

LESSONS NEEDED: Citrus export development



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Citrus fruit is one of the most important earners of foreign currency within the agricultural sector. South Africa exports citrus to a range of lucrative markets around the world.

This article provides some insights into the patterns and trends in export markets for South African citrus fruit.

Table 1. A composition of South Africa's citrus exports.

	Share in 2002	Share in 2013	Change
Oranges	62%	61%	- 1%
Mandarins	9%	13%	+ 4%
Grapefruit	17%	13%	- 4%
Lemons	10%	13%	+ 4%
Other citrus	2%	0.2%	- 1.8%

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THE COMPOSITION OF citrus fruit exported since 2002 did not change and is dominated by oranges. This is further illustrated in **Table 1**. It shows that mandarins and lemons increased their respective shares in citrus exports at the expense of grapefruit. In terms of value, the total exports of citrus fruits increased by 360% between 2002 and 2013. It comes down to the fact that in terms of the type of citrus products exported, not much has changed since 2002.

What happened in terms of the export destinations of citrus? **Figure 2** makes a comparison of the number of export destinations in 2002 and 2013 for each of the different citrus fruits (sizable: A threshold of an export value of > 10 000 USD was used). The figure clearly shows a significant diversification of export markets since 2002. Especially oranges and grapefruit experienced a significant increase in export destinations. This pattern of increased market diversification makes exports of citrus less vulnerable to external shocks.

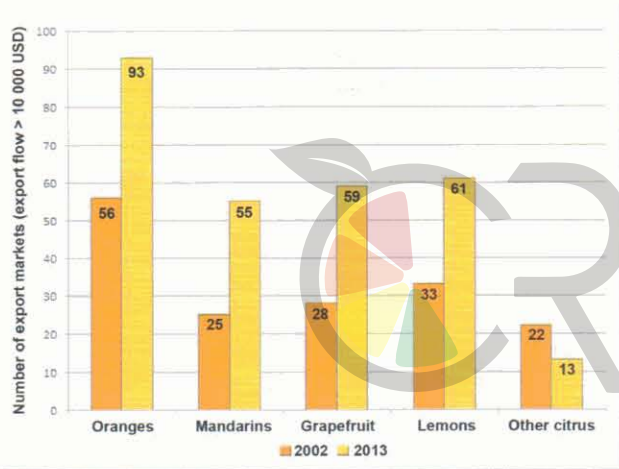


Figure 2. The number of export markets for South African citrus fruit: 2002 vs. 2013.

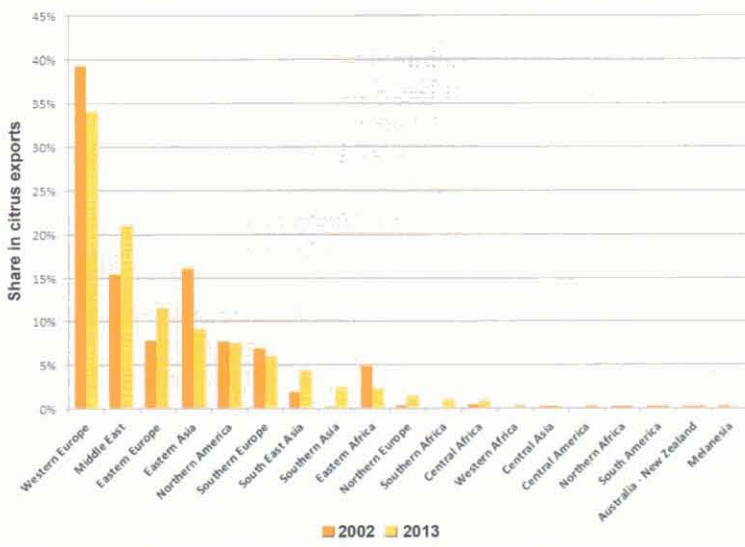


Figure 3. Regional distribution of export markets for South African citrus fruit: 2002 vs. 2013.

Which overseas markets are favoured?

Figure 3 shows the shifts in the geographical distribution of South Africa's citrus exports since 2002. It is evident from the figure that most citrus fruit is being exported to markets in Western Europe (34% in 2013) as was the case in 2002. The share in total exports of this region, as well as the shares of Eastern Asia and Eastern Africa, did experience a decrease in the period from 2002 to 2013. This was at the expense of an increase in the market shares of the Middle-East, Eastern Europe and South-East Asia. Exports of citrus to the Far-East, Oceania, Latin America and the rest of Africa are relatively marginal.

