The 2019 Southern African citrus export season

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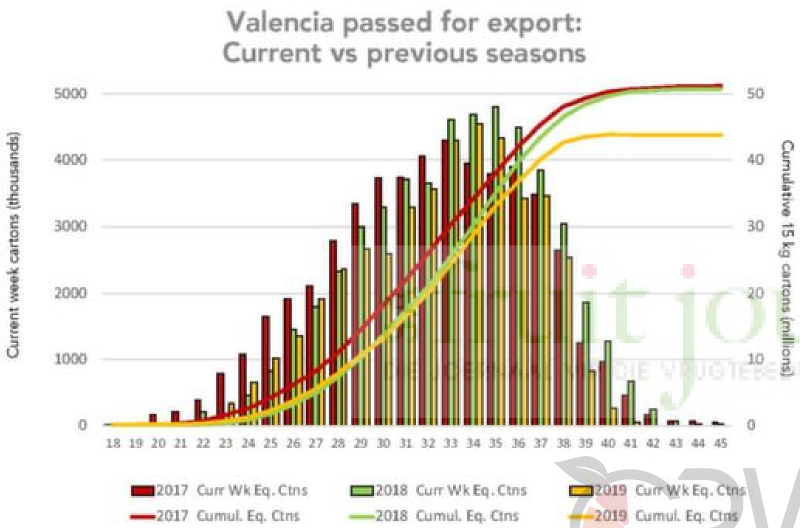
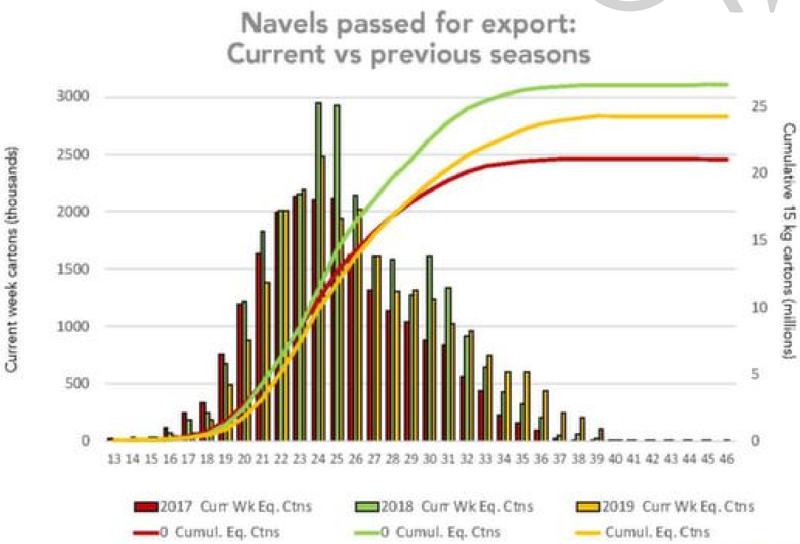
In March 2019 the Citrus Marketing Forum (CMF) agreed on a total export crop of 137 million 15 kg equivalent cartons from Southern Africa. With the season almost finished at week 39 and 126.8 million cartons packed, we're likely to finish at 129 million cartons, around 6% short of the March estimate.





Oranges

Navel oranges, down 9% and Valencia oranges, down 13% on last year had the biggest influence. Grapefruit was also down 14% on last year (alternate "on-off" years in terms of yield seem to be the main reason for the oranges and grapefruit being down, particularly in the northern regions). Senwes, in particular, showed a massive swing: down 27% on their record 8,9 million cartons of Navel crop last year and 35% on their similarly huge 8.2 million cartons of Valencia packing in 2018. Apart from the decrease in yields, growers from this region experienced lower pack-outs due to wind scarring, smaller fruit and poor colour. The poor colour development, particularly for late Valencias was a common theme for the northern regions. Limpopo River, Hoedspruit, Zimbabwe and Eswatini all look to finish significantly down on their Valencias compared to last year. The Eastern Cape regions, on the other hand packed very similar volumes to last year. The lower export volumes saw improved prices in the markets, particularly as the season progressed. Late recovery in prices in the Chinese and Russian markets relieved what could've culminated in a calamitous year for grapefruit growers and exporters.

