

FROM THE DESK OF THE CEO (18/23)

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Justin Chadwick 5 May 2023



“The creative adult is the child who has survived” Ursula Le Guin

WORLD CITRUS ORGANISATION (WCO) AGM

The WCO AGM featured two fantastic presentations. Enselme Cleron from CIRAD presented on the present status of the citrus industry, with special reference to the southern hemisphere estimate, while Paco Borrás presented on the Valencian citrus plan. The following was highlighted in the CIRAD presentation:

- The transition from northern hemisphere to southern hemisphere supply should be seamless as there is an early end to the northern hemisphere season with one of the smallest crops in the Mediterranean region for the last decade. Spanish late oranges are 27% below the four-year average, while Spanish verna lemon are down 32% against the average.
- There have been significant increases in import prices of between 20 and 38% (lemons being the best).
- In Europe there will be competition for imported southern hemisphere citrus from other fruits (stone fruit, bananas) that are expected to be heavier in volume than the last two seasons.
- Hectares under citrus have grown in the southern hemisphere since 2013 as follows. Orange hectares have experienced modest growth from 132 000 Ha to 136 000 Ha; there has been substantial growth in the Mandarin hectares from 67 000 Ha to 88 000 Ha with similar figures for lemon hectares from 65 000 Ha to 87 000 Ha; grapefruit hectares have bucked the trend dropping from 16 000 Ha to 14 000 Ha
- Oranges still lead southern hemisphere citrus export estimates with 1,57 million tonnes – a 2% increase over 2022 and 1% more than the five-year average. Mandarins are at almost 1 million cartons – 3 % increase over 2022 and 16% increase over five-year average (please note mandarin figures differ from AGM due to lower final estimates against provisional estimates). Lemons are at 928 000 tons, 10% less than 2022 and at five-year average levels. Finally, grapefruit are at 220 000 tons – 13% off 2022 and 13% off the long term average.

MAY CITRUS MARKETING FORUM (CMF)

A decision was taken at the first CMF of 2023 to hold monthly CMF meetings. These meetings would be virtual, and last just one hour. The agenda would include a brief update on packed and shipped citrus to date, feedback from the markets and an “ask us anything” session where FPEF and CGA staff would be available to respond to industry questions. Please could you send any questions through to Portia portia@cga.co.za beforehand so that we can ensure the appropriate person can prepare a response. CMF members (registered growers, FPEF members and value chain representatives) who would like to attend are asked to send a mail to Portia so that she can provide the link.

The meeting will be on **Tuesday 23 May from 14h00 to 15h00**.

PACKED AND SHIPPED

The 2023 estimation process has been extremely difficult given the uncertainty around global factors and the experiences of 2022. After much deliberation the Mandarin Focus Group have settled on an estimate of 34.1 million cartons – a 7% increase from last season. The satsuma season is almost complete with 1,413 million cartons (91%) of the 1,557 million carton estimate already packed.

End of Week 17 Million 15 Kg Cartons	Packed	Packed	Packed	Shipped	Shipped	Original Estimate	Latest Prediction	Final Packed
SOURCE: PPECB/AGRIHUB	2021	2022	2023	2022	2023	2023	2023	2022
Grapefruit	5.6 m	4.5 m	4.5 m	1.5 m	2.1 m	14.4 m	14.4 m	16.7 m
Mandarins	2.3 m	1.7 m	2.8 m	0.9 m	1.6 m	34.1 m	34.1 m	31.8 m
Lemons	8.5 m	5.5 m	9.4 m	4.1 m	6.1 m	37.3 m	37.3 m	34.7 m
Navels	0.5 m	0.1 m	0.2 m	-	-	25.3 m	25.3 m	27.8 m
Valencia	-	-	-	-	-	54.5 m	54.5 m	53.8 m
Total	16.9 m	11.8 m	16.9 m	6.5 m	9.8 m	165.6 m	165.6 m	164.8 m

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