

Minutes of the Citrus Marketing Forum Meeting

Wednesday, 23 October 2024 at 10h00

[MS Teams]

- Present:** Portia Magwaza, Paul Hardman, Precious Kunota, Deon Joubert, Anton Kruger and 122 participants via MS Teams.
- Apologies:** Justin Chadwick, Mitchell Brooke, Graham Barry and Barry Landman
- Chair:** Mr Werner van Rooyen (WvR)
- Secretariat:** Ms Claudia Walklett (CW)

1. WELCOME AND APOLOGIES

Mr Werner van Rooyen opened the meeting and welcomed all present. Apologies were noted as above.

2. FINALISATION OF THE AGENDA

No items were added to the agenda.

3. MATTERS ARISING FROM MINUTES

No matters arising were discussed.

4. INFORMATION:

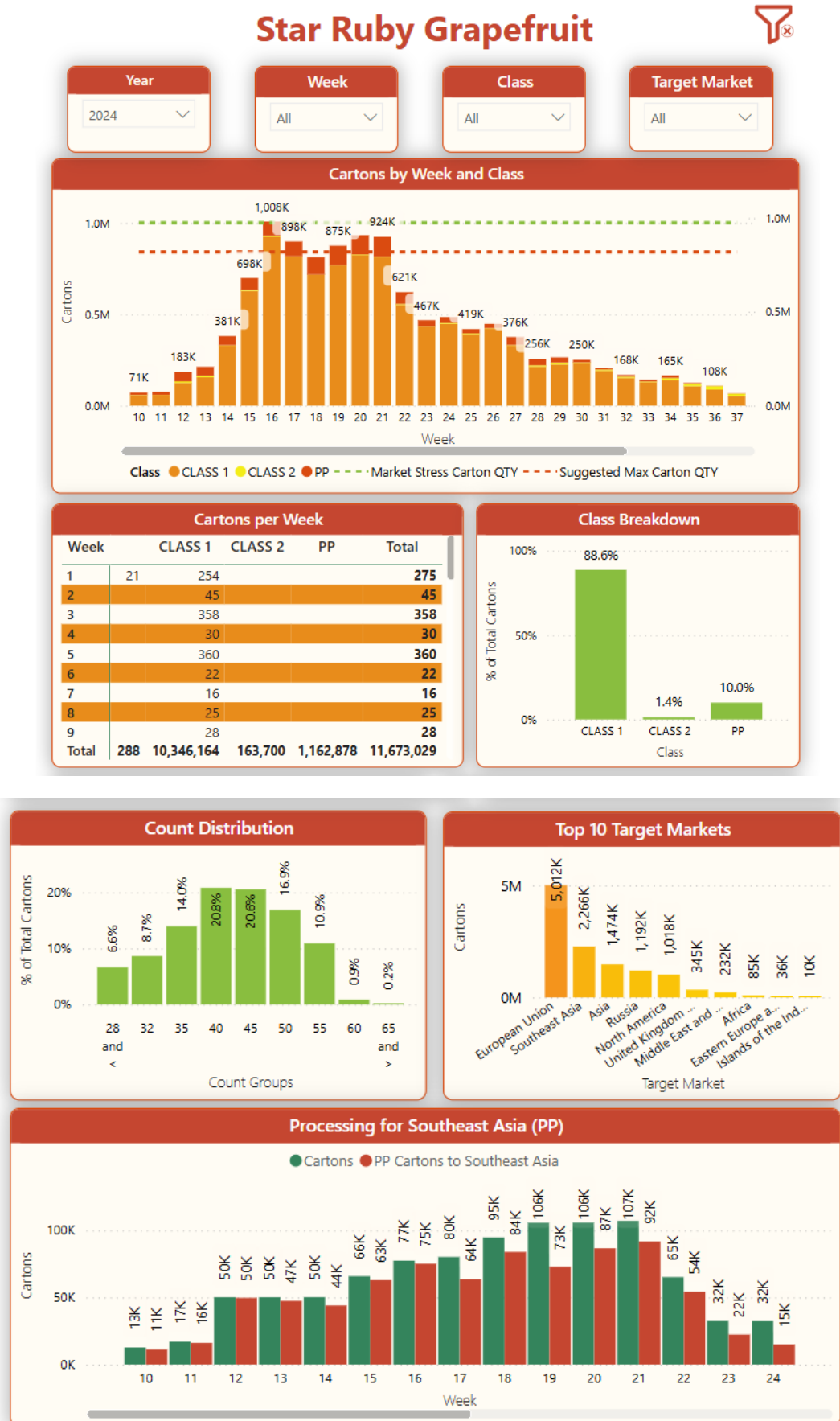
- **Production and Export Volumes**

Portia Magwaza presented an overview from the CGA and the various Variety Focus Groups. The presentation is attached for your perusal (**23 October CMF – Industry Stats**).

