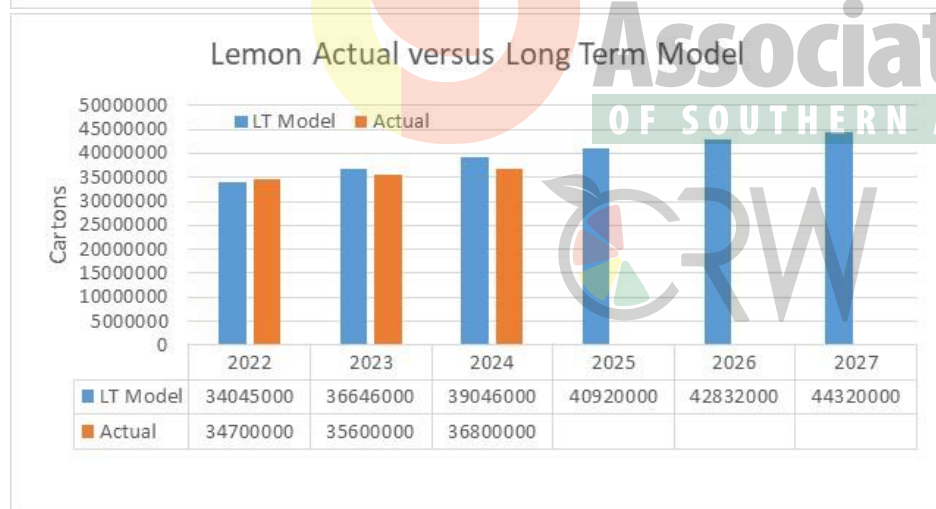
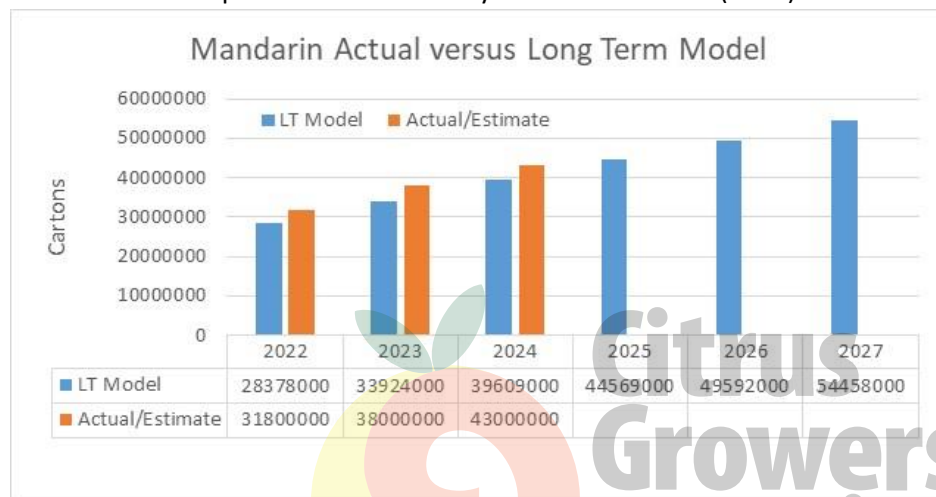


"You must learn from the mistakes of others. You can't possibly live long enough to make them all yourself" Sam Levenson

VISION 260: ONE YEAR REVIEW

Vision 260 was adopted by the CGA Board in 2022 and guides the work of the CGA. Central to the vision is the foreseeable growth in citrus volumes over the ten years from 2023 to 2032. Although the original vision was based on an increase from 165 million to 260 million cartons, revision of the long term model peg the level closer to 230 million. However, the 260 million mark remains the ambition.

An initial period to 2027 has been chosen to track progress – with the volume anticipated to increase to 205 million cartons over that period. With the first year now behind us (2023) it is worthwhile to check how progress is going.



This week we will look at mandarins and lemons.

Mandarin volumes in 2023 tracked slightly ahead of Vision 260 predictions. This was driven by growth in the EU, UK, Asia, and Middle East. Growth in Asia, North America, and Russia lagged a bit on predictions.

Asian growth was largely driven by China and Hong Kong, with significant increases in volumes.

Initial estimates put the 2024 season ahead of the Vision 260 target.

Lemon volumes tracked slightly behind predictions in 2023. Although EU, UK, and Russia showed increases ahead of expectations, Asia, Middle East, and North America did not reach the predictions.

Initial estimates put the 2024 lemon prediction slightly below the Vision 260 target.

PACKED AND SHIPPED

A slight upward revision by the Grapefruit Focus Group takes the predicted 2024 volume back towards the 180 million carton mark.

End of Week 19 Million 15 kg Cartons	Packed	Packed	Packed	Shipped	Shipped	Original Estimate	Latest Prediction	Final Packed
SOURCE: PPECB/AGRIHUB	2022	2023	2024	2023	2024	2024	2024	2023
Grapefruit	7.1 m	5.9 m	6.3 m	4.4 m	3.8 m	16.8 m	16 m	14.7 m
Mandarins	3.6 m	5.5 m	6.1 m	3.2 m	3.4 m	43 m	43 m	38 m
Lemons	9.1 m	13.7 m	11.6 m	11.1 m	8 m	37.9 m	36.8 m	35.6 m
Navels	0.6 m	1.1 m	1.2 m	0.3 m	0.2 m	25.7 m	25.7 m	24.8 m
Valencias	-	-	-	-	-	58.3 m	58.3 m	52 m
Total	20.4 m	26.2 m	25.2 m	19.0 m	15.4 m	181.7m	179.8 m	165.1 m