

# CGA Variety Update (2017\_Week 26)

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## Lemons:

The projected final export remains for now, at March's estimate of **17.6 million cartons**. Packing is 30% up on last year's at **14 million cartons**. Lemon shipments at **11.8 million cartons** are **23%** up on last year's **9.6 million cartons** at this stage. The latest report from Russia say the market is oversaturated with substandard Argentinean lemons which are just not moving even at USD 12.50 for 15 kg. Good quality SA lemons were available at USD 17.50.

## Soft citrus:

The projection remains at the original **13.5 million cartons**. Current packing volumes (end week 26) show soft citrus level with 2016's at **7.8 million cartons** packed to date. Late mandarin types are up 55% on last year's cumulative exports at the same time. To end week 26, soft citrus shipments at **7.0 million cartons** are **4%** up on last year's **6.7 million cartons**. SHAFPE shows a stable supply to UK and E.U. with Peru showing strongly in week 26.

## Oranges:

Orange projections for the season are down with Navels now 17% down on the original estimate; now at **21.8 million cartons** and Valencias now projected at **47.9 million cartons**. At end week 26, PPECB packing data shows navels down 20% (14.2 vs 17.8 million cartons) and valencias up 27% (7.2 vs 5.7 million cartons). Agrihub data shows shipping of oranges is 19% down at end week 26 (14.1 vs 17.4 million cartons) at end week 26. European sources report that sales have slowed due to high temperatures. Volumes from Spain are declining. Arrivals have continued to be lower than average and some batches of RSA Navels have exhibited quality issues. Significant volumes of Valenciate from Spain have continued to enter the market. All prices have remained firm. The end of Spanish Valenciate season is expected by the end of July. Prices on the French market for RSA navels were in the range of 1.00 and 1.05 Euros per kilogram last week.

## Grapefruit:

The Southern African projection remains at **13.1 million cartons (17kg)**; compared to the initial estimate of **13.8 million cartons**. PPECB packing data (11.6 million 17kg cartons) indicates volumes are up on last year's by 16% to end week 26. Agrihub shipping data shows volumes **4%** up on last year at end week 26. Market reports from Europe report demand muted due to the hot weather and competition from stone fruit. Arrivals from RSA, still exhibiting a wide proportion of large grades (32/35), have begun to reduce earlier than previous years. The peak of arrivals had taken place sooner than usual due to the early end of Floridian and Mediterranean seasons. The pressure of the arrivals should further decrease and importers will try to extend the RSA season, waiting for the beginning of the Mexican season (end of August). Hence, despite the accumulated stocks, prices have been stable at high levels. Prices on the French market were in the range of 16 to 19 Euros per 15 kg box last week.

