

FROM THE DESK OF THE CEO (37/17)

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Justin Chadwick 29 September 2017



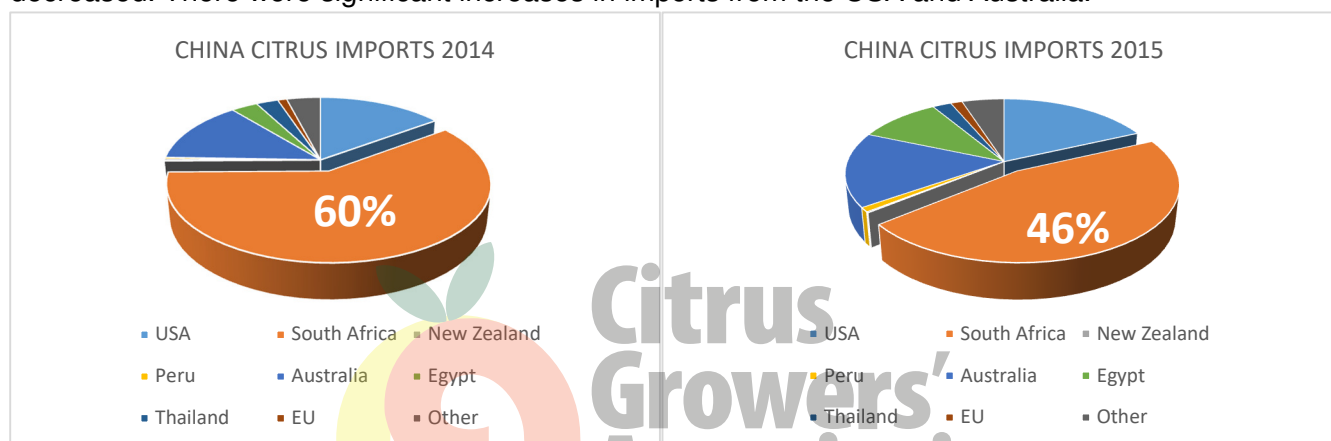
“The only thing to do with good advice is to pass it on. It is never any use to oneself” Oscar Wilde

CITRUS MARKETING FORUM (CMF)

The final CMF for 2017 will be held on Thursday 26 October 2017. The meeting will be held at ARC Infruitec, Stellenbosch from 10h00.

CHINESE CITRUS IMPORTS

From 2014 to 2015, world citrus imports into China increased from 161 833 tons to 214 873 tons. Although South Africa remained the main supplier (supplying almost 100 000 tons per annum), its share of imports decreased. There were significant increases in imports from the USA and Australia.



PACKED AND SHIPPED **IT IS A RECORD CROP!**

With the volume now packed closing in on 120 million 15 Kg cartons (1.8 million tons) the southern African export volumes are the highest ever, surpassing 2015's 118.4 million cartons; and we have a few weeks of packing to go. The final packed figure will not be far off the seasons opening estimate of 122.7 m cartons, although the mix favours soft citrus, lemons and Valencia at the expense of navels.

With a bigger volume of **grapefruit** exported in 2017 than the previous year – all regions experienced growth in terms of total volumes. However, the volumes were spread slightly differently. The biggest importer was **the EU** (still including the UK) which received 5.5 m cartons (2016 5.2 million), this represented a market share of 41% (2016 45%). **Asia** (which includes Japan, South Korea, Bangladesh, India, Thailand and Indonesia amongst 16 countries classified into this region) received 3.1 m cartons (2016 2.4m) and increased market share from 20% to 23%. **South East Asia** (China, Malaysia, Taiwan, Hong Kong, Singapore and Vietnam) increased from 1.6m to 1.8 m; but market share dropped from 15% to 14%. **Russia** increased from 0.9 m to 1.1 m cartons – going from 7% to 8% market share. **North America** increased from 500 000 to 600 000 cartons, while **Middle East** increased from 330 000 to 350 000 cartons.

To End Week 38 Million 15 Kg Cartons SOURCE: PPECB/AGRIHUB	Packed 2015	Packed 2016	Packed 2017	Shipped 2016	Shipped 2017	Original Estimate 2017	Latest Prediction 2017	Final Packed 2016
Grapefruit	16.1 m	13.8 m	15.7 m	12.3 m	14.2 m	15.6 m	15.7 m	13.8 m
Soft Citrus	9.9 m	12.1 m	13.4 m	11.1 m	12.9 m	13.2 m	13.8 m	12.2 m
Lemons	14.7 m	14.9 m	19 m	14.5 m	18.7 m	17.5 m	19 m	15 m
Navels	24.4 m	26.2 m	21 m	25.4 m	21 m	26.3 m	21.2 m	26.2 m
Valencia	47.5 m	40.6 m	50.8 m	38.1 m	44.9 m	50.1 m	52.2 m	41.8 m
Total	112.6 m	107.6 m	119.9 m	101.4 m	111.7 m	122.7 m	121.9 m	109 m

THE CGA GROUP OF COMPANIES (CRI, RIVER BIOSCIENCE, XSIT, CGA CULTIVAR COMPANY, CGA GROWER DEVELOPMENT COMPANY & CITRUS ACADEMY) ARE FUNDED BY SOUTHERN AFRICAN CITRUS GROWERS