

"Seeing ourselves as others see us would probably confirm our worst suspicions about them" Franklin P Adams

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Eric's presentation focused on southern hemisphere citrus information. This included some interesting facts:

- Southern hemisphere share of annual citrus trade increased to 27% from 24% in 2019. A total of 3.7 million tonnes was exported in 2020 – an increase of 360 000 t from 2019. In 2012 the southern hemisphere share was 20%.
- Trade grew significantly in EU, UK and USA markets; while slight growth was recorded in Middle East and Eastern Europe. Asia was significantly down on 2019 volumes; after growing at 60 000 t per annum for the past number of years; export volumes decreased by 80 000 t in 2020.
- Southern hemisphere soft citrus exports grew by 169 000 t in 2020 – more than 2.4 times the average growth from 2015 to 2019. This was due to an increase of 108 000 t to north America and 44 000 t to EU27+UK, and a doubling of volumes to Middle East. Asia showed a slight decline.
- Lemon exports from southern hemisphere grew by 120 000 t – EU27+uk up 59 000 t, Middle East up 25 000 t, north America up 13 000 t and Eastern Europe up 19 000 t.
- Southern hemisphere orange trade increased by 53 000 t (1.7 times the average between 2015 and 2019). EU27+UK was the driver increasing by 95 000 t, USA by 30 000 t. Asia dropped by 30 000 t.
- Grapefruit pretty much flat lined at 250 000 t. EU27+UK was down 8 000 t and Asia up 9 000 t.
- During the period 2016 to 2020 southern hemisphere trade increased by 900 000 t. Two thirds of the growth were from South Africa, 15% from Chile (mostly soft citrus), 14% from Peru (mostly soft citrus) and 4% from Australia (soft citrus and oranges). Uruguay and Argentina registered a reduction in volumes exported over this period.
- Citrus production in the southern hemisphere increased to 9.4 million t – a 9% increase over 2019. All countries other than Argentina recorded increases in production.
- Looking forward to 2021, it's anticipated that soft citrus and oranges will increase by a further 200 000 t, lemons by 100 000 t while grapefruit almost flat again. This translates to a 12% increase in orange exports (compared to 2020); 20% increase in soft citrus exports; 7% increase in lemon exports and 10% increase in grapefruit exports.
- In terms of southern hemisphere orchards, area under oranges (136 000 hectares) and grapefruit (13 400 ha) are flat. Lemons have increased from 60 000 ha in 2012 to 86 000 ha in 2020. Similarly, soft citrus increased from 64 000 ha (2012) to 85 000 ha (2020).
- Turning to the northern hemisphere – 2020/21 will be an average to light crop. The Mediterranean countries production will be up 3% over the 4-year average; oranges down 6%; lemons down 4% and grapefruit down 13%. For the USA soft citrus production is down 2%; oranges up 3%; lemons up 5% and grapefruit down 9%. China production is little changed – no change in soft citrus and 1% increase in oranges.
- In terms of competing fruits Europe is forecasting a very short stone fruit crop.

PACKED AND SHIPPED

There have been some small movements in the 2021 predictions. Although oranges remain steady, the Grapefruit Focus Group dropped their prediction by 1 million cartons. With a small upward adjustment, the Soft Citrus Focus Group prediction remains 1 million cartons lower than estimate; while the Lemon Focus Group dropped predictions by 200 000 cartons.

To end Week 19 Million 15 Kg Cartons	Packed	Packed	Packed	Shipped	Shipped	Original Estimate	Latest Prediction	Final Packed
SOURCE: PPECB	2019	2020	2021	2020	2021	2021	2021	2020
Grapefruit	5.1 m	6 m	8.6 m	3.4 m	5 m	18 m	17 m	15.5 m
Soft Citrus	2.8 m	3.6 m	5.1 m	2.5 m	2.5 m	30.5 m	29.5 m	23.6 m
Lemons	5.1 m	11.5 m	11.1 m	9.2 m	8.5 m	30.2 m	30 m	29.6 m

Navels	0.9 m	1.4 m	2 m	0.5 m	0.5 m	26.3 m	26.3 m	26.2 m
Valencia	0.3 m	-	0.1 m	-	-	58 m	58 m	55.1 m
Total	14.2 m	22.5 m	26.9 m	15.6 m	16.5 m	163 m		150 m

