

FROM THE DESK OF THE CEO (39/14)

Justin Chadwick (10 October 2014)

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QUOTE OF THE WEEK "Always borrow money from a pessimist. He won't expect to be paid back" Oscar Wilde

BRAAIVLEIS BANTER

Well done to the Bok's for a gritty display against the All Blacks – such a victory is hard fought and long remembered. Also well done to the Argentinean Puma's on their first victory in the Castle Lager Rugby Championships.

TITLE DEED NUMBER REQUIRED FOR 2015 MARKET REGISTRATIONS

The definition of a production unit is a farm covered by one title deed. DAFF is concerned that some growers have registered multiple production unit codes (PUC's) on a single farm – and will be requiring growers to include the title deed number as part of the registration process. DAFF will then check that the title deed numbers are correct. Growers who have inadvertently registered a number of PUC's on a single farm are advised to deregister the PUC's with DAFF. Growers who are leasing farms are required to get the title deed number from the farm owner. Proper identification of production units is an integral part of the CBS Risk Management System (RMS) – failure to provide a title deed number will mean no registration; and incorrect title deed numbers will be considered as fraud and appropriate action will be taken by DAFF.

In the case where there is one PUC registered and the production unit covers a number of title deeds then it is only necessary to include one title deed number when doing the registration.

US AGRICULTURAL ATTACHE: MEETING 23 OCTOBER 2014

Eric Wenberg - Agricultural Attache' from the US in Pretoria will be meeting with growers at The Junction, Letsitele from 10h00 on Thursday 23 October. Eric has indicated that his presentation will cover;

- * The Global Citrus Situation; covering the USDA global forecast for the upcoming year,
- * Potential and forecast growth in consumer demand for horticultural and specialty crops in Sub Saharan Africa.
- * US exports to growing new middle class consumer markets like India and China, what SA might gain from US experience.
- * Accessing the U.S. market for fresh fruit, key updates on marketing and policy
- * Any other business

Please rsvp to Gloria@cga.co.za - refreshments will be available from 09h30 and we need to know how many to cater for.

This is a unique opportunity to meet the US Attache' - please make use of it.

PACKED AND SHIPPED

As the season comes to an end there is always interest about trade flows. Difficult conditions in the EU have resulted in 14% less South African citrus going into that market. Both Valencia and navel volumes decreased by 14%; while grapefruit volumes decreased by 33%. Soft citrus volumes to EU increased slightly (2%) while lemon volumes increase by 29% (in 2013 very little lemons were exported to EU). This can be compared to an export volume decrease (from South Africa to all markets) of 3%; grapefruit down 16%, navels down 1% and Valencia down 5% while lemons increased by 22% and soft citrus increased by 15%. The decreased volumes to EU were taken up by Asia where total volumes increased by 29% (from 240 000 to 315 000 tons). Grapefruit volumes to Asia increased by 10%, lemon and soft citrus volumes doubled while navel volumes increased by 44% and valencia's by 15%. Middle East (330 000 tons), northern America (105 000 tons) and Africa (15 000 tons) export volumes all remained static. Similar to the EU, Eastern European volumes also decreased – by 10%; grapefruit down 10%; navels down 31%; soft citrus down 13% and Valencia down 4%. Lemons increased by 2%.

South Africa stopped packing for the EU from end week 36 (except for Pest Free Areas and soft citrus); PPECB figures show that 12% less oranges have been shipped to EU (since end week 36) than during the same period last year.

To Week 41 Million 15 Kg Cartons	Packed	Packed	Packed	Shipped	Shipped	Original Estimate	Latest Prediction (Packed)	Final Packed
SOURCE: PPECB	2012	2013	2014	2013	2014	2014	2014	2013
Grapefruit	13.1m	17.9 m	15.6 m	17.8 m	14.8 m	16.5 m	15.6 m	17.9 m
Soft Citrus	7.6 m	8.4 m	9.9 m	8.4 m	9.6 m	9.2 m	10.1 m	8.4 m
Lemons	10.5 m	10.5 m	13.1 m	10.5 m	12.9 m	12.1 m	13.5 m	10.6 m
Navels	24.6 m	25.4 m	26 m	25.4 m	26 m	25.8 m	26 m	25.4 m
Valencia	45.2 m	49.7 m	48.6 m	45.1 m	42.5 m	49.5 m	48.6 m	51.4 m
Total	101 m	111.9 m	113.2 m	107.2 m	105.8 m	113.1 m	113.8m	113.7 m

GROWERS' ENSURE A COMPETITIVE AND SUSTAINABLE SOUTHERN AFRICAN CITRUS INDUSTRY BY FUNDING AND GUIDING THE CGA GROUP (CRI; CITRUS ACADEMY; CGACC; RB AND XSIT)