

USDA Foreign Agricultural Service

GAIN Report

Global Agricultural Information Network

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Required Report - public distribution

Date: 12/14/2012

GAIN Report Number:

South Africa - Republic of

Citrus Annual

Industry Continues Steady Recovery for the Second Year in a Row

Approved By:

Ross Kreamer

Prepared By:

Nicolas Rubio

Report Highlights:

South Africa ranks as the world's second largest exporter of fresh citrus fruit by volume behind Spain. For Marketing Year (MY) 2012/13, continued recovery is expected in citrus production for the second year in a row, after the hail storms that reduced Navel yields in the Groblersdal and Marble Hall production areas in the MY 2010/12.

Executive Summary:

Post expects a continued recovery of citrus production for Marketing Year (MY) 2012/13, for the second year in a row, after the hail storms that reduced Navel yields in the Groblersdal and Marble Hall production areas in MY 2010/11. In addition, despite increased competition in global markets, SA citrus production and exports have been increasing as industry adopts varieties that are in demand globally and shifts to improved management practices to improve fruit quality. With over 60 percent of citrus in SA grown for export markets, South Africa considers itself a source of excellent quality fruit in terms of taste, size, and color.

Fifty one percent of SA's citrus exports depart from Durban; eighteen percent transits through the Cape Town port, one percent is shipped through Port Elizabeth, nine percent is shipped from Coega (near Port Elizabeth), with the remaining four percent shipped through Mozambique.

Figure 1. Map of Citrus Producing Regions



Source: CGA

Harvest Season

The citrus season in SA typically starts in April and ends in September. However, the harvest time and marketing years vary depending on the type of fruit.

Marketing Year

There is a one year lag between the SA marketing year and the U.S. marketing year. For example, SA MY 2012/2013 for Grapefruit is equivalent to March 2013 to February 2014. (Please see PSD

tables for the relevant marketing years for each commodity.)

Table 1. South Africa: Harvest Period for Citrus by Commodity

Citrus	Harvest Period
Marsh Grapefruit	April to June
Star Ruby Grapefruit	April to September
Lemons	June to September
Navel Oranges	June to July
Tangerines/Mandarins	July to August
Valencia Oranges	July to September

Export season outlook:

It is still early to have a clear picture of the 2013 export season outlook; however, with good early rains, good temperatures during the early cycle of the production season, and the potential of a weak Rand in the first half of next year, the industry is expecting total exports season similar to 2012, at about 1.6 MMT.

The 2012 export season just wrapped up, and it was a good year for the SA industry as a result of higher volumes of all citrus types, except for grapefruit which declined slightly. Grapefruit production was down as a result of the phenomenon of alternate yields for different years: a high-yield year will be followed by a low-yield year.

The new SA tree census will be released by the end of January 2013, but expectations are of a slight increase of area planted. The industry received foreign direct investment from companies like Sunkist to help supply growing markets. U.S. retailers like Wal-mart, Costco and Wholefoods are sourcing fruit from SA as well, with oranges exports to the United States continuously increasing as a result of the USDA pre-clearance program. SA exported grapefruit to the United States for the first time in 2010 following the USDA’s recognition of several SA production areas as free of citrus black spot disease.

SOURCES

- Citrus Growers’ Association (CGA)
- National Agricultural Marketing Council (NAMC)
- Perishable Products Export Control Board (PPECB)
- Global Trade Atlas (GTA)
- Jacobsens Harmonised Customs Tariff
- Euromonitor
- Tshwane Market
- South Africa Department of Agriculture, Forestry and Fisheries (DAFF)

Table 2. EXCHANGE RATES

	R- \$ (Dollar)	R- € (Euro)	R- £ (Pound)
June 2012	8.65	11.18	13.87
June 2011	6.69	9.87	11.02

Source: <http://www.exchange-rates.org>

Commodities:

Grapefruit, Fresh

Area Planted:

The industry new tree census is expected to be released by the end of January 2013. A slight increase is expected compared to the census in 2011, as a result of growing markets in Japan, Russia, and new access to the United States. The industry's 2011 tree census indicated that 9,477 ha were planted to grapefruit in South Africa. Star Ruby, the most globally favored grapefruit variety covered about 7,076 ha of the total area planted.

