

Minutes of the Citrus Marketing Forum Meeting

Thursday, 20 March at 10h00

[ZOOM]

Present: Werner van Rooyen, Willy Madiba, Vijan Chetty, Mitchell Brooke, Precious Kunota and 146 participants via Zoom

Apologies: Justin Chadick, Boitshoko Ntshabele and Hendrik Warnich

Chair: Paul Hardman

Secretariat: Portia Magwaza

1. WELCOME AND APOLOGIES

Paul Hardman opened the meeting and welcomed all present. Apologies were noted as above.

2. APPROVAL OF THE PREVIOUS MINUTES OF THE MEETING HELD ON 23 OCTOBER 2024

The minutes of the previous CMF Meeting were approved.

3. MATTERS ARISING FROM MINUTES

No matters were raised.

4. FINALISATION OF THE AGENDA

No items were added to the agenda.

5. INFORMATION

5.1 Tree Census

Precious Kunota presented on the tree census:

The tree census data is submitted by growers. The total hectares for 2024 are **101 624**, there is a 2% increase from last year. The province of Limpopo has the largest share of citrus planted in 2024. Botswana is a new entrant, and the region has 888 ha.

Valencia and Midseason Budwood sales increased from 2023 whereas Mandarin sales declined. The age distribution is highest at 3-10 years, meaning there will be lots of trees coming into production. Mandarins have the highest number of young tree. Grapefruit has three distinct groups - young, middle and old trees.

The presentation is attached for your perusal (*March CMF_2025_Tree Census & Estimate*).

5.2 Crop Estimate

Variety Focus Group chairmen provided the following feedback:

Grapefruit: *Barry Landman*

13.5 million cartons (17 kg equivalent) of grapefruit to be exported, this includes class 1, class 2 and Processing (PP). Pigmented grapefruit will make up 12.1m of the total and 500 000 is white grapefruit and 900 000 PP.

The 2025 pigmented estimate is the same as 2023 volumes. The historical trends exhibit downward trend based on a 5-year range. White grapefruit is stable. There is uncertainty around the PP estimate as the prices are currently not published, and volumes may not materialize. The peak packing weeks are 16-20 and the group will closely monitor the supply not to over supply the markets. The grapefruit growers have started a grapefruit promotion campaign – for more information you can contact Barry and Jan-Louis Pretorius.

Lemons: Leroux Venter

32.9 million cartons is the estimate for 2025 which is 5% decline from 2024 final volumes. The four largest producing regions (S.R Valley, Senwes, Boland and Patensie) submitted estimates lower than 2024 volumes. These regions produce 70% of the country's total volumes. The regions are late and there are different fruit sets in each region. The country has enough lemons to supply the markets and programmes. Growers should not rush harvesting as it will create bottlenecks in the markets.

Mandarins: Portia Magwaza provided feedback on behalf of Hendrik Warnich

The Satsuma have not increased from last year's volumes. The Clementine estimate is slightly higher (600 000 cartons) than last year since 2024 season. Nova estimate is 100 000 cartons more than 2024 final volumes. The early preliminary estimate for the other mandarin variety groups shows a stable and normal growth. The Mandarin focus group decided to rather finalise the late varieties at the next focus meeting as there is some uncertainty on growing factors that can have an influence on the final estimate.

Navels: Stiaan Engelbrecht

The Navel estimate is 26.1 million cartons - 11.3 million early/mid Navels and 14.8 late Navels. The year is a normal season, last year's extreme weather conditions resulted in lower early navels, but the late navel growth caught the group off guard. This year the focus group decided to split the Navel estimate to monitor the growth. The market conditions will determine the cartons exported.

Valencia: Stiaan Engelbrecht

52 million cartons are estimated for 2025, this is marginal increase. The fruit is on the tree; the juice price and market conditions will determine export cartons.

The crop estimate presentation is attached for your perusal ([March CMF_2025_Tree Census & Estimate](#)).

