



**Vision 260**



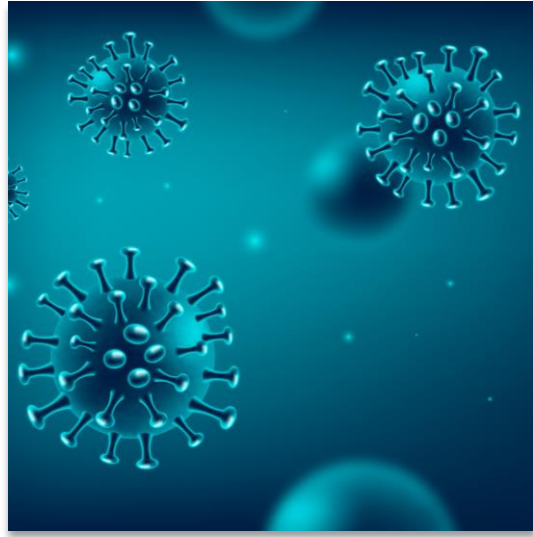
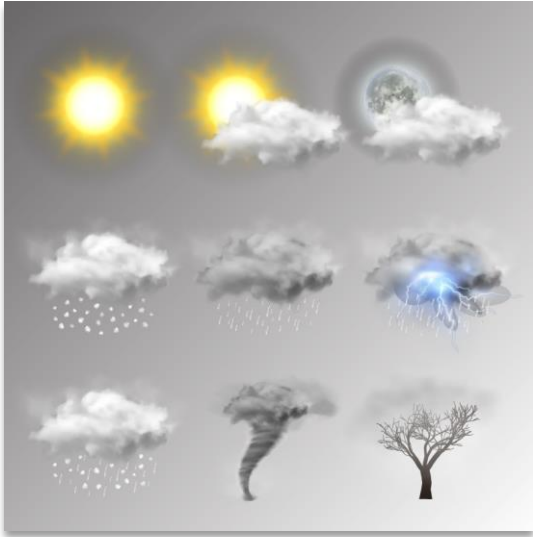
**CGA Citrus  
Summit**

