

LEMON FOCUS GROUP

DRAFT MINUTES OF THE LEMON FOCUS GROUP TELECONFERENCE HELD AT 15:00 ON FRIDAY 9 MAY 2014

Present:

Hannes De Waal	(Chairman - Sunday's River)
Peter Button	(Southern KZN)
Ernest de Villiers	(East Cape Midlands)
Graham Barry	(CGA—observer)
John Edmonds	(CGA-secretariat)
Guy Turner	(Nelspruit)
Gert Bezuidenhout	(Hoedspruit)
Richard Allen	(Boland)
Peter Pullinger	(Senwes)
Rikus Groenewald	(Western Cape)
Jacques Nel	(Letsitele)

Apologies:

Philip Dempsey	(Patensie)
Danie Matthewson	(Vaalharts)
Petros Shiba	(CDC)
Peter Nicholson	(Limpopo River)
Andre Barnard	(Pongola)

1. Welcome

The Lemon Focus Group chairman (2013), Hannes de Waal welcomed all to the meeting.

2. Apologies

(As noted above)

3. Approval of Minutes of Meeting held on 17 March 2013.

The minutes were approved by Peter Button, seconded by Ernest de Villiers.

4. Matters Arising from Minutes

4.1. John Edmonds was asked to bring the debate on existing industry structures to the attention of Justin Chadwick.

5. Estimates for 2014 (see table below)

Only Guy Turner (Nelspruit) lowered his estimate to 475 000 from 500 000 cartons. The rest remained unchanged. Philip Dempsey (Patensie) emailed a report with the news that to week 18 lemons packed, totaled about 15 000 cartons. He expects 30 000 by end of week 19. All packhouses will start packing next week. Current sizing peaks on counts 113/100/138. Color plate 4 currently during packing.

Sunday's River Valley was peaking on counts 113, 138 (1 size up); Western Cape 138, 102, 113 (slightly smaller than last year); Senwes on 113, 138 (also a bit smaller); Nelspruit 138, 113; Boland 138, 113; KwaZulu-Natal 113, 138 and E.Cape Midlands 113, 138, 100 (a bit bigger).

Thus overall, the sizing bodes well for the season.

6. Markets

Hannes de Waal reported that markets, in general, appear to be very strong everywhere. Argentina seems to have undersupplied programs in EU and Russia. Middle East and Far East had also been supplied about 60% of their normal volume. He expected the positive outlook to continue. He noted that demand in China, Far East and S.E Asia was strong and although prices may drop off a bit it would still be good. He felt that South Africa could win ground due to its stability of supply.

7. General

Guy Turner inquired about the situation and research efforts into CBS and FCM. Hannes de Waal informed the meeting that Shaun Moore was doing work on FCM although lemons were generally not a good host for FCM. He noted that Sunday's River Valley had less FCM than last year due to favourable weather. Peter Pullinger (Senwes) said that due to late rains they would pick a bit later and be vigilant. Hannes de Waal said that in the long term the CBS would be resolved with a WTO debate but that a lot of work was being done in the background by local role players.

8. Meeting dates for 2014

The next meeting will be Wednesday 4 June at 3pm.

Annex1. Lemon Focus Group 2014 Estimate and Projection

CGA Region	2014 Estimate				Projection1: 9 May 2013			
CGA Region	Early (<wk19)	Mid (19to34)	Late (>wk34)	2014*	Early (endWK18)	Mid (18to34)	Late (Post34)	Proj. Total
S.R. Valley	1 074 205	4 489 165	436 630	6 000 000	1 074 205	4 489 165	436 630	6 000 000
Senwes	878 366	1 359 504	26 824	2 264 694	878 366	1 359 504	26 824	2 264 694
Boland	11 986	714 587	23 426	749 999	11 986	714 587	23 426	749 999
W. Cape	88 745	481 903	9 352	580 000	88 745	481 903	9 352	580 000
Midlands	-	362 682	17 318	380 000	-	362 682	17 318	380 000
Hoedspruit	432 308	30 800	6 892	470 000	432 308	30 800	6 892	470 000
Patensie	53 351	304 862	21 787	380 000	53 351	304 862	21 787	380 000
Nelspruit	200 000	150 000	150 000	500 000	195 000	140 000	140 000	475 000
Limpopo River	179 745	20 186	68	199 999	179 745	20 186	68	199 999
S-KZN	26 020	125 717	8 263	160 000	26 020	125 717	8 263	160 000
Letsitele	91 393	32 735	872	125 000	91 393	32 735	872	125 000
Nkwadini	41 044	63 956	-	105 000	41 044	63 956	-	105 000
Pongola	55 000	50 000	-	105 000	55 000	50 000	-	105 000
Oranje rivier	14 671	55 329	-	70 000	14 671	55 329	-	70 000
VaalHarts	9 086	10 914	-	20 000	9 086	10 914	-	20 000
Swaziland								
Other	8 786	12 617	3 597	25 000	8 786	12 617	3 597	25 000
Grand Total	3 164 706	8 264 957	705 029	12 134 692	3 164 706	8 264 957	705 029	12 109 692