

The Citrus Industry in Australia and South Africa

ASOEX 2011



- Two Southern Hemisphere Citrus Exporting Countries
- Both Belong to SHAFFE – Southern Hemisphere Association of Fresh Fruit Exporters
- The industries contrast in many aspects of scale, production and focus.

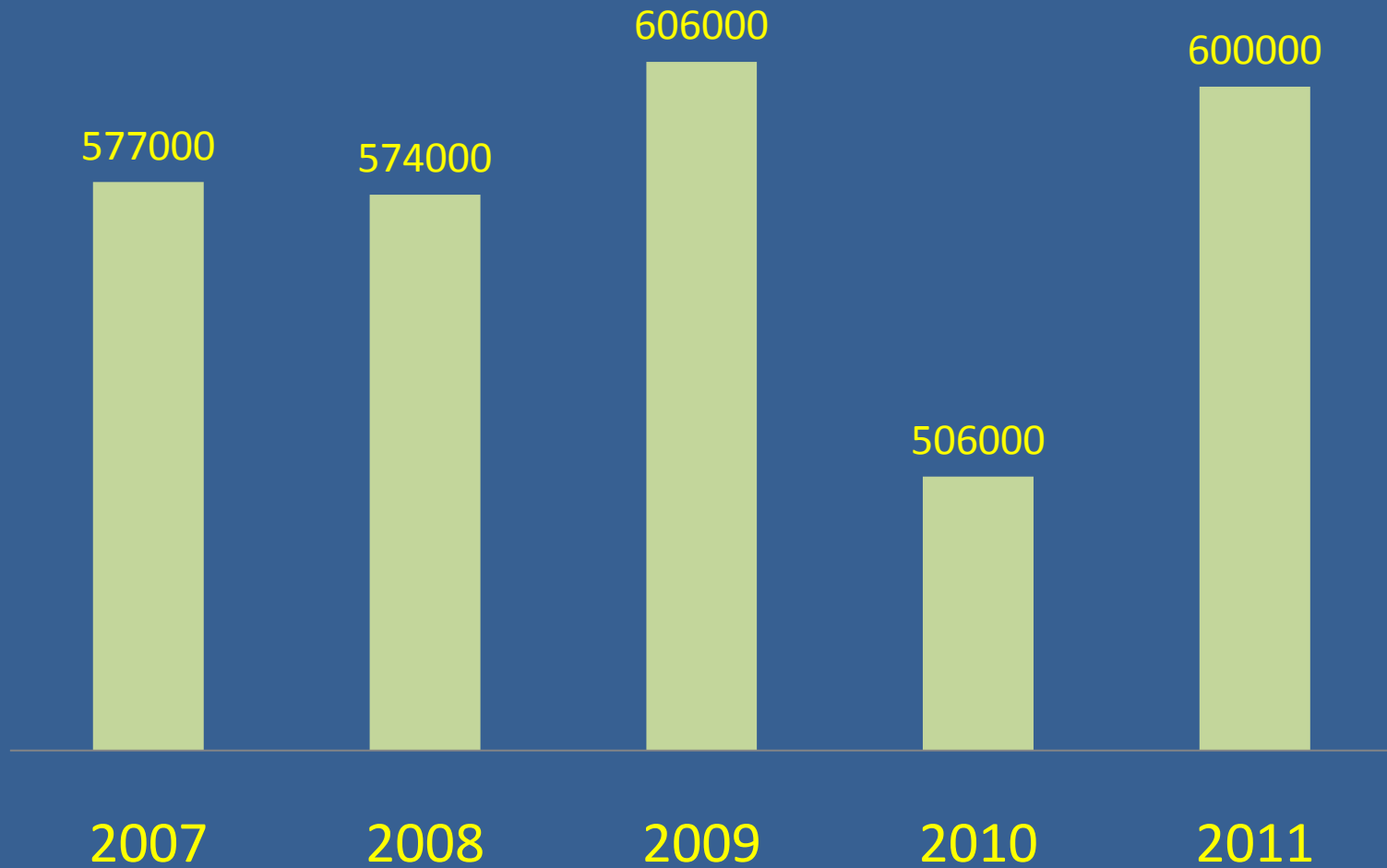
What we are about to see:

- Scale
- Market Focus
- Exports
- Production Aspects
- Industry Issues
- Summary: A side by side look at the industries.