**The CGA Board Vision for the Future**

**Justin Chadwick**



# Uncontrollables



**So, what can we control?**



# Underpinning the vision:



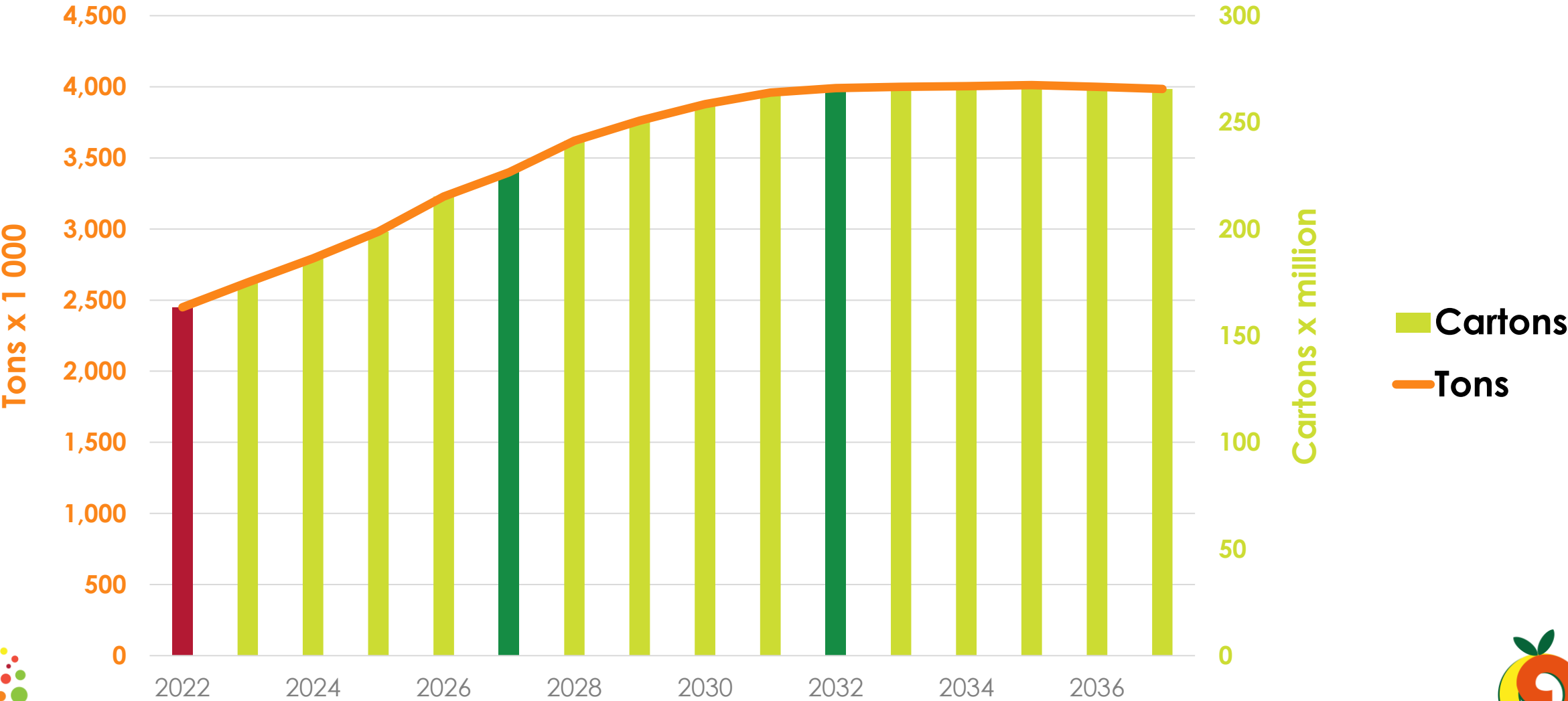
# CGA Long Term Model

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- **Baseline 2022 tree census: 99,969ha**
- **Budwood sales: assumed replacement and new hectares**
- **Assume no new plantings**
- **Assume replacement intervals**
- **Yield based on tree age**
- **Initial years deemed more accurate**
- **Export (not production!) prediction**

