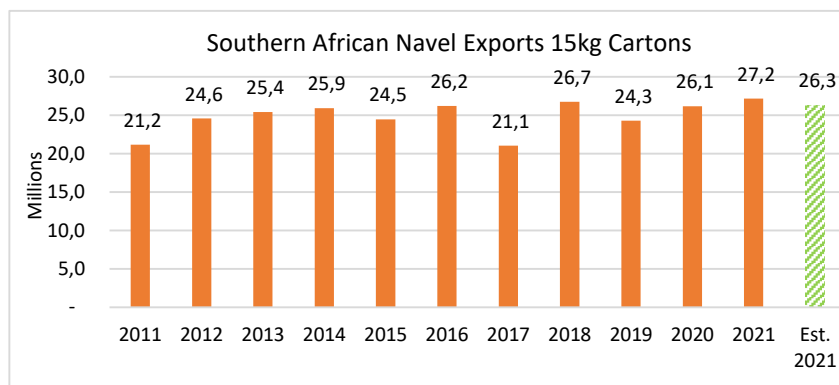


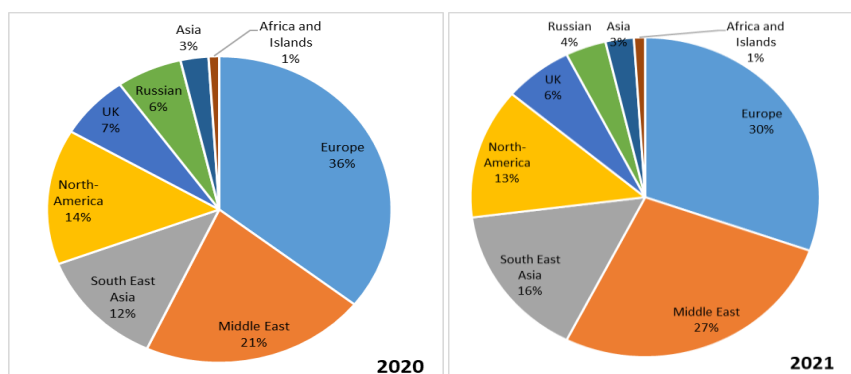
"If you cannot do great things, do small things in a great way" – Napoleon Hill

2021 Navel Seasonal Review (Portia Magwaza)

The Navel Orange sector experienced a record export volume – at 27.2 million cartons and just ahead of 2018 (26.7 m). This was just 3% over the March 2021 estimate so well done to the Navel Focus Group. Senwes remains the biggest region with 7.6 m cartons – 8% over estimate. Western Cape is second biggest with 7.2 m cartons – 5% over estimate; while Sunday's River Valley at 6 m was 3% under the estimate. Patensie was 17% over estimate (2.6 m vs 3 m), whereas Nelspruit was 7% under estimate (1.1 m vs 1 m).



Navels peaked at size 72, 88 and 64. The 2021 season had high volumes but the fruit size was smaller. The peak weeks for packing was from week 22 to week 25, at a packing rate of 2 million cartons per week. The packing pattern was similar to the previous year.



In terms of market distribution, a decrease in Europe volumes (from 36% in 2020 to 30% in 2021) was taken up by Middle East (21% to 27%). South East Asia increased their share from 12% to 16%, while North America (14% vs 13%) and UK (7% vs 6%) changed marginally. Russia decreased from 6% to 4%. Distribution to other regions did not differ materially from 2020 – Asia 3% and Africa and Islands 1%.

The decline in the EU volumes was due to the lingering Egyptian fruit in the market and stringent phytosanitary regulations. Lower Russian imports was also attributed to limited amounts of large sized fruit.

REMINDERS – Important dates:

16 & 17 Nov @9h00: Global Citrus Congress. 18 Nov @9h00: DALRRD Annual Citrus Coordinating Meeting. 26 Nov: Special Market Registrations close.

COVID 19 Vaccinations

Administered in last 24 hours = 136 550; total administered = 23 684 440; Individual vaccinated = 15 818 324 (= 39.75% of adult population). Source: <https://sacoronavirus.co.za/latest-vaccine-statistics/>

Packed and Shipped *Using a combination of PPECB and Agrihub data to account for shipping timing

End of Week 44	Packed	Packed	Packed	Shipped	Shipped	Original Estimate	Latest Prediction	Final Packed
Million 15kg Cartons	2019	2020	2021	2020	2021	2021	2021	2020
SOURCE: PPECB/AGRIHUB								
Grapefruit (17kg)			15.5 m		15.2 m			
Grapefruit	16.8 m	15.5 m	17.5 m	15.2 m	17.2 m	18.0 m	17.6 m	15.5 m
Soft Citrus	18.2 m	23.6 m	30.9 m	23.6 m	29.4 m	30.5 m	30.8 m	23.6 m
Lemons	22.1m	28.4 m	31.0 m	27.1 m	29.6 m	30.2 m	30.9 m	29.6 m
Navels	24.3 m	26.0 m	27.2 m	25.2 m	27.2 m*	26.3 m	27.2 m	26.2 m
Valencia	46.8 m	53.1 m	54.9 m	53.1 m	54.9m*	58.0 m	55.1 m	55.1 m
Total	128.2m	146.6m	161.5m	144.2m	158.3m*	163.0 m	161.6 m	150 m