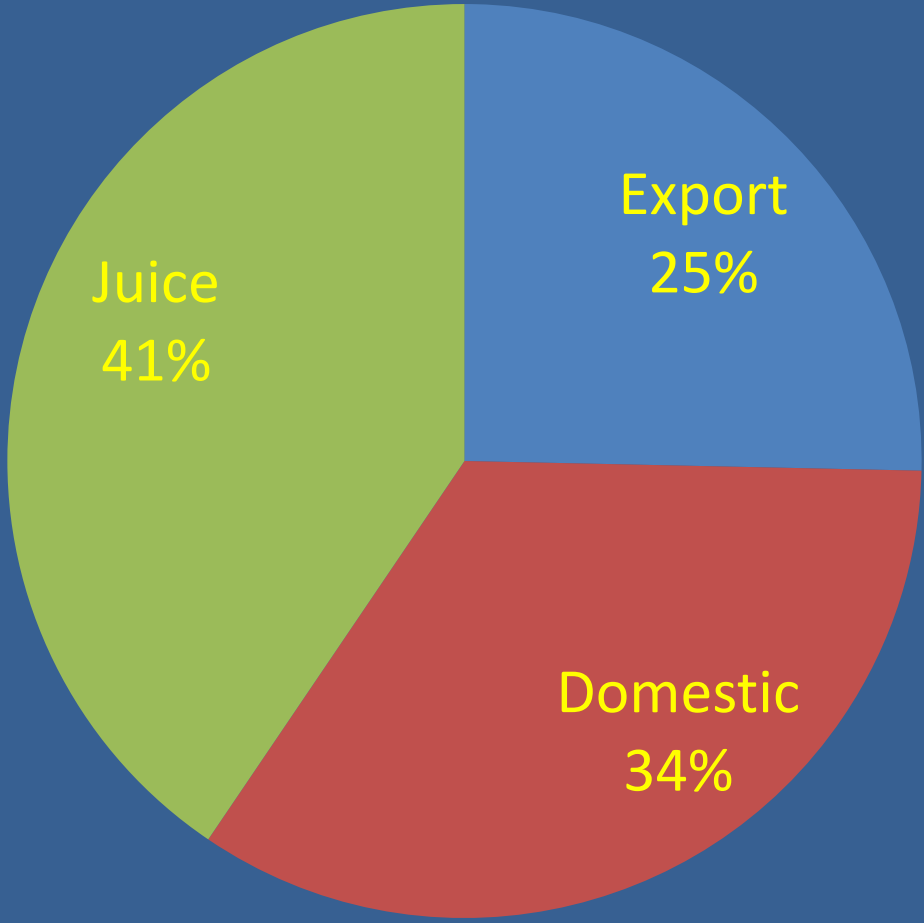
The Australian Citrus Industry



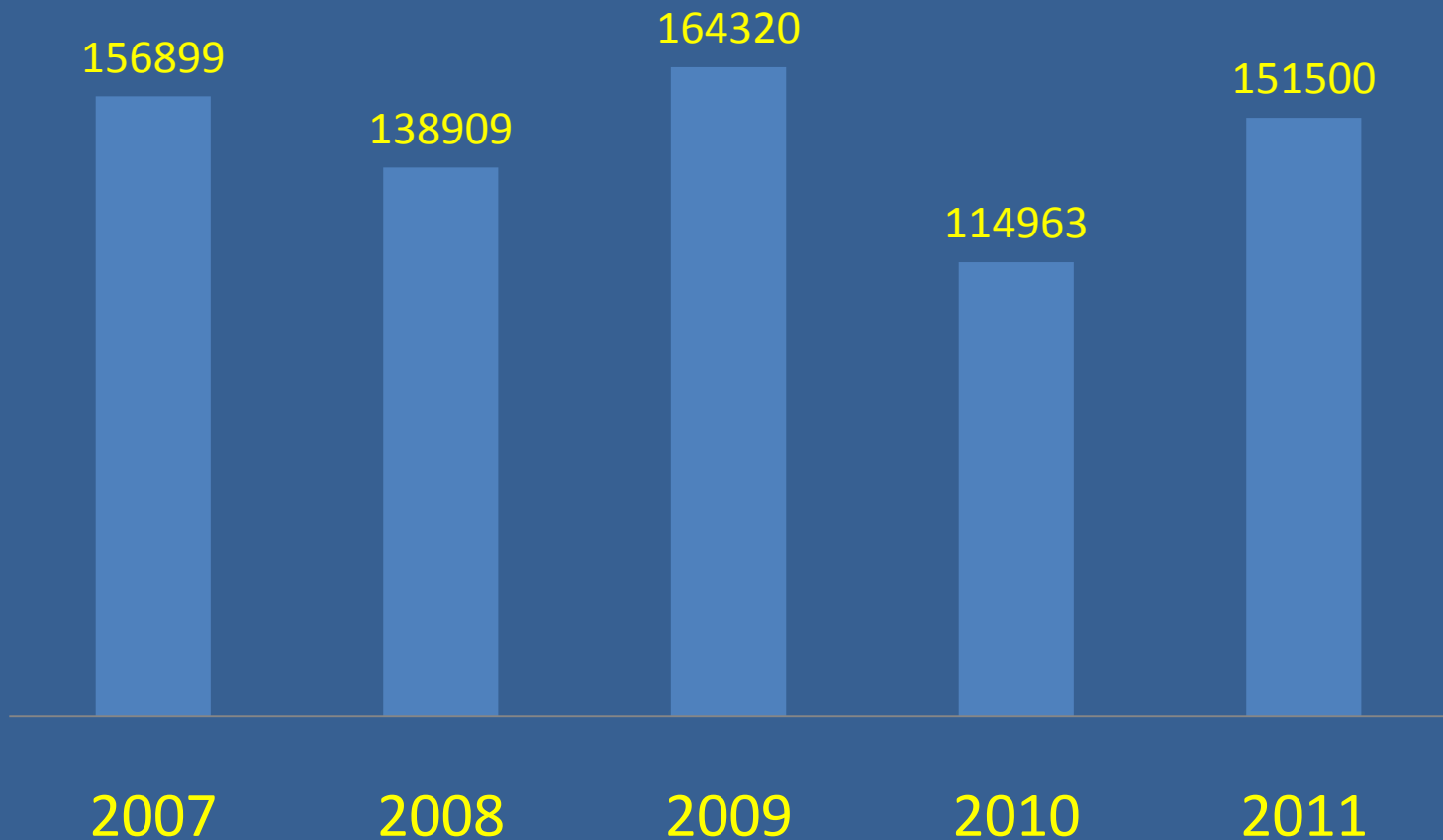
Australian Citrus Production (MT)



Australia Market Segments

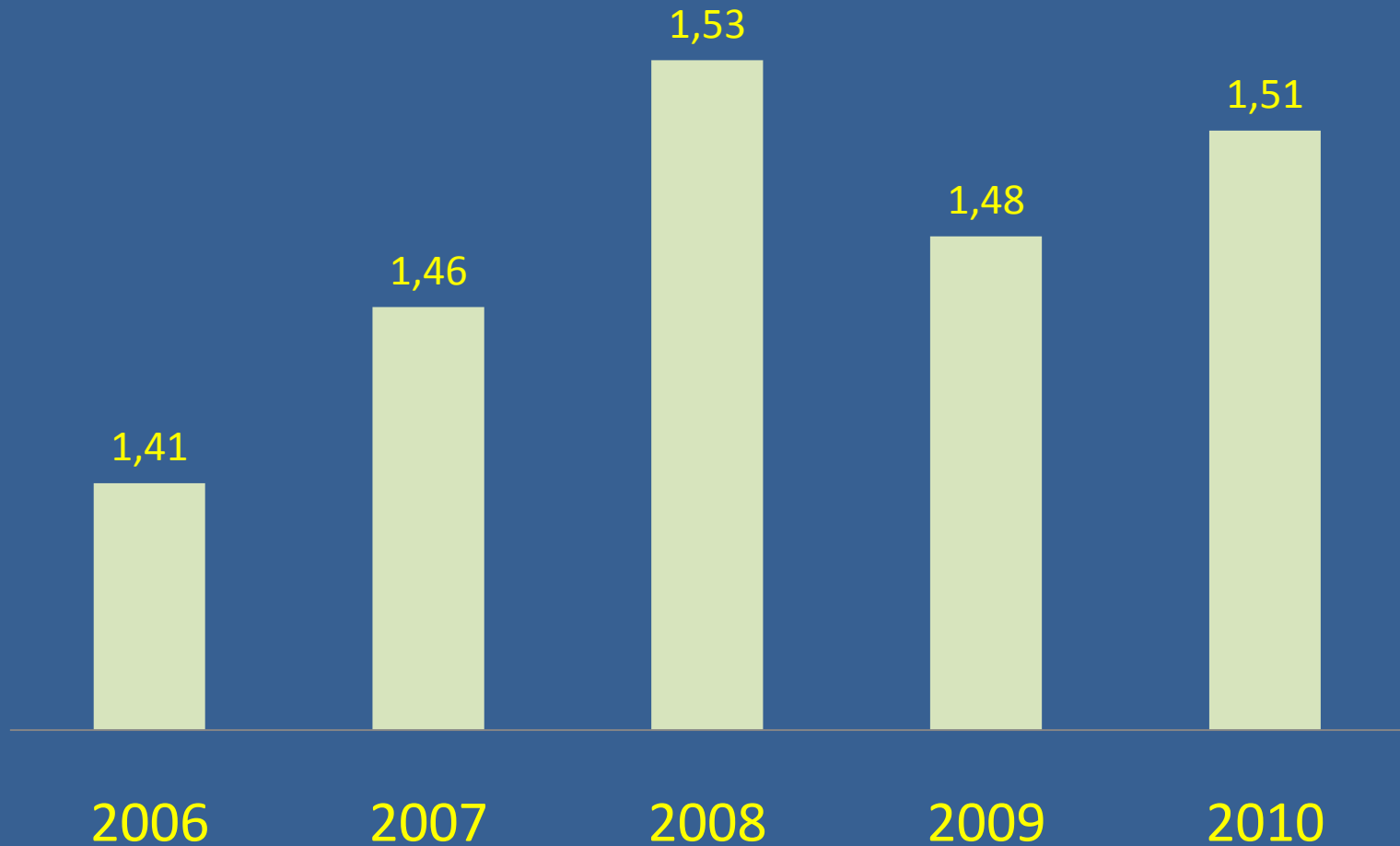


Australian Citrus Exports (MT)

