

"You can fool some of the people all of the time, and all of the people some of the time, but you cannot fool all of the people all of the time" Abraham Lincoln

WESTERN CAPE DEPARTMENT OF AGRICULTURE (WCDOA) SUPPORTS FRUIT GROWERS IN THE PROVINCE

Fruit growers in the Western Cape received a pleasant surprise for their 2023/4 season when the WCDOA assisted them with a financial contribution towards the costs of sterile insect technology in the province. This contribution will assist growers in ensuring market access to both the EU and the USA which supports over 20 000 jobs in the province and contributes to rural development and stability while earning much-needed foreign exchange. Sterile Insect Technology is carried out in many countries on a range of insects, in all other countries the program is either completely government-funded or heavily subsidized by the government; in South Africa, the user pays the bill – this contribution by the WCDOA will assist these financially strapped growers to continue using this service.

CITRUS SUSTAINABILITY FORUM

The last Citrus Sustainability Forum of the year is scheduled for 21 November on Zoom (09:00 – 11:30). Make sure to diarize this and keep an eye out for the Zoom details on the Comms tool (no need to RSVP).

SEASON REVIEW: GRAPEFRUIT (all carton information in 17Kg's)

Packed: The Grapefruit Focus Group (GFG) did a fantastic job with their estimate – the final 13 million cartons are just 2% higher than March's estimate of 12.7 million cartons. The estimate was 14% lower than 2022's actual and a whopping 27% off 2021's 17.4 million cartons. One factor leading to this decrease was the GFG's decision to restrict the marketing of fruit for processing purposes. This decision was largely adopted with processing purpose fruit dropping from 2.7 million cartons in 2022 to under 500,000 cartons in 2023.

Packed 2022	Packed 2023	Estimate 2023	Prediction 2023
14.8 m	13 m	12.7 m	13 m

Shipped: The EU received more grapefruit in 2023 than in 2022 – with 5.8 million cartons surpassing 2022's 4.9 million cartons; back to the same levels as 2021. In 2023 47% of southern African grapefruit exports were sent to the EU. The other destination with a very slight increase over 2022 was China at 1.7 million cartons or 14% of the total grapefruit shipped. Russia received 10% of grapefruit shipped increasing from 1.1 million cartons to 1.2 million cartons (level pegging with 2021).

Asian shipped volumes dropped from 1.8 million (2022) to 1.3 million cartons (10% of total). Russia also received 10% of grapefruit shipped. Both the USA and the UK received 4% of grapefruit shipped - the USA increasing from 370 thousand to 553 thousand cartons while the UK held steady at 551,000 cartons.

What is evident is the drop in demand in both Japan (in Asian figures) and the UK – the UK used to consistently import at the 800 000 carton level, and Japan above the 3 million carton mark.

CITRUS MARKETING FORUM (CMF)

Historically industry holds two CMFs a year – one in March and one in October. This process was followed in 2023 with excellent attendance (March 214 and October 81). In addition, this year FPEF and CGA added a monthly series of "CMF lite" meetings which also proved popular with attendance as follows – May 132, June 90, July 75, August 72, and September 50. The industry will continue with the same format in 2024 – and is working on a date for the March CMF. Monthly CMF lite meetings will be on the last Thursday of each month at 14h15 (subject to change in case of a clash with other events).

PACKED AND SHIPPED

End of Week 40 Million 15 Kg Cartons	Packed	Packed	Packed	Shipped	Shipped	Original Estimate	Latest Prediction	Final Packed
SOURCE: PPECB/AGRIHUB	2021	2022	2023	2022	2023	2023	2023	2022
Grapefruit	20.3 m	16.7 m	14.7 m	14.9 m	13.9 m	14.4 m	14.7 m	16.7 m
Mandarins	30.7 m	31.7 m	37.8 m	31.7 m	37.7 m	34.1 m	38.0 m	31.8 m
Lemons	31.0 m	34.6 m	35.5 m	33.9 m	35.0 m	37.3 m	35.6 m	34.7 m
Navels	27.2 m	27.8 m	24.7 m	27.3 m	24.6 m	25.3 m	24.8 m	27.8 m
Valencia	54.8 m	53.2 m	51.7 m	49.0 m	49.0 m	54.5 m	52.2 m	53.8 m
Total	164.0m	164.0m	164.4m	156.8 m	160.2 m	165.6 m	165.3 m	164.8 m