

CGA Variety Update (2017_Week 25)

John Edmonds (30 June 2017)



Citrus Growers Association (CGA)

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 **13** million cartons. Lemon shipments at 10.8 million cartons are 20% up on last year's 9.0 million cartons at this stage. SHAFTE data shows Russia having imported 25 000 tons more lemons from South Africa and Argentina by the end of week 25. Reports 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 **13.2** million cartons. Current packing volumes (end week 25) show soft citrus level with 2016's at 7.3 million cartons packed to date. Clems are 12% down year on year at **2.6** million cartons whilst other mandarin types are up 20% to 2.5 million cartons. To end week 25, soft citrus shipments at 6.5 million cartons are 2% up on last year's 6.4 million cartons. Data from other Southern Hemisphere exporters shows a stable supply to UK and E.U. In Russia the soft citrus market was still in good shape. South African satsumas average \$15 for 10 kg carton; clementines \$15.84; novas \$17.50.

Oranges:

Orange projections for the season are down with Navels 16% down on the original estimate; now at 22 million cartons and Valencias now projected at 47.9 million cartons. Sunday's River Valley dropped their projection by 1 million cartons at this week's Valencia Focus Group meeting citing tree burn and fruit drop after a severe wind storm of 2 weeks ago. Growers in the northern parts of the country report excellent quality with their valencias this year. At end week 25, PPECB packing data shows navels down 22% (12.5 vs 16.0 million cartons) and valencias up 37% (5.2 vs 3.8 million cartons). Agrihub data shows shipping of oranges is 24% down at end week 25 (10.9 vs 14.3 million cartons) at end week 25.

Grapefruit:

The Southern African projection is currently at 13.1 million cartons (17kg); compared to the initial estimate of 13.8 million cartons. PPECB packing data (11.0 million 17kg cartons) indicates volumes are up on last year's by 16% to end week 25. Grapefruit growers seem upbeat about the season's progress as it nears its end. Agrihub shipping data shows volumes 10% up on last year at end week 25. Market reports from Europe indicate that, despite a slight decrease of prices, (trading between 17 and 19 Euro per 15 kg box) the grapefruit market remains well-oriented. Sales have slowed down due to the heat wave across Europe and with the increased arrivals. Prices have tended down, but remain about 13% above average. Stocks have been built in order to anticipate the reduction of deliveries and maintain the sales rhythm.

