Durban Port Friday Report

An assessment of the northern regions citrus production volume, Durban export volume & synopsis of Durban port operations

Week 29

Data Supplied by PPECB

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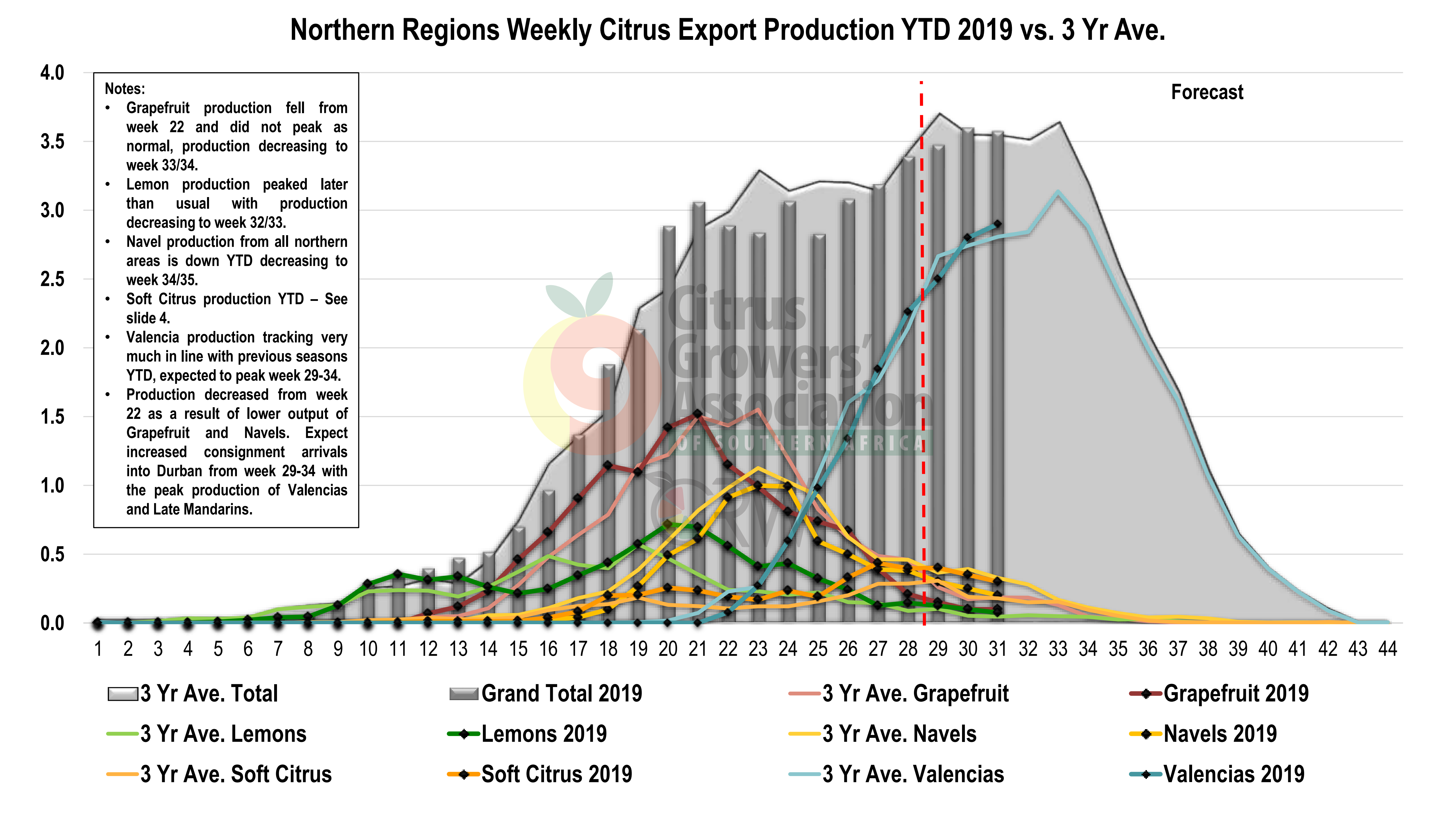
Citrus Growers' Association
OF SOUTHERN AFRICA


