CITRUS PRODUCTION OUTLOOK
short-to-medium term

Mitchell Brooke

Why fresh fruit export volumes don't match the many new orchards planted by citrus producers across Southern Africa over the past few years. By Mitchell Brooke

The past three citrus seasons show low-growth fresh fruit export volumes.

Some of the main reasons:

- **High-cost inflation** resulted in mainly premium fruit being exported with low-quality fruit and marginal count sizes being discarded, sold locally, or sent for juicing and concentrate.
- **Weather and climatic incidences** impacted production yields over the course of three to five years.
- **Fruit sizing and quality** have also impacted production yields.

I did an assessment looking at production volumes over the past three seasons. Considering all production regions and the highest volume produced for each citrus category, revealed an interesting tale. I grouped all the production regions relevant to each export corridor, to determine an outcome of the peak production that could materialise in the short to medium term. Due to the highlighted factors, the export production volume has capped at 164 million 15 kg equivalent cartons for the 2022 and 2023 seasons. However, if one considers all production regions yielding the highest volume over a single season, the outlook shows the possibility of up to 182 million 15 kg equivalent cartons being produced. In the table below, I factored in a nominal increase in production for lemons and late Mandarins, to determine a short-term production volume, should all citrus-producing regions yield maximum volumes. The outcome shows that up to 186 million 15 kg equivalent cartons could be produced. The possibility of every region yielding maximum volume across all categories is slim, although it does indicate that there could be a wave of citrus being produced in a single season. From a logistics and shipping point of view, this is a strong indication that projects outlined in Vision 260 need to be implemented sooner rather than later. The table also highlights the 2027-based production output levelled against the long-term crop projection model, which indicates that 207 million 15 kg equivalent cartons could be produced.

Table 1. Production 2023 (variety per 15 kg)

Production 2023	Valencia	Navels	Lemons	Soft citrus	Grapefruit	Total citrus
Northern Regions	36 458 576	6 675 000	13 095 843	12 623 240	12 455 333	81 307 992
E Cape Regions	8 680 000	10 640 000	18 200 000	9 295 694	544 000	47 359 694
N/W Cape Regions	5 880 000	7 271 000	4 650 000	15 551 928	1 677 333	35 030 261
Total	51 018 576	24 586 000	35 945 843	37 470 862	14 676 667	163 697 947
Peak production 2020 – 23	**Valencia**	**Navels**	**Lemons**	**Soft citrus**	**Grapefruit**	**Total citrus**
Northern Regions	42 166 576	9 369 200	13 911 166	13 484 240	16 221 933	95 153 115
E Cape Regions	10 151 090	11 458 755	18 200 000	9 295 694	493 454	49 598 993
N/W Cape Regions	6 806 096	8 266 000	4 779 000	15 785 898	1 677 333	37 314 327
Total	59 123 762	29 093 955	36 890 166	38 565 832	18 392 720	182 066 435
Production: short-term outlook	**Valencia**	**Navels**	**Lemons**	**Soft citrus**	**Grapefruit**	**Total citrus**
Northern Regions	42 538 000	8 588 000	14 985 000	15 287 240	16 134 000	97 532 240
E Cape Regions	10 188 007	10 910 000	18 820 000	9 950 000	493 454	50 361 461
N/W Cape Regions	7 170 000	7 566 000	4 980 000	16 797 160	1 600 000	38 113 160
Total	59 896 007	27 064 000	38 785 000	42 034 400	18 227 454	186 006 861
Production: 2027 outlook	**Valencia**	**Navels**	**Lemons**	**Soft citrus**	**Grapefruit**	**Total citrus**
Northern Regions	46 070 000	8 560 000	16 500 000	21 500 000	16 000 000	108 630 000
E Cape Regions	10 500 000	10 925 000	20 200 000	12 270 000	450 000	54 345 000
N/W Cape Regions	8 100 000	7 500 000	5 900 000	21 000 000	2 000 000	44 500 000
Total	64 670 000	26 985 000	42 600 000	54 770 000	18 450 000	207 475 000

I'll highlight the logistics projects outlined in Vision 260 in an upcoming *SA Fruit Journal* series that will cover:

1. inland transportation to port, road, and rail
2. cold storage capacity demands
3. container and port capacity demands
4. shipping trade lane and service capacity demands.

Do stay tuned, as we explore and make sense of the pertinent aspects of production and their relativity to export.

New Industry Affairs Manager

When Paul Hardman stepped into the newly created role of COO, the vacant industry affairs manager position had to be filled. By Tanya Ungerer

Albert Coetzee

Albert Coetzee was appointed as the new industry affairs manager (IAM) on 1 November 2023, succeeding Paul Hardman who now fulfils the recently created role of Chief Operating Officer (COO). Based in the Western Cape, Albert's initial focus will be on sustainability matters and project work within Vision 260, working together with Paula Bester, who will continue to focus on food and safety requirements.

He grew up in the Overberg region in the Western Cape where he attended school in Caledon. He then went on to study at Stellenbosch University (SU) where he obtained a BScAgric in Agricultural Economics in 2015, and then completed his MScAgric in 2016. During his time at SU, he was involved in various leadership structures, including the Student Representative Council, where he received the coveted H.B. Thom Bursary for Leadership in 2015.

Albert has worked at a fruit industry data service provider where he focused on benchmarking various commodities and growing regions in SA. This helped guide growers to mitigate risks and ensure sustainable farm profitability. From there, he worked in an operational role at an integrated citrus and grape export business, involved in various aspects of the business, including finance, information systems, corrugators, solar installations, and the construction of a citrus packhouse.

The role of the IAM is expected to change in time, along with industry needs and challenges. The focus on sustainability will most likely increase, as various sustainability requirements continue to be generated and consolidated in key markets like the EU. In fact, while the EU is in many areas setting the pace in terms of establishing the requirements and standards for sustainability, many other countries are systematically introducing their own sustainability objectives and targets. The new IAM will keep abreast of these and try to help growers position themselves to meet environmental compliance requirements, and to compete accordingly. It will be important to ensure sustainability is not used as the next trade barrier to new and existing markets.

At this stage the extent of the IAM's focus on economic sustainability is to clearly identify the role of CGA in these matters. The CGA does not get involved in growers' enterprises. So while the idea is to create an environment where all growers can prosper, caution will be required to not undermine growers' hard work and the resultant competitive advantage gained over the last number of years.

The IAM role will also help to address any new issues that might emerge from exporting more cartons annually – as projected under Vision 260. The latest forecast is that by 2027 another 40 million cartons are expected to enter the export supply chain. Surely this will trigger new issues and challenges, and the IAM is standing by to step in where and when required.

The CGA wishes Albert every success in his new role within the organisation.