

Satsuma production in SA



JOHN EDMONDS

Earlier this year I wrote an article highlighting the pressure bearing on navels and satsumas from various forces. In the case of satsumas, Northern and Southern Hemisphere producers have to navigate increasing pressure from the counter seasonal export offering of the other hemispheres' high quality late mandarin types.

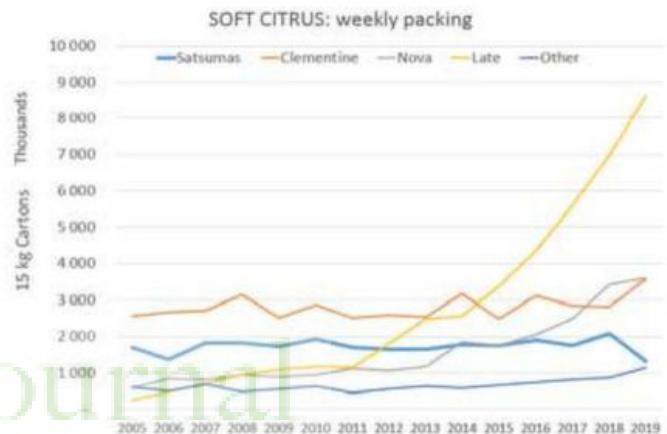
During the 2019 season, the Soft Citrus Focus Group did an investigation on satsumas, clementines and late mandarin types to identify threats and opportunities to allow better decision-making opportunities. To this end Dr Graham Barry, in his role as advisor to the variety focus groups, prepared a presentation on the particular characteristics of the satsuma season. Some of his research is summarised in this article. Similar investigations will follow on clementines and late mandarin types.

South African satsuma exports are relatively stagnant and can be seen in the graph right.

The Citrus Growers' Association (CGA) of Southern Africa growing regions of Boland and Patensie account for over 50% of SA's total satsuma volumes. The Boland and Cape Midlands have the highest production per hectare. The Western and Eastern Cape areas lying within latitude 32°S to 34°S, account for 84% of area planted and 89% of volumes exported. (See chart right).

Indicative of the relatively stagnant growth of satsuma production is that 256 ha (23%) of the satsuma orchards is older than 25 years of age; 556 ha (49%) is 16 years and older; and 581 ha (51%) were planted between 2004 and 2018.

The satsuma harvest starts in mid- to late-February in the "earliest" regions in Burgersfort and Zimbabwean Highveld and ends mid- to late-May in the Eastern Cape Midlands. Thus, southern Africa has a 13-week supply window with a seven-week peak, as illustrated in the chart below:

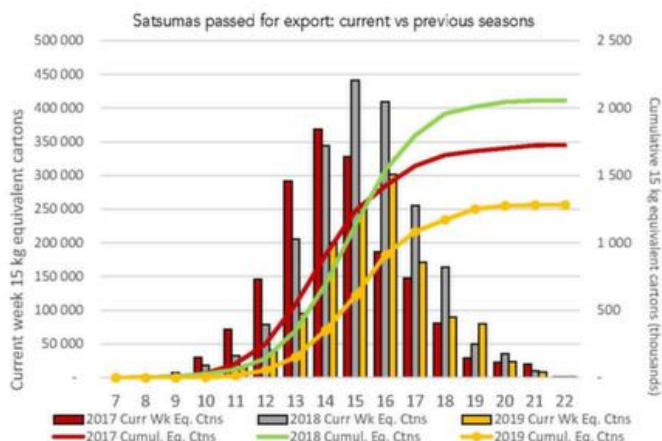


PRODUCTION REGION	SUB-REGION	AREA PLANTED (ha; 2018)	EXPORT VOLUME (Ave. 2004-2018) (15 kg cartons)
Western Cape	Boland	295 (25.9%)	590 025 (32.3%)
	Citrusdal	174 (15.3%)	211 511 (11.6%)
Eastern Cape	Patensie	238 (20.9%)	401 898 (22.0%)
	East Cape Midlands	179 (15.7%)	320 093 (17.5%)
	Sunday's River Valley	68 (6.0%)	107 697 (5.9%)
Mpumalanga	Nelspruit	128 (11.2%)	165 868 (9.1%)
	(Burgersfort Ohrigstad)		21 260 (1.2%)
Limpopo	Marble Hall	45 (4%)	21 260 (1.2%)
Northern Cape	Vaalharts	6 (0.5%)	
Zimbabwe	Mvurwi	6 (0.5%)	
Total		1 138 ha	1 827 115 (100%)