Northern Regions Weekly Citrus Export Production YTD 2019 vs. 3 Yr Ave.
Notes:
• Grapefruit production fell from week 22 and did not peak as normal, production decreasing to week 33/34.
• Lemon production peaked later than usual with production decreasing to week 32/33.
• Navel production from all northern areas is down YTD decreasing to week 34/35.
• Soft Citrus production YTD – See slide 4.
• Valencia production tracking very much in line with previous seasons YTD, expected to peak week 29-34.
• Production decreased from week 22 as a result of lower output of Grapefruit and Navels. Expect increased consignment arrivals into Durban from week 29-34 with the peak production of Valencias and Late Mandarins.
Forecast
4.0
3.5
3.0
2.5
2.0
1.5
1.0
0.5
0.0
1 2 3 4 5 6 7 8 9 10 11 12 13 14 15 16 17 18 19 20 21 22 23 24 25 26 27 28 29 30 31 32 33 34 35 36 37 38 39 40 41 42 43 44
3 Yr Ave. Total
Grand Total 2019
3 Yr Ave. Grapefruit
Grapefruit 2019
3 Yr Ave. Lemons
Lemons 2019
3 Yr Ave. Navels
Navels 2019
3 Yr Ave. Soft Citrus
Soft Citrus 2019
3 Yr Ave. Valencias
Valencias 2019
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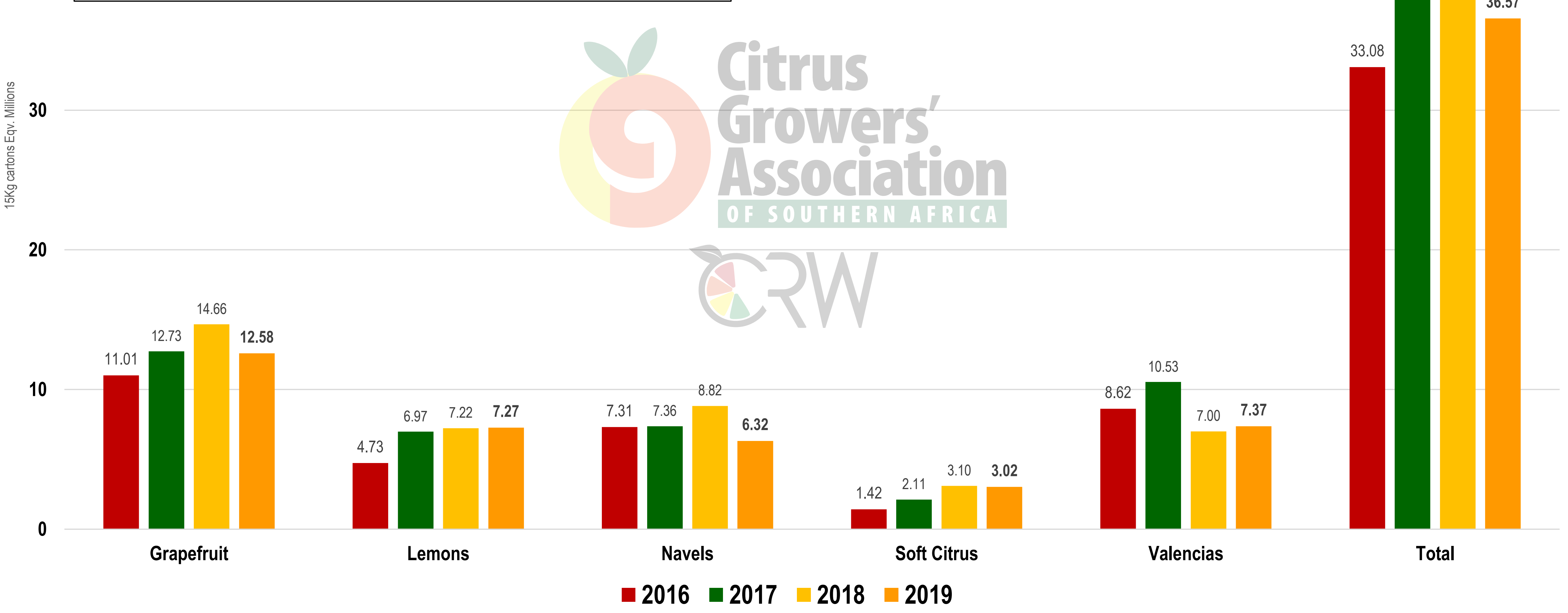
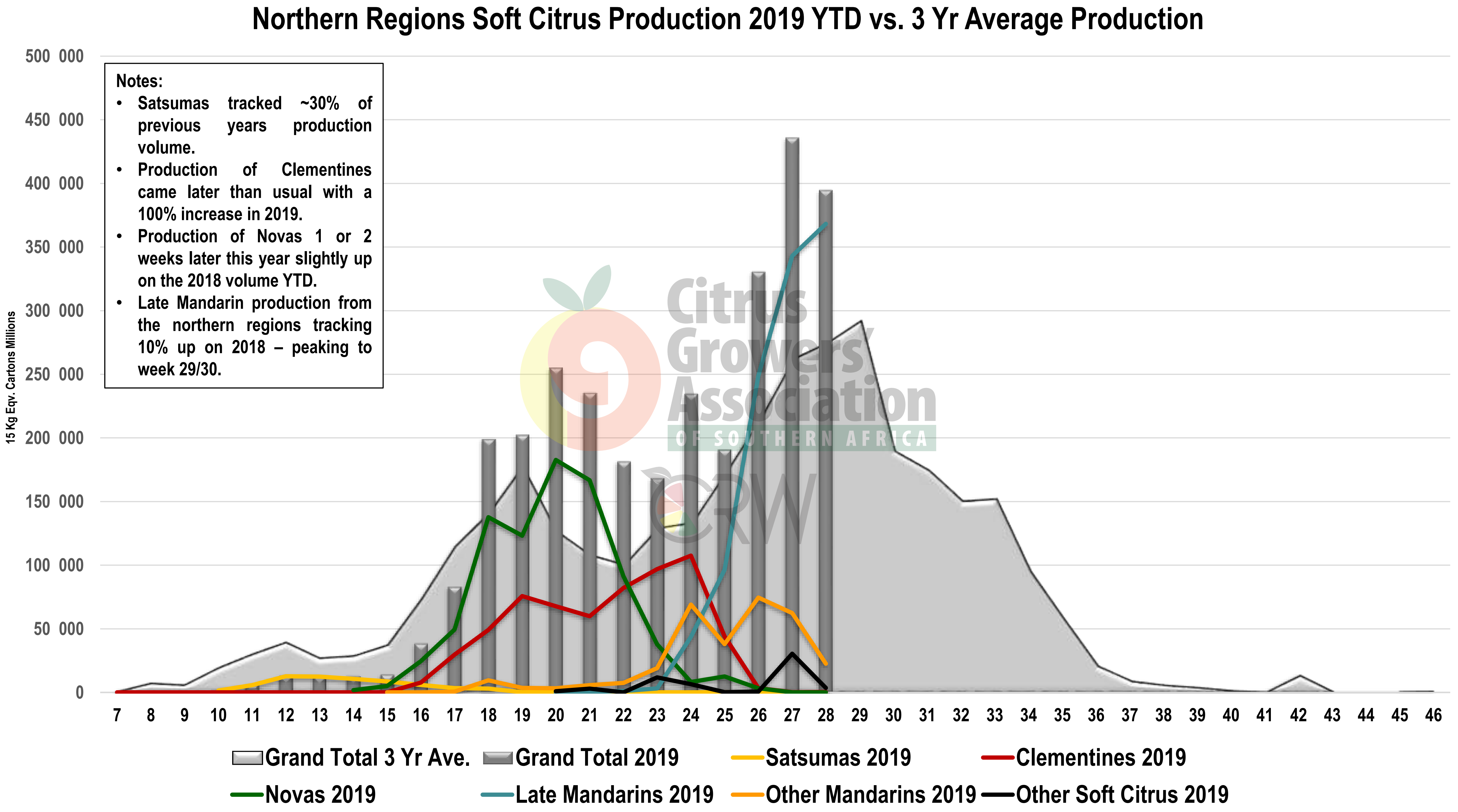
Northern Regions Citrus Export Production Volume YTD