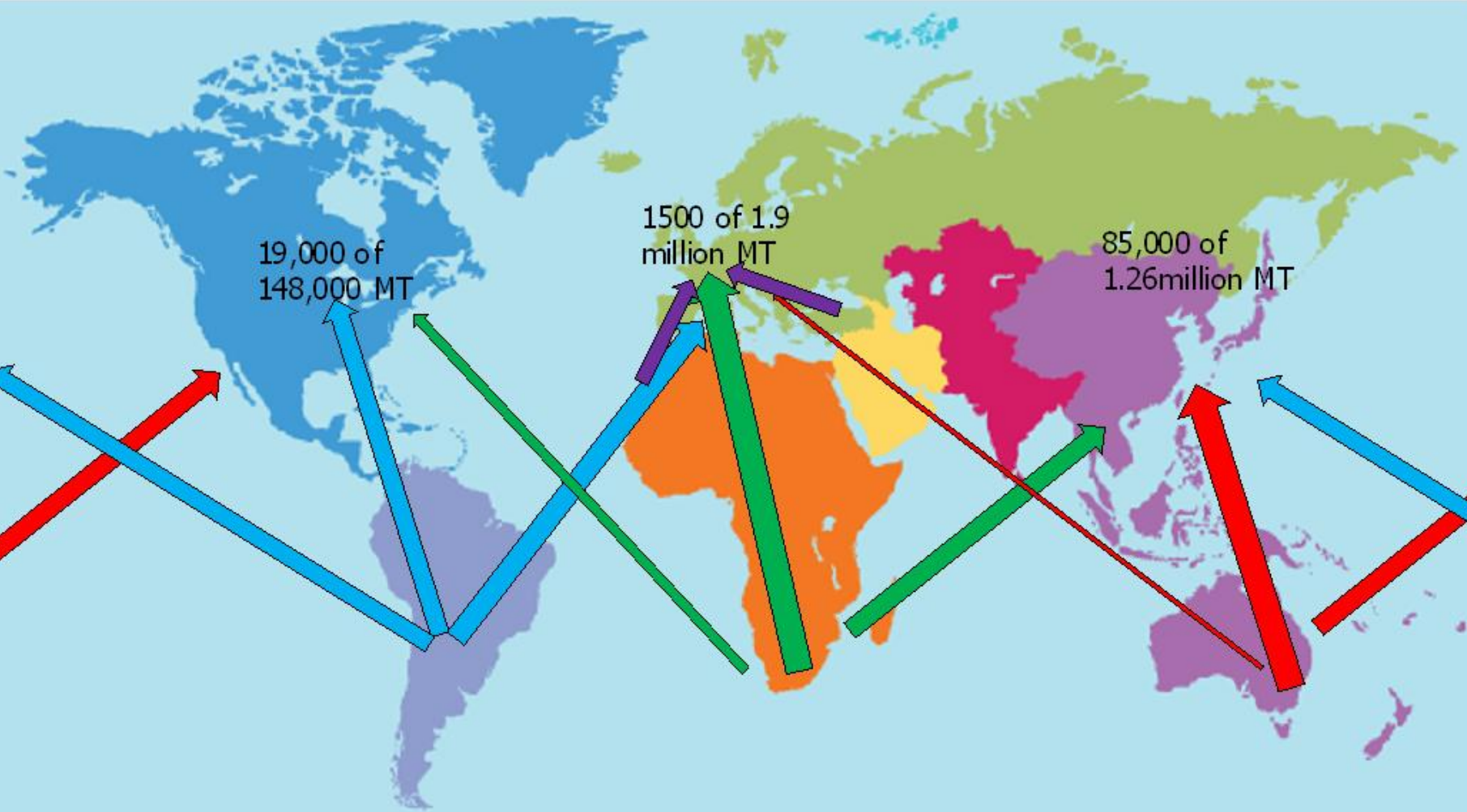


- 1.6% of world citrus exports
- 3% of Southern Hemisphere exports

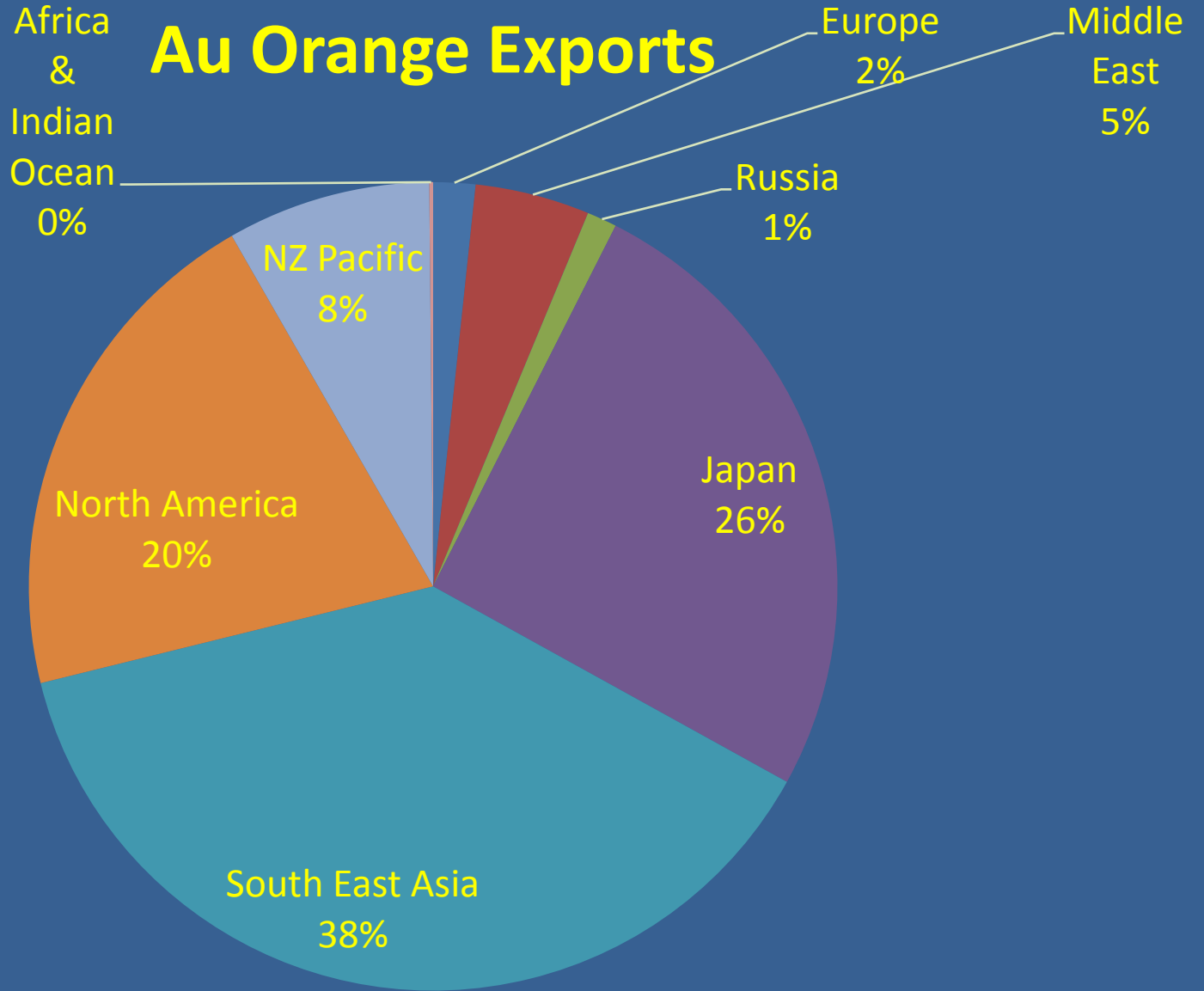
Australian Fruit in Japan Average Export Price Au\$/kg



