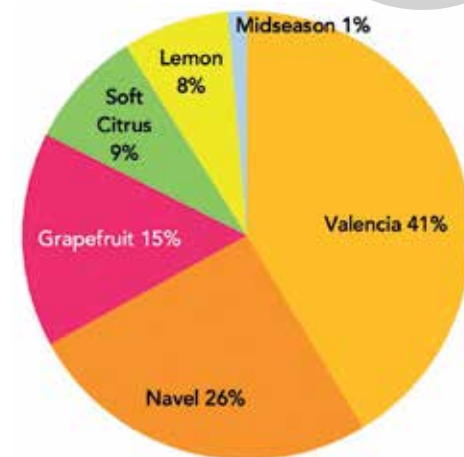


Figure 1: Area planted per citrus group, 2011 stats

those for market demand and consumption makes for interesting reading.

For some years, the CGA has reported flatlining in the consumption of all citrus types. But if we drill down into the details for each citrus type, would all cultivars be flatlining?

Easy-peelers and lemons are both showing signs of increased growth. While Easy-peeler fruit kg/capita consumption is slowing a bit, lemons kg/capita consumption is still growing.

Oranges, especially Navels, showed no recent growth since the 2018/19 peak. As early reports indicate, we are seeing some positive signs in the current 2023 season, especially in EU markets and China (which is recovering from the effects of a zero COVID policy).

While grapefruit is still on a downward trend, it has stabilised in recent years, thanks to growth in China and the rest of the Far East. Unfortunately, demand in Japan and the EU – our historical markets – remains weak.

What we can deduce from these comparisons

- **Oranges:** Valencia have remained strong; the main reason oranges have kept the number one position of area planted in SA. There are many promising cultivars

in evaluation throughout the maturity window, Jasi being a stand-out new open variety. We are releasing a promising cultivar that is three to four weeks earlier than Turkey in the coming months. Navels have seen some growth in production, but not in kg/capita consumption. Hopefully the positive trend in the 2023 season will persist. Below are cultivars that we are looking at to help reverse the downward kg/capita consumption trend.

- **Red, Lycopene cultivars: vitamin C and flavonoids** such as Hesperidin and Naringin levels are similar to orange-pigmented cultivars (blonde oranges). Thus, these health benefits remain the same. However, there is

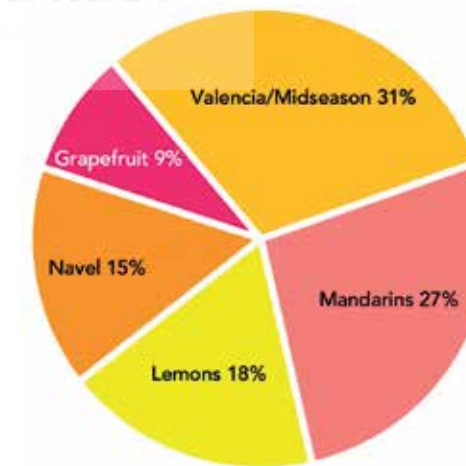


Figure 2: Area planted per

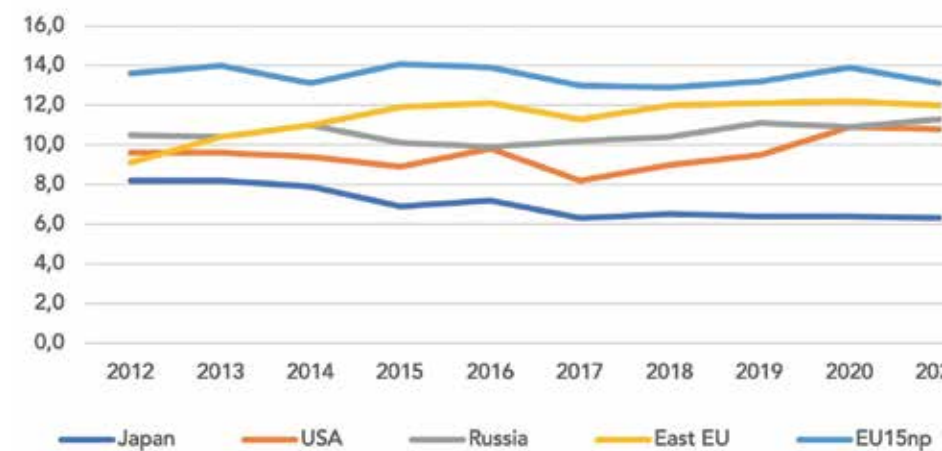


Figure 3: Citrus Consumption in main markets

growing evidence to suggest that red oranges, due to their chemical composition, Lycopene, have a higher antioxidant structure. Therefore, they contain significantly higher levels of Carotenoids, (vitamin A precursor) as shown in Figure 6.

