

FROM THE DESK OF THE CEO (49/19)

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“England and America are two countries separated by a common language” George Bernard Shaw

THE 2019 SOUTHERN AFRICAN CITRUS SEASON

The advantage of having an industry that produces citrus over a wide geographic area is that problems in one region can be offset by favourable conditions in another. The 2019 soft citrus season is a fine example of this. In March 2019 the Soft Citrus Focus Group estimated a crop of 18 263 160 cartons (15Kg equivalents). This estimate was endorsed by the Fresh Produce Exporters Forum and the Citrus Marketing Forum and adopted as the official 2019 soft citrus estimate. By season end the actual exports were 18 218 287 cartons – the focus group had been out by a mere 0,2457 %, or 45 000 cartons. But that does not tell the full story. The fourth biggest production area, Sundays River, exported 30,9% more than the initial estimate, while the fifth biggest, Senwes (representing the Marble Hall and Groblersdal areas) exported 42,6% less than estimate. The biggest soft citrus region (Boland) packed for export 17% more than estimate, and the second biggest region (Western Cape) was up 14%. Patensie ended up 6% less than estimate.

A similar scenario played out with lemons. The CMF endorsed official 2019 lemon estimate was 21 982 876 cartons (15Kg); the final packed for export figure was 22 077 288 cartons – a mere 95 000 cartons difference, or 0,429%. The largest region, Sundays River Valley (representing about 50% of southern Africa’s total lemon volumes) was a commendable 2.1% over estimate, while the second biggest region (Senwes) was 17,8% less than estimate. These two regions account for 63% of southern African lemon exports. All the other lemon exporting regions do not reach 10% of total lemon exports – Boland 6,9%, Patensie 5,8% and Hoedspruit 5,7%.

The industry sets a target whereby a 10% variance from estimate is acceptable, with a 5% being preferable. In a difficult season for estimations, the navel focus group just crept in under the acceptable level – at 9,56% under original estimate. The March 2019 navel estimate was for 26 856 000 cartons while the final tally was 24 287 540 cartons. Sundays River (under estimate by 0,27%), Patensie (over estimate by 0,52%) and Western Cape (under estimate by 2,13%) did particularly well. Senwes was 27,3% less than the original estimate.

The grapefruit focus group were marginally higher than the acceptable level at 10,55% less than the original 17 147 107 cartons (please note although the estimate is done in 17Kg cartons – this has been converted to 15Kg equivalents for this exercise). The final packed figure was 15 337 965 cartons. All regions had overestimated, with Onderberg packing 24,5% less than estimate, Letsitele packing 14,1% less, and Hoedspruit 11,8%.

The biggest disappointment was for Valencia growers – where the final tally was some 11,58% less than the original 52 877 400 cartons estimate. This equates to some 6 million cartons of valencia’s less than anticipated. The northern regions were most impacted – Limpopo River down by 24,7%; Senwes by 24,3%, Letsitele 17,3% and Hoedspruit 14,8%. Sundays River estimations were once again commendable – final packed for export just 0,9% off estimate. Overall the 2019 exports of 126 675 503 cartons was 7,62% down on the original 2019 estimate – within the acceptable level. This table shows the actual versus estimate for the past 12 years; very impressive!!

	2008	2009	2010	2011	2012	2013	2014	2015	2016	2017	2018	2019
Grapefruit	2%	8%	1%	-9%	-15%	-14%	-7%	6%	12%	-1%	11%	-11%
Soft Citrus	1%	9%	Spot on	14%	Spot on	3%	10%	-1%	9%	1%	3%	Spot on
Lemons	-16%	8%	-6%	-9%	-6%	-5%	8%	10%	-7%	7%	-4%	Spot on
Navel	-8%	11%	-6%	-8%	7%	2%	1%	-3%	6%	-20%	4%	-10%
Valencia	-3%	12%	-11%	-3%	-1%	6%	Spot on	5%	-11%	7%	Spot on	-12%
TOTAL	-5%	10%	-7%	-5%	-1%	5%	1%	4%	-2%	Spot On	2%	-8%

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