Southern Hemisphere Citrus trade to the north



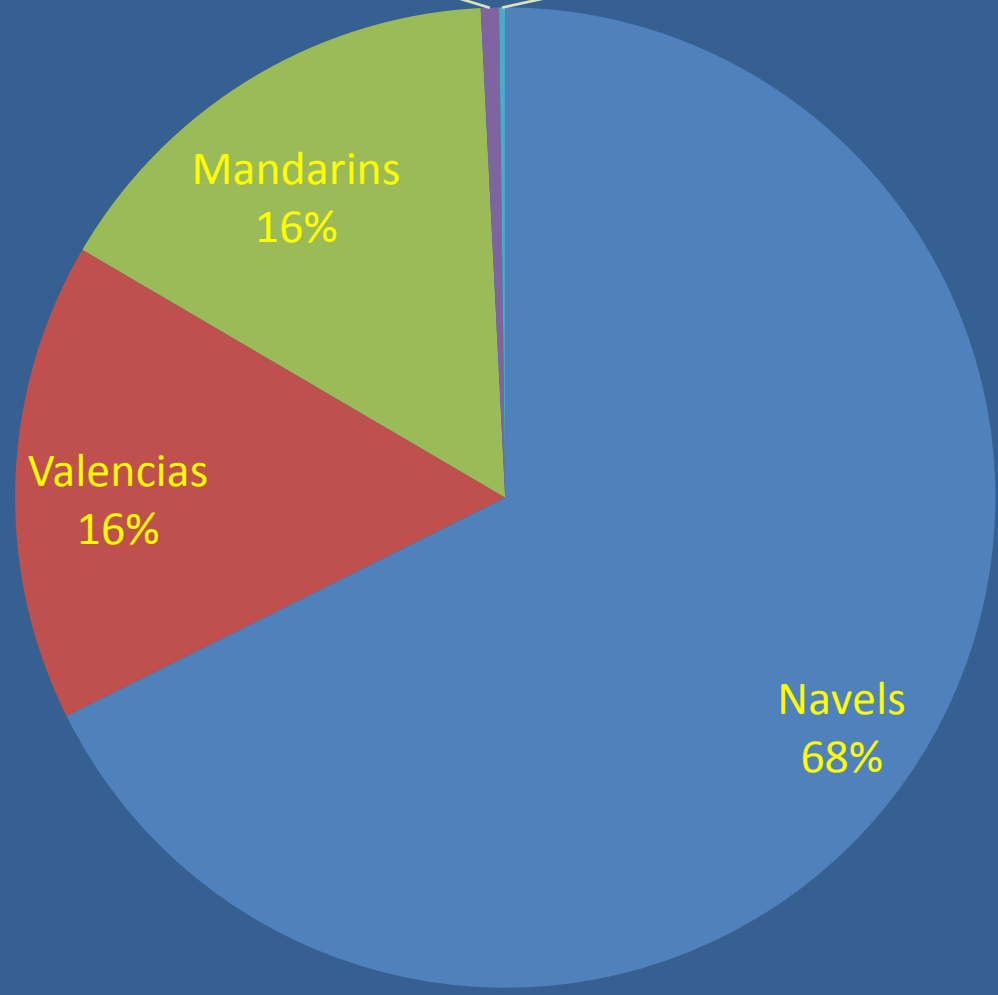
Au Orange Exports



Australian Citrus Exports

Lemons
0%

Grapefruit
0%



Mandarins
16%

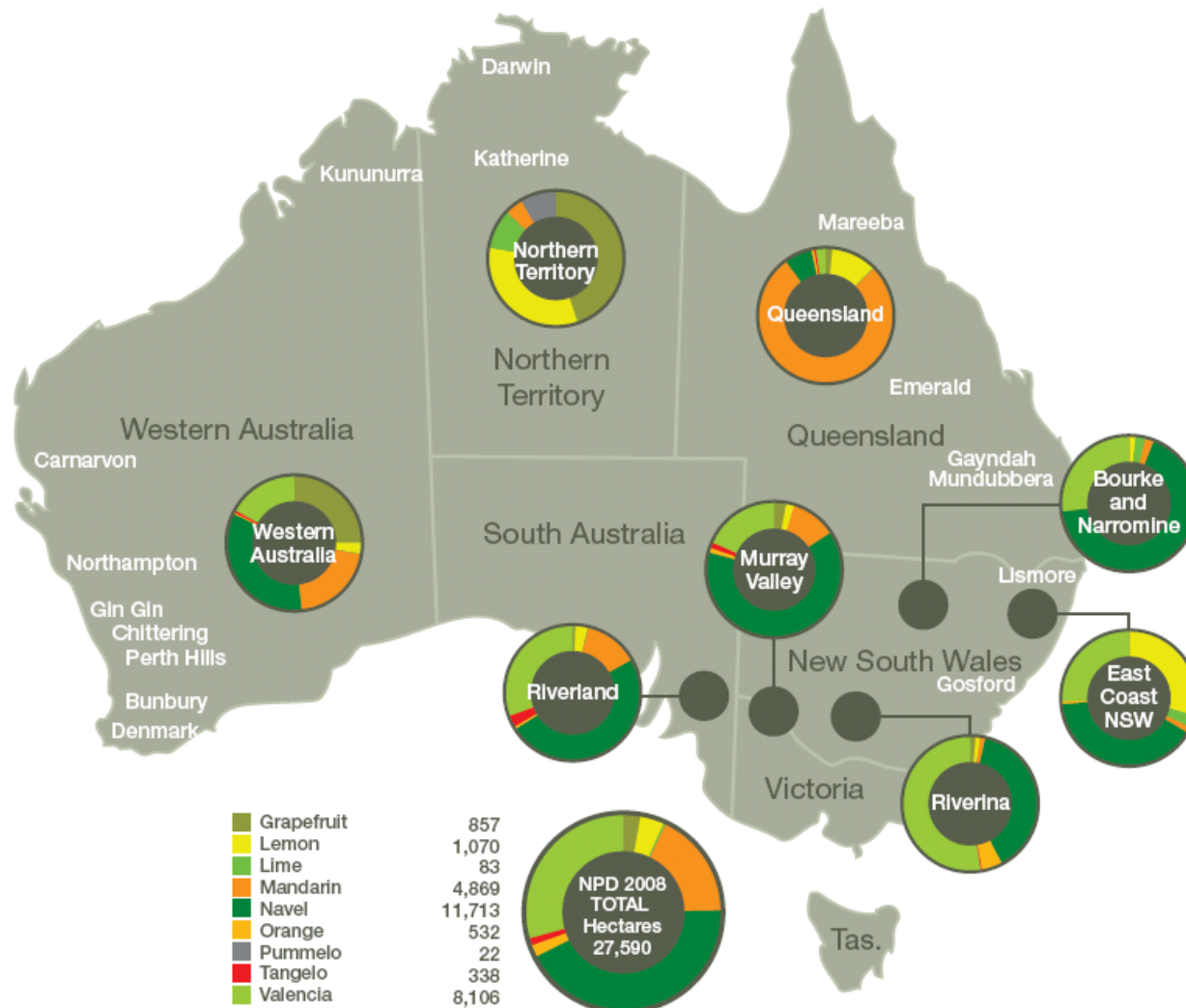
Valencias
16%

Navels
68%

Citrus Production Areas



Citrus Plantings



Current Industry Issues

- Market Access
- Water Rights
- Biosecurity Issues

Summary:

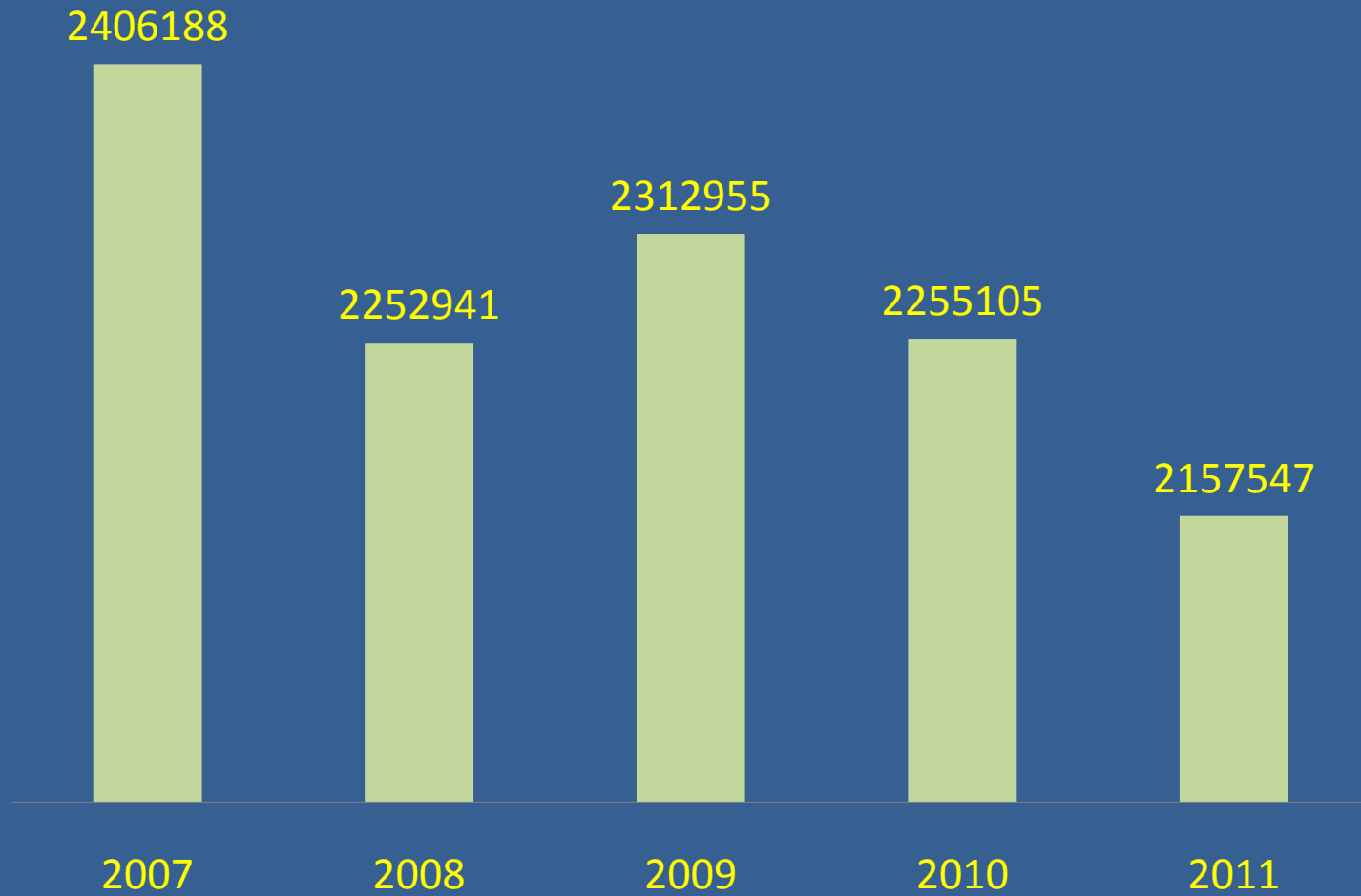
Australia:

