

Orchard registration

RESULTS ANALYSIS

According to the 2023 tree census, the growth rate of tree plantings in the South African citrus industry continues to plateau. By **Precious Kunota**



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The South African tree census data is compiled from an online orchard registration process for special markets each year in October/November. The data from this exercise includes statistics on varieties, rootstock, tree age, and hectares. The data set is critical for guiding growers in their selection of varieties to plant, assisting the citrus supply chain with packing and logistics investment decisions, and directing market access and research needs.

Table 1: Hectares planted per citrus commodity (2018-2023)

Commodity	2018	2019	2020	2021	2022	2023	2022 vs 2023 (ha)	2022 vs. 2023 (%)
Valencias	26 956	26 971	27 690	29 235	28 228	28 290	62	0,2%
Mandarins	16 308	16 388	23 635	26 094	26 678	26 833	155	1%
Lemons	14 616	14 630	17 647	17 742	17 555	18 054	499	3%
Navels	16 141	16 158	16 204	15 864	15 440	14 703	-736	-5%
Grapefruits	7 625	7 625	8 112	8 515	8 377	8 097	-280	-3%
Grand Total	81 646	81 772	93 289	97 450	96 277	95 977	-300	-0,3%

Below is a summary of the 2023 orchard registrations, as well as some key findings (similar data appears in the CGA Annual Statistics Booklet).

Growers from Zimbabwe and Eswatini are also members of the CGA and contribute to the annual census. However, this article only covers the South African tree census.

The 2023 SA citrus tree census indicates a total of 95 977 ha of citrus, representing a 0.3% decrease from the previous census. This aligns with the industry trend that began in the 2022 season, during which growers removed some orchards. The trend is further supported by declining budwood sales.

Currently, 89% of these trees are bearing fruit, with the remaining 11% not yet mature enough to produce fruit. This suggests potential production growth in the coming years as the non-bearing trees mature. However, if the current planting rate persists, we face a challenge: In the next few years, the trees will predominantly fall into middle and aging groups, with fewer



young trees being planted to replace them. Consequently, the overall tree population will gradually age and production will be negatively impacted.

Table 1 shows that the total hectareage for Valencia oranges remained largely unchanged, while the area for Navel oranges and grapefruit decreased by 5% and 3%, respectively. In contrast, mandarins and lemons experienced increases of 3% and 1%, respectively.

Limpopo Province has the largest citrus production area in the country, accounting for 41% of the total planted area, followed by the Eastern Cape (26%), and the Western Cape (20%). The Western and Eastern Cape have cooler climates ideal for growing navels, lemons, and mandarins. In contrast, the warmer climates in Limpopo, Mpumalanga, and KwaZulu-Natal are suited for growing grapefruit and Valencias. The growth rate across these provinces has remained nearly stagnant, with the highest increase being 2% in KwaZulu-Natal. Mpumalanga showed a sharp decrease of 8%, as shown in Table 2. The North West had the highest percentage of orchards removed for the second consecutive time, showing a 12% reduction.

Although the overall change in total hectares is a marginal 0.3%, Table 3 illustrates that there are notable variations when examining the breakdown by CGA regions. The Limpopo River region experienced the greatest percentage increase (26%) compared to the previous year's census. The

Table 2: Hectares planted per province (2018-2023)

Province	2018	2019	2020	2021	2022	2023	2022 vs 2023 (ha)	2022 vs 2023 (%)
Limpopo	34 770	34 704	37 842	40 329	39 524	39 634	110	0,3%
Eastern Cape	21 160	21 249	24 648	25 217	24 508	24 681	173	1%
Western Cape	14 882	14 964	17 938	18 914	19 208	19 332	124	1%
Mpumalanga	6 363	6 367	7 639	7 877	8 127	7 443	-684	-8%
KwaZulu Natal	2 131	2 131	2 432	2 440	2 350	2 394	43	2%
Northern Cape	1 773	1 785	1 956	1 838	1 818	1 837	18	1%
North West	554	559	823	822	730	645	-85	-12%
Free State	13	13	13	12	12	12	-	0%
Grand Total	81 646	81 772	93 289	97 450	96 277	95 977	-300	-0,3%