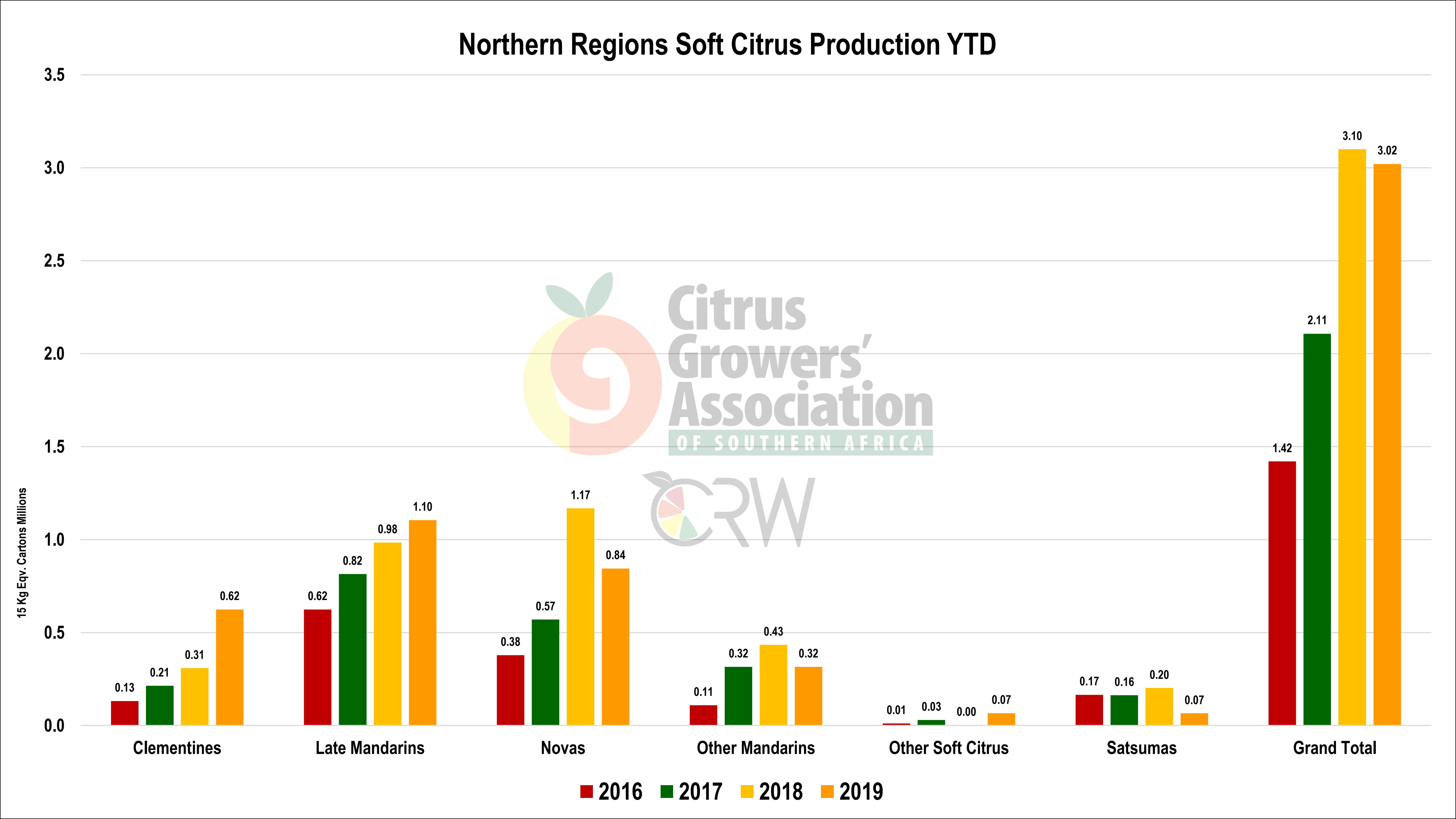
Grapefruit	Lemons	Navels	Soft Citrus	Valencias	Total Estimate
13.60m 16.80m	8.30m 7.80m	7.40m 11.20m	5.80m 4.80m	39.00m 42.80m	74.1.00m 2019 83.40m 2018 Act.