Variety Focus Group Chairmen provided the following feedback:

Grapefruit: Tommy Landman

Tommy Landman shared the graph below which is self-explanatory:



*17kg Equivalent Cartons



Lemons: Leroux Venter

This year was down by about 900 000 boxes. Our initial estimate was about 38 million cartons but due to weather and various circumstances this was reduced drastically. From 2021, the lemon industry has experienced many challenges . In collaboration with the CGA, an Argentinian model is being used to measure what the market can absorb so that there is not an oversupply of lemons and have a negative effect on the price. An influx of lemons from Spain also negatively affected the market. Good communication between growers and exporters and with luck from the weather we managed to flatten the curve.

Mandarins: Hendrik Warnich

Of the 1.4 million cartons that was short – the main contributors were 800 000 cartons of Nadorcott Tangos and 500 000 cartons of Clementines.

Navels: Stiaan Engelbrecht

Going forward, we need to split the late navels from the mid seasons and early navels. We were caught off guard towards the back end of all the new plantings and late navels that was more than we projected.

Valencia: Stiaan Engelbrecht

We got very close to the original estimate. In the beginning we estimated 58 million cartons which we later adjusted to 48 million cartons. The previous year we shipped 32 million of the 50 million cartons all before Week 34 and only 18 million cartons were shipped from Week 34 to Week 39. Compared to this year, we only did 26 million cartons before Week 34 and 19,2 million cartons after Week 34 of which 10 million cartons went to Europe. Middle East volumes were down from 5,6 million cartons last year to 3,8 million cartons this year.

5. MARKETS: FPEF FEEDBACK

EUROPE

Charl Milleskie of **Lona Citrus** shared that the early varieties on **mandarins** was a lot slower due to quality problems we experienced in South African but also due to the Northern Hemisphere overhang. The demand was a bit slower due to the large amount of fruit in the market with a lot of quality problems. The late mandarins fared pretty well. It was a mediocre season on the **grapefruit** side of things due to the Spanish market flooding it. **Lemons** started slowly due to weather and quality problems. Record prices were reached during some weeks but tapered towards the end of the season. **Oranges** provided a great juice option as Brazil was down on their volumes and this fetched high prices.

MIDDLE EAST

Anton Bonnema of **Niche Fruit** provided feedback that the Middle East proved to be a very tough market and disappointingly low prices were the order of the day except for Lemons which fared surprisingly well.

FAR EAST

Anton Gouws of **Dole** provided the following feedback:

Bangladesh

It was a tough market with variable arrival quality from South Africa. There was no margin for error. High import costs. Contributing factors was that Egyptian fruit was hanging in the market for longer and cheaper fruit could be procured from Dubai during certain periods.

India

India had a slow start with regards to market performance but picked up towards the end.

South East Asia

Chinese lemons flooded the South East Asia market at low prices. Orange market wasn't great and didn't return much profit.

China

Disappointing Grapefruit season. The early market fetched good prices but quickly dropped. The grapefruit market is shrinking year on year. The orange market was better and prices remained satisfactory for longer.

Korea

Last year was a good season for grapefruit – this year was the total opposite. There is competition with local produced fruit.

RUSSIA

Mikhail Fateev shared that the Russian market demonstrated sustainability during this season and there were no phytosanitary challenges experienced. Vessel services continued without interruption and this is thanks to the skills of the exporters and importers that came to the party.

6. MARKET ACCESS FEEDBACK

Elma Carstens of the **CRI** shared a presentation which is attached for your perusal (**CMF_2024_final**).

7. CITRUS MINIMUM STANDARDS FEEDBACK

Paul Hardman from the **CGA** provided feedback on behalf of **Graham Barry** who was not able to attend the meeting. The presentation is attached for your perusal (**CMF Citrus Quality Standards Oct2024**).

8. CITRUS LOGISTICS

Portia Magwaza provided feedback on behalf of **Mitchell Brooke** as follows: The necessity for enhanced statistics and information is currently being examined by the industry associations. A report on the current state of logistics and an information report are scheduled to be released by the industry associations.

9. NEXT MEETINGS

Citrus Coordinating Meeting – these meetings will be communicated appropriately.

March 2025: CMF – **Justin Chadwick** and **Anton Kruger** will collaborate on a date, and this will be shared accordingly.

10. GENERAL

Audits went well with the data provided as being accurate.

11. CLOSURE

The meeting closed at 11h50.