Production:

Post forecasts 2012/2013 South African grapefruit production at 410,000 MT as a result of good rainfalls in the eastern part of the country, new trees coming into production, and higher yields expected due to South Africa's grapefruit production cycle. The grapefruit production in SA exhibits a phenomenon of alternate yields for different years: a low-yield year will be followed by a high-yield year, and 2012 was a low-year yield.

Grapefruit is mainly grown in Limpopo (3,970 ha), Mpumalanga (2,386 ha) and Kwa-Zulu Natal (1,638 ha) production regions, which are characterized by warm subtropical temperatures favorable for grapefruit production. There has been some limited plantings in the cooler areas of the Eastern Cape (234 ha), Northern Cape (324ha), and Western Cape (21 ha). The Star Ruby and Marsh are the most popular grapefruit varieties in South Africa. Star Ruby is a seedless variety with a long harvest season running from April to September. The Marsh variety is cultivated mainly for processing because of its abundant and flavorful juice.

Consumption:

Post forecast 2012/2013 domestic consumption of fresh grapefruit to remain flat at 5 MT on stable consumer demand. The industry keeps its focus on the export market as local consumers have not acquired a strong taste for grapefruit. As a result, domestic consumption figures remain around 5,000 MT.

Grapefruit is also processed for juice, the majority of which is exported to the European Union (EU). The left over pulp following commercial juice extraction is an important source of grapefruit oil which is used as a flavoring in many soft drinks. The inner peel is a source of pectin and citric acid, which are both used by the food industry to preserve fruits, jams, and marmalades. Naringin is also extracted from grapefruit peel, and gives tonic-water its distinctive bitter flavor. Finally, the grapefruit peel oil is used in scented fragrances.

Trade:**Imports**

Post forecast 2012/2013 imports at 300 MT as a result of a good domestic crop, which will be able to satisfy domestic demand. Post revised 2012 grapefruit imports at 250 MT, due data in GTA. Although South Africa is not a major grapefruit importer, imports typically come from Israel, Spain, and

Zimbabwe. Israel dominates the market for SA imports and, as a counter season producer, fills the demand gap towards the end of the calendar year.

Table 3. South Africa: Grapefruit Import Statistics

South Africa Import Statistics				
Commodity: 080540, Grapefruit Including Pomelos, Fresh Or Dried				
Year Ending: December				
Partner country	Unit	Quantity		
		2010	2011	2012*
Israel	MT	409	234	165
Zimbabwe	MT	151	210	0
Spain	MT	19	138	61
Other not listed	MT	20	63	21
Grand total	MT	599	645	246

*Year ending imports for 2012 is September. Complete 2012 data will not be available until February 2013.

Source: GTA

(Note: In the PSD tables, quantities below 1,000 MT will be displayed as zero.)

Exports

Post forecast 2012/2013 grapefruit exports at 220,000 MT, as a result of expected higher production compared to 2011/2012. Post revised lower the 2011/2012 grapefruit exports at 192,000 MT based on final industry reports as of November 30, 2012. In addition, exports were lower than expected because SA's production in 2011/2012 was characterized by smaller fruits. The export markets for SA tend to prefer bigger size grapefruits.

Industry figures for grapefruit exports tend to be slightly different from the GTA data. Post recognizes this difference and has decided to use the industry figure in the PSD since the industry figures reflect the most current situation.

Japan and Europe are the SA's major export markets. South African grapefruit enter the European Union duty-free under their bilateral Trade Development Cooperation Agreement (TDCA), while Japan imposes a ten percent Most Favored Nation (MFN) duty on SA grapefruit. Russia, which is becoming an important market for South Africa, imposes a five percent or \$27.96 /ton (whichever is the greater), while Canada, Hong Kong, and the UAE apply a zero percent MFN tariff on South African grapefruit imports. South African grapefruit can enter the United States duty free under AGOA.