- High cost producer
- Domestic market based
- Small scale on world markets
- Exports heavily biased toward navels

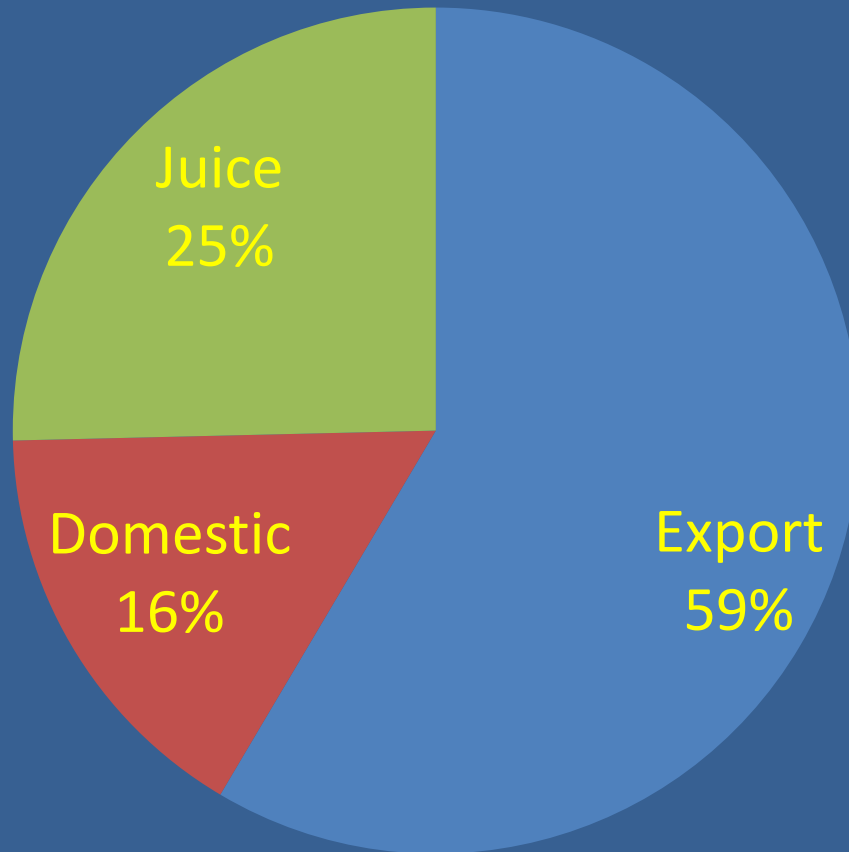
The South African Citrus Industry



South Africa Citrus Production (MT)