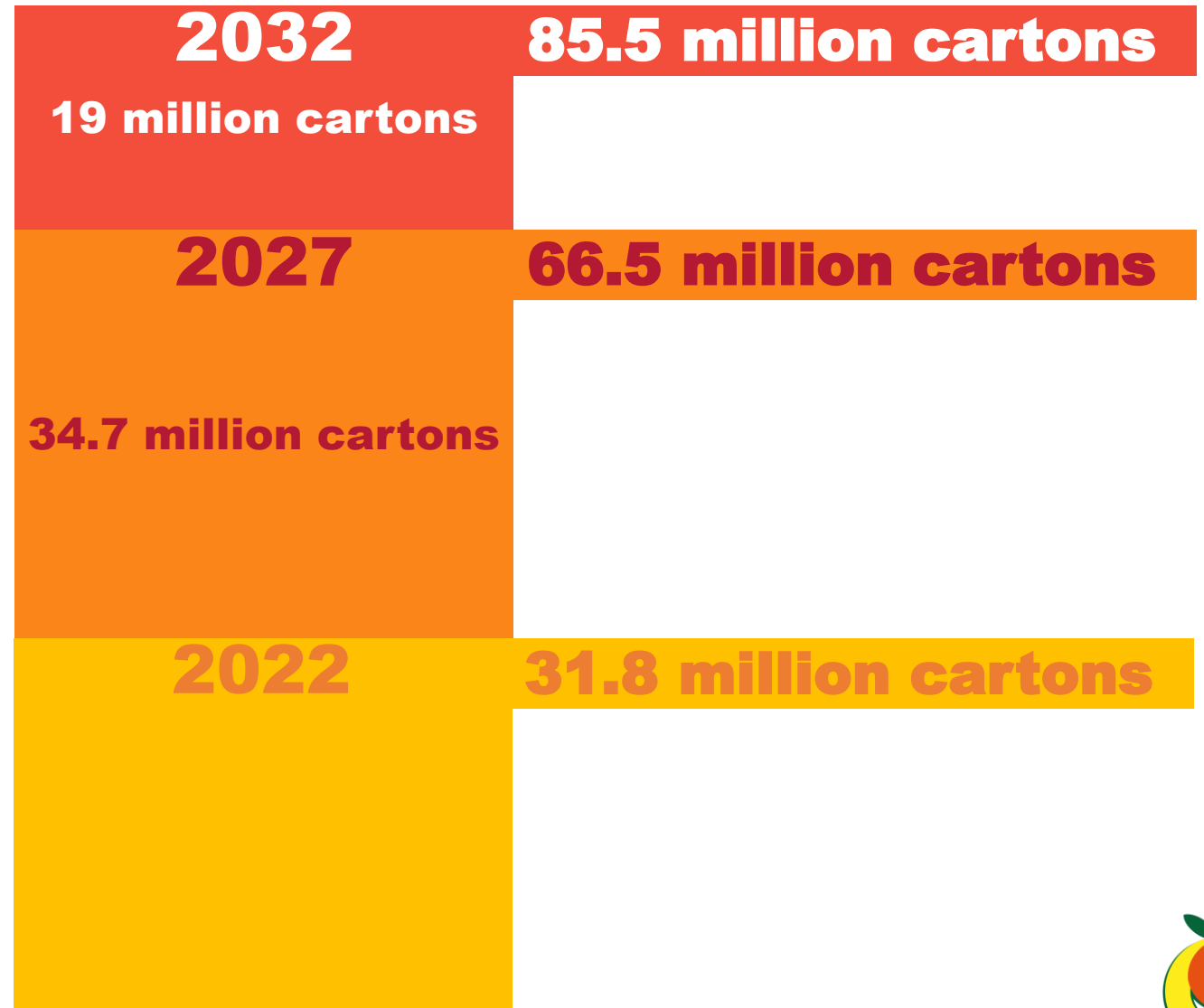


# CGA Long Term Model





# Growth Projections - Mandarins



# Growth Projections - Oranges



**2032**  
19 million cartons

**115.4 million cartons**

**2027**  
14.8 million cartons

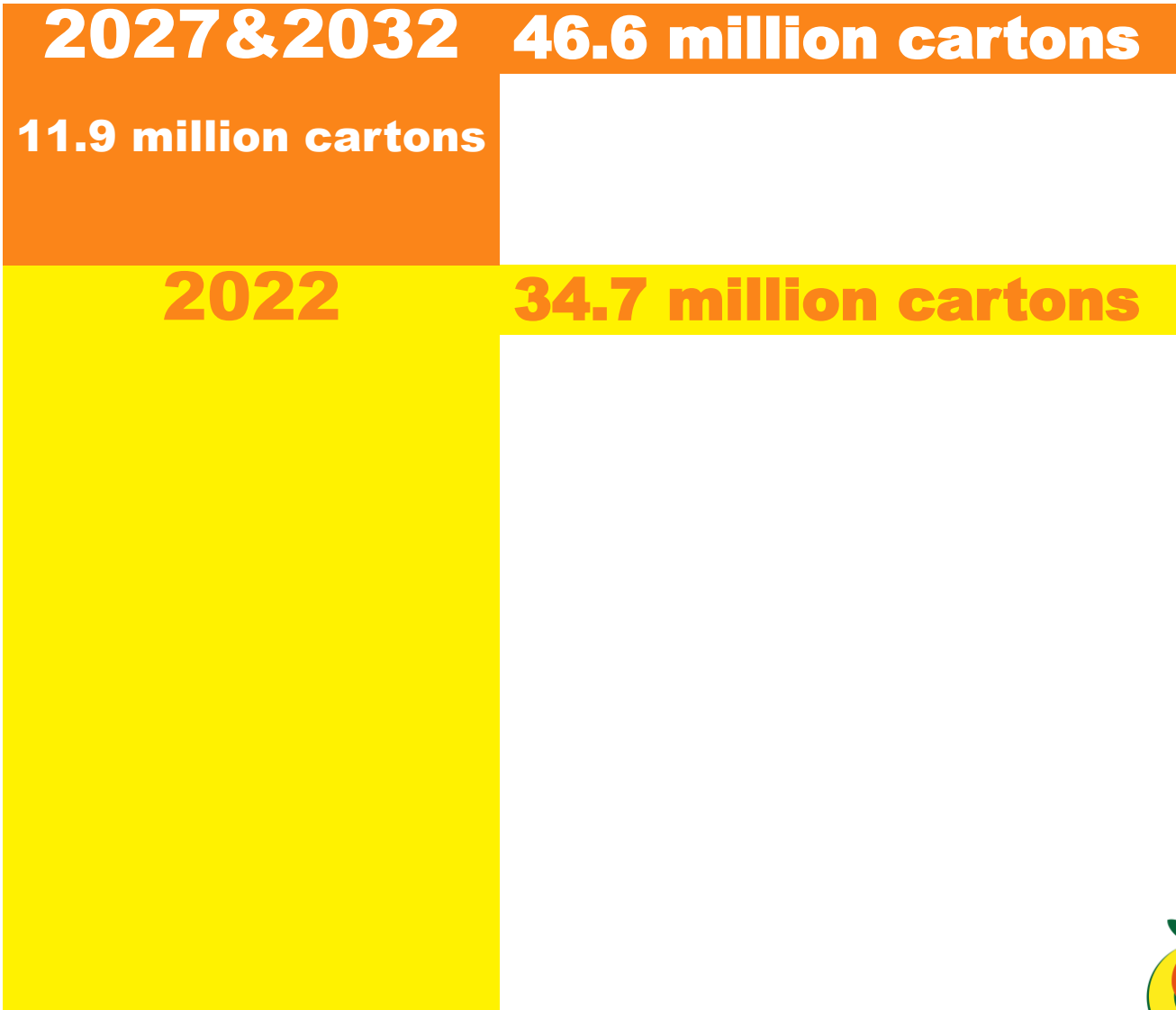
**96.4 million cartons**

**2022**

**81.6 million cartons**



# Growth Projections - Lemons





# Growth Projections - Grapefruit



**2032**

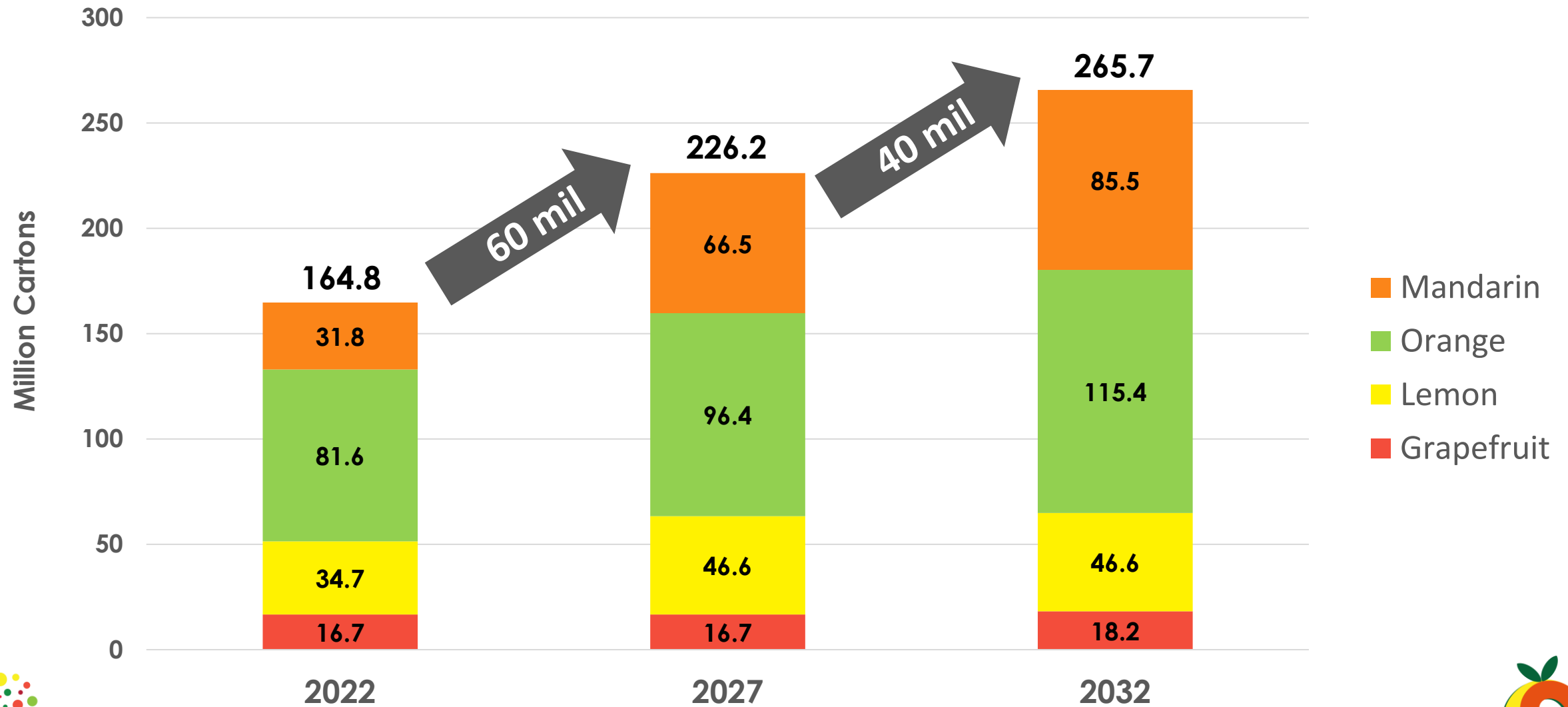
**18.2 million cartons**

**1.5 million cartons**

**2022 & 2027 16.7 million cartons**



# Long Term Projections – 5 and 10 Years



# The Future Imagined



# Vision 260



# The Burning Questions

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- #1 Where is the fruit going to be marketed?**
- #2 How are we going to get the fruit from packhouse to port?**
- #3 How will we store the fruit before shipping?**
- #4 How will we get the fruit effectively and efficiently through the port and onto vessels?**
- #5 How will we ship the fruit cost effectively and timeously?**
- #6 How do we ensure all stakeholders are aligned to enable Vision 260?**
- #7 How do we communicate the plan, its challenges and opportunities, progress and setbacks?**
- #8 How do we collect, collate, analyse and distribute information that is essential to make informed decisions?**



# The Most Burning Question

How do we achieve inclusive growth and give life to the Agricultural and Agroprocessing Masterplan (AAMP) through vision 260?

**HAVE A VISION**



**CGA  
Grower  
Development  
Company**





A close-up photograph of a person's hands holding a single orange. The person is wearing a white, ribbed sweater. The background is a market stall with a large pile of bright orange fruit, likely navel oranges, and a basket of red cherry tomatoes. A white mesh bag is also visible, partially filled with oranges. The scene is brightly lit, suggesting an outdoor market setting.