Table 4. South Africa: Grapefruit Export Statistics

South Africa Export Statistics				
Commodity: 080540, Grapefruit Including Pomelos, Fresh Or Dried				
Year Ending: December				
Partner country	Unit	Quantity		
		2010	2011	2012*
Japan	MT	45,553	55,750	49,789
Netherlands	MT	50,098	59,795	46,532
Russia	MT	17,424	23,318	13,639
UK	MT	11,218	10,882	10,089
Mozambique	MT	12,820	11,376	9,346
United States	MT	184	275	76
Others not listed	MT	42,313	55,837	48,063
Grand Total	MT	179,610	217,233	177,534

*Year ending exports for 2012 is September. Complete 2012 data will not be available until February 2013.

Source: GTA

Production, Supply and Demand Data Statistics:
Table 5.

Grapefruit, Fresh South Africa	2010/2011		2011/2012		2012/2013	
	Market Year Begin: Mar 2011		Market Year Begin: Mar 2012		Market Year Begin: Mar 2013	
	USDA Official	New Post	USDA Official	New Post	USDA Official	New Post
Area Planted	9,477	9,477	9,900	9,900		9,900
Area Harvested	8,571	8,571	8,600	8,600		9,000
Bearing Trees	8,571	8,571	8,600	8,600		9,000
Non-Bearing Trees	993	993	1,000	1,000		900
Total No. Of Trees	9,564	9,564	9,600	9,600		9,900
Production	406	406	390	390		410
Imports	0	0	0	0		0
Total Supply	406	406	390	390		410
Exports	217	217	210	192		220
Fresh Dom. Consumption	5	5	5	5		5
For Processing	184	184	175	193		185
Total Distribution	406	406	390	390		410

HECTARES, 1000 TREES, 1000 MT

Commodities:

Oranges, Fresh

Area Planted:

The industry new tree census is expected to be released by the end of January 2013. However, at this point a slight increase of about 600 hectares in 2012/2013 is forecast compared to area planted in 2011/2012, as a result of a growing market in Japan and Russia.

Production:

Post forecasts the 2012/2013 South African oranges production (Valencia and Navel) at 1.5 million MT as a result of good weather conditions so far in the eastern part of the country. Post's final estimate for SA's 2011/2012 orange production stayed at 1.45 million MT on good weather conditions coupled with the recovery in the previously hail-affected Groblersdal and Marble Hall production areas.

South African oranges are primarily comprised of two varieties; Valencias and the Navels. Producers prefer Valencia oranges over Navels for their growing characteristics that enable higher yields and maintain a longer shelf life than Navels.

The two leading regions for Valencia production are Limpopo and Mpumalanga (although Valencia oranges are also grown in Eastern Cape and Western Cape on a smaller scale). Approximately 49 percent of Valencias are grown in Limpopo, which is characterized by warm to hot climatic conditions needed for Valencia production. The main cultivars for Valencias are Delta and Midnight, and the harvest season extends from July to September.

The three leading regions for Navel production are Eastern Cape, Western Cape, and Mpumalanga. Unlike Valencia oranges, Navels require cool growing conditions as can be found in the provinces above. The main cultivar for Navels is Palmer, and the harvest season extends from June to July.

Consumption:

Post estimates 2012/2013 fresh local orange consumption to remain flat at 140,000 MT on static consumer demand. Fresh oranges are popular in South Africa and are widely consumed. Oranges form part of the national food basket of goods which is monitored quarterly by the South African National Marketing Council (NAMC) to track food price inflation. Oranges destined for the local market are consumed as fresh fruit or processed as orange juice.

Trade:

Imports

Post forecasts 2012/2013 imports at 500 MT based on limited supplies that come in the country around the months of November and December to close supply gaps and satisfy year long demand. Post revised downward its 2011/2012 estimate of orange imports to 500 MT, as reported in the GTA through September.

Table 6. South Africa: Orange Import Statistics

South Africa Import Statistics
Commodity: 080510, Oranges, Fresh Or Dried

Year ending: December				
Partner country	Unit	Quantity		
		2010	2011	2012*
Zimbabwe	MT	1,022	429	0
Spain	MT	0	152	230
Israel	MT	187	107	92
Other not listed	MT	46	120	0
Grand total	MT	1,255	808	322

*Year ending imports for 2012 is September. Complete 2012 data will not be available until February 2013.

Source: GTA

(Note: In the PSD tables, quantities below 1,000 MT will be displayed as zero.)

