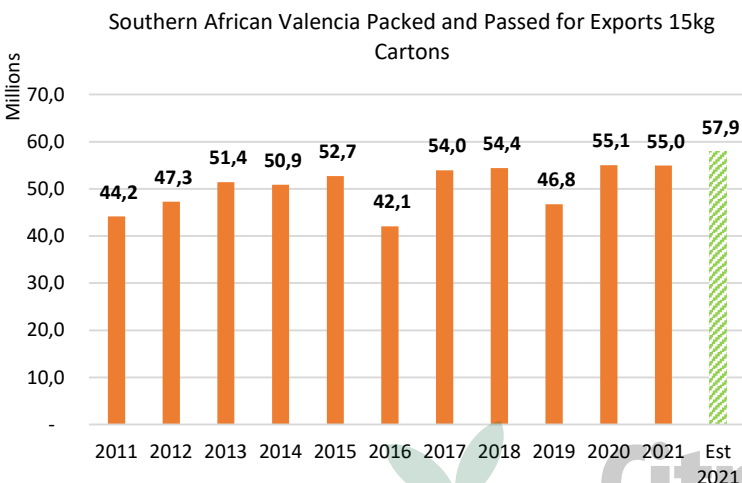


"Either you run the day, or the day runs you."- Jim Rohn

2021 Valencia Seasonal Review (Portia Magwaza)

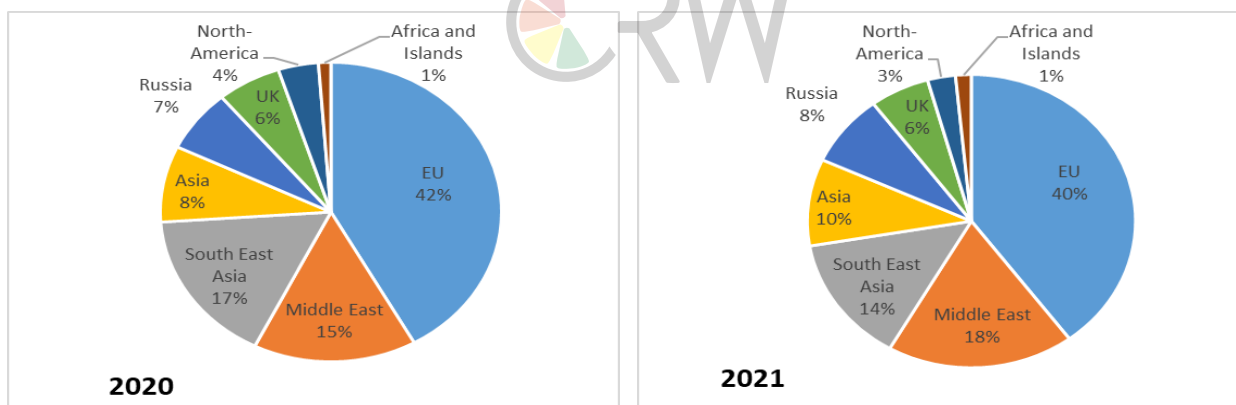
The Valencia fruit quality in 2021 was good, if not slightly compromised due to longer dwell times in ports (due to civil unrest and the Transnet cyber-attack) that persisted right to the end of the season. There was normal sizing (peaked at size 72, 88 and 64) but higher than normal acid levels in the some of the Valencia regions were observed.



Valencia packing for exports was at 55 million cartons, almost 5% down on the March estimate of 57.9 million cartons, and practically the same as 2020. Letsitele remains the biggest region with 13.2 m cartons – 9% below the estimate. Senwes is second largest with 7.2 m cartons, 6% over estimate; while Sunday's River Valley at 6.2 m was 4% under the estimate. Limpopo River was 15% below estimate (6.8 m vs 5.8 m), whereas Hoedspruit was 13% under estimate (6.2 m vs 5.4 m). This season the peak weeks for packing was from week 33 to week 37, at a packing rate of 4.7 million cartons per week. 5.1 Million cartons were

packed at week 35 which is a record high for Valencia. Valencia's were the most impacted when industry leaders called on producers to slow down packing so the ports could clear the backlog of fruit.

In terms of market distribution, a decrease in Europe volumes (from 42% in 2020 to 40% in 2021) was taken up by Middle East (15% to 18%). South East Asia decreased their share from 17% to 14%, while Asia increased from 8% to 10%. Russia (7% vs 6%) and North America (4% vs 3%) changed incrementally. Distribution to other regions did not differ materially from 2020 – UK 6% and Africa and Islands 1%. The decline in the EU volumes was due to the lingering Egyptian fruit in the market and stringent phytosanitary regulations.



Exporters indicate the returns from the market are well below those of 2020 as the COVID effects on the global economy take hold, logistics and operational costs have increased, and the Rand remaining strong to major currencies.

COVID 19 Vaccinations

Administered in last 24 hours = 153 240; Total administered = 26 109 436; Individual vaccinated = 16 944 413 (= 42.58% of adult population). Source: <https://sacoronavirus.co.za/latest-vaccine-statistics/>