

FROM THE DESK OF THE CEO (42/17)

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Justin Chadwick 3 November 2017



“There’s a fine line between genius and insanity. I have erased this line” Oscar Levant

Citrus Marketing Forum (CMF)

Gary Player is alleged to have claimed “The more I practice, the luckier I get”. Over the past 9 years the Variety Focus Groups (VFG’s) total estimates have been within 5% of the final actual volume exported no fewer than 7 times – and this year they were spot on. This is particularly important for macro planners in southern Africa – those looking at port capacity, warehousing and transport requirements, amongst others. These planners can use the CMF’s annual estimate in March each year as a good indicator of what is to come. Within varieties the VFG’s also fared well – the Grapefruit Focus Group and the Soft Citrus Focus Group were both within 1% of the final volume. Lemon and Valencia exports were 7% more than original estimate – still within the 10% goal. It is only with the Navel Focus Group that the estimate was way out – with 20% less exported than anticipated. But who could have anticipated the devastating impact of the hot, dry summer conditions which resulted in fruit splitting and dropping. Some may say that the VFG’s are lucky – it is more likely that they are getting better with practice.

	2006	2007		2008	2009	2010	2011	2012	2013	2014	2015	2016	2017
Grapefruit	30%	-20%		2%	8%	1%	-9%	-15%	-14%	-7%	6%	12%	-1%
Soft Citrus	7%	-18%		1%	9%	Spot on	14%	Spot on	3%	10%	-1%	9%	1%
Lemons	Spot on	4%		-16%	8%	-6%	-9%	-6%	-5%	8%	10%	-7%	7%
Oranges	18%	-18%	Navel	-8%	11%	-6%	-8%	7%	2%	1%	-3%	6%	-20%
			Valencia	-3%	12%	-11%	-3%	-1%	6%	Spot on	5%	-11%	7%
TOTAL	17%	-17%		-5%	10%	-7%	-5%	-1%	5%	1%	4%	-2%	Spot On

	VAL	NAV	GF	LEM	SC
Sundavs River	-9%	-34%		2%	-5%
Senwes	9%	-15%		1.6%	
Letsitele	18%		-6%		
Hoedspruit	5%		-2.1%		
Western Cape		-26%			0.2%
Patensie		-15%			-1.6%
Limpopo River	12%				
Onderberg			-3%		
Boland					-5%
Nelspruit					39%

Turning attention to the regional estimates, and looking at those regions that account for at least 10% of the total export volume for that category. As expected all four regions with 10% or more of navel volumes had estimates way out from the actual volume. Only two regions account for more than 10% of lemon volumes – and they both were exceptionally close to the original March estimate. Grapefruit Focus Group members also fared well – all within 10% of the actual volume. With regard to soft citrus, four of the five regions with 10% or more of the total volume were within the 5% range; with only Nelspruit way out. Interestingly enough it was soft citrus that experienced both the closest estimate (Western Cape – just 0.2% above estimate) and the worst estimate (Nelspruit a whopping 39% over estimate). The Valencia Focus Group produced a mixed bag; 3 of the 5 within the 10% range; with Letsitele and Limpopo River recording higher than anticipated volumes.

Phytosanitary Special Market Registrations

Growers and packhouse are reminded to complete their online registration before the 10th November 2017 using www.phytoclean.co.za. Registrations for Exporters, Freight Forwarders and Cold Stores will follow in December and January 2018, but further information will be communicated in this regard.

Change of meeting plans

Previously CGA communicated that FMS meetings were arranged in some parts of the country (i.e. 7 November Groblersdal/Marble Hall; 8 November Tzaneen/Letsitele/ Hoedspruit; 9 November Nelspruit/Onderberg/KZN; 14 November Eastern Cape and 16 November Western Cape). Please note that these meetings have been cancelled.

PACKED AND SHIPPED

To End Week 43 Million 15 Kg Cartons	Packed	Packed	Packed	Shipped	Shipped	Original Estimate	Latest Prediction	Final Packed
SOURCE: PPECB/AGRIHUB	2015	2016	2017	2016	2017	2017	2017	2016
Grapefruit	16.1 m	13.8 m	15.7 m	13.2 m	15.4 m	15.6 m	15.7 m	13.8 m
Soft Citrus	10 m	12.2 m	13.4 m	11.3 m	13 m	13.2 m	13.4 m	12.2 m
Lemons	15 m	15 m	19 m	14.6 m	18.8 m	17.5 m	19 m	15 m
Navels	24.5 m	26.2 m	21.1 m	25.5 m	21.1 m	26.3 m	21.1 m	26.2 m
Valencia	52.5 m	41.8 m	53.8 m	39.8 m	50.4 m	50.1 m	53.8 m	41.8 m
Total	118.1 m	109 m	123 m	104.4 m	118.4 m	122.7 m	123 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