Exports

Post forecasts 2012/2013 orange exports will be slightly higher at 1.1 million MT, based on an expected good crop and a relatively weaker Rand.

Post revised 2011/2012 orange exports at 1.07 million MT, slightly higher than the estimate on the July 2012 semi-annual, on industry's final data.

Although the Netherlands has been SA's traditional market, industry reports show that citrus shipments are increasing to new markets like the Middle East and Russia. These markets are recovering from the global recession, while sluggish demand persists in Europe, the UK, and Japan. Another reason is that Egypt has increased production over the years, and it is exporting good quality oranges to the European market. Egypt has a freight advantage in the European market over South African producers.

Industry figures for orange exports in the PSD are slightly different from the GTA. Post recognizes this difference and has decided to use the industry figures in the PSD, with the expectation that the industry figures reflect the most current situation. However, the GTA table shows the individual markets for SA orange exports.

Table 7. South Africa: Orange Export Statistics

South Africa Exports Statistics
Commodity : 080510, Oranges, Fresh Or Dried
Year ending: December

Partner	Unit	Quantity		
		2010	2011	2012*
Netherlands	MT	197,813	175,039	197,581
Russia	MT	138,939	122,986	116,619
Saudi Arabia	MT	88,914	89,456	96,260
United Arab Emirates	MT	104,064	78,660	90,227
United Kingdom	MT	69,711	66,869	65,202
Portugal	MT	38,053	31,997	41,947
United States	MT	34,813	36,897	40,777
Grand total	MT	1,109,611	984,243	1,072,774

*Year ending exports for 2012 is September. Complete 2012 data will not be available until February 2013.
Source: GTA

Production, Supply and Demand Data Statistics: Table 8.

Oranges, Fresh South Africa	2010/2011		2011/2012		2012/2013	
	Market Year Begin: Mar 2011		Market Year Begin: Mar 2012		Market Year Begin: Feb 2012	
	USDA Official	New Post	USDA Official	New Post	USDA Official	New Post
Area Planted	40,230	40,230	41,400	41,400		42,000
Area Harvested	38,316	38,316	39,500	39,500		39,500
Bearing Trees	38,316	38,316	39,500	39,500		39,500
Non-Bearing Trees	2,512	2,512	2,800	2,800		2,800
Total No. Of Trees	40,828	40,828	42,300	42,300		42,300
Production	1,428	1,428	1,450	1,450		1,500
Imports	0	0	0	0		0
Total Supply	1,428	1,428	1,450	1,450		1,500
Exports	942	942	1,040	1,065		1,100
Fresh Dom. Consumption	138	138	140	140		140
For Processing	348	348	270	245		260
Total Distribution	1,428	1,428	1,450	1,450		1,500
HECTARES, 1000 TREES, 1000 MT						

Commodities:

Orange Juice

Production:

Post forecasts 2012/2013 oranges destined for processing to increase slightly to 260,000 MT as a result of a higher production. Post revised 2011/2012 oranges destined for processing down to 245,000 MT, on lower supplies due to higher fresh orange exports. Producers in SA tend to divert their fresh orange production for the export market, instead of the processing sector, because producers receive a higher premium for fresh fruit in export markets. As a result, the industry's first priority is the export market and whatever remains goes to processing.

Industry statistics for orange juice (200911, 200912, and 200919) are largely unavailable in SA given the highly competitive nature of the industry. SA has approximately 16 fruit juice processors, with three of the largest facilities in Limpopo and Eastern Cape. The production, supply, and distribution

data are comprised of information extracted from various sources and represent Post's best effort to estimate statistics for frozen orange juice concentrate. Data were derived from visits to citrus processors and information from sources primarily focused on ready to drink juices in the domestic market such as Euromonitor.

Consumption:

Post forecasts 2012/2013 domestic consumption for orange juice to stay at 7,400 MT, as consumers switch to lower-cost beverages due to budgetary pressures. In addition, consumption has return to normal levels after the jump during the World Cup soccer tournament. In the local market, orange juice is used as a blend with other fruit juices and is also sold to local dairy processors for products like drinkable yoghurt. SA oranges have a high acid-to-sugar ratio, which causes juice makers to blend orange juice with other fruits.

