

*"Half the world is composed of people who have something to say and can't, and the other half who have nothing to say and keep on saying it." Robert Frost*

### **INTEGRATION, COLLABORATION, INFORMATION AND COMMUNICATION (MITCHELL BROOKE)**

The 2024 season export estimates are an indication that the increasing production towards Vision 260 is indeed very real. We cannot shy away from the fact that at some point very soon, a lot of fruit is going to need to be exported. How can it not, since the tree census data and long term crop projection model (not to omit what we see with our own eyes) highlights the number of hectares that have been planted over the last few years. Through analysis we can determine that there are sufficient hectares of trees at a maturity age to produce 185 million 15kg cartons for export in the short term. Understandably though, factors that contribute positively or negatively to the number of cartons being exported will dictate such a volume being exported from season to season. The total 2024 estimate has been pitched just above 180 million cartons (an increase of 10%), however, this will be effected by harvesting and market dynamics as the season progresses. From a corridor perspective, the northern regions estimate of 91 million cartons is up from a baseline of 82 million cartons (increase of 11% on the eastern corridor). The Eastern Cape estimate of 52,5 million cartons is up from 47,5 million cartons (increase of 10% on the central corridor) and the Northern and Western Cape regions estimate of 38 million cartons is up from 36 million cartons (increase of 6% on the western corridor). It is important to point out that the CGA initiative around integration, collaboration, information and communication is of paramount importance when it comes to logistics and shipping. Given the infrastructure, capacity and equipment demands that the industry faces (now and into the future), coupled to the problem of port container terminal productivity and operational challenges, the industry and logistical service providers will need to strongly support this initiative. The CGA and FPEF are collaborating to drive this initiative to foster an environment of information sharing that enables the identification of hotspots in the eco system. This will introduce contingencies and troubleshooting mechanisms to overcome identified constraints. Closer collaboration is seen as a necessary mechanism to ensure the logistics and shipping capabilities are enabled to carry the industry forward. If we are successful, everybody potentially wins – especially SA Inc. We are also seeking much more collaboration on two important short term strategic projects. Firstly, there is no getting away from the fact that transporting citrus by rail from hinterland and port precincts is fundamentally important. To this end the CGA has contracted the service of former Transnet Freight Rail Executive Jan-Louis Spoelstra to guide the citrus industry on the changing rail landscape and to navigate the path for progressive implementation of rail-aligned projects. The CGA will coordinate a series of online meetings where Jan-Louis will provide updates on the rail policy and reform landscape. From this we expect a clearer path to much needed traction in rail development. Secondly, the CGA and FPEF have agreed to coordinate a working group aligned to the development of exporting increasing volume of citrus from the Maputo port. We have seen a significant uptake of containers of citrus being routed from Maputo to the Middle East and Bangladesh in 2023. In the short term, this can be increased and expanded to more destinations in greater Asia, Far East and South East Asian countries that do not require DALRRD preclearance or cold treatment measures (i.e. Malaysia). Shipping services to these regions are already there. The future expansion of exports from Maputo lies firmly with the development of infrastructure and capacity to enable exports to markets that do require additional measures; in particular but not limited to China. We see this new working group as the driving force behind these developments going forward.