Table 3: Hectares planted per CGA region (2018-2023)

CGA Region	2018	2019	2020	2021	2022	2023	2022 vs 2023 (ha)	2022 vs 2023 (%)
Grand Total	167 328	167 582	190 618	198 942	196 599	196 000	-598	-0,3%
S.R. Valley	13 856	13 924	16 361	15 941	15 105	15 624	519	3%
Senwes	11 002	11 090	11 357	13 083	13 415	12 506	-909	-7%
W. Cape	10 232	10 237	13 433	12 596	12 204	12 095	-110	-1%
Letsitele	11 303	11 130	11 924	13 355	11 803	11 684	-119	-1%
Hoedspruit	6 368	6 368	6 297	6 805	7 828	7 920	93	1%
Boland	4 698	4 794	4 505	6 318	6 956	7 085	129	2%
Patensie	5 345	5 346	6 224	7 073	7 240	7 014	-225	-3%
Limpopo River	4 599	4 649	4 979	4 754	3 946	4 981	1 036	26%
Nelspruit	5 700	5 649	6 444	6 515	4 357	4 051	-307	-7%
Burgersfort Ohrigstad			3 513	3 216	3 598	3 576	-22	-1%
Onderberg	2 971	2 971	1 526	1 300	3 434	3 085	-349	-10%
KwaZulu Natal	1 941	1 941	2 432	2 440	2 350	2 394	43	2%
E. Cape Midlands	1 875	1 875	2 063	2 204	2 176	2 080	-96	-4%
Northern Cape	1 786	1 798	2 232	1 851	1 865	1 883	18	1%

Sundays River Valley, Hoedspruit, Boland, and Northern Cape regions saw marginal increases compared to previous seasons. However, most regions removed some orchards, leading to an overall decrease in the total hectares for 2023.

There is also a notable shift in the age

distribution. Graph 1 shows that 18% of the mandarin area and 8% of the lemon area are currently non-bearing and that about 65 % is now in the 5–12 year bearing phase. Whereas 65% of orange and 71% of grapefruit orchards are mature aging trees. Overall, 54% of the citrus orchard area in

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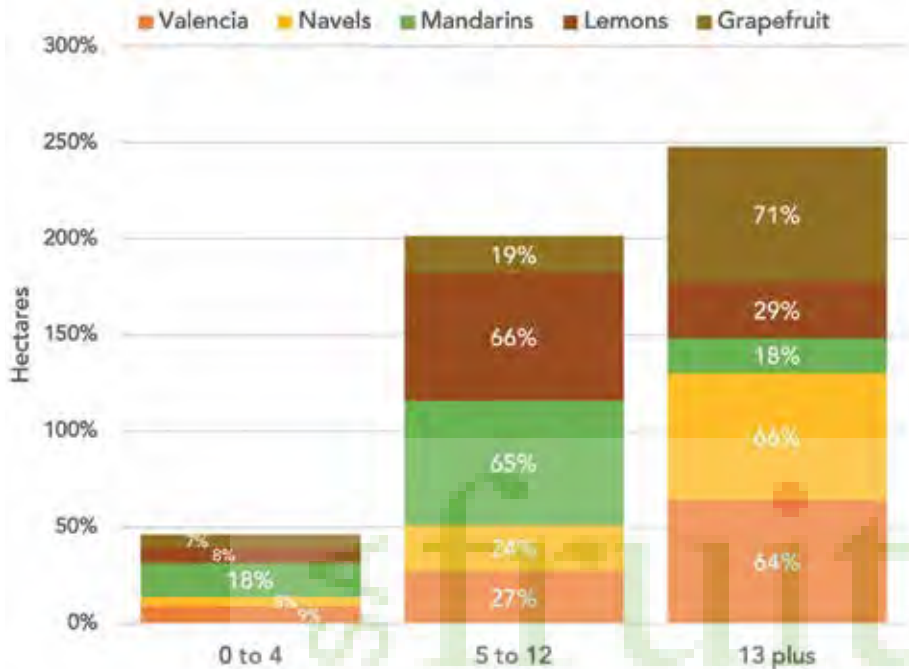
SA is under 13 years old.