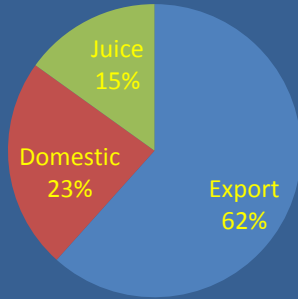


SA Market Segments

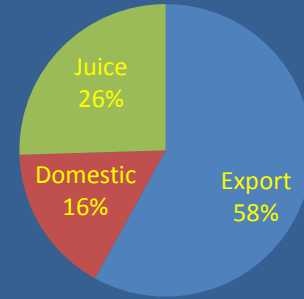


SA Market Segments by Type

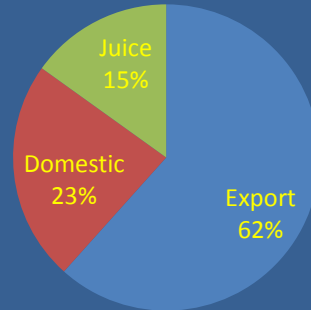
Navels



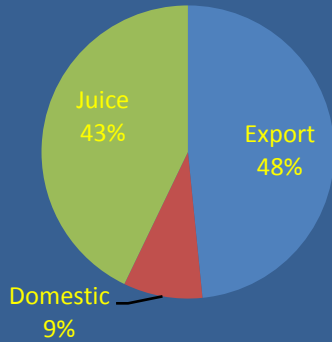
Valencias



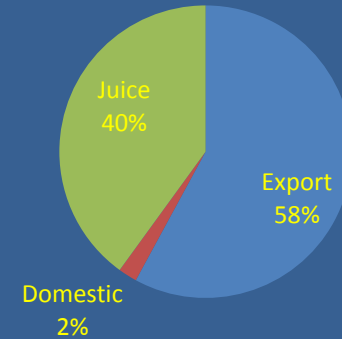
Soft Citrus



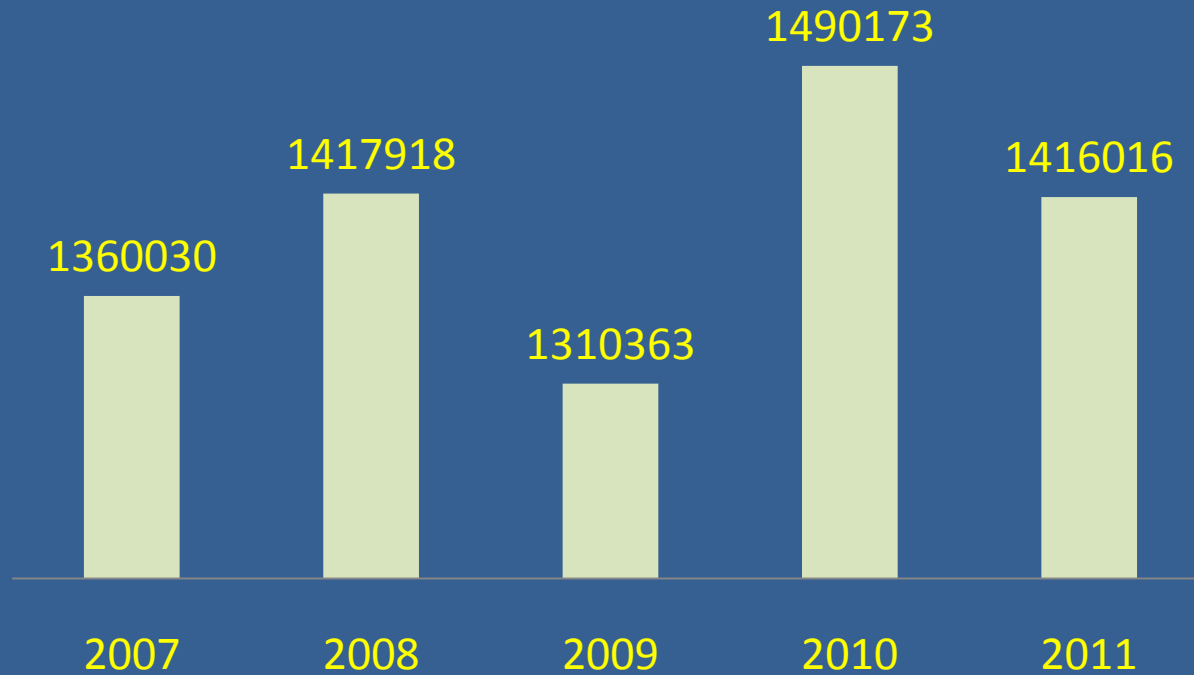
Lemons



Grapefruit



South Africa Citrus Exports

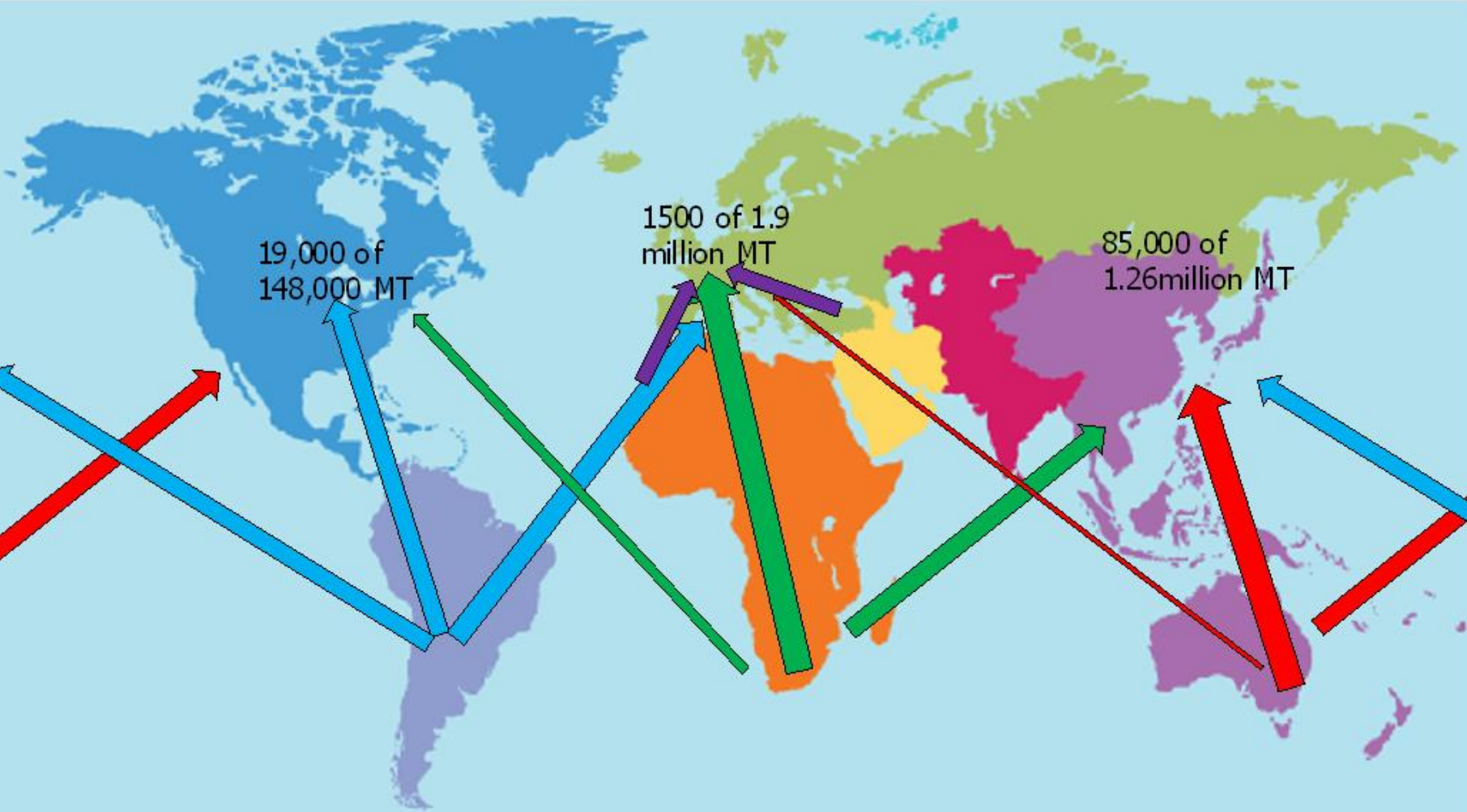


- 10% of world citrus exports
- Over 30% of southern hemisphere exports
- World's second largest citrus exporter after Spain

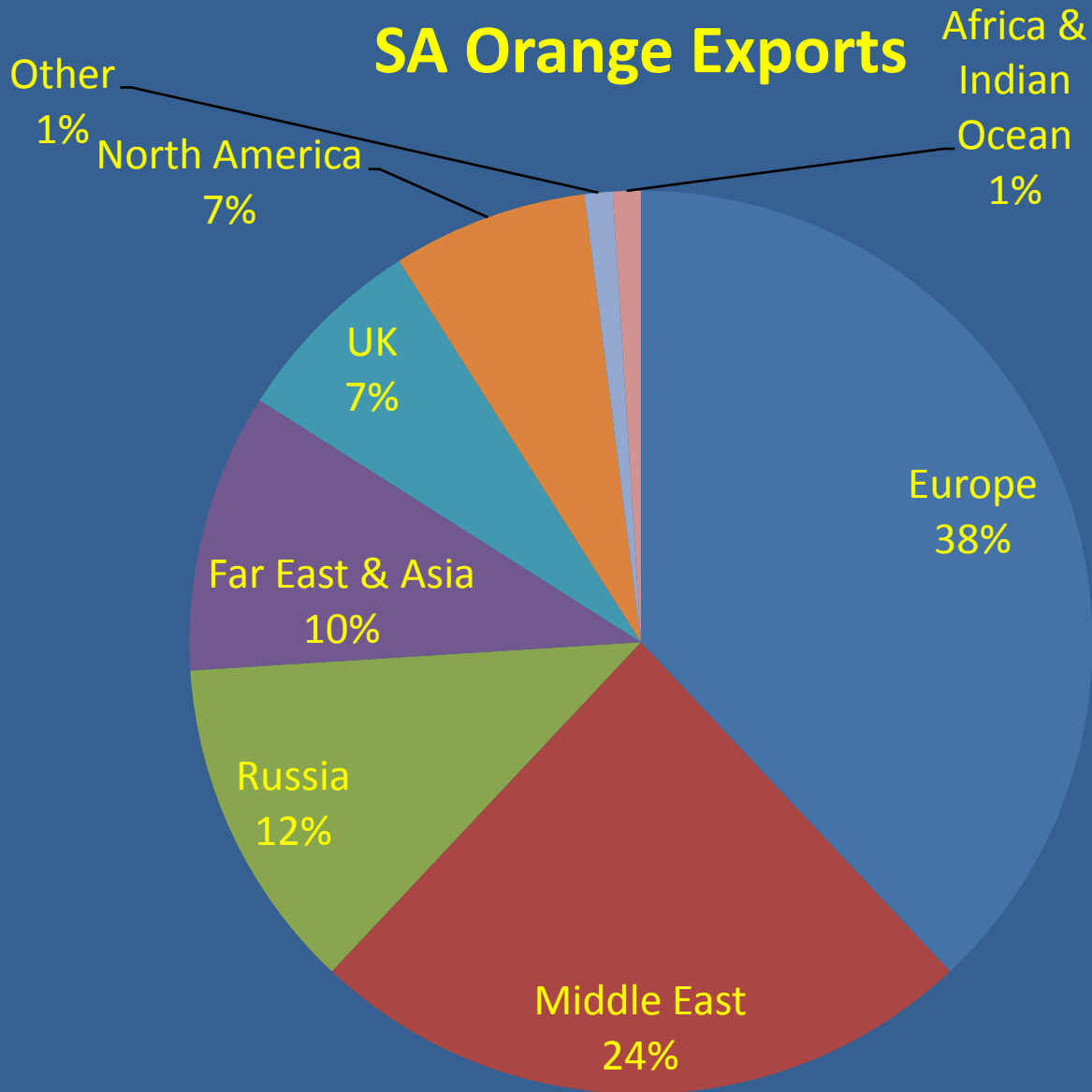
South African Fruit in Japan Export Price Au\$/kg



