

“We learn from history that we do not learn from history” Hegel

LEMON TRACKING

We are looking forward to our first 2024 lemon tracking session on Zoom, which will focus on monitoring the EU & UK lemon markets using volumes from South Africa and other Southern hemisphere suppliers. Anya Jaworski from SAFRESCO will present market performance using an Artificial Intelligence model built to track lemon exports to the EU and the UK. The model will show the performance of lemons from other markets as well. This will provide useful information and contribute to discussions regarding optimal loadings and strategic decision-making for the coming weeks.

If anyone needs the Zoom link for the session, please reach out to Precious Kunota at precious@cga.co.za.

RAIL TRANSPORT UPDATE

On Tuesday 7 May at 10am the CGA will host a session covering rail transport policy updates and the future state of rail transport for citrus exports. Jan-Louis Spoelstra will be providing feedback on the state of rail and ports. Rail transport is a strategic priority, as outlined in Vision 260. Please join this session to gain an understanding of this important topic. Meeting link:

<https://us02web.zoom.us/j/87095368812?pwd=UHo2RkZncGNPUW1OTzITUEVhOGVuZz09>

SOUTHERN HEMISPHERE FORECAST: WORLD CITRUS ORGANISATION (WCO)

At the WCO AGM the secretariat presented the Southern hemisphere forecast for 2024:

- Total Southern hemisphere citrus production forecast is at 24.3 million tons; a slight 0.8% decrease over 2023 and 3.7% greater than the four year average.
- Total Southern hemisphere citrus exports forecast to increase by 7.5% to 4.2 million tons.
- For production: Oranges forecast to drop by 5.7% to 15.5 million tons; grapefruit dropping 3.9% to 532 539 tons; mandarins increase by 11.6% to 3.3 million tons, lemons increase by 5.7% to 3.2 million tons; limes increase by 10.6% to 1.8 million tons.
- South Africa is forecast to increase exports by 9.8% to 2.7 million tons; Chile decrease by 4.2% to 383 750 tons; Argentina increase by 11.8% to 316 000 tons; Australia increase by 3.8% to 271 550; Peru increase by 5.9% to 267 372 tons; Brazil increase by 9.3% to 145 000 tons; and Uruguay increase by 26.6% to 86 453 tons.

PACKED AND SHIPPED

With 8% of the estimate now packed and passed for shipment, the season has begun. Meanwhile, for satsumas the season is done. Since the Citrus Marketing Forum last met, the Grapefruit Focus Group have predicted a lowering of the original estimate by 6.5% while the Lemon Focus Group have decreased the prediction by 800 000 cartons. The Mandarin Focus Group have effected a slight increase of 200 000 cartons. The total prediction for 2024 now stands at 180 million cartons.

End of Week 17 Million 15kg Cartons	Packed	Packed	Packed	Shipped	Shipped	Original Estimate	Latest Prediction	Final Packed
SOURCE: PPECB/AGRIHUB	2022	2023	2024	2023	2024	2024	2024	2023
Grapefruit	4.1 m	4.1 m	4 m	2.3 m	1.8 m	16.8 m	15.7 m	14.7 m
Mandarins	1.8 m	2.9 m	3.2 m	1.8 m	1.1 m	43 m	43.2 m	38 m
Lemons	5.7 m	9.8 m	7.2 m	7 m	4.8 m	37.9 m	37.1 m	35.6 m
Navels	0.1 m	0.2 m	0.2 m	-	-	25.7 m	25.7 m	24.8 m
Valencia	-	-	-	-	-	58.3 m	58.3 m	52 m
Total	11.7 m	17 m	14.6 m	11.1 m	7.7 m	181.7 m	180 m	165.1 m