In terms of mandarin hybrid development (Nova, Nadorcott, Tango, Leanri, etc.), Nadorcotts remain the most common variety in SA. Currently, 17% (4 686 ha) of the country's total mandarin hybrids (26 833 ha) are not yet in production. **Graph 2** shows that most regions have a significant proportion of their mandarin hybrid trees in the productive 5–12-year age range, indicating strong potential for high yields in the near future. The Western Cape region has the largest planted area and has a well-established presence of older trees. Boland and Senwes also show substantial planted areas with a balanced distribution of tree ages, indicating on-going development. Other regions have smaller but notable areas with most trees in the productive age range, and some on-going development of younger orchards.

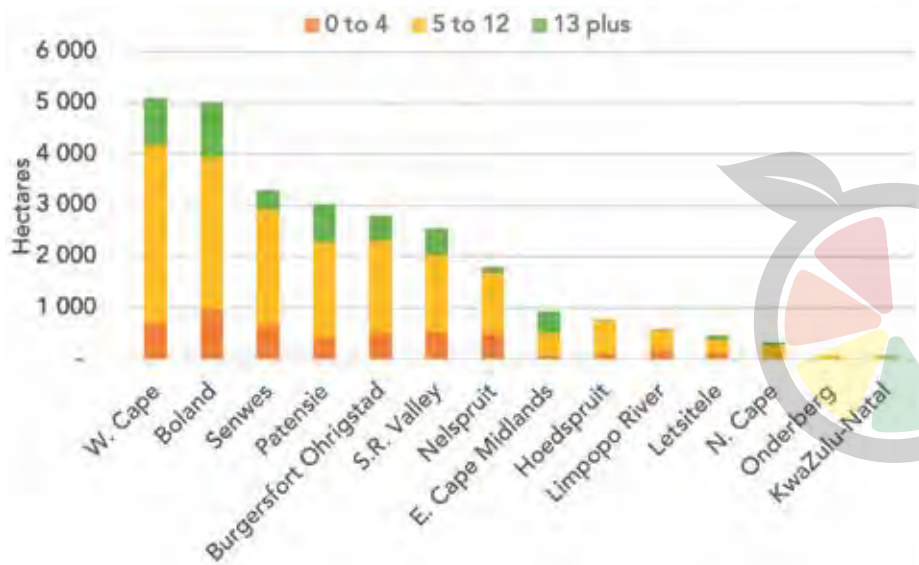
Graph 3 indicates that most regions have a substantial proportion of their lemon trees in the 5–12-year age range, signifying strong current and near future yields and exports. The Sundays River Valley stands out, with the largest planted area and a significant number of older trees. This demonstrates a mature and established lemon industry in the region. Other regions show a mix of young and productive trees, with limited older tree populations, suggesting on-going growth and development in lemon production.

Table 4 highlights the prominence of older, mature Valencia trees across most regions, particularly in Letsitele, Hoedspruit,

Limpopo Province has the largest citrus production area in SA.