- Varieties currently under evaluation such as 'Mandorange', is a new, mandarin-orange hybrid that kids can peel easily. It has a more appealing deep orange-mandarin colour, stable production, and better internal and external quality. These varieties remain "orange-like" and apart from the darker orange appearance, have all the fresh-orange characteristics and would be packed in the orange line.

- **Easy-peelers:** will continue to increase in production worldwide and will possibly continue to cannibalise fresh orange (mainly the Navel market share). There is little doubt from the markets that the modern consumer prefers Easy-peelers due to the convenience factor of easy peeling, appearance, and flavour. The concern, not seen in the market and consumer trends, is the massive production peak in the second half of the season. Offering similar quality, early-season Easy-peelers from weeks 15 to 22 could flatten that peak. However, the challenge is discovering a cultivar of similar quality to the late Mandarins. There are early cultivars available like Clemenson and Oronules Clementines on interstock. Other cultivar companies have several promising early easy-peeler cultivars in evaluation or early release.

- **Lemons:** Seedless lemons have been the focus in recent years. However, based on production volumes, they're trumped by mainstream cultivars like Eureka. Until there is significant demand for seedlessness, growers continue to plant main-

Let's compare these production stats with those for market demand and consumption.

stream varieties. Some plant breeders are looking at citrus black spot and Mal Secco tolerance or resistance, but there are no viable commercial options at this stage.

- The **grapefruit** is in the doldrums. An easing in the current downward trend is positive, but can it be converted into growth? The negative aspects of Furanocoumarin compounds in grapefruit were discussed in previous articles. Unfortunately, this compound has given grapefruit negative press that overlooks the various health benefits. Add to this competition against the “convenience fruit” label attached to Easy-peelers, and that the grapefruit flavour profile is only liked by the older generation. Could the trend be reversed? What if there were new cultivars that could solve all these negative attributes, like existing hybrids that had been overlooked? As previously discussed, UF 914, a Red Star grapefruit hybrid with near undetectable Furanocoumarins, has a low naringin taste profile with higher Brix and lower acids. There are also cultivars managed by other cultivar companies, such as Alizza, with similar attributes. And Jackson seedless is a small pomelo hybrid that packs a punch of flavour. These cultivars are recent arrivals and will probably require significant plantings for critical mass in the market, to provide a stable supply for brand awareness. It is believed that these varieties have the potential to compete with the best-eating citrus types in terms of flavour. 🍊

