

CGA Variety Update (2017_Week 36)

John Edmonds (18 September 2017)

Citrus Growers Association (CGA)



Soft citrus:

The RSA projection of soft citrus exports is now 13.8 million cartons vs the original estimate of 13.2 million cartons. Current packing volumes (end week 36) show soft citrus up 1% on 2016's at 12.0 million cartons packed to date. Late mandarin types are up on last year's cumulative exports at the same time. To end week 36, soft citrus shipments at 12.3 million cartons are up on last year's 10.9 million cartons.

In Russia (week 37) soft citrus was oversupplied. Prices fell to between \$18.97 and \$16.38 per 10 kg carton. South African, Argentinean, Uruguayan, and Peruvian product was available in wholesale markets.

Lemons:

The RSA projected final export is now 18.7 million cartons, vs March's estimate of 17.5 million cartons. Current packing is up on last year's 14.5 million cartons; now at 14.7 million cartons. Lemon shipments at 18.0 million cartons are up on last year's 14.1 million cartons at this stage. In Russia week 37, medium quality South African lemons traded in range between \$18.97 and \$21.56 whilst high quality fetched \$22.42 to \$ 23.28 per 15 kg carton.

Grapefruit:

The Southern African initial estimate of 13.8 million 17 kg cartons made in March seems to have proven very accurate as the season comes to an end. Current PPECB packing data at 13.4 million 17kg cartons together with the Zimbabwean and Swaziland contribution, sees the current total at 13.7 million cartons; up on last year's by 15% to end week 36. Agrihub shipping volumes at 12.4 million 17kg cartons, are 15% up on last year at end week 36.

In Russia, week 37; grapefruits are in short supply. Wholesale prices were in the range \$20.70 – 21.99 per 15 kg carton with only South African brands on offer.

In Europe the global supply has remained limited. The last arrivals from South Africa have entered the market and stocks (mainly large grades) are reducing week after week. Volumes from Mexico in w38-39 should be 25 to 30 % lower due to the delays in picking (rainfalls). Hence, it should enable to end the last stocks of RSA and to ensure a smooth transition.

Oranges:

Week 36 PPECB packing data shows navels down; (-20% at 21.0 vs million cartons last year) and valencias up 20% (44.7 vs 37.2 million cartons) versus the same period last year. The RSA Navel packing is finished and Valencias are projected at 49.0 million cartons (including Swaziland and Zimbabwe volumes).

Agrihub data shows shipping of navels was 17% down on last year at end week 36 (20.9 vs 25.3 million cartons). Valencia shipping is 11% up (34.1 vs 30.8 million cartons).

In Russia week 37, South African valencias were traded around \$ 17.25 per 15 kg carton. In Europe, week 37 global supply is still moderate. Sales are strong, particularly for small grades. RSA Valencia season continues to benefit from a clear market. After a beginning of season ahead of schedule, arrivals have slowdown, reaching levels below average (-23%). Prices have continued to firm up, maintaining levels of 0.95 to 1.10 Euro per kilogram.

