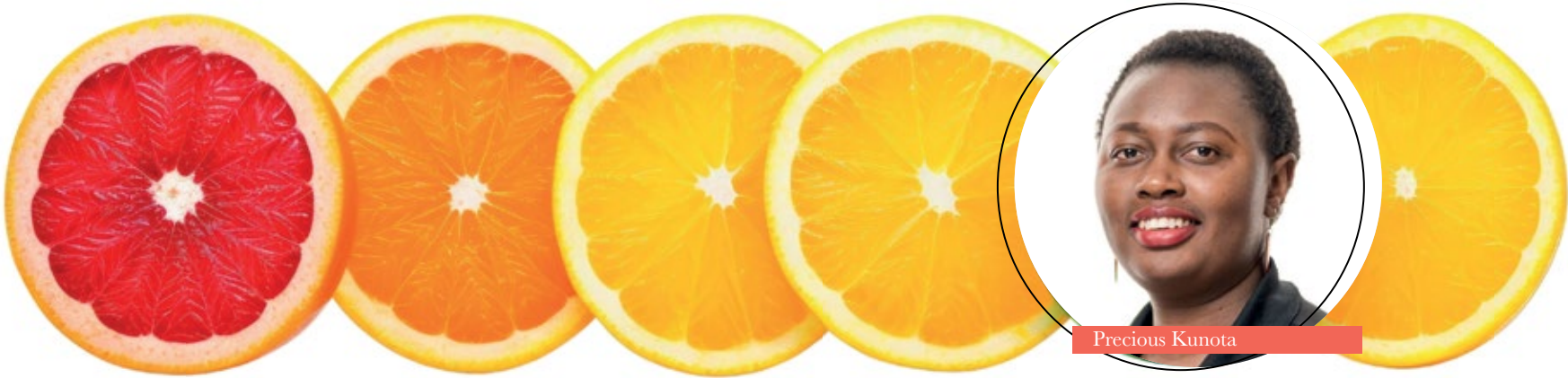


Review

THE 2024 CITRUS SEASON

The 2024 season faced challenges that led to a significant gap between estimated and final export volumes, especially for oranges.

By Precious Kunota



At the start of each citrus season, variety focus group members conduct a thorough exercise, working closely with growers in their regions to gather data on anticipated yields. This information is then used to forecast the total volume of fruit expected to be packed and approved for export. While this process has proven effective over the last decade, the 2024 season faced challenges that led to a significant gap between estimated and final export volumes, especially for oranges.

Table 1 shows that final citrus packed volumes fell short by 17.1 million 15 kg equivalent cartons (9%) compared to initial estimates. This shortfall has raised industry-wide concerns, prompting an investigation into its underlying causes. Insights gathered from industry stakeholders reveal several significant factors contributing to this gap. In this feature we aim to summarise the primary issues identified as the main drivers of reduced export volumes with a strong emphasis on oranges.

Table 1: Initial vs. final packed 15kg equivalent cartons - 2024

Commodity	2024 estimate (15 kg equiv. carton)	Packed in 2024 (15 kg equiv. carton)	Shortfall from estimate	% shortfall
Grapefruit	16 773 516	14 379 162	2 394 354	14%
Mandarins	43 025 053	41 653 970	1 371 083	3%
Lemons	37 937 869	34 708 094	3 229 775	9%
Navels	25 687 243	25 105 080	582 163	2%
Valencia	58 309 762	48 737 503	9 572 259	16%
Total	181 733 442	164 583 809	17 149 633	9%

A case for orange juice

One of the most prominent factors affecting export volumes in the 2024 season has been the high price offered for oranges destined for local processing. As noted by feedback from several industry stakeholders, this has been a major driver in pulling fruit away from fresh fruit export and local markets.

The favourable global juice prices presented a more attractive option for many growers to divert their produce to local processing facilities. The high orange juice price did not only reduce the export share, but it also reduced the fresh orange local market share. Sources in the juice industry reported a significant increase (60–80 %) in volumes of oranges processed at their facilities compared to the 2023 season. So far, it is estimated that about 6 million 15 kg orange cartons (7%) destined for exports were diverted to juicing plants, while a further 4 to 6 million 15 kg equivalent cartons could have been diverted from the local market.

Unfavourable weather

Adverse weather conditions also played a significant role in reducing the volume of citrus available for export. Hot and dry conditions during the mid to late summer of December 2023 led to smaller fruit sizes, while various weather events during the 2024 season – such as freezing temperatures in Senwes, floods in the Western Cape, and strong winds in the Eastern Cape – further exacerbated the situation. These weather-related factors resulted in a reduction of fruit suitable for export. The orange focus group reduced the total projection for oranges by 980 000 cartons due to these related weather conditions. It is likely that all the marginal fruit that did not make it to the local and export market was sent to the juice processing plants. In the navel category, early-season characteristics included low acidity and delayed coloration.

Regulations around diseases

The regulatory environment, particularly around citrus black spot (CBS), impacted export volumes to an extent. Quantifying the exact impact of CBS on orange exports remains challenging. It is also probable that some of the fruit from withdrawn orchards was redirected to juicing plants, meaning that these volumes are likely already accounted for in the juice estimates.

