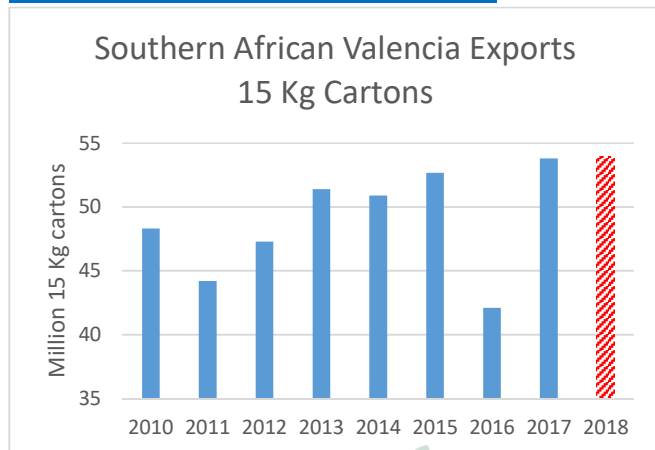


"I start with the premise that the function of leadership is to produce more leaders, not followers" Ralph Nader

2018 VALENCIA SEASONAL REVIEW



The record valencia crop gives southern African citrus exporters a full house of records in terms of volumes packed and passed for export. The 2018 final packed figure of 54 million cartons slightly up on 2017's 53.8 million.

The Valencia Focus Group did a great job in estimating the final volume packed (after being rapped across the knuckles in 2017) – with the packed actual being just 1% over the initial estimate of 53.9 million cartons.

Illustrating the advantage of the wide geographic distribution of citrus production in southern Africa – while some regions registered big declines in volumes packed against original estimate, other regions made up for the decline by packing more than estimate – thereby meeting importers requirements. Of the bigger valencia regions, the Cape (Eastern and Western) experienced the greatest declines as a result of the dry conditions – Sundays Rivers 5.4 million cartons packed was 23% less than the estimated 7 million – and marginally lower than 2017's 5.9 m. Western Cape at 3.9 m was 15% less than the estimated 4.6 m (and appreciably lower than 2017's 4.9 m). Hoedspruit at 5.4 m was 7% off the estimated 5.8 m (and less than 2017's 6.2m), while Letsitele at 14.6 m was 4% less than estimated 15.2 m (2017 14 m). Making up for the shortfall was the increase in Senwes – From 5.9 m in 2017 it was estimated that the region would increase to 6m, but ended up packing 32% over estimate at 7.9 m.

BRAZIL

Last week I had the privilege of addressing an International Seminar in Sao Paulo, Brazil organised by the OECD fruit and vegetable scheme. While in Brazil I had the opportunity to visit with the citrus industry in Sao Paulo province. This is some of what I learnt:

- Brazil is blessed with a great climate for agriculture – it is world leader in production of sugar cane, coffee and oranges; number 2 in beef and soya bean and 3 in maize. Brazil produces almost 20 million tons of oranges – and yet only exports around 100 000 tons. About 90% of oranges are processed.
- Farming for juice is very, very different from farming for fresh fruit consumption. Brazil has some of the most devastating citrus diseases – Asian Greening (HLB) and Canker. In addition, they have citrus black spot (CBS). The focus of the research and production practices in Brazil is not to eliminate the disease or to produce disease free fruit. The aim is to keep the fruit on the tree so that it gets to maturity and contains sufficient juice of acceptable quality.
- One solution is buffer zones created around the border of the farms; these buffer zones are planted to citrus trees and receive full cover treatment for the psyllid. As trees succumb to greening, they are replaced so that the buffer zone remains in place. It was noticeable that trees grown inside the buffer zone seemed to be healthy and in good production.
- Visiting Fundecitrus in Araranquera it is clear that they have some extremely bright, young minds working on their research. There is a close relationship with CRI in South Africa, and South African citrus researchers are held in the highest regard.

PACKED AND SHIPPED

To Week 45 Million 15 Kg Cartons SOURCE: PPECB/Agrihub	Packed 2016	Packed 2017	Packed 2018	Shipped 2017	Shipped 2018	Original Estimate 2018	Latest Prediction 2018	Final Packed 2017
Grapefruit	13.8 m	15.7 m	18.7 m	15.4 m	18.1 m	16.8 m	18.7 m	15.7 m
Soft Citrus	12.2 m	13.4 m	16.1 m	13 m	15.9 m	14.7 m	16.1 m	13.4 m
Lemons	15 m	19 m	19.8 m	18.8 m	19.3 m	20.6 m	19.8 m	19 m
Navels	26.2 m	21.1 m	26.6 m	21.1 m	26.3 m	25.7 m	26.6 m	21.1 m
Valencia	42 m	53.8 m	54 m	52.9 m	52 m	53.9 m	54 m	53.8 m
Total	109.2 m	123 m	135.2 m	120.9 m	131.6 m	131.7 m	135.2 m	123 m

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