

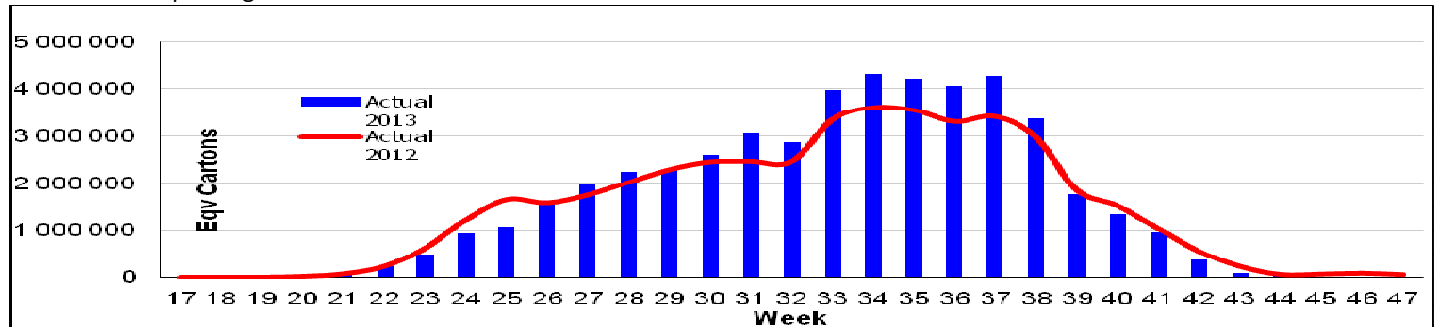
FROM THE DESK OF THE CEO (49/13)

Justin Chadwick (6 December 2013)

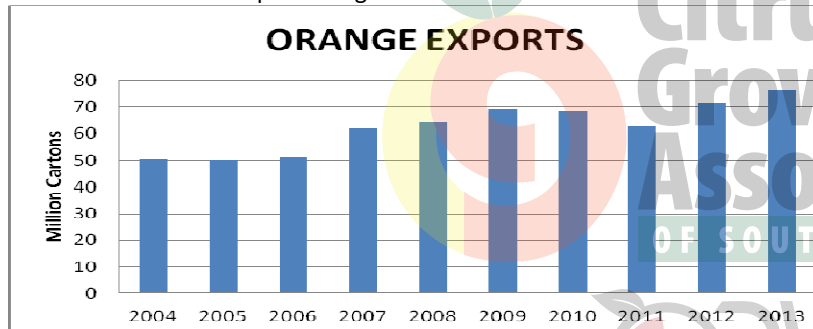
QUOTE OF THE WEEK "A morning without orange juice is like a day without sunshine" Anon

2013 REVIEW: VALENCIA

Valencia packed and passed for export reached the 50 million carton milestone in 2013. Although Letsitele remains the largest valencia region, there has been significant growth in the Senwes region (taking the Valencia Focus Group by surprise with the Senwes estimate 32% less than the actual volume packed). Sundays River shows it is not just a lemon producing region with 13% of valencia export volumes. Hoedspruit and Limpopo River both account for 10% each. The growth is self evident from this graph – with increased packing from week 31 to 38.

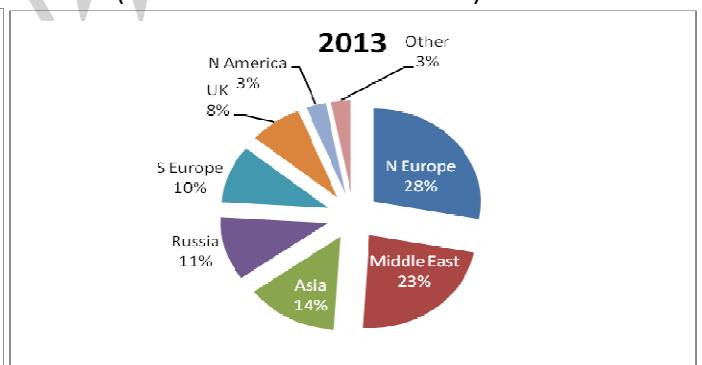
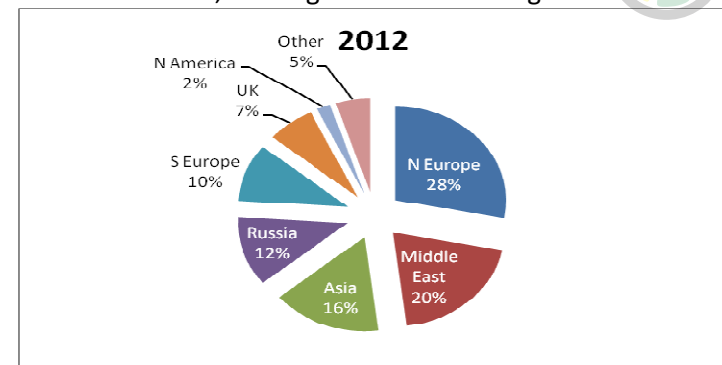


Since 2008 the orange estimate has been split between valencia and navel types. In those six years the Valencia Focus Group has achieved the target of being within 10% of the final packed figure in 4 of the six years – in 2013 the actual packed is 6% more than the estimate. The final packed figure was 50.8 m cartons while estimate was 47.8 m and 2012 was 47.3 m.



Total orange export volumes have moved from a flat 50 million cartons between 2004 to 2006, to fluctuating between 60 and 70 million between 2007 and 2011; and breaking through the 70 million carton mark in 2012 and 2013. [Note: This includes Valencia and Navel oranges]

Valencia export distribution is very similar for the last two years – EU countries still take the lions share of southern African valencia's, although there has been growth in the Middle East (from 9.4 m cartons to 11.1 m).



PHYTOSANITARY REGISTRATION LIST

DAFF have published the Draft Phytosanitary Registration list which is available from the DAFF website. It is critical that growers review the list to see if their details are correct especially for markets like China, Thailand and South Korea where orchard indications and varieties/cultivars need to be printed on the carton.

Please direct all changes to DAFF on the details provided below **BEFORE 13 DECEMBER 2013**. Below direct link can also be used:

Draft Citrus Database to All Special Markets 2013-2014 ([http://www.nda.agric.za/doaDev/sideMenu/plantHealth/docs/Draft Citrus Database to All Special Markets 2013-2014.xls](http://www.nda.agric.za/doaDev/sideMenu/plantHealth/docs/Draft%20Citrus%20Database%20to%20All%20Special%20Markets%202013-2014.xls))

Draft Citrus Pack House Database for 2013-2014 Export Season

[http://www.nda.agric.za/doaDev/sideMenu/plantHealth/docs/DRAFT Citrus Pack House Database for 2013-2014 Export Season.xls](http://www.nda.agric.za/doaDev/sideMenu/plantHealth/docs/DRAFT%20Citrus%20Pack%20House%20Database%20for%202013-2014%20Export%20Season.xls)

The list is on the CGA website. NB. All corrections should be sent to: PatrickMag@daff.gov.za AND Cc TshivhidzoS@daff.gov.za

Due date for all the corrections is 13 December 2013, No late request will be accepted after the due date.

SOUTHERN AFRICAN CITRUS GROWERS' OWNED COMPANIES CGA, XSIT, CRI, RIVER BIOSCIENCE, CGACC AND CITRUS ACADEMY ENSURE A COMPETITIVE AND SUSTAINABLE INDUSTRY