Sizing and count distribution

Another contributor to the decline in export volumes was the shift in fruit sizing due

Figure 1: Size count percentage contribution to total volumes for oranges

	2022	2023	2024	
Count group	% Total	% Total	% Total	
36	1.01%	2.34%	1.23%	Largest fruit size ↓ Smallest fruit size
40	3.31%	6.4%	3.54%	
48	7.38%	10.95%	7.16%	
56	13.13%	15.67%	12.22%	
64	15.33%	16.13%	14.78%	
72	23.28%	20.61%	22.93%	
88	19.31%	14.57%	20.86%	
105	8.32%	5.84%	9.64%	
125	1.37%	1.17%	1.79%	
Other	7.57%	6.31%	5.86%	

to hot and dry weather conditions in the late summer of 2023. Figure 1 shows the oranges' size counts group percentages distribution for 2022–24. Clearly, there was a shift in the 2024 season towards smaller size counts such as 72 and 88 compared to the previous season. For example, the weighted average fruit count per carton for oranges went from 67.56 in 2023 to 70.27 in 2024, which equates to an extra 2.71 (4%) of oranges required to fill the same carton. This change in size distribution towards smaller fruit had a notable impact on the overall volume of fruit cartons available for

export. It can be roughly extrapolated that the contribution from having smaller fruit on the lower orange volumes was 4%, which translates to 3.4 million cartons. Table 2 summarises and quantifies the major factors that contributed to the wide gap between final and estimated orange volumes.

Lemons

The lemon estimate fell short by 3.2 million cartons (9%). Unlike oranges, juice prices did not impact lemon exports. Early in the 2024 season, it became clear that South African lemons would enter the European



Table 2: Quantifies the impact of several factors on the orange exports

Factor	Cartons
High juice prices (7% of initial orange estimate)	5 814 542
Smaller size fruit (4% of initial orange estimate)	3 359 880
Floods in Western Cape (0.7% of initial orange estimate)	600 000
Frost in Senwes (0.5% of initial orange estimate)	380 000
Total	10 154 422

The challenges in the 2024 season led to a significant gap between estimated and final export volumes, especially for oranges.

For example, the decline in orange exports was more severe in Valencias than in navels, with Valencias experiencing a 16% drop in volumes, while navels saw a more modest 2% decline. Some regions, such as Letstitele, reported an increase in overall production, but a significant portion of that increase was directed toward juice processing. The fruit was there – it just did not get packed into an export carton.

Moving forward, it's important for the citrus industry to address the challenges that hamper accurate estimates, particularly in terms of understanding the balance between fruit destined for processing and for the export market.

market later than usual due to an abundant Spanish lemon supply. Spain's Fino crop was estimated to increase by 41% from the previous season, extending its presence in the market, followed by a 59% larger Verna harvest. This late start prevented SA from catching up to the previous season's export volumes. Additionally, lemon-growing regions faced unfavourable weather, including frost in the Senwes region and oleo, compounded by smaller fruit sizes. Together, these contributed to the lemon shortfall. Ironically, a lemon shortage arose at the end of the season, resulting in strong prices as the season ended.

Grapefruit

The grapefruit category experienced a shortfall of 2.4 million cartons (14%) compared to the initial estimate, primarily due to unfavourable weather conditions that impacted colour and size development across all citrus varieties. Market opportunities at viable pricing levels back on farm were under pressure, leading to some growers choosing to divert their export quality fruit to local juicing. Given these challenges, the grapefruit focus group aims to continue to provide information about current market realities to reduce the gap

between supply and demand. At the same time, they are actively working on a strategy to rejuvenate demand for South African Star Ruby to sustain the category's viability.

Mandarins

This category performed well, with a modest 3% shortfall compared to the initial 2024 estimate. The shortfall was primarily due to the dominance of smaller fruit sizes and the widespread unfavourable weather conditions, which affected colour development in some cases.

In conclusion, the decline in citrus export volumes compared to the initial estimate for the 2024 season can be attributed to a combination of factors. The high price offered for processing oranges played a dominant role, drawing a large portion of fruit away from the export and local markets. Adverse weather conditions, including heat, drought, and extreme wet weather events, further reduced the available volume of high-quality exportable fruit. Disease pressures and fruit quality issues compounded these challenges, while the shift in fruit sizing contributed an additional reduction in volumes. It is also important to note that the extent of these issues varied by region and citrus variety.

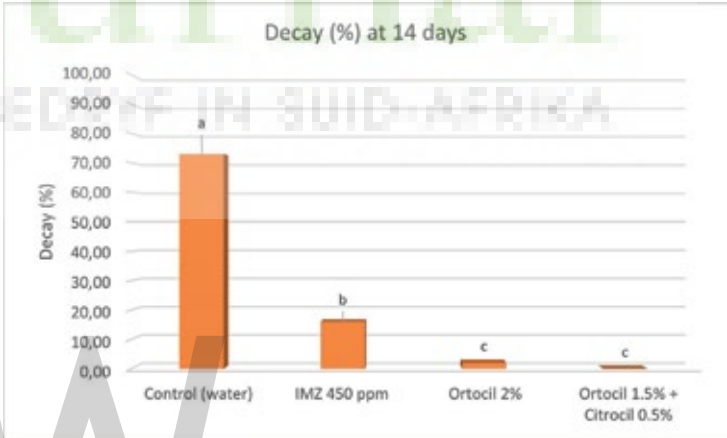


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Control of *Penicillium spp.* Resistant strains can be achieved with the ideal treatment of 1.4% Ortocil® + 0.6% Citrocil® (L10416)*.



Decay after 14 days at 20-22°C of Navelina oranges inoculated with *Penicillium digitatum* Resistant to Imazalil and Pyrimethanil subjected to the specified treatments. **Citrocil® is a 7.5% Imazalil sulphate + 10% OPP liquid formulation.**



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