



FROM THE DESK OF THE CEO (33/09)

Justin Chadwick (21 August 2009)

Citrus Growers Association (CGA)

QUOTE OF THE DAY: Murray Mexted: "Well, either side could win it, or it could be a draw."

CELEBRATE SUCCESS: Caster Semenya – World 800 meter Champion!!!!

IMPORTANT DATES

It has been decided to hold the standards workshops and CMF around the dates set for the Department Agriculture, Forestry and Fisheries (DAFF) Coordinating meeting which will be held **in Stellenbosch at ARC Infruitec, Olive Grove on 16 September 2009 at 09h00.**

So the **standards meetings** will be held on **Tuesday 15 September** with oranges (navels and valencias together) from 10h00 to 12h00; followed by lemons, grapefruit and soft citrus (all together) from 13h00 to 16h30 – all at **ARC Infruitec, Olive Grove.**

The **Citrus Marketing Forum (CMF)** will then be held after the DAFF meeting (Wednesday 16 September) from 14h00, at the same venue.

TOYOTA NEW HARVEST OF THE YEAR COMPETITION

I was privileged to attend the ceremony where the Toyota New Harvest of the Year winner was announced. Israel Nemaorani was one of the ten finalists, and listening to his accomplishments was very inspiring. He was up against stiff competition, with the level of farming expertise and accomplishments being very high. The profile of these ten finalists indicates that the farms they work are in very capable hands, and was a positive sign given the large amount of press given to failed farming operations. Unfortunately Israel did not win – but we can be proud of him making the final ten and representing the citrus industry with distinction.

PACKED AND SHIPPED 2009

The packed figures reflect that the grapefruit, soft citrus and navel seasons are all but done with packed figures close to the final predicted figures. Still a few lemons to go – PPECB graphs show that the third pick has definitely been higher than the previous season. So the focus is on Valencias, with 17 m cartons still to be packed.

In circular 30 industry stakeholders attention was drawn to PPECB graphs which showed the current year's cumulated export volume compared to the highest cumulated volume (of the last 5 years) into all export markets. The idea being that if the volumes are approaching the highest levels then exporters need to see how prices are faring – if prices are starting to dip then caution should be taken in shipping more into that market. The following markets are at or above the highest volume levels; grapefruit to Middle East and Russia; lemons to Middle East, Hong Kong and Japan; Soft Citrus to Far East; Oranges (navel and Valencia combined) to Middle East and Hong Kong. Please note that this does not necessarily mean that these markets are oversupplied, as many of these markets are developing every year; the caution is just to be aware that volumes are higher than average and to monitor price trends. With most commodities in Europe under pressure, there has been a noticeable shift to markets outside the EU; lemons being the most pronounced with 45% going to EU in 2008 compared with only 28% in 2009.

The Middle East has been an important market for southern African citrus in 2009 – taking 43% of lemons, 28% of navels, 22% of Valencia and 7% of soft citrus. Asia (including Japan and Far East) has also proved a valuable export region – taking 38% of grapefruit, 18% of Valencia, 11% of lemons and navels, and 5% of soft citrus. And Russia has also taken some pressure off EU markets by taking 11% of Valencia and lemons, 9% of soft citrus, 8% of navels and 6% of grapefruit.

To Week 33 – Million 15Kg cartons	Packed	Packed	Packed	Shipped	Shipped	Original Estimate	Latest Prediction	Final Packed	Final Shipped
Source : PPECB	2007	2008	2009	2008	2009	2009	2009	2008	2008
Grapefruit	13.9 m	12.6 m	13.5 m	11.9 m	12.7 m	15.1 m	13.5 m	12.8 m	12.4 m
Soft Citrus	6.5 m	7 m	6.5 m	6 m	5.5 m	7.4 m	6.6 m	7.3 m	6.5 m
Lemons	6.5 m	9 m	7.9 m	7.7 m	6.3 m	9.4 m	8.2 m	9.6 m	8.8 m
Navels	18.3 m	20.8 m	19 m	19.1 m	17.2 m	21.6 m	19 m	21.5 m	21.2 m
Valencia	21.5 m	24.1 m	21.2 m	15.9 m	12.1 m	43 m	38.2 m	42.8 m	40.4 m
	66.7 m	73.5 m	68.1 m	60.6 m	53.8 m	96.5 m	85.5 m	94 m	89.3 m

YOUR LEVY WORKING FOR YOU – GROWER LEVIES ARE USED TO FUND THE ACTIVITIES OF CGA, CRI AND THE CITRUS ACADEMY