Notes:
- Northern Regions 2019 production estimate decreased further to 74.1million. Almost 10 million cartons below 2018.





Northern Regions Soft Citrus Production 2019 YTD vs. 3 Yr Average Production
15 Kg Eqv. Cartons Millions
500 000
450 000
400 000
350 000
300 000
250 000
200 000
150 000
100 000
50 000
0
7 8 9 10 11 12 13 14 15 16 17 18 19 20 21 22 23 24 25 26 27 28 29 30 31 32 33 34 35 36 37 38 39 40 41 42 43 44 45 46
Notes:
• Satsumas tracked ~30% of previous years production volume.
• Production of Clementines came later than usual with a 100% increase in 2019.
• Production of Novas 1 or 2 weeks later this year slightly up on the 2018 volume YTD.
• Late Mandarin production from the northern regions tracking 10% up on 2018 – peaking to week 29/30.
Grand Total 3 Yr Ave.
Grand Total 2019
Satsumas 2019
Clementines 2019
Novas 2019
Late Mandarins 2019
Other Mandarins 2019
Other Soft Citrus 2019


Northern Regions Soft Citrus Production YTD
15 Kg Eqv. Cartons Millions
3.5
3.0
2.5
2.0
1.5
1.0
0.5
0.0
0.13
0.21
0.31
0.62
0.62
0.82
0.98
1.10
0.38
0.57
1.17
0.84
0.11
0.32
0.43
0.32
0.01
0.03
0.00
0.07
0.17
0.16
0.20
0.07
1.42
2.11
3.10
3.02
Clementines
Late Mandarins
Novas
Other Mandarins
Other Soft Citrus
Satsumas
Grand Total
2016
2017
2018
2019
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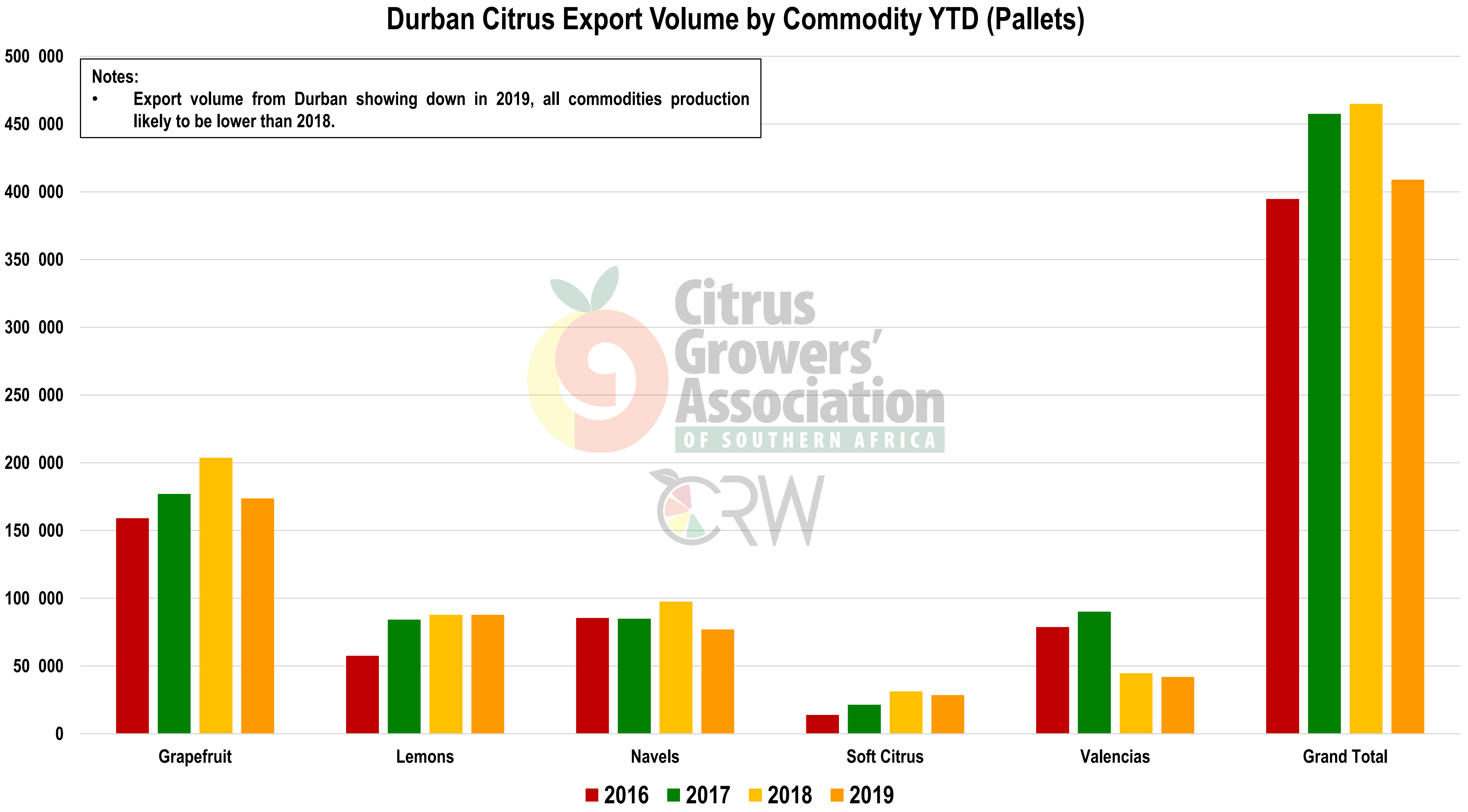
Durban Citrus Export Volume by Commodity YTD (Pallets)
Notes:
• Export volume from Durban showing down in 2019, all commodities production likely to be lower than 2018.
500 000
450 000
400 000
350 000
300 000
250 000
200 000
150 000
100 000
50 000
0
Grapefruit
Lemons
Navels
Soft Citrus
Valencias
Grand Total
2016
2017
2018
2019
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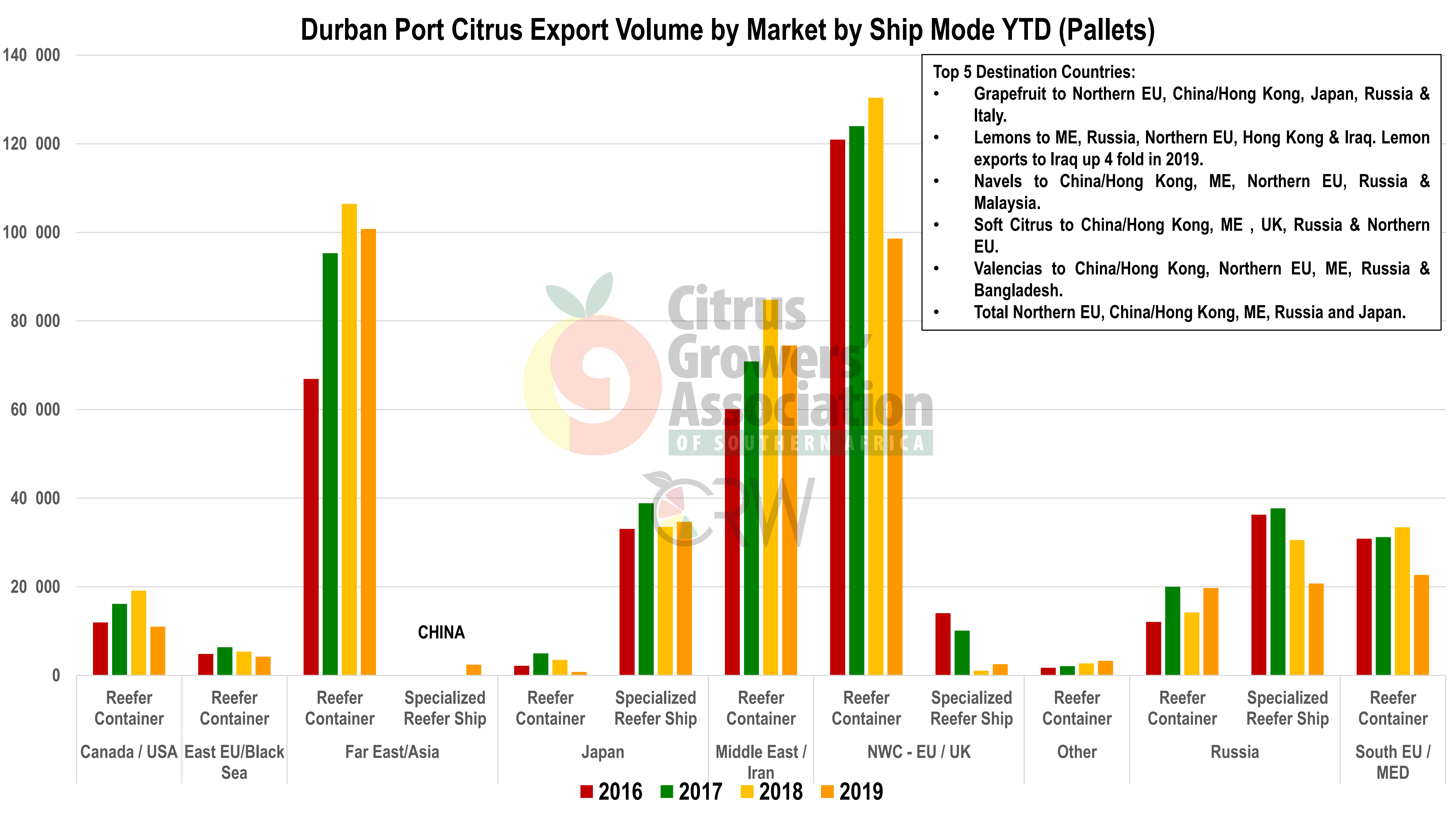