Trade:

Imports

Post forecasts 2012/2013 SA imports of frozen juice concentrate at 1,000 MT, 33 percent lower compared to the previous marketing year as a result of higher than expected deliveries of domestic oranges to processors. Post revised the 2011/2012 SA import estimate of frozen orange juice concentrate at 1,500 MT, due to lower domestic supplies available for processors. Orange producers in SA prefer to sell their produce to the export market due to higher returns.

Exports

Post forecasts 2012/2013 exports of frozen orange juice concentrate at the same level as 2011/2012 at 18,000 MT. The main export markets for SA orange juice are Netherlands, and other African markets like Zimbabwe; Mozambique and Angola.

Production, Supply and Demand Data Statistics:

Table 9.

Orange Juice South Africa	2010/2011		2011/2012		2012/2013	
	Market Year Begin: Apr 2011		Market Year Begin: Apr 2012		Market Year Begin: Apr 2013	
	USDA Official	New Post	USDA Official	New Post	USDA Official	New Post
Deliv. To Processors	348,000	348,000	270,000	245,000		260,000
Beginning Stocks	7,106	7,106	1,898	1,898		1,848
Production	31,320	31,320	24,300	23,850		25,000
Imports	1,263	1,263	1,200	1,500		1,000
Total Supply	39,689	39,689	27,398	27,248		27,848
Exports	17,891	17,891	18,000	18,000		18,000
Domestic Consumption	19,900	19,900	7,400	7,400		7,400
Ending Stocks	1,898	1,898	1,998	1,848		2,448
Total Distribution	39,689	39,689	27,398	27,248		27,848

MT

Commodities:

Tangerines/Mandarins, Fresh

Area Planted:

The industry new tree census is expected to be released by the end of January 2013. Post estimates planted area for soft citrus in 2012/2013 at 5,400 ha on growing consumer demand in the United States and the United Kingdom. Of the citrus types, soft citrus is attractive to producers as it has very good margins as consumers prefer its easy peeling and seedless characteristics.

Although the cost of establishing new orchards is increasing, higher returns from the growing demand in the United States and other markets is offsetting higher production costs. Industry officials expect to continue expanding the area planted to soft citrus over the next three to five years.

Production:

Post forecasts 2012/2013 SA soft citrus production to increase slightly to 160,000 MT, on good weather conditions so far in the Eastern Cape, which is a major production region. Soft citrus grows best in the cool climatic conditions of the Eastern Cape and Western Cape regions. The SA soft citrus varieties are Clementines, Mandarins, Naartjie, and Satsuma, with Mandarins being the most popular cultivars. Satsuma in particular is doing really well with consumers in the United Kingdom.

Consumption:

Post estimates local consumption of soft citrus at 10 MT in 2012/2013, as domestic demand remains flat. The small size of soft citrus along with its easy-peeling nature and seedless characteristics make soft citrus a desirable snack for all consumers.

Trade:

Imports

Post estimates 2012/2013 soft citrus imports at 750 MT, as South African can meet most of its domestic demand. Late year imports from Israel and Spain do enter the market to provide year-round supplies during the holiday season. Post revised 2011/2012 soft citrus imports estimate to 800 MT as reported in the GTA through September.

Table 10. South Africa: Soft Citrus Import Statistics

South Africa Import Statistics				
Commodity: 080520, Mandarins (Tang & Sats) Clementines & Wil- Kings & Sim Citrus Hybrids, Fresh/Dried				
Year Ending: December				
Partner country	Unit	Quantity		
		2010	2011	2012*

Israel	MT	548	574	521
Spain	MT	181	272	195
Others not listed	MT	22	0	0
Grand Total	MT	751	846	746

*Year ending imports for 2012 is September. Complete 2012 data will not be available until February 2013.

Source: GTA

(Note: In the PSD tables, quantities below 1,000 MT will be displayed as zero.)

Exports

Post forecasts 2012/2013 soft citrus exports at 115,000 MT, the same as previous year estimates. The United Kingdom remains the leading importer of soft citrus from South African, but exporters are focusing on the Middle East and Russia as growing markets for South African soft citrus. Industry reports that Satsuma varieties are doing very well in the UK market. Growers also consider the United States an increasingly important market for future growth.