Graph 1: Age distribution per citrus commodity



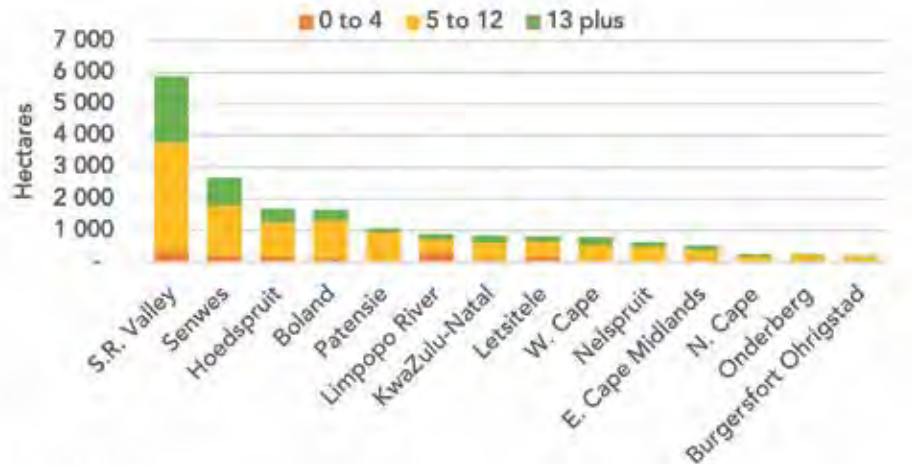
Graph 2: Age distribution of mandarin hybrid types per region



and Sundays River Valley. While there is a significant proportion of trees in their prime productive years (5–12 years), the presence of younger trees (9%) indicates a steady renewal and expansion of orchards.

The total hectares under navels (**Table 5**) continues a slight decline year-on-year. Most of production is in the 13-plus age category with the Eastern Cape and Western Cape being the biggest producers.

Only about 7% of the grapefruit trees are currently under five years old compared to 15% in the previous year's census. Due to the global decline in grapefruit demand, there is a gradual decrease in registered



Graph 3: Age distribution of lemons per region

areas planted in SA, to 8 097 ha in 2023 (down by 3% from 2022), as expected. Most of the trees are still producing but are in the ageing stage.

Even though the rate of growth in tree planting appears to be stagnant, there are still some growth opportunities in the citrus industry. Stakeholders

in the industry will almost certainly need to continuously put effort and resources into identifying, exploring, and improving export opportunities for these commodities as increased production meets consumer demand. 🍊

Table 4: Valentias planted hectares

CGA Regions	0–4	5–12	13 +	Grand Total
Letsitele	719	2 596	4 752	8 068
Hoedspruit	315	1 185	2 002	3 502
S.R. Valley	200	689	2 489	3 377
Senwes	406	602	2 133	3 141
Limpopo River	203	519	2 073	2 794
W. Cape	192	632	1 817	2 641
Onderberg	64	413	705	1 182
Nelspruit	123	197	827	1 148
Patensie	47	308	604	959
N. Cape	55	230	230	515
KwaZulu-Natal	97	160	208	466
Burgersfort Ohrigstad	35	29	180	244
Boland	61	69	76	207
E. Cape Midlands	15	5	27	47
Grand Total	2 532	7 633	18 124	28 290
% of Total	9%	27%	64%	

Table 5: Navels planted hectares

CGA Regions	0–4	5–12	13 +	Grand Total
S.R. Valley	155	1 066	2 479	3 700
W. Cape	169	413	2 948	3 530
Senwes	163	892	2 342	3 397
Patensie	78	715	1 058	1 851
E. Cape Midlands	48	93	450	591
Nelspruit	50	154	275	479
Burgersfort Ohrigstad	49	100	176	324
N. Cape	35	60	155	250
Boland	5	81	132	218
Limpopo River	22	6	101	129
KwaZulu-Natal		53	60	114
Hoedspruit		60	11	70
Onderberg		20	15	34
Letsitele		12	4	16
Grand Total	773	3 724	10 206	14 703
% of Total	5%	25%	69%	

Table 6: Grapefruit planted hectares

CGA Regions	0–4	5–12	13 +	Grand Total
Letsitele	200	392	1 719	2 311
Hoedspruit	70	375	1 452	1 897
Onderberg	125	356	1 075	1 556
KwaZulu-Natal	34	284	584	902
Limpopo River	31	104	461	596
N. Cape	71	77	406	554
Patensie	17	25	73	115
S.R. Valley	4	3	97	104
W. Cape	8	5	21	34
Burgersfort Ohrigstad			22	22
Boland		5		5
Senwes			2	2
Grand Total	560	1 626	5 911	8 097
% of Total	7%	20%	73%	

