

FROM THE DESK OF THE CEO (12/13)

Justin Chadwick (22 March 2013)

QUOTE OF THE WEEK "There is a fine line between fishing and just standing on the shore like an idiot"
 Stephen Wright

SOUTHERN AFRICAN 2013 ESTIMATE

The Citrus Marketing Forum met on Thursday 14 March 2013 to consider the estimates developed by the variety focus groups two days earlier. These estimates have now been considered by all role-players and adopted as the final estimate for 2013. Since 2012 these figures now include volumes from Swaziland, Mozambique and Zimbabwe – making this a southern African estimate.

The biggest increase is in grapefruit (15%), following the low volumes in 2012. Valencia and navel volumes are estimated almost the same as 2012 (1% increase), while lemons will increase by 6% and soft citrus by 7%. Overall the estimate shows a 4% increase over 2012.

	2 006	2 007	2 008	2 009	2 010	2 011	2 012	Estimate 2013
VALENCIA	34 425 852	43 557 225	43 224 699	38 499 132	46 739 760	44 169 932	47 238 584	47 687 700
NAVELS	16 610 193	18 730 110	21 540 837	19 402 276	22 943 816	21 158 307	24 554 517	24 857 390
GRAPEFRUIT	10 521 535	14 312 096	12 839 811	14 223 903	12 470 420	15 937 517	13 038 968	14 957 659
LEMONS	7 492 139	7 352 636	9 580 168	8 661 996	9 655 291	10 782 427	10 504 127	11 140 405
SOFT CITRUS	5 878 399	6 762 572	7 342 352	6 781 746	7 535 584	6 907 856	7 635 313	8 177 105
TOTAL CITRUS	74 928 117	90 714 639	94 527 867	87 569 053	99 344 873	98 956 039	102 971 509	106 820 258

Looking at the four southern hemisphere countries – South African Valencia's show a small 0.4% increase over 2012, Zimbabwe increases by 12%. Swaziland estimates a decrease of 8%, while Mozambique anticipates the same volumes as last year.

VALENCIA VOLUMES	2012 Actual	2013 Estimate
South Africa	44 466 584	44 686 700
Zimbabwe	1 950 000	2 200 000
Swaziland	822 000	751 000
Mozambique	50 000	50 000

Although Zimbabwean grapefruit exports are estimated to be static, volumes from Mozambique are estimated to increase by 23%, South Africa by 15% and Swaziland by 14%.

GRAPEFRUIT VOLUMES	2012 Actual	2013 Estimate
South Africa	10 787 648	12 387 934
Zimbabwe	75 000	75 000
Swaziland	585 644	665 000
Mozambique	56 670	70 000

Comments from the focus groups were as follows; **grapefruit** sizing should be much better in 2012 (which was characterized by smaller sizes), good quality and good color. All in all it should be a good grapefruit season. The largest **lemon** growing region (Eastern Cape) will have an increase in earlier lemons (by 10% compared to a low first pick in 2012), an 8% increase in the mid season and 6% increase in late lemons. The area also expects larger sizing. **Navel** growers also expect larger sized fruit, with a shift from earlier fruit to later fruit. There have been isolated incidences of hail in the Western Cape and Nelspruit; while Vaalharts region shows recovery from last year's hail. For **soft citrus** late mandarins show the most growth (10%) as young orchards start to mature, Satsuma's increase by 8% while Clementine's are estimated to increase by 3%. For **Valencia's** the northern areas show slight decreases in the estimate, while the southern regions estimate growth.

**SOUTHERN AFRICAN CITRUS GROWERS' FUND THEIR FUTURE THROUGH THE LEVY
 ADMINISTERED BY THE CGA**