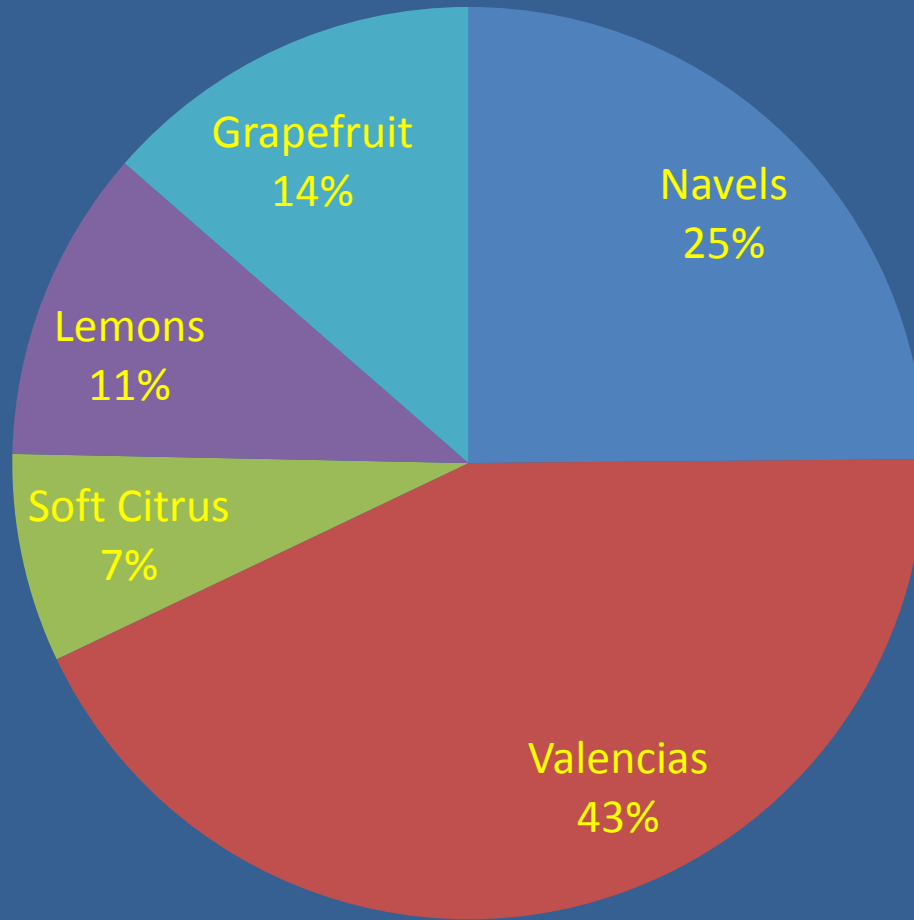
Southern Hemisphere Citrus trade to the north



SA Orange Exports



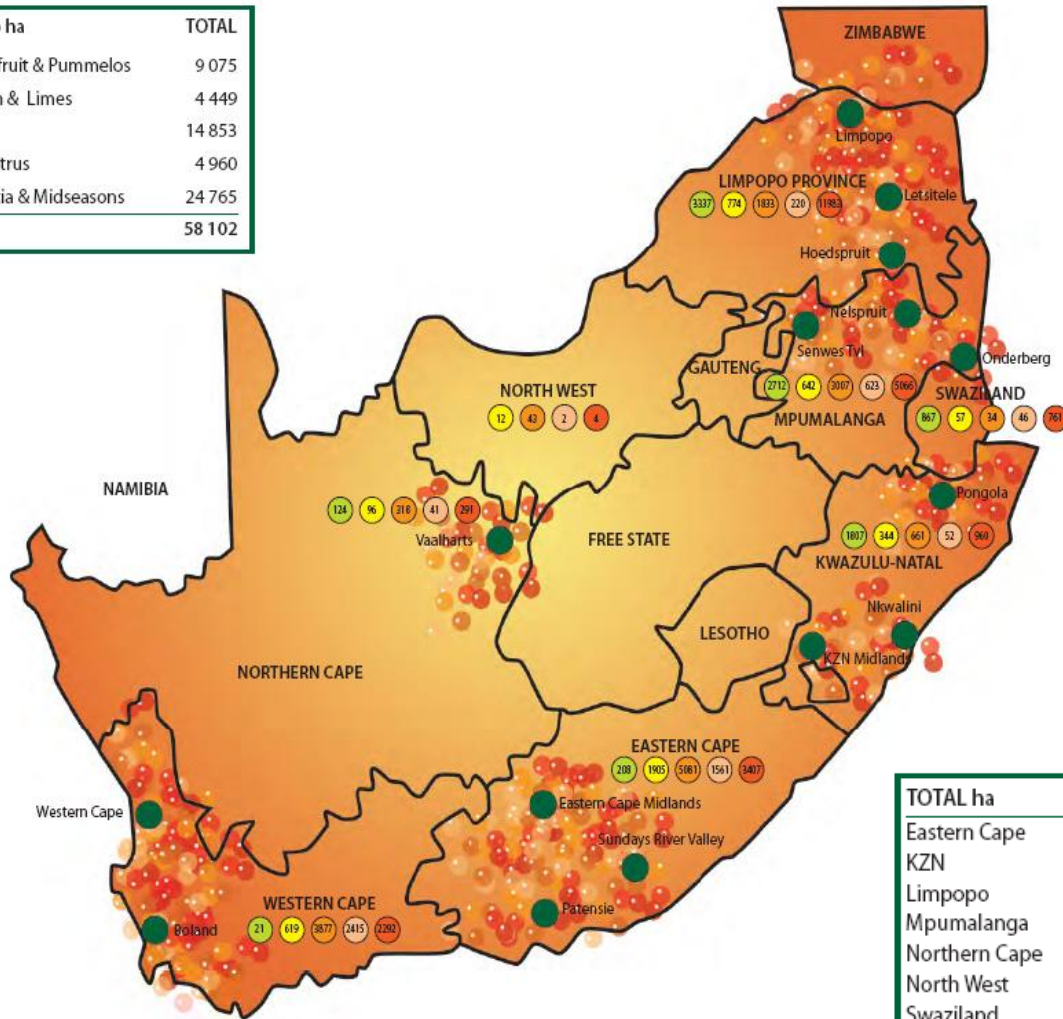
South Africa Citrus Exports



- Lemons Increasing
- Oranges Increasing
- Grapefruit Increasing
- Soft citrus stable to decline

South Africa Citrus Plantings and Production

KEY to ha	TOTAL
Grapefruit & Pummelos	9 075
Lemon & Limes	4 449
Navel	14 853
Soft Citrus	4 960
Valencia & Midseasons	24 765
	58 102



TOTAL ha	58 102
Eastern Cape	12 162
KZN	3 824
Limpopo	18 146
Mpumalanga	12 050
Northern Cape	871
North West	61
Swaziland	1 764
Western Cape	9224

Source: Southern Africa Citrus Growers, Global Conference 2010.

Current Industry Issues

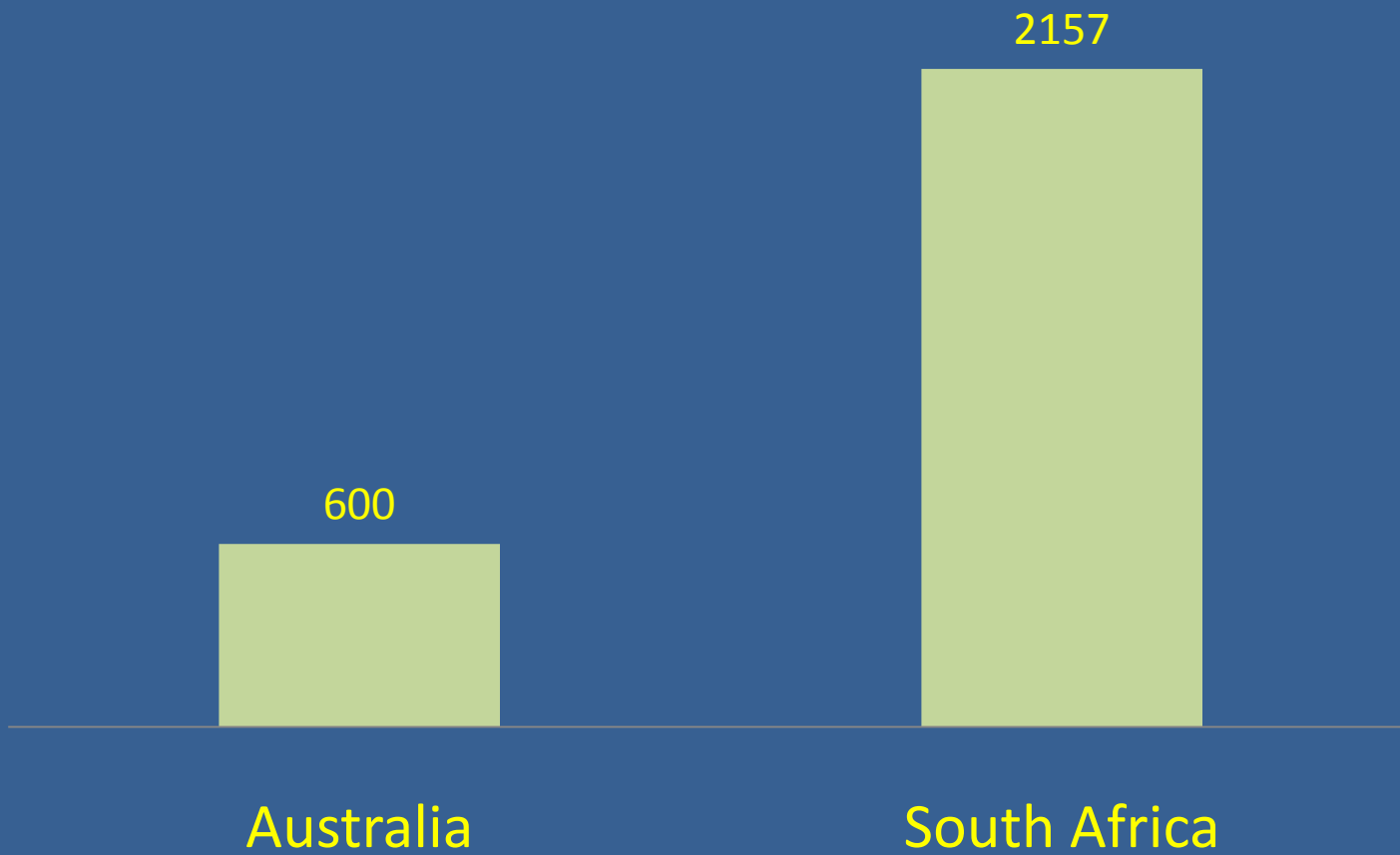
- Stagnant traditional markets in EU, Middle East, UK.
- New emerging markets – China, India, Africa, Eastern Europe.
- Political uncertainty, land redistribution.