# **Project 1: Market Demand**



# Project 1: Market Demand

## **Sufficient market demand to absorb the anticipated volume increase over 5 years and over 10 years**

- Assess market opportunities in existing and new markets (master plan)
- Determine what activities need to be undertaken to ensure all market opportunities are exploited:
  - ❖ DALRRD plant health mobilised to negotiate new and optimise present market access while retaining all present markets under favourable conditions
  - ❖ Food safety requirements addressed for optimum access to plant protection products
  - ❖ Act 36 equipped to ensure access to plant protection products
- Investigate market development opportunities
- Address tariff duty imbalance – competitors advantage



# Paper – Quantifying Benefits of Market Access

|              | Average imports from South Africa 2016-2018 (Tonnes) | Average imports from South Africa 2019-2021 (Tonnes) | Increased imports by 2024 (Tonnes) | Target 2024    | Imports from South Africa 2021 (Tonnes) | Imports from South Africa 2022 (Tonnes) | Increased income by 2024 (R million) | Increased jobs by 2024 |
|--------------|--|--|------------------------------------|----------------|---|---|--------------------------------------|------------------------|
| EU-27        | 109 000  | 191 636  | 50 000                             | 159 000        | 196 183                                 | 201 001                                 | 675                                  | 1 667                  |
| USA          | 11 000   | 28 609   | 50 000                             | 61 000         | 39 002                                  | 50 440                                  | 675                                  | 1 667                  |
| Canada       | 6 000  | 14 802   | 20 000                             | 26 000         | 17 780                                  | 21 073                                  | 270                                  | 668                    |
| Russia       | 20 000   | 29 727   | 10 000                             | 30 000         | 36 258                                  | 46 277                                  | 135                                  | 333                    |
| Japan        |  | -  | 10 000                             | 10 000         | -                                       | -                                       | 135                                  | 333                    |
| Thailand     |  | 95   | 10 000                             | 10 000         | -                                       | -                                       | 135                                  | 333                    |
| Malaysia     | 2 000  | 4 218  | 10 000                             | 12 000         | 6 200                                   | 10 083                                  | 135                                  | 333                    |
| Philippines  |  | 318  | 10 000                             | 10 000         | 720                                     | 767                                     | 135                                  | 167                    |
| China        | 3 000  | 16 275   | 20 000                             | 23 000         | 23 558                                  | 22 926                                  | 270                                  | 668                    |
| Vietnam      | 1 000  | 57   | 5 000                              | 6 000          | 25                                      | 45                                      | 68                                   | 167                    |
| Indonesia    | 150  | 347  | 10 000                             | 10 150         | 315                                     | 449                                     | 135                                  | 333                    |
| Kazakhstan   |  |  | 10 000                             | 10 000         |   |   | 135                                  | 333                    |
| India        | 250  | 1 325  | 10 000                             | 10 250         | 2 779                                   | 4 722                                   | 135                                  | 333                    |
| UAE          | 9 000  | 24 976   | 10 000                             | 19 000         | 39 755                                  | 37 151                                  | 135                                  | 333                    |
| S Arabia     | 4 000  | 6 551  | 10 000                             | 14 000         | 8 349                                   | 9 475                                   | 135                                  | 333                    |
| Iraq         |  | 5 463  | 10 000                             | 10 000         | 8 782                                   | 5 800                                   | 135                                  | 333                    |
| <b>TOTAL</b> | <b>165 400</b>                                       | <b>324 399</b>                                       | <b>255 000</b>                     | <b>420 400</b> | <b>379 706</b>                          | <b>410 209</b>                          | <b>3 443</b>                         | <b>8 500</b>           |





# **Project 2: Road and Rail**



# Project 2: Road and Rail

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## Properly functioning road and rail to transport citrus to ports

- Cannot afford criminality that closes roads (truck driver strikes, service delivery protests); government must restore law and order
- Repairs to rail to open route to port
- Private sector participation concluded
- Analyse each corridor to determine road usage and rail opportunity





# Project 3: Cold Stores and Warehousing





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**Adequate cold stores and warehousing capacity to facilitate export volume and comply with new regulations**

- Research each corridor to determine present capacity, required capacity and capacity gaps





# Project 4: Ports



# Project 4: Ports

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**Properly functioning South African ports to ship increased volumes of citrus**