EU member states impose a 1.6 percent preferential tariff for South Africa for all naartjies originating from South Africa. Russia imposes a five percent or \$41.93 /ton (whichever is the greater) general tariff Most Favored Nation (MFN), while Canada, Hong Kong, the UAE, and Saudi Arabia impose a zero percent MFN duty. South African naartjies enter the U.S. duty-free as a result of AGOA preferences.

Industry figures for 2011/2012 soft citrus exports are slightly different from GTA numbers; however both numbers indicate a decrease in 2011 exports. Post recognizes this difference and has decided to use the industry figures in the PSD on view that they reflect the current situation, GTA table help to show the individual markets for SA exports.

Table 11. South Africa: Soft Citrus Export Statistics

South Africa Exports Statistics				
Commodity: 080520, Mandarins (Tang & Sats) Clementines & Wil- Kings & Sim Citrus Hybrids, Fresh/Dried				
Year Ending: December				
Partner	Unit	Quantity		
		2010	2011	2012*

United Kingdom	MT	45,266	40,802	47,681
Netherlands	MT	18,932	17,879	23,492
Russia	MT	12,136	12,614	11,584
United States	MT	8,448	4,236	7,390
Canada	MT	4,699	5,182	5,891
Others not Listed	MT	25,889	25,510	25,510
Grand Total		115,878	107,945	119,187

*Year ending exports for 2012 is September. Complete 2012 data will not be available until February 2013.

Source: GTA

Production, Supply and Demand Data Statistics:

Table 12.

Tangerines/Mandarins, Fresh South Africa	2010/2011		2011/2012		2012/2013	
	Market Year Begin: Feb 2010		Market Year Begin: Feb 2011		Market Year Begin: Feb 2012	
	USDA Official	New Post	USDA Official	New Post	USDA Official	New Post
Area Planted	5,200	5,200	5,300	5,300		5,300
Area Harvested	4,609	4,609	4,800	4,800		4,800
Bearing Trees	4,609	4,609	4,800	4,800		4,800
Non-Bearing Trees	591	591	800	800		800
Total No. Of Trees	5,200	5,200	5,600	5,600		5,600
Production	140	140	155	155		160
Imports	0	0	0	0		0
Total Supply	140	140	155	155		160
Exports	104	104	115	115		115
Fresh Dom. Consumption	10	10	10	10		10
For Processing	26	26	30	30		35
Total Distribution	140	140	155	155		160
HECTARES, 1000 TREES, 1000 MT						

Commodities:

Lemons, Fresh

Area Planted:

The industry new tree census is expected to be released by the end of January 2013. Post forecasts planted area for lemons in 2012/2013 at 4,900 ha. Lemons are favored by producers as they have higher margins in export markets.

Production:

Post forecasts 2012/2013 lemon production at 270,000 MT, on a good weather conditions in the Eastern Cape, which is a major production region. According to the industry, returns for producers are very attractive, which is creating an incentive to produce more. In addition, competition from Argentina will be less this upcoming year as a result of lower production due to major weather issues.

Lemons grow best in the cool climatic conditions of Eastern Cape, and the most popular cultivar is Eureka. Some lemon producers have tried producing a seedless type of Eureka to appeal to foreign consumers, but the world's first seedless lemons developed in South Africa have reportedly yielded disappointing results. The seedless variety of Eureka has low yields, is susceptible to root rot, and is costly in terms of production.

Consumption:

Post estimates 2012/2013 local domestic consumption of lemons at 11,000 MT on stable domestic demand. Lemons are used as flavorings for grilled or fried poultry and fish dishes. Lemon juice can also be used in the drink, cleaning and pharmaceutical industries. In the food industry, lemon juice is used as a flavor agent, in cakes, tarts, biscuits, candies, ice creams and salad dressing sauces. In the drink industry, it is used to make lemonade, smoothies, juices and liquors. In the cleaning industry, lemon juice has been used as a degreaser and disinfectant, due to its high concentration of citric acid, which can inhibit the proliferation of some molds and bacteria.