In general, a climate of opportunity
and uncertainty.

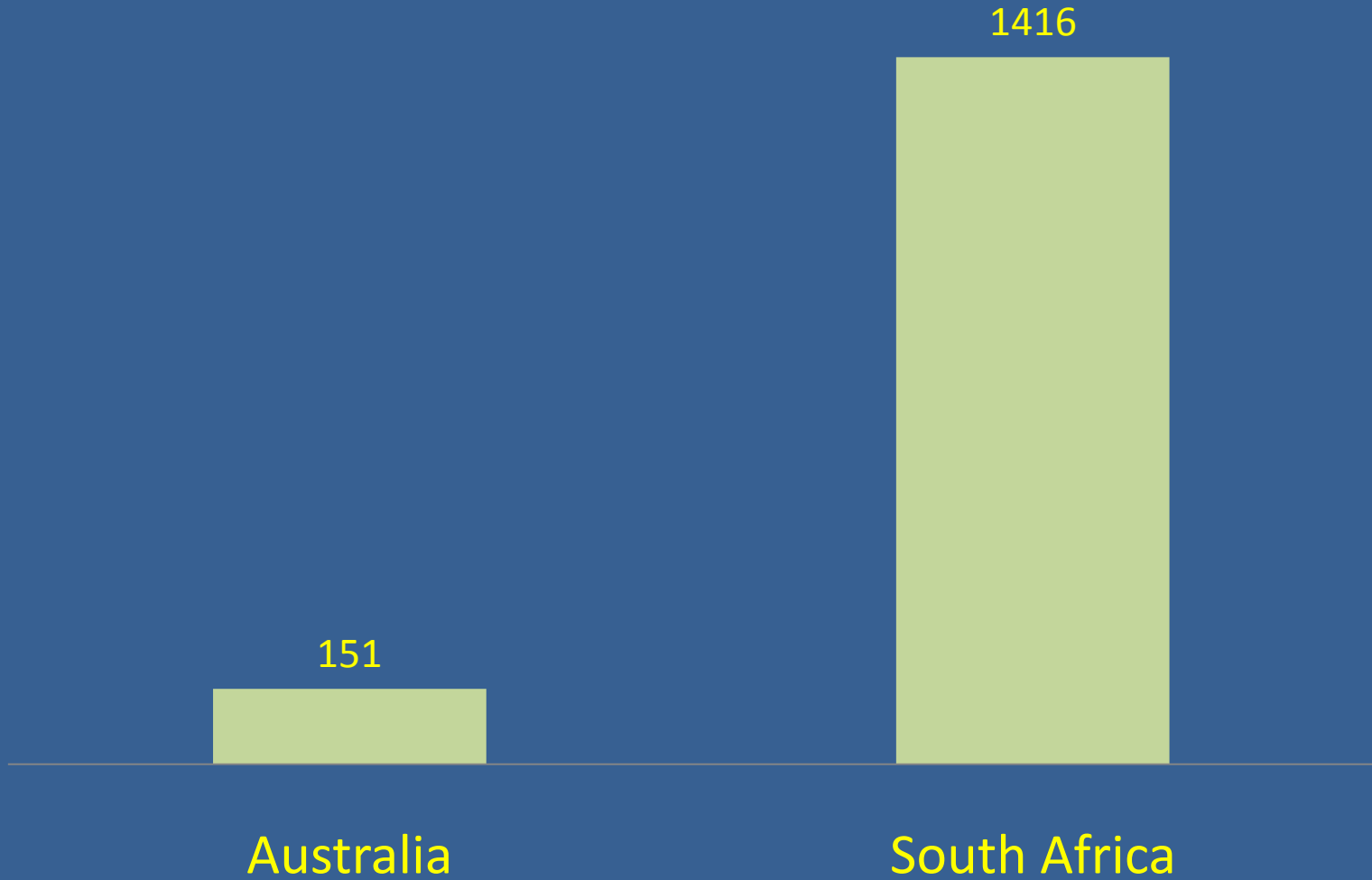
The Industries Side by Side



Production (000 MT)

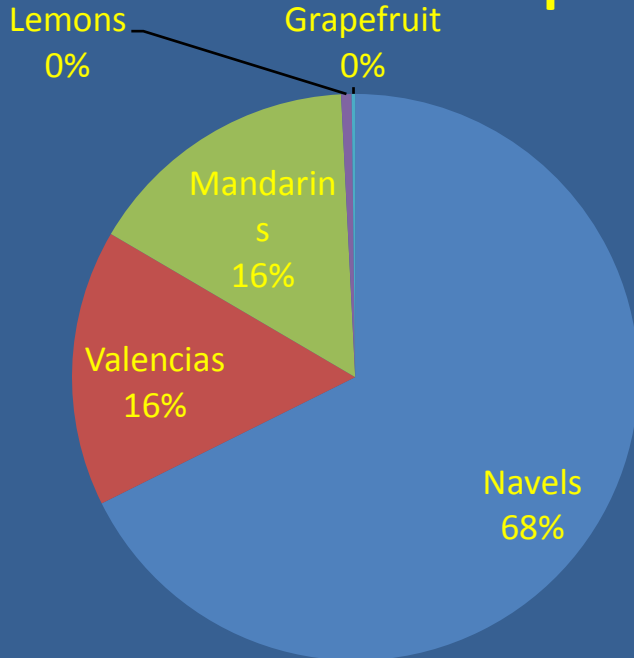


Export (000 MT)

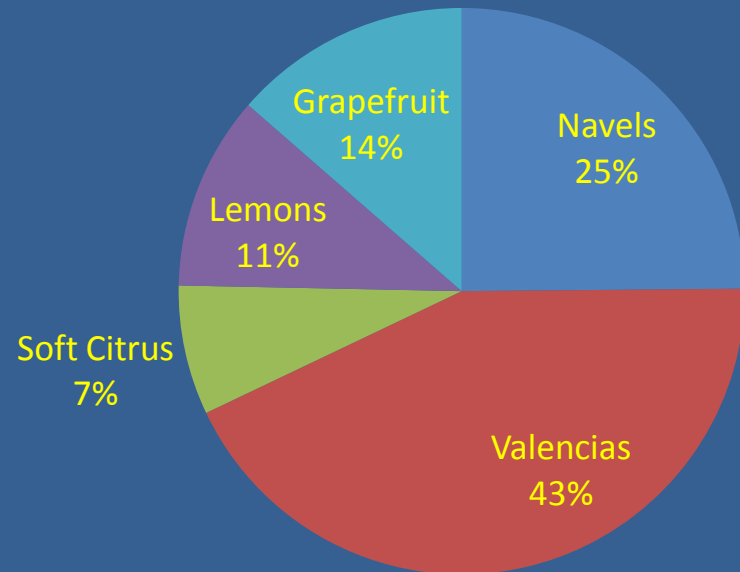


Export Citrus Mix

Australian Citrus Exports



South Africa Citrus Exports



Average Price/kg / Japan

1,478



Australia

0,958



South Africa

Current Industry Issues in Common:

- Market Access
- Biosecurity
- New Varieties
- Currency Movements

What Future Do We See?



Healthy and prosperous for us all