6. FPEF MARKET FEEDBACK

Werner van Rooyen from **FPEF** shared a presentation which is attached for your perusal ([CMF FPEF MARKET FEEDBACK- 2025](#)).

Leardt van der Burgh of **Fruit One** shared that the Northern regions have had a slow start as the rain has kept growers from harvesting **lemons** for two weeks. This has naturally created a gap in the market. Growers and Exporters should be cautious and not rush to send fruit to Middle East and Russia. The size of the crop is good and the reliance on the Middle East market should be less. There are logistical challenges for Russia for the Northern regions as there are no conventional ships going to the Durban port at the moment. The UK and Europe have a decent demand driven by the Northern Hemisphere's poor-quality product which has given South Africa access to these markets earlier than previous years. In the Far East, there is stable demand and pricing.

Grapefruit remains a challenge with the declining demand. South Africa had a slow start, and the volumes are picking up in week 12 shipments. The focus on the Far East markets will be

determined by the quality of the fruit and the internals. The retail programs in the EU will remain important for SA. There is excitement around the new Grapefruit promotion campaign that Barry Landman mentioned.

Mandarin season has not started but the crop looks good and there will be decent demand out of EU and UK since the Spanish fruit will be out of the market earlier than normal.

7. CITRUS LOGISTICS

Mitchell Brooke of **CGA** shared that the pre-season meeting with Transnet will be held in the coming weeks. Durban has seen an income of critical equipment, particularly Pier 1 around the RTGs which were in bad supply last year. This will help get Pier 1 on track with operations. Pier 2 may struggle in the interim. The South key short cranes are in deficit. There are straddle carriers that have come in and may help operations to some extent. In the Eastern Cape, the NCT facility needs to have a bit of augmentation on the capacity on reefer plugs based on last year's challenges as well as the transshipments which had a big impact. There is a backlog on vessels servicing the Cape Town port at the moment.

Claudia from **CTI** added that Transnet has started working on 5 reefer train set getting them ready for the season. The weekly operational meetings have started to plan for the coming citrus season. Transnet have requested that industry assists with one train a week in May from City Deep. Transnet have committed to two trains a week from June. A train is 960 pallets.

8. PPECB FEEDBACK

Vijan Chetty from **PPECB** shared a presentation which is attached for your perusal (*VIJAN CHETTY PPECB*).

9. DALRRD- Food Safety and Quality Assurance

Willy Madiba reported that amendments are considered every two years. The current proposed amendments will not be changed as the season has started but will be dealt with through dispensations. At the end of the season, the current proposed amendments and any other amendments that need to be incorporated into the standard will be evaluated.

The document is attached for your perusal (*Proposed changes to the export standard*).

10. CMF NEXT MEETING 2025

Monthly CMF meetings will be held on the last Thursday of every month, starting in April. The meeting will start at **10h00** and will be scheduled for an hour.

The Zoom link will be sent to Growers and Exporters. Other value chain stakeholders who are interested in attending the meeting please may they contact Portia Magwaza.

Meeting Schedule

- Meeting 1- **24 April 2025**
- Meeting 2- **29 May 2025**
- Meeting 3- **26 June 2025**
- Meeting 4- **31 July 2025**
- Meeting 5- **28 August 2025**
- Meeting 6- **25 September 2025**
- Final CMF Meeting- **To be confirmed**

11. GENERAL

11.1 Special Export Programmes

Mitchell Brooke the forum that the Japan program is open now and the Eastern Cape and Western Cape facilities are approved. For South Korea, the APQA are permitting DALRRD to conduct independent inspections. There are few conditions that were put forward that CRI and

DALRRD will relay to APQA. At the moment, DALRRD is waiting for APQA to announce when the market can be opened.

12. CLOSURE

Paul Hardman thanked all the citrus stakeholders (growers, exporters and value chain partners) for attending the meeting. He wished everyone well for the coming citrus season.

The meeting closed at 11h37.