

“Some people walk in the rain, others just get wet” Roger Miller

2024: A MOST UNUSUAL CITRUS SEASON

Over the next few weeks, these newsletters will cover a season review of the different citrus sectors. As the season comes to an end, most actors in the citrus industry are breathing a sigh of relief and wondering “what is normal?”.

There were high hopes for a record season as the Variety Focus Groups (VFG) estimated a crop of just shy of 182 million cartons, well ahead of the Vision 260 goal and a big increase over the 2023 final volume of 165 million cartons.

After years of brilliant estimating by the VFG’s, 2024 unfortunately proved trickier than usual to forecast accurately. It must be said that the fruit was there – it just did not get into a carton destined for the overseas markets; and weather did play its role.

The first impact of weather was the hot, dry conditions in the summer of 2023 that led to smaller sized fruit – moving from one count to the next can influence volumes by as much as 10%. Weather events during the season also took its toll with two hundred-year floods in a single year in Citrusdal wreaking havoc with their season, a freeze in Senwes that wiped off a couple of million cartons, and winds in the Eastern Cape that caused fruit drop.

Market conditions at the beginning of the season also did not help – with a lot of northern hemisphere fruit still in the market at the start of the season, exporters had to plan their season carefully.

But without doubt, the biggest influence on orange volumes was the elevated price for processing fruit. A crop failure in Brazil, with juice stocks already low, meant that orange juice prices were elevated. Brazil accounts for over 70% of the world’s orange juice, producing up to 20 million tonnes of oranges per annum. The initial 24% volume decrease announced in July was followed by a further decrease when revised.

The CGA will take a close look at the juice dynamic when it does its strategic planning at the end of next week. It is important that the industry gets our estimates as accurate as possible, many value chain partners use these estimates for planning and capital investment decisions. It is possible that the processing option could influence marketing decisions for the next two seasons, or even longer.

PEST CONTROL OPERATOR SURVEY

This is a reminder to all citrus growers to please participate in the Pest Control Operator Survey as part of the CGA/CRI and Citrus Academy’s effort to better understand how this requirement will impact the growers. Please complete the survey before Friday, 1 November by following this link: <https://survey.zohopublic.com/zs/IKD3jC>

For any questions on the matter, please contact Paula Bester (pb@cga.co.za).

CGA CITRUS SUMMIT: KEYNOTE SPEAKER FRANS CRONJE

A third of the seats for the CGA Citrus Summit from 11-13 March 2025 have now been filled – registrations can be done by following this link <https://cgasummit.co.za/registrations/>

I recently listened to a Biznews podcast where Alec Hogg interviewed Frans Cronje on the first 100 days of the Government of National Unity in South Africa. Frans relies on detailed research to give a considered and well informed commentary on the present situation, and what can be expected in the future. The CGA Citrus Summit will take place after 300 days of the coalition government – it will be fascinating to hear his thoughts at that time.

Frans Cronje’s bio reads as follows: Frans Cronje is an analyst with 20 years of experience advising corporations and government agencies on South African and global strategic risks. He runs the advisory firm Frans Cronje Private Clients (Pty) Ltd, chairs South Africa’s Social Research Foundation, sits on the advisory board of the BRE-DE-RE think-tank in Germany, and chairs the US-based Yorktown Foundation for Freedom.

PACKED AND SHIPPED

End of Week 42 Million 15 kg cartons	Packed	Packed	Packed	Shipped	Shipped	Original Estimate	Latest Prediction	Final Packed	Vision 260
SOURCE: PPECB/AGRIHUB	2022	2023	2024	2023	2024	2024	2024	2023	2024
Grapefruit	17.8 m	14.7 m	14.4 m	13.9 m	14.1 m	16.8 m	14.4 m	14.7 m	16.2 m
Mandarins	34.2 m	38 m	41.6 m	37.8 m	41.2 m	43 m	41.6 m	38.0 m	39.6 m
Lemons	37.6 m	35.6 m	34.7 m	35.5 m	34.5 m	37.9 m	34.7 m	35.6 m	39 m
Navels	30.1 m	24.8 m	25.1 m	24.6 m	24.7 m	25.7 m	25.1 m	24.8 m	22.3 m
Valencia	57 m	52 m	48.7 m	50.1 m	48.2 m	58.3 m	48.8 m	52.0 m	55.4 m
Total	176.6 m	165.1 m	164.5 m	161.9 m	162.7 m	181.7m	164.6 m	165.1 m	172.5 m