South African grapefruit

The South African grapefruit industry is among the largest in the world in terms of both production (among the five leaders) and exports (second largest exporter in the world). The sector is resolutely export-oriented, focusing in particular on the EU and Japan, and dominates world trade during the summer. Plantations are mainly located in the north-east with production of an average of some 270 000 to 290 000 t in recent years. The cultivated area is tending to stabilise.

Grapefruit - South Africa - Production zones

Source: Cirad

Production zones

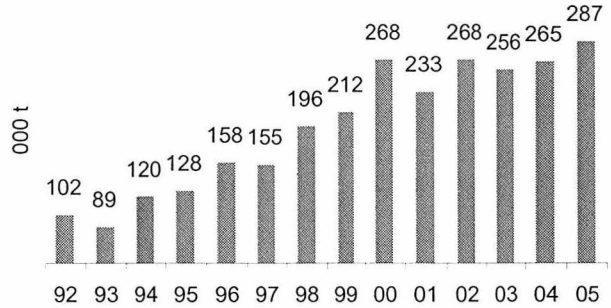
The 7 800 hectares of plantations inventoried in 2004 are in the plains (Lowveld) in the north-east, the only part of the country with the subtropical climate required for growing grapefruit. Most of the orchards are in the valleys of the main rivers in rich, deep soil where irrigation is possible. Limpopo Province in the far north of the country accounts for about 25% of the area under grapefruit (mainly around Lestitele, Hoedspruit and Tshipise at the frontier with Zimbabwe). Most of the other plantations are in provinces further south that are more moist because they are close to the sea. Mpumalanga is the country's main production zone with about 37% of the area, in particular near Malelane in the Crocodile River valley. About 21% of the total area is found further south in Kwazulunatal, mainly around Pongola and Nkwaleni. Production is more limited in the other provinces. The plantations in Swaziland (included in the statistics with those of South Africa) are decreasing noticeably to the benefit of sugar cane and in 2004 accounted for some 13% of the total area. A few rare plantations can be found in the Eastern Cape.

Volumes

The dissemination of 'Star Ruby', a variety well suited to local soil and climate, and the opening of the Japanese market led to a wave of planting in the 1990s. During the decade, production increased from about 100 000 t to nearly 270 000 t in 2000. It stabilised at this level until 2004, and in the years to come should remain close to the 290 000 t reached in 2005.

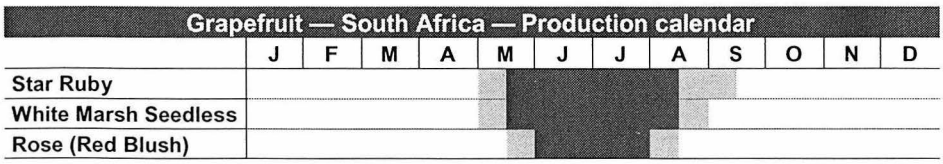
On the one hand, the start of production of the orchards planted in 2000 should be counterbalanced by the decrease in the planted area in Swaziland. On the other, a strong rand and the decrease in consumption on the international market weigh on a sector whose profitability is largely dependent on exports. The maintaining of competitiveness while the government is establishing a policy aimed at improving the standard of living of the black population ('Black Economic Empowerment', including a form of land redistribution) is also a challenge for the citrus industry. The sector is strongly structured and provides full or partial funding for several support bodies whose actions are coordinated by the Citrus Grower Association (Citrus Research International, Citrus Marketing Forum). The fungal disease Citrus Black Spot and the insect pest Cryptophlebia leucotreta (False Codling Moth) are the two main sanitary constraints on the sector as they lead to restricted access to certain markets.

Grapefruit - South Africa - Production



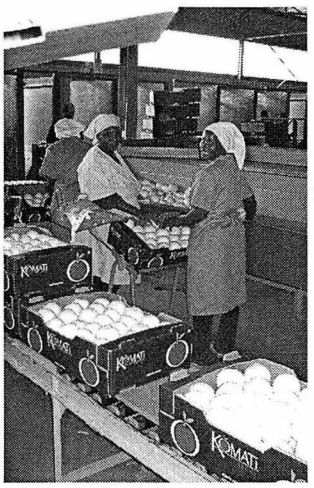
Source: CGA

Grapefruit — South Africa — Production calendar



Production calendar and varieties

'White Marsh' production is decreasing in favour of coloured varieties but still accounted for 37% of the planted area in 2004. 'Star Ruby' clearly dominates production with more than 80% of the area devoted to coloured grapefruit. The variety grown in South Africa is original as it was obtained by germinative propagation and is particularly well-suited to soil and climate conditions. The other varieties, with 'Red Blush' (referred to locally as 'Rose') being the most commonly planted with about 10% of the total area. The staggering of plantation zones over 6°0 latitude means that production has considerable spread. The harvest can start in the first half of April in Limpopo and in the second half in the other regions.