Trade:

Imports

Post forecasts 2012/2013 imports of fresh lemons at 50 MT, as a result of a better than expected crop and SA's ability to satisfy domestic demand. Post revised its estimates for 2011/2012 imports for fresh lemons at 50 MT, as reported on GTA.

Table 13. South Africa: Lemon Import Statistics

South Africa Import Statistics				
Commodity: 080550, Lemons (Citrus Limon/Limonum) & Limes (Citrus Aurantifolia/Latifolia), Fr/Dried				
Year ending: December				
Partner	Unit	Quantity		
		2010	2011	2012*
Spain	MT	0	0	23
El Salvador	MT	22	79	15
Zimbabwe	MT	8	154	0
Other not listed	MT	20	2	0
Grand Total	MT	54	235	39

*Year ending imports for 2012 is September. Complete 2012 data will not be available until February 2013.

Source: GTA

(Note: In the PSD tables, quantities below 1,000 MT will be displayed as zero.)

Exports

Post forecasts 2012/2013 lemon exports at 175,000 MT, as a result of additional exportable supplies compared to the previous year and lower competition from Argentina as a result of their expected weather related production problems.

Post revised 2011/2012 lemon exports down to 160,000 MT from 166,000 MT on final GTA data. The Middle East is a major importer of SA lemons, as Middle Eastern populations make extensive use of

lemons for culinary use and cultural occasions. Saudi Arabia and the United Arab Emirates account for 28 percent of total SA exports.

Table 14. South Africa: Lemon Export Statistics

South Africa Exports Statistics				
Commodity: 080550, Lemons (Citrus Limon/Limonum) & Limes (Citrus Aurantifolia/Latifolia), Fr/Dried				
Year Ending: December				
Partner country	Unit	Quantity		
		2010	2011	2012*
United Arab Emirates	MT	28,370	25,009	33,352
Netherlands	MT	21,186	19,193	19,620
Russia	MT	21,896	27,186	18,853
Saudi Arabia	MT	19,056	20,652	18,494
United Kingdom	MT	17,103	14,316	16,203
Hong Kong	MT	8,584	10,431	10,984
Grand Total	MT	150,606	165,223	162,102

*Year ending exports for 2012 is September. Complete 2012 data will not be available until February 2013.

Source: GTA

Industry figures for 2011/2012 lemon exports are slightly different from the GTA number, but both show an increase in lemon exports. Post recognizes this difference and has decided to use industry figures in the PSD on view that they reflect the current situation. However, the GTA table helps to show the individual markets for SA exports.

Production, Supply and Demand Data Statistics:

Table 15. South Africa: Production; Supply and Distribution Data

Lemons/Limes, Fresh South Africa	2010/2011		2011/2012		2012/2013	
	Market Year Begin: Jan 2010		Market Year Begin: Jan 2011		Market Year Begin: Jan 2012	
	USDA Official	New Post	USDA Official	New Post	USDA Official	New Post
Area Planted	4,726	4,726	4,900	4,900		4,900
Area Harvested	4,183	4,183	4,200	4,200		4,200
Bearing Trees	4,183	4,183	4,200	4,200		4,200
Non-Bearing Trees	543	543	600	600		600

Total No. Of Trees	4,726	4,726	4,800	4,800		4,800
Production	257	257	260	260		270
Imports	0	0	0	0		0
Total Supply	257	257	260	260		270
Exports	162	162	165	160		175
Fresh Dom. Consumption	13	13	11	11		11
For Processing	82	82	84	89		84
Total Distribution	257	257	260	260		270
HECTARES, 1000 TREES, 1000 MT						

Policy Issues:

United States cold-steri protocol

The cold-steri protocol for SA citrus destined for the United States still requires 24 days to control False Codling Moth, a serious threat to the U.S. industry. Local officials maintain that the provision of 24 days has resulted in losses between six and 15 percent of a shipment due to cold damage, whereas 22 days cold storage treatment results in losses of only three percent.

Labor strikes

In the last few months, South African has experienced several labor strikes in various economic sectors demanding higher wages. The most recent strikes were organized by farm workers in the Western Cape. This volatile situation, fortunately, did not affect the citrus industry, since the strikes began after the packing season was over. FAS/Pretoria will follow the situation closely in 2013 and report any disruptions that might occur.