

CGA Variety Update (2017_Week 29)

John Edmonds (31 July 2017)



Citrus Growers Association (CGA)

Thursday 27 July was a busy day for the variety focus group members with the Navel, Valencia, Soft Citrus and Grapefruit Focus Groups all reviewing their current situation and updating their projections.

Soft citrus:

The Soft Citrus Focus Group meeting discussed the normal phenomenon of sales slowing and prices dropping during holidays in Europe. The concern is that the current period particularly warm weather which worsens the problem is also seeing increased shipments from Peru and RSA which will put even further pressure on prices. Late mandarin types which usually arrive in August, are making an early appearance in the markets which puts great pressure on the remaining stock of Clementines and other earlier maturing varieties.

The RSA projection of soft citrus exports is now **13.6** million cartons vs the original estimate of 13.2 million cartons. Current packing volumes (end week 29) show soft citrus up 1% on 2016's at **9.4** million cartons packed to date. Late mandarin types are up 18% on last year's cumulative exports at the same time. To end week 29, soft citrus shipments at **8.5** million cartons are up on last year's **7.9** million cartons.

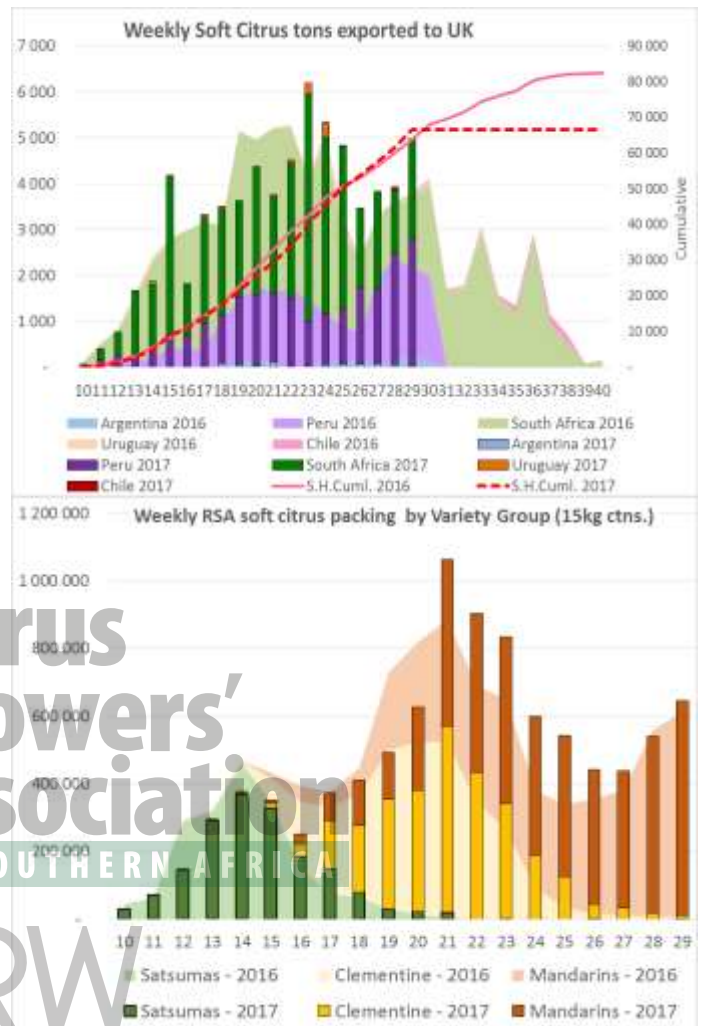
Lemons:

The Sunday's River Valley have adjusted their projection down by a million cartons. With adjustments made to reflect the totals for the regions who have finished packing, the RSA projected final export is now **17.6** million cartons, vs March's estimate of **17.5** million cartons. Current packing is **28%** up on last year's 12.8 million cartons; now at **16.4** million cartons. Lemon shipments at **14.8** million cartons are up on last year's 11.8 million cartons at this stage. In Russia lemons from Argentine and South Africa ranged from \$16.67 to \$21.67 per 15 kg carton in week 30.

Grapefruit:

The Southern African projection is now at 13.6 million cartons (17kg); compared to the initial estimate of 13.8 million cartons. Current PPECB packing data at 12.7 million 17kg cartons, indicates volumes are up on last year's by 14% to end week 28. Agrihub shipping volumes at 10.1 million 17kg cartons, are 6% up on last year at end week 29.

Prices in Europe have remain stable ranging from 17 to 19 Euros per 15 kg box in week 30; whilst in Russia, grapefruit prices were in the range of \$11.25 to \$13.75 for a 15 kg carton.



Oranges:

A review of the projections last week sees Navels down at **20.0** million cartons and Valencias projected at **48.5** million cartons. At end week 29, PPECB packing data shows navels down (-19% at 17.8 vs 22.1 million cartons estimate) and valencias up 22% (16.3 vs 13.4 million cartons). Agrihub data shows shipping of navels now 17% down on last year at end week 29 (16.0 vs 19.3 million cartons). Valencia shipping is 6% up (8.8 vs 8.3 million cartons). In Europe some Spanish and, Moroccan valencialates are still available on the market but prices are stable in week 30. In Russia the price for oranges in week 30 were between \$14.17 and \$15.00 per 15 kg carton.