Durban Port Citrus Export Volume by Market by Ship Mode YTD (Pallets)
Top 5 Destination Countries:
• Grapefruit to Northern EU, China/Hong Kong, Japan, Russia & Italy.
• Lemons to ME, Russia, Northern EU, Hong Kong & Iraq. Lemon exports to Iraq up 4 fold in 2019.
• Navels to China/Hong Kong, ME, Northern EU, Russia & Malaysia.
• Soft Citrus to China/Hong Kong, ME , UK, Russia & Northern EU.
• Valencias to China/Hong Kong, Northern EU, ME, Russia & Bangladesh.
• Total Northern EU, China/Hong Kong, ME, Russia and Japan.
140 000
120 000
100 000
80 000
60 000
40 000
20 000
0
CHINA
Reefer Container
Specialized Reefer Ship
Canada / USA
East EU/Black Sea
Far East/Asia
Japan
Middle East / Iran
NWC - EU / UK
Other
Russia
South EU / MED
2016
2017
2018
2019
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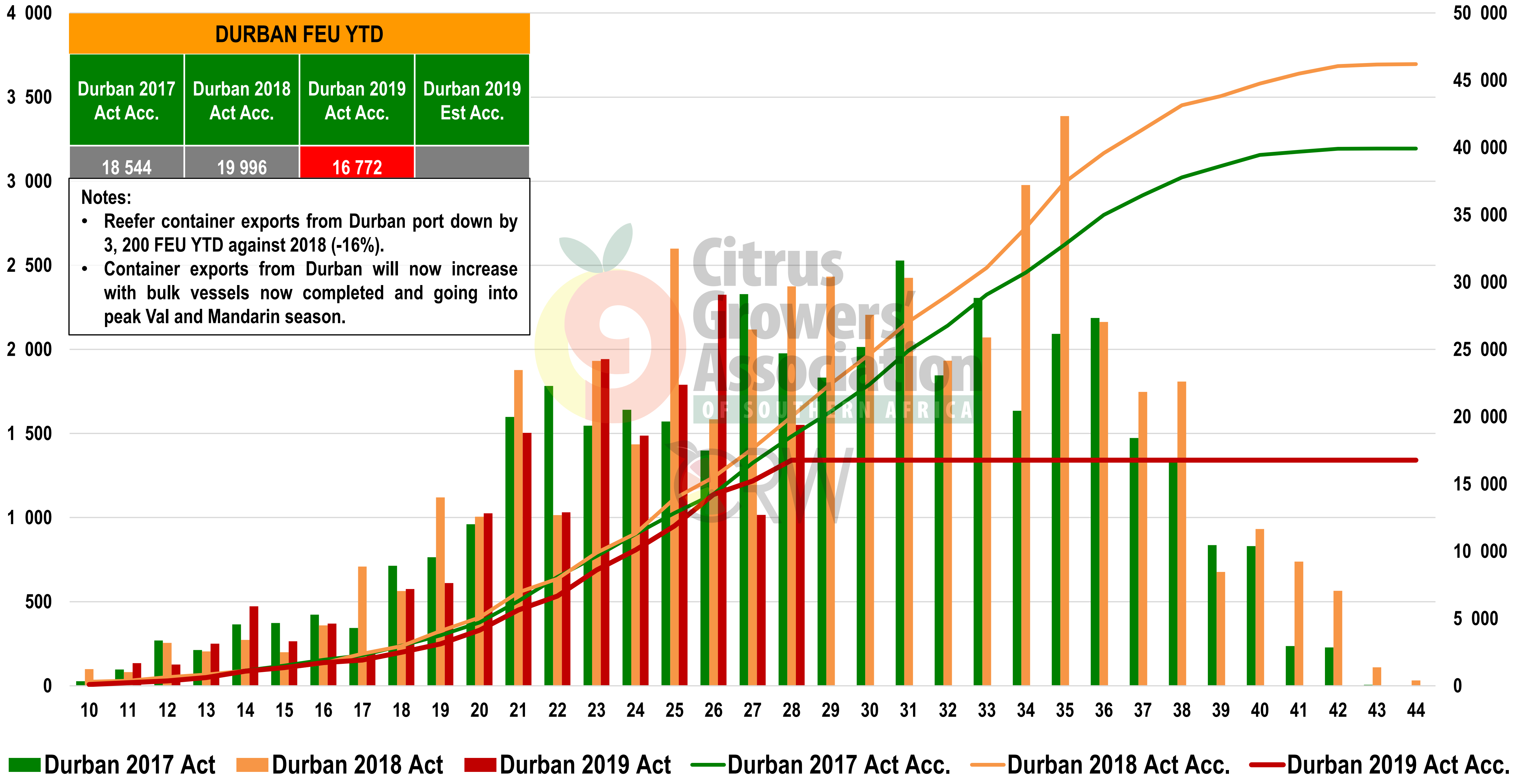
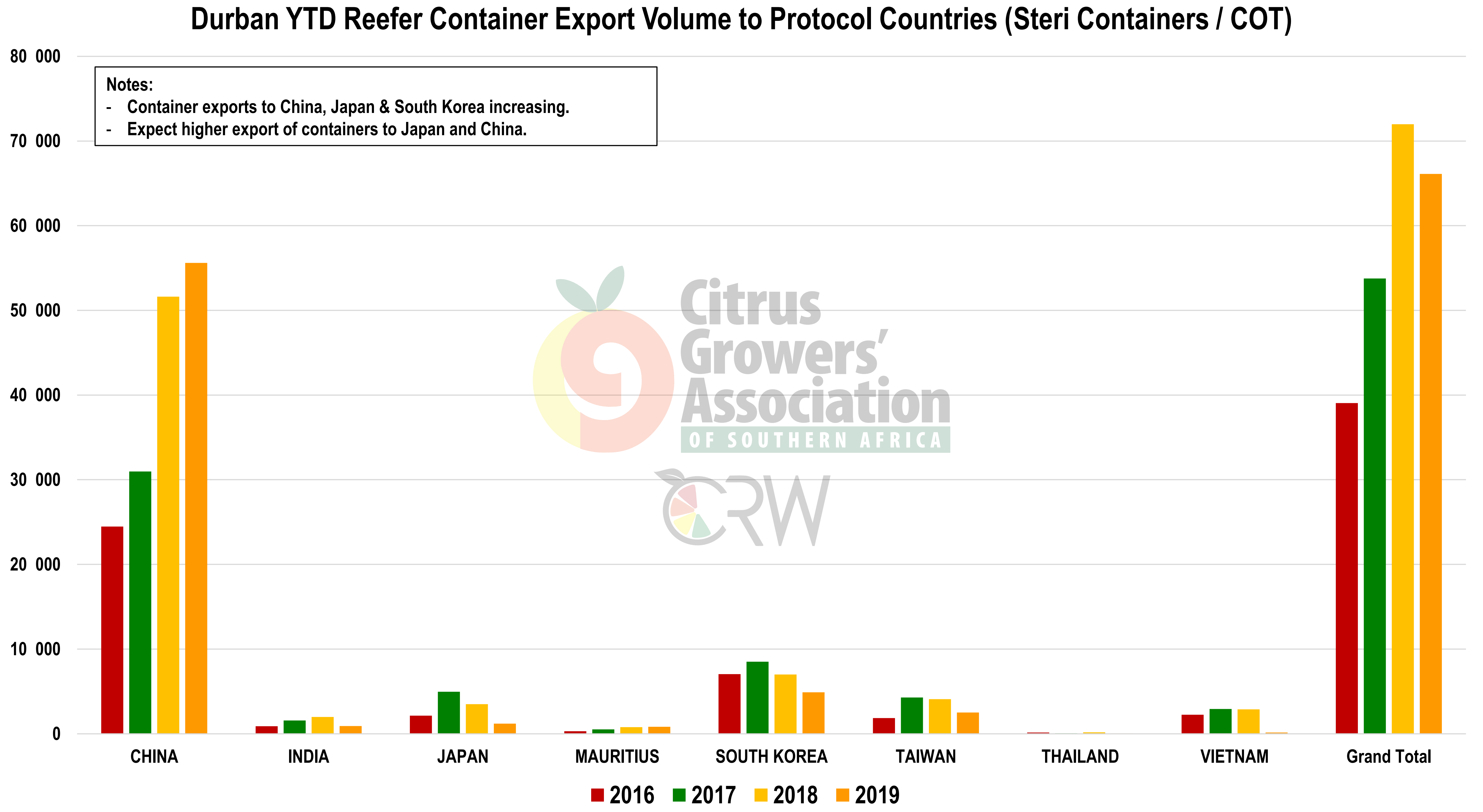
Citrus Reefer Volume ex DCT/MW/FPT/DRT (FEU)



