

FROM THE DESK OF THE CEO (45/14)

Justin Chadwick (21 November 2014)

QUOTE OF THE WEEK "Everything is in a state of flux, including the status quo" Robert Byrne

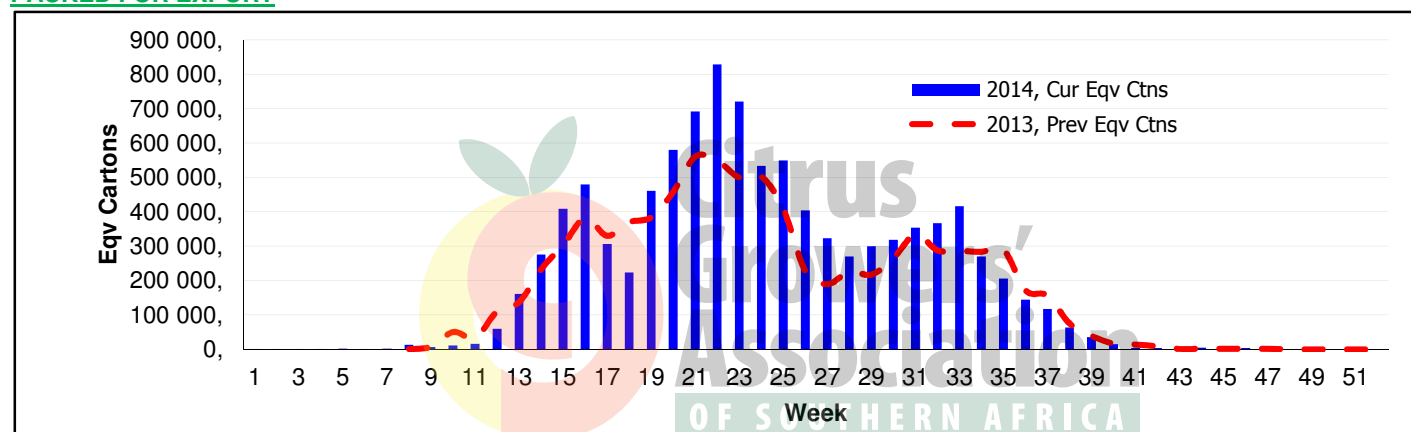
2014 SEASON RECAP:

SOFT CITRUS ESTIMATE 2014

In March 2014 the soft citrus focus group (SCFG) estimated that the 2014 packed and passed for export figure would be 9% higher than 2013. Clementines were predicted to increase by 12%, Satsuma by 6% and mandarins by 8%. The final packed figure is 18% higher than 2013's final (9% more than estimate). 5 regions account for 87% of S A soft citrus volumes – Boland (25%), Western Cape (24%), Patensie (15%), Nelspruit (12%) and Sundays River Valley (11%). The SCFG achieved the goal of estimating within the 10% margin (only just).

	Total 2013	Est 2014	Actual 2014	% change on Est.	% change on 2013.
Boland	2 222 436	2 303 612	2 730 431	19%	23%
W. Cape	1 925 982	2 183 775	2 232 598	2%	16%
Patensie	1 129 029	1 321 000	1 499 406	14%	33%
Nelspruit	1 108 442	1 055 467	1 010 486	-4%	-9%
S.R. Valley	945 585	960 000	1 223 741	27%	29%
Other	1 110 731	1 248 000	1 234 993	-1%	11%
Grand Total	8 442 205	9 071 854	9 931 655	9%	18%

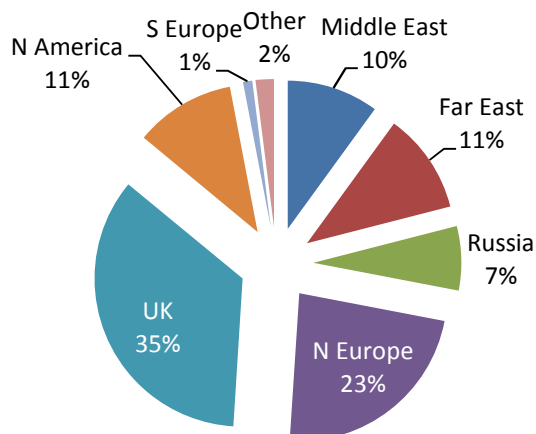
PACKED FOR EXPORT



The graphic of packed soft citrus clearly shows the big increase in clementine production in weeks 19 to 25, with less pronounced increases for Satsuma (week 11 to 18), and mandarins (week 26 to 39).

MARKET DISTRIBUTION

EXPORT DESTINATION 2014



EXPORT DESTINATIONS 2013



Northern Europe and UK continue to take the bulk of South African soft citrus (58%) – although the volumes for both dropped in 2014; in N Europe 2.1 m to 2 m cartons and in UK 3.5 m to 3.3 m. In percentage terms Asia showed the biggest increase – from 0.4 m to 0.7 m. North American volumes doubled from 0.3 m to 0.6 m cartons; Middle East increased 0.6 m to 0.9 m while Russia decreased 0.8 to 0.7 m cartons.

PACKED AND SHIPPED (no change from last week: the season is over)

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