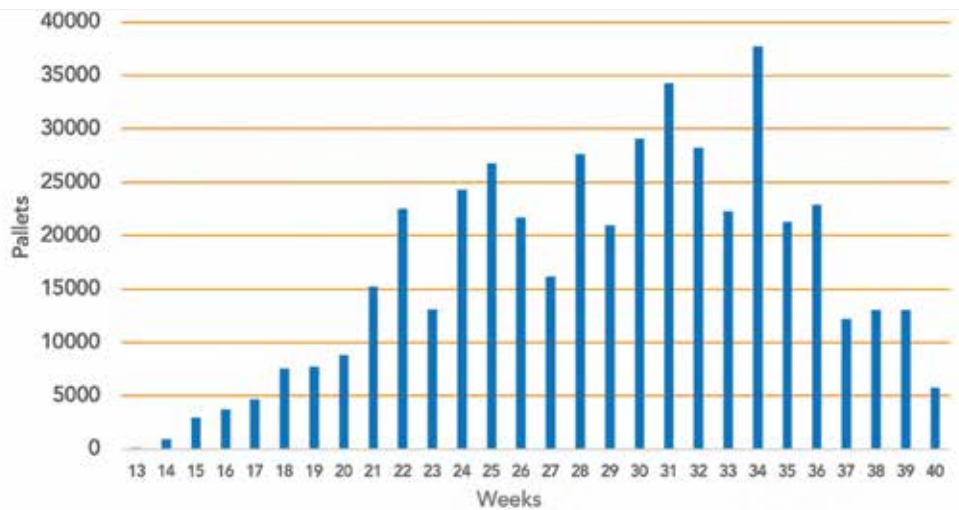


Figure 4: Easy-peeler production peaks

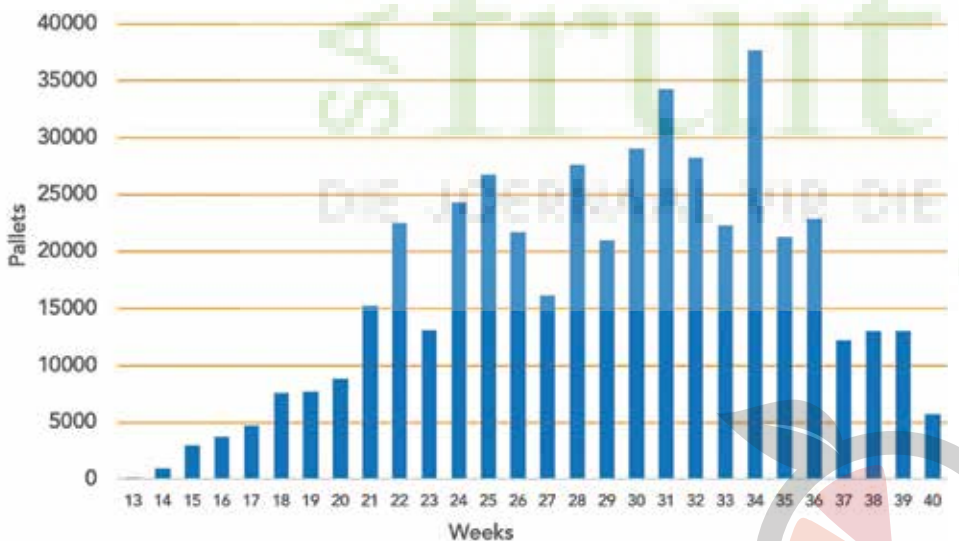


Figure 5: Shipped Mandarins 2022

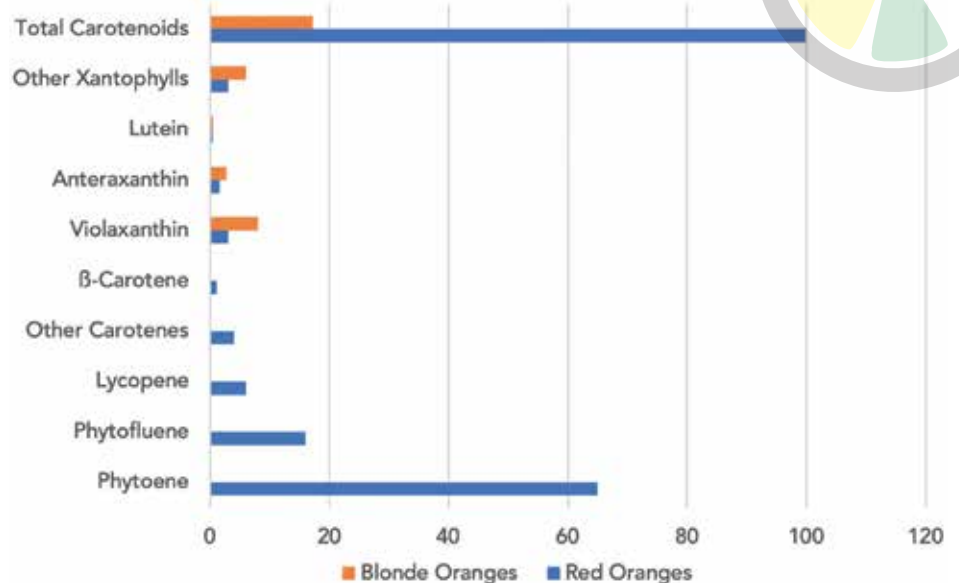


Figure 6: Carotenoids, (content µg/g/FW)

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