Market size should be valued

The question being asked is whether South Africa exports its citrus to the best growth markets. **Figure 4** shows the growth orientation of South Africa's citrus exports in terms of its export markets. The horizontal axis indicates the growth in total imports of citrus fruit of each market for the period from 2009 to 2013. The vertical axis depicts the

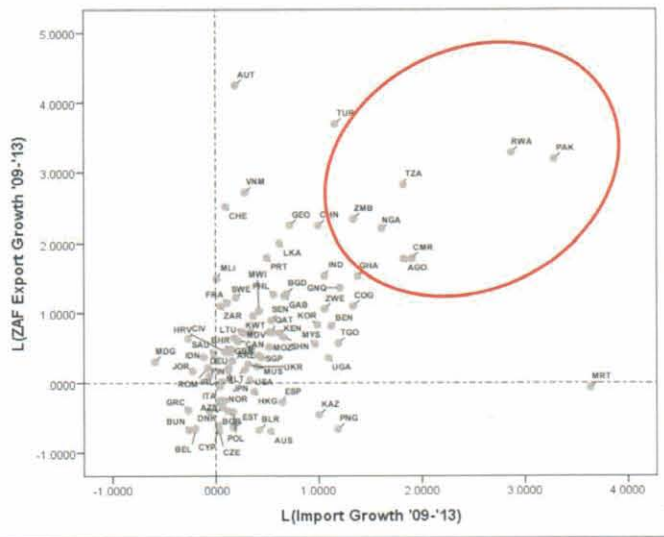


Figure 4. Growth orientation of South Africa's citrus fruit exports 2009 to 2013. SOURCE: Author's own calculations based on data from UN Comtrade (2015)

growth in South Africa's exports of citrus to those markets for that same period. Ideally, for an adequate growth orientation of citrus exports, you want to see high export growth in the fastest growing markets.



It is evident from the figure (see red circle) that South Africa showed some good export performance in the global growth markets for citrus such as Rwanda (RWA), Pakistan (PAK), Turkey (TUR), Tanzania (TZA), Zambia (ZMB), Nigeria (NGA), Cameroon (CMR), Angola (AGO), China (CHN), India (IND) and Ghana (GHA). Note that most growth markets for citrus are located in Africa.

These growth markets, however, do not necessarily pose significant potential in terms of market size. Further analysis show that South African citrus is found on the retail shelves in 35 of the 40 largest import markets for citrus fruit. Of these 50 sizable citrus markets, it currently does not export to Iraq, Thailand, Afghanistan, the Slovak Republic and Hungary. Hence, export potential to these markets should be further explored.

It is evident from the analyses (Figure 4) that the South African citrus sector is a best case study for fruit exports which can provide valuable lessons for export development in other agricultural sub-sectors. <<

'n Biologiese benadering tot swartvlekbeheer

Swartvlek op sitrus is 'n ernstige probleem, veral in kusgebiede.

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DIE EPIDEMIOLOGIE VAN SWARTVLEK wys dat die swam op dooie materiaal oorleef, veral op sitrusblare op die boordvloer. Hier kan die swam piknidiospore of askusspore vorm. Dit is egter veral die geslagtelike askusspore wat deur 'n kragtige aksie in die lugstrome vrygestel word en die hoofbron van besmetting op sitrus in Suid-Afrika vanaf einde September tot einde Januarie is.

Een van die interessante eienskappe van swartvlek is dat die veroorsakende organisme, *Guignardia citricarpa*, baie jare lank in 'n spesifieke sitrusgebied teenwoordig kan wees voordat simptome op sitrus voorkom. Voor dit epidemiese afmetings bereik kan dit 5 tot 30 jaar neem, vanaf die verskyning van die eerste simptome op sitrus in 'n bepaalde gebied. Wanneer die siekte epidemiese afmetings aangeneem het, is dit 'n ernstige bedreiging vir enige sitrusproducent, tensy doeltreffende beheermaatreëls toegepas word.

Om die siekte biologies te beheer sal die beste benadering wees om die swartvlekwam op die vloer van die boord te beheer voordat askusspore in die lug vrygestel kan word.

Baie navorsing is die afgelope twee dekades op die *Trichoderma*-swam gedoen, wat 'n bekende parasiet op ander swamme is, veral wortelpatogene. *Trichoderma* word vandag ook redelik algemeen in sommige boerderye as swamdoder vir bogrondse patogene soos botrytis en selfs houtverrotting-

Die twee foto's hieronder (1 en 2) toon hoe die *Trichoderma*-swam die swartvlekwam (*Guignardia citricarpa*) parasiteer. Die groen/gyserige/wit swam is *Trichoderma*, terwyl swartvlekwam swart vertoon.



Trichoderma (vanaf die regterkant van foto) het halfpad oor die swartvlekwam gegroei.



Trichoderma het amper heeltemal oor die swartvlekwam gegroei. Net 'n V-vormige stukkie van die swartvlekwam is nog sigbaar.

swamme gebruik. Hierdie swam het verskeie meganismes ontwikkel om ander swamme aan te val. Verskeie rasse van *Trichoderma* kan vandag bykans enige patogeniese swam beheer en help die plant ook om voedingstowwe op te neem.

Metode van toediening

Om 'n patoog biologies te beheer is dit belangrik dat *Trichoderma* op die regte tyd en plek in oorvloed teenwoordig moet wees. *Trichoderma* is 'n baie aggressiewe koloniseerder van organiese materiaal en sal ook die swartvlekwam, wat op die blare oorleef, parasiteer. Vir die doeltreffende beheer van swartvlek op sitrus is dit gevolglik belangrik om *Trichoderma* gedurende Augustus en September op die vloer van die boord toe te dien en die boord se vloer vir 5 tot 7 dae klam te hou so-

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