

“Man’s capacity for justice makes democracy possible, but man’s inclination to injustice makes democracy necessary” Reinhold Niebuhr

ORANGE FOCUS GROUP REVISES 2024 EXPORT VOLUME PREDICTION

After a meeting this week of the Orange Focus Group, the CGA is adjusting its orange export estimates downward.

The projected number of 15kg cartons of Navel oranges expected to be exported is now 22 million. This is a significant 14.5% reduction from the estimate at the start of the season, which was 25.6 million. The new estimate also represents an 11% decrease from last year, when South Africa packed a total of 24,8 million cartons of Navels for shipping to foreign markets.

There are several factors which necessitated the adjustment to the current season's estimates. Local citrus juicing prices are currently high, and many growers are taking advantage of this. Fruit sizes are also somewhat smaller due to the warm and dry weather experienced in large parts of the country. This means there are more individual fruit packed into a 15kg cartons relative to last year. Severe winds have also caused some fruit to drop from trees in the Western Cape and hail damage has been experienced in certain parts of the Senwes (Groblersdal and Marble Hall) region.

An increase of Egyptian oranges in the European market also plays a role. Even though Egypt is counter-seasonal to South Africa, more Egyptian oranges (as they are at present) in the European market does impact early season demand.

Navels make up approximately 17% of the entire South African citrus export volume.

The projected export figure of 15kg cartons of Valencia oranges has also been reduced to just over 56 million, which is a 4% reduction from the estimate at the beginning of the season. It is, however, early in the Valencia season and a further reduction is possible. Last year South Africa packed 52 million cartons of Valencias for shipping to foreign markets. Valencias make up approximately 31% of total citrus export volumes.

It is important to note that the overall increase in orange production in South Africa is set to continue on a gradual growth trajectory for the next ten years. However, a larger 2024 crop does not necessarily mean that an excessive volume of oranges will be shipped to export markets, making the risk of over-supply low.

PACKED AND SHIPPED

An additional column has been added to the weekly table to reflect what the long term model upon which Vision 260 is based has recorded for 2024. The predicted volume is closely tracking Vision 260 volumes. Noticeable differences are mandarins ahead and lemons behind Vision 260 levels.

End of Week 21 Million 15kg Cartons	Packed	Packed	Packed	Shipped	Shipped	Original Estimate	Latest Prediction	Final Packed	Vision 260
SOURCE: PPECB/AGRIHUB	2022	2023	2024	2023	2024	2024	2024	2023	2024
Grapefruit	9.3 m	7.8 m	8.8 m	6.7 m	6.1 m	16.8 m	16 m	14.7 m	16.2 m
Mandarins	6.7 m	9.3 m	9.8 m	5.9 m	6.3 m	43.0 m	43.0 m	38.m	39.6 m
Lemons	13.5 m	16.5 m	15.9 m	14.7 m	11.9 m	37.9 m	36.8 m	35.6 m	39 m
Navels	2.8 m	3.6 m	4 m	1.5 m	1.3 m	25.7 m	21.9 m	24.8 m	22.3 m
Valencias	0.1 m	0.2 m	-	-	-	58.3 m	56.1 m	52 m	55.4 m
Total	32.4 m	37.4 m	38.5 m	28.8 m	25.6 m	181.7m	173.8 m	165.1 m	172.5 m