Estimates of export volumes for 2010

JOHN EDMONDS

On 23 March this year the variety focus groups met at the Willow Park Centre in Benoni to reach consensus on their estimates for the 2010 export volumes. The estimates compiled by the variety focus groups were presented at a Citrus Marketing Forum (CMF) meeting the following day for consideration by the Citrus Exporters’ Forum (CEF). It has now been adopted as the final estimate by the Citrus Marketing Forum (CMF). It must be noted that the estimates are what will be packed and available for export. The final shipped figure depends on a lot of variables such as market demand which will influence exporters’ decisions on shipping. The actual shipped figure as a percentage of packed fruit is dependent on the fruit type and ruling market demand.

Following a low 2006 export season of about 75 million fifteen kilogram cartons, the last three years’ packed volumes have been hovering around the 90 million cartons mark. It remains to be seen if this trend will continue into 2010 as predicted in the current estimates. With the estimates now fixed, the focus groups will meet regularly during the year when they will update their projections of the final export.

GRAPEFRUIT

The estimate shows an anticipated decline in export in 2010 volumes for both white and pigmented grapefruit, with the latter showing a larger decline.

This is due to the heavy crop experienced in 2009 (alternate bearing) and climatic factors. The grapefruit growers and exporters prefer that their figures be presented in 17 Kg carton equivalents.

## GRAPES

Data collected from the regional Navel Focus Group representatives’ estimate of pack shows an eleven percent increase over the 2009 season. The navel estimate has been split into volumes exported before week 29, and volumes exported after week 29. The reason for this is to show the impact of late navel plantings. These plantings have resulted in a navel export season that stretches over a far longer period than in the past, meaning that although the total navel volumes have increased, the export volumes available per week have not changed significantly. The Navel Focus Group also decided to separate Cara Cara from the other Navels for monitoring purposes and expect about 800 000 cartons of the total estimate to consist of this variety. Realistically they expect about twenty million cartons to reach the markets.

The 2009 season was an extremely difficult year for many Valencia growers given the global recession, but the Valencia Focus Group felt that the timely communication of accurate information about the projections and quality of the total SA citrus crop had helped to create a true understanding of the prevailing production conditions which in turn helped build trust with receivers in markets. It is anticipated that the packed for export volumes will be up seven percent on the 2009 volumes but below those of 2007 and 2008.

LEMONS

The Lemon Focus Group’s combined estimate came in just under the nine million cartons mark and about four percent above 2009’s final volume. Sunday’s River Valley which produces over fifty percent of the South African lemon export volume reported that their fruit was generally cleaner and maybe earlier than that of 2009 with a good volume of prime counts. Western Cape and Boland areas had some problems with wind scarring but this did not translate into a significant effect on their estimates.
Total volumes for the year are estimated to be just five percent up on the 2009 season at almost 92 million cartons.

All these figures are expressed in millions of 15 Kg equivalent cartons. Looking at the summary right one can observe that the 2010 estimate is similar to the 2008 actual figure for Navels, Grapefruit and Lemons.

SOFT CITRUS
Soft citrus export volumes are divided between Clementines, Satsuma and Mandarin (being any soft citrus that is not a Satsuma or a Clementine). Overall soft citrus exports are estimated to increase by eleven percent over 2009, with Mandarins increasing by sixteen percent (mainly due to late Mandarin plantings), Clementines by six percent and Satsuma’s by nine percent.