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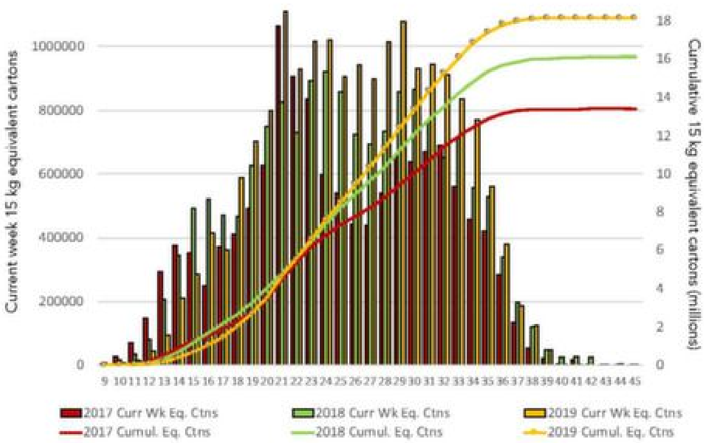
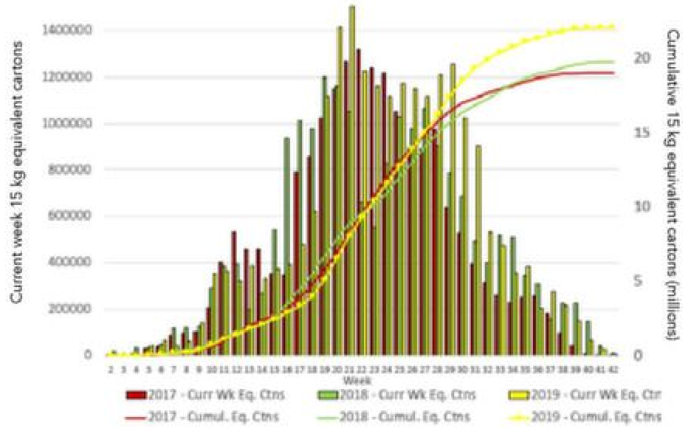
The 2019 Southern African citrus export season CONTINUED

Soft citrus passed for export: Current vs previous seasons

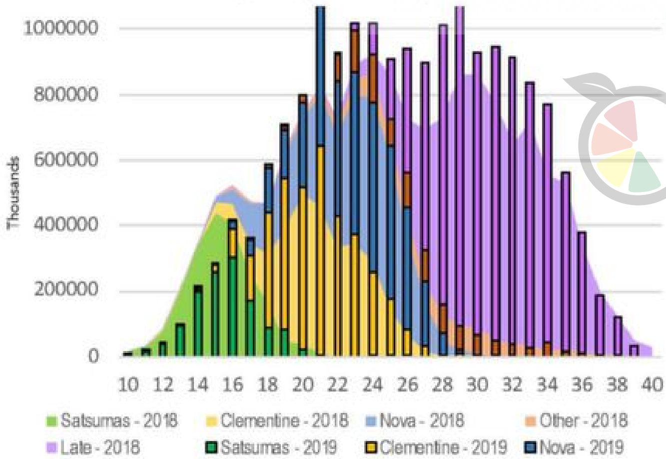


Lemons passed for export: Current vs previous seasons

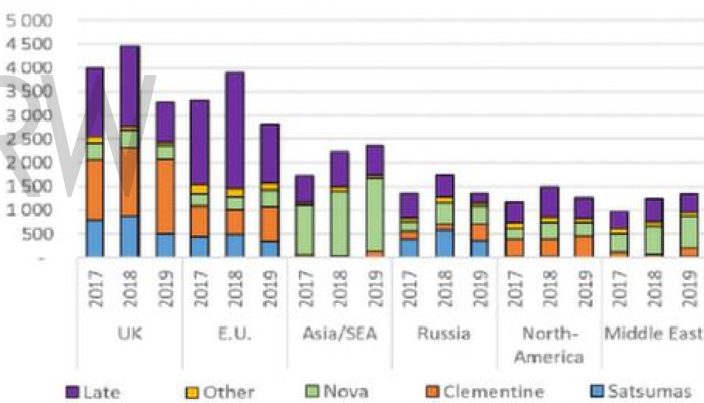


As is to be expected with the growing hectares of lemons and soft citrus in the country, these commodities are expected to finish 2 and 3% up on estimate; and 13 and 17% up on 2018, respectively.