DURBAN FEU YTD			
Durban 2017 Act Acc.	Durban 2018 Act Acc.	Durban 2019 Act Acc.	Durban 2019 Est Acc.
18 544	19 996	16 772	

Notes:

- Reefer container exports from Durban port down by 3, 200 FEU YTD against 2018 (-16%).
- Container exports from Durban will now increase with bulk vessels now completed and going into peak Val and Mandarin season.


Durban YTD Reefer Container Export Volume to Protocol Countries (Steri Containers / COT)
80 000
70 000
60 000
50 000
40 000
30 000
20 000
10 000
0
Notes:
- Container exports to China, Japan & South Korea increasing.
- Expect higher export of containers to Japan and China.
CHINA
INDIA
JAPAN
MAURITIUS
SOUTH KOREA
TAIWAN
THAILAND
VIETNAM
Grand Total
2016
2017
2018
2019
Citrus Growers' Association
OF SOUTHERN AFRICA
CRW

SUMMARY:

- Farm truck intakes (Fri) – production from the northern region is now peaking with Vals and Late Mandarins, truck arrivals into Durban Cold Stores noticeably on the increase. Assessment am today (Fri 19/07) shows low truck staging at all cold stores at this time. Suspect this could be a result of the truck driver protest action currently at play. One could assume truck arrivals into Durban would increase from week 30.
- Cold storage capacity – cold storage capacity increasing at this time with some cold stores at >80% capacity.
- Durban Container Terminal – truck TTT at DCT Pier 2 last week 28 ave = 253min with average 115 moves per hour (Relatively poor productivity). 3 container vessels at anchorage outside Durban, all 3 vessels at anchorage >48 hours. NCT vessel backlog has been resolved (productivity >20 GCH recorded) although terminal wind bound until am 20/07. E.R Santa Barbara (SAFARI) should still make the DCT berthing slot 24/07.
- Japan SEP week 28 – 2% rejections FCM/CBS on GF, nil on Lemons and Nil on Navels. Balance of exports will be in containers, kindly note the inspection cut off dates that have been circulated.
- Korea SEP week 28 – nil rejections. (See – Spotlight on South Korea week 28).

GENERAL:

- Durban cold stores holding 11,403 pallets of stock for China as of 6am 19/07 = 570 containers worth and 22% of Durban cold store capacity.
- Wind forecast shows Beaufort 8-10 level SW wind from 6pm 19/07 to 6am 20/07. DCT operations likely to be impacted.