# Project 5: Shipping



# Project 5: Shipping

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**Investigate and implement shipping options to bring about structural change in the shipping environment in order to control freight rates and improve service delivery**

- *Phase 1 (July-September 2022):* CGA (together with HORTGRO, SATI, BerriesZA and SUBTROP) contracted Thomas Eskesen Advisory to assist researching strategic questions
- *Phase 2 (November 2022-October 2023):* Continuation of project to look at implementation of best option(s), FPEF included in phase 2







# **Project 6: Stakeholder Engagement**

# Project 6: Stakeholder Relations

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## **Build strong relationships with government and other key industry stakeholders**

- Stakeholder mapping exercise to identify key stakeholders to assist Vision 260
- Determine key government entities and officials for engagement
- Assess present capacity, goal capacity and gaps





## Project 6: Stakeholder Mapping

[illegible]

# Project 7: Communication



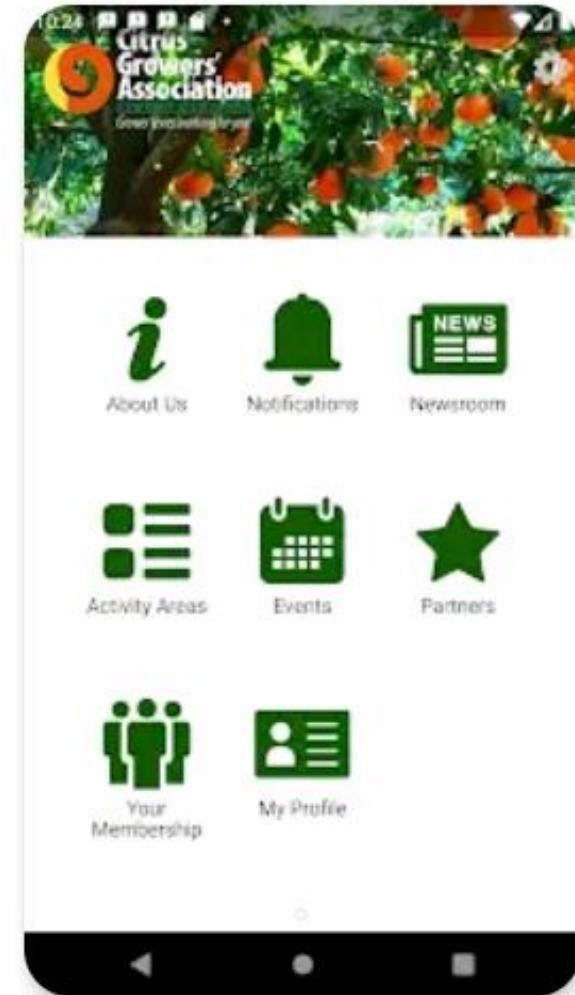
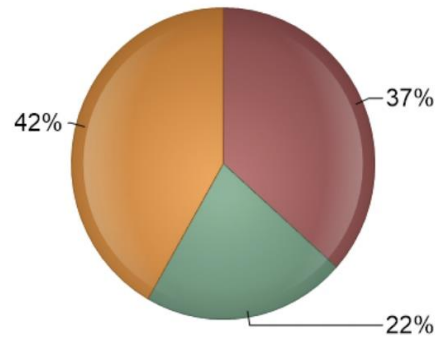
# Project 7: Communication

## Communicate regularly with growers and key industry stakeholders

### Total combined monitoring units for Citrus Growers Association

1 Jan - 31 Dec 2022

|           |       |     |
|-----------|-------|-----|
| Print     | 420   | 37% |
| Broadcast | 249   | 22% |
| Online    | 479   | 42% |
|           | 1,148 |     |







# Project 8: Information and Intelligence

# Project 8: Information and Intelligence

**Ensure provision of timely, complete and useful information and intelligence to assist with informed decision-making**



# Together, we can make it happen



## Vision 260







**Thank you!**



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