Soft citrus: two years' packing comparison (15 kg cartons)

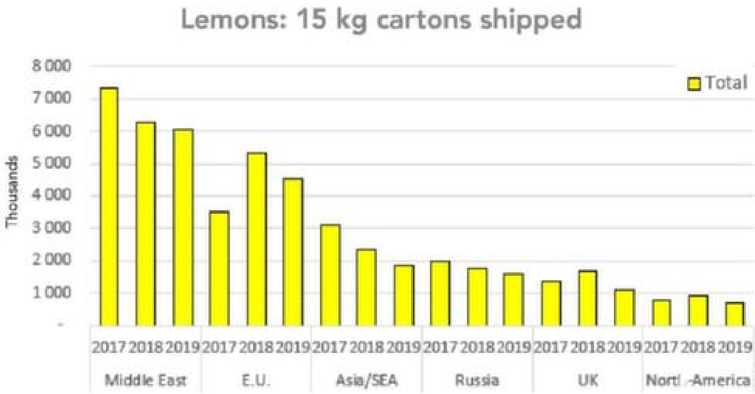


Soft citrus: 15 kg cartons shipped



Soft Citrus

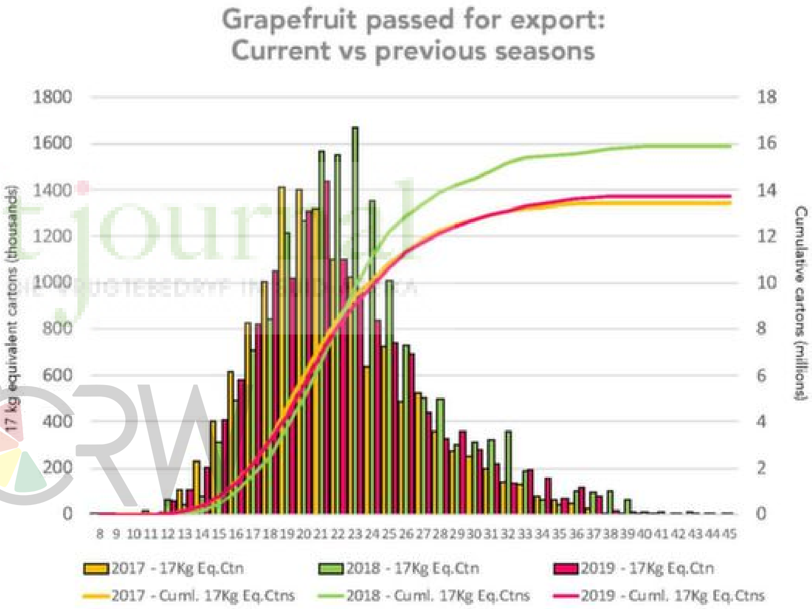
The soft citrus exports got off to a rocky start with satsumas performing poorly, although the clementine volumes compensated to some extent to give Europe and the UK a steady supply. The growth in Nova volume was directed mainly to non-European markets as can be seen in the chart above left.



Lemons

The 2019 final lemon export is projected to finish on 22.5 million cartons, against March's estimate of 22 million cartons and 13% up on last year's 21.9 million cartons. The Sunday's River Valley – which typically accounts for almost half the country's lemon exports – saw 17% growth. But stand-out growth regions for lemons were Boland, up 26% and Patensie, which is 54% up on last year.

Most markets imported a similar volume of lemons from South Africa this year compared to last year. However, the growth in exports was absorbed by South Africa's main lemon export market, the Middle East, which took 38% of the export crop and received 15% more lemons from South Africa than last year (see chart left).



Grapefruit

Together with the Zimbabwean and Swaziland contribution, this year's packed total was 14.2 million, about 6 % short of the initial March estimate of 15.1 million 17 kg cartons. Packing initially tracked ahead of last season's volumes. But Limpopo completed packing early and many growers in Letsitele, Hoedspruit and the Onderberg switched packing temporarily to Turkey Valencias, therefore some success was achieved in the attempt to stretch the season and spread the typical peak seen in historical grapefruit packing trends. With the lower export volume supplied by South Africa, most markets faired well with the exception of Russia and China, both of which recovered only later in the season.

As indicated, 2019 was characterised as being an "off" year in terms of production. Next year could see a significant increase in volumes, which will demand improved efficiencies in the logistical chain, especially when considering the constraint experienced at our ports this year.