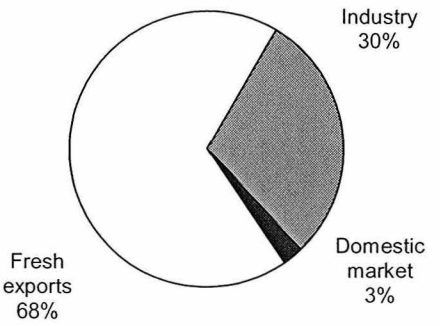


© Eric Imbert

Outlets

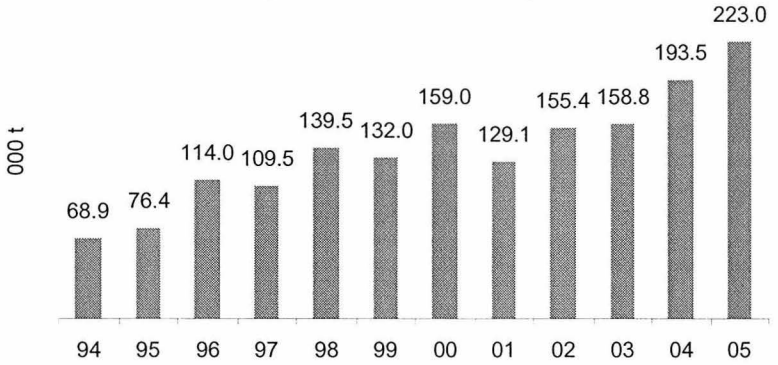
The sector is export-oriented as this is the most profitable outlet. About two-thirds of production is exported. The domestic market for grapefruit is little developed in contrast with that of other citrus fruits. Average per capita consumption is less than 160 g per year, that is to say about half a grapefruit. The share of volumes delivered to industry increased from about 25% at the end of the 1990s to 35-40% in 2004 because production increased faster than export demand. The trend has reversed in the last two seasons as the international fruit market is now more open. However, South Africa is still the fourth largest producer of concentrated juice in the world.

Grapefruit - South Africa - Outlets



Source: CGA 2003-2004 average

Grapefruit - South Africa - Exports



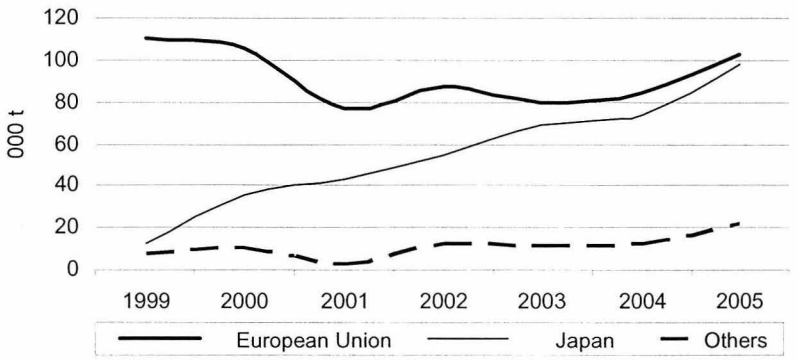
Source: CGA

Exports

Almost entirely limited to the European market, exports were fairly stable until the mid-1990s at some 60 000 to 70 000 t. The possibility of exporting to Japan, on condition that quarantine measures (cold treatment) were taken to combat fruitfly, stimulated the South African grapefruit industry. Exports increased from 1997 onwards after the end of OUTSPAN, the single channel for international sales. Growth slowed from 2000 onwards because of disappointing returns for growers, the strengthening of Citrus Black Spot control measures in the EU and a less favourable exchange rate. It recovered strongly in 2005 as a result of the shortage of fruits from Florida.

The Japanese and European markets imported similar volumes (approximately 100 000t) in that year. They were followed by South Korea, North America (mainly Canada) and Eastern Europe, but these destinations were far behind with 4 000 to 6 500 t. The Perishable Product Export Control Board performs quality control of the goods shipped to international markets. The Citrus Marketing Forum (CMF) contributes to coordinating exports but there are still many export structures (more than 200 with the first 10 controlling some 60% of volumes) in spite of a decrease in recent years and this adversely affects economic returns.

Grapefruit - South Africa - Exports by destination



Source: CGA

Logistics

More than 80% of the fruits are shipped from Durban. This port is the least remote from the production zones and also the only one approved for exports to Japan. Although close to the large production zones in the north of the country, the port of Maputo in Mozambique is little used because of its comparatively mediocre infrastructure. A few limited quantities are shipped from Port Elizabeth and Cape Town.

Grapefruit — South Africa — Logistics

Markets	Main shipping lines		Shipping time	Observations
	Port of Departure	Port of arrival		
EU	Durban	Antwerp, Rotterdam, Vlissinguen	16 to 18 days	Numerous lines
		Vado, Tarragone, Castellon	18 to 22 days	
Japan	Durban	Tokyo, Osaka, Yokohama	19 to 21 days	Nunerous lines