

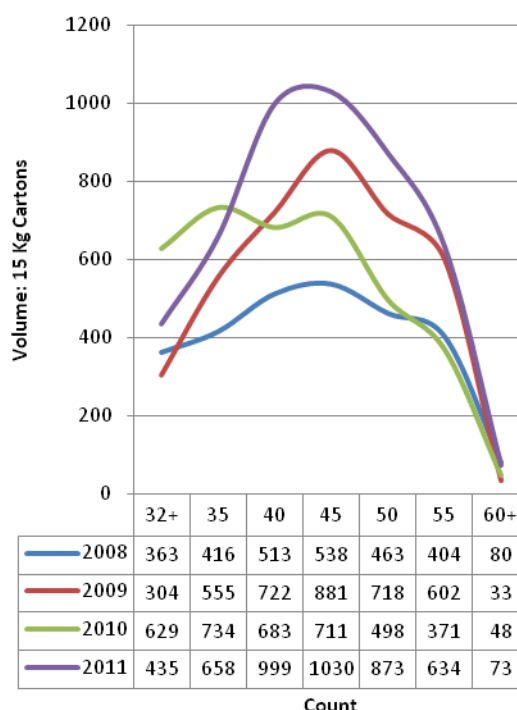
FROM THE DESK OF THE CEO (19/11)

Justin Chadwick (20 May 2011)

QUOTE OF THE WEEK "What counts is not necessarily the size of the dog in the fight - it's the size of the fight in the dog." Dwight D Eisenhower

GRAPEFRUIT : SIZE COUNTS

Count Size - All Grapefruit Packed to week 19



All grapefruit exporters worth their salt know that size matters when you are talking about their product. That does not mean that all markets want the same size, but that different markets are very specific about the sizes they require. As a result there is a great deal of interest regarding the size spread for the season ahead. With about a third of the 2011 grapefruit crop now packed and passed for export, it is interesting to see how the sizing is shaping up.

2010 was generally considered a "big" grapefruit year and this is borne out by the fact that in 2010 grapefruit packed up to end week 19 peaked on count 35 – with a fairly flat distribution between counts 35 and 45.

In 2008 and 2009 the peak was on count 45 with a more pronounced peak in 2009.

More grapefruit has been packed to date in 2011 than in any of the previous three years. Once again grapefruit is peaking on count 45.

Although there was a concern regarding smaller fruit, to date the percentage of grapefruit packed that is count 50, 55, 60+ is 34%, similar to 2009 (35%) and the same as 2008 (34%).

PACKED AND SHIPPED 2011

Satsuma harvesting is basically over with 1.672 million of the 1.7 million cartons having been packed and passed for export. **Clementine** harvesting is now in full swing with 640 000 cartons packed. To date 52% of **soft citrus** has been exported to the UK (2010 48%). Northern Europe and Russia have received the same as 2010 at 24% and 17% respectively. The European Union (UK, southern and northern Europe) continue to receive the bulk (68%) of **grapefruit** shipments (2010 31%). With the first two ships already on their way to Japan volumes to that destination are also starting to increase (there were about 9 000 pallets of grapefruit on the first two vessels). As usual in the early season most **lemon** exports have been to the Middle East (2011 48%; 2010 41%). Other significant lemon destinations are Russia at 20% (2010 20%), N Europe 7% (2010 12%) and Far East 11% (2010 7%).

PLEASE NOTE THAT PREVIOUS YEAR SHIPPING FIGURES MUST BE TREATED WITH CAUTION AS THERE WAS A LAG IN CAPTURING DATA.

To Week 19 Million 15 Kg Cartons	Packed	Packed	Packed	Shipped	Shipped	Original Estimate	Latest Prediction	Final Packed	Final Shipped
SOURCE: PPECB	2009	2010	2011	2010	2011	2011	2011	2010	2010
Grapefruit	4 m	3.6 m	4.5 m	0.7 m	2.8 m	14.7m	15.2m	12.5m	12.2m
Soft Citrus	2.1 m	2.9 m	2.4 m	2.1 m	1.9 m	7.9m	7.4m	7.5m	7.1m
Lemons	2.1 m	3.3 m	2.5 m	1.4 m	1.9 m	9.8m	9.7m	9.6m	9.4m
Navels	1 m	2.2 m	1.4 m	0.1 m	0.5 m	19.4m	19.3m	22.9m	22.6m
Valencia	-	-	-	-	-	42.9m	42.9m	46.5m	45.9m
	9.2 m	12 m	10.8 m	4.3 m	7.1 m	94.7m	94.7m	99m	97.2m

**GROWERS LEVIES ARE USED TO FUND CGA, CRI AND CITRUS ACADEMY ACTIVITIES.
ENSURING A GLOBALLY COMPETITIVE SOUTHERN AFRICAN CITRUS INDUSTRY**