PRODUCTION REGION	FEBRUARY				MARCH					APRIL					MAY			
	5	6	7	8	9	10	11	12	13	14	15	16	17	18	19	20	21	22
OHRIGSTAD BURGERSFORT																		
ZIMBABWE HIGHVELD																		
GAMTOOS																		
SUNDAYS RIVER																		
SWELLENDAM BREEDERIVIER																		
SWARTLAND BOLAND																		
EAST CAPE MIDLANDS																		



The satsuma supply period typically peaks from weeks 12 to 18, i.e. late-March to end-April, with over 90% of volumes shipped (300 000 to 450 000 cartons per week). The early period from week eight to week 11, i.e. late-February to late-March accounts for only 3%, whilst the later period from weeks 19 to 22 (i.e. May) accounts for the remaining 5%.



The early-maturing (mid-February to early-March) satsumas from SA compete head-on with Spanish nadorcott and other late-maturing mandarins from the Mediterranean basin. The late-maturing (mid-June to late-July) – either late-maturing cultivars such as aoshima, bela late, satsuma hybrids or late region – will compete with clementines and other mandarins.

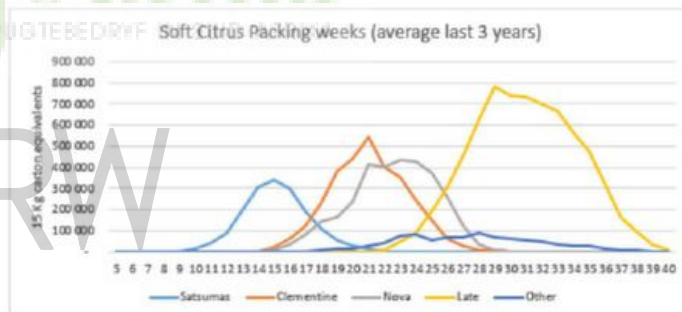
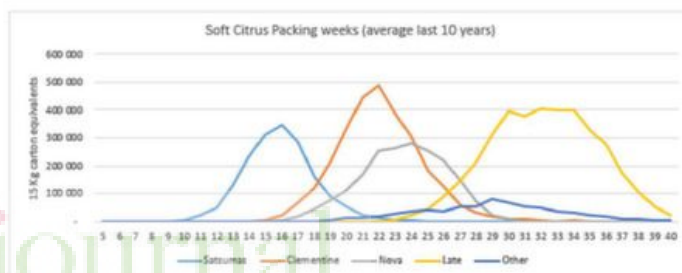
Satsumas have some significant advantages over other varieties of mandarin, in that they have generally good production and cartons per hectare, are relatively easy to produce and give typically good per hectare returns. However, the product matures in autumn, prior to onset of cold for natural colour development and pale rinds are sensitive to chilling injury under low-temperature shipping conditions. Degreening is often required due to delayed colour development and they are more prone to chilling injury due to long periods of low-temperature shipping than other varieties. They are also sensitive to sunburn, zebra skin, FCM, sucking and piercing moths, and sour rot.

Soft citrus weekly shipments

Satsuma harvesting is characterised by a narrow harvest period and minimal overlap with other mandarin varieties in the country. Whilst this is advantageous, any delays in harvesting pushes the window into that of clementines and novas, potentially shortening the satsuma season.

As can be seen in the first graph, satsuma-mandarin supply volumes are stable at around 1.8 m cartons and a long-term projection to 2030 seems optimistic at 2.3 million cartons, i.e. +2.4% per annum growth.

Analysing three years' average data for 2016-2018 reveals that three principle markets buy 97% of the South Africa satsuma export volume, namely the UK/Ireland 44-50% 800 000-890 000 cartons; Netherlands 24-27% 440 000-480 000 cartons and Russia 19-29% 340 000-570 000 cartons.



Satsumas are figuratively caught between a rock (in the Northern Hemisphere late mandarins) and a hard place (in the local clementines and novas following hard on their heels). The key is to be aware of this challenge and to focus on optimising productivity and pack-outs during the limited time frame. ❀

The chart below illustrates the global satsuma supply periods into the main market of the UK.

