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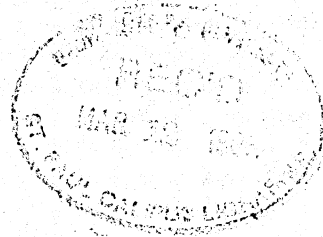
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THE SOUTHERN AFRICAN CITRUS INDUSTRY

D KRUGER

S A Co-operative Citrus Exchange

1. INTRODUCTION

The citrus industry of Southern Africa has existed as an organised industry for over half a century. During this period it experienced various slumps, but also various peaks. It is important to assess the viability of the industry over the long-term rather than to look at the results of one or two years in isolation. This does not mean that short-term setbacks do not have adverse implications for the industry.

A brief evaluation of historical performances and difficulties and of future prospects will now be given, based on this point of view.

In this paper "citrus" refers to oranges, grapefruit, lemons and a limited number of selected soft citrus cultivars.

"Southern African Citrus Industry" refers to the industries in the Republic of South Africa, the self-governing national states, the independant national states and neighbouring countries.

In the statistical schedule attached hereto, calender years are used, representing the year of harvest and marketing. Citrus is mainly harvested from April to October and marketed until December of the same year.

2. PRODUCTION

2.1 Size and Value

Table 1 gives the total production, gross sales value and net free-on-rail value of citrus from 1973 to 1983.

The total 1983 crop is estimated at approximately 38,6 million 15-kg carton equivalents and was sold at a gross value of R250 million. The 1983 net free-on-rail value is estimated at approximately R120 million.

Table 2 shows the total number of trees and total area under citrus, as well as the 1982 production figures by area of production. The Transvaal is the main production area, followed by the Eastern Cape, Western Cape and Swaziland.

## 2.2 Trends, Problems, Strengths and Technological Developments

### 2.2.1 Trends

Total production for the past number of years varied considerably. A low production level of 37,5 million cartons was reached in 1977, compared with a peak of 46,8 million cartons in 1981. The decrease in total production since 1982 will probably continue for the coming season (1984).

The total gross sales value of citrus has increased steadily since 1973, but a slight decrease is expected for 1983.

A steady increase also occurred in gross (net free-on-rail) payments to growers since 1973, although a decrease is expected from 1982 to 1983.

### 2.2.2 Problems

#### - Droughts

The drought which started towards the end of 1982 contributed considerably to the drastic decrease in the 1983 crop. The lack of sufficient early spring rains in 1983 will probably have a further negative effect on the 1984 crop.

The dry conditions also had a negative effect on fruit size, to such an extent that large quantities of fruit, especially grapefruit, had to be dumped in 1983. The demand for small grapefruit is negligible and there is no economic sales outlet for smalls.

Although no meaningful tree losses have occurred to date, a repetition of the 1983 drought during 1984 may well result in such losses being suffered.

- Cost increases

The citrus industry is subject to severe cost increases. Labour costs in particular are high and growers are under constant pressure to further increase the wages of their labourers. Unfortunately these cost increases do not go hand in hand with a corresponding improvement in productivity. Increases in the cost of pesticides and fungicides also place a heavy financial burden on growers, as pest and disease control are of vital importance to the continued production of good quality fruit.

- Productivity

Production yields play a very important part in the profitability of the industry. As suitable land for the production of citrus is often limited, it is important that the available land be fully utilised. A high percentage of the existing area under citrus is not fully utilised at the moment because unproductive trees are often not replaced. Large gaps exist in orchards where trees that died have not been replaced.

Cultivars are often planted in areas that are not suitable, with the result that yields are unsatisfactory and often fruit of poor quality is produced. As citrus trees have a life expectancy of 35 years and the establishment of trees is a very expensive operation, it is often not possible to remove these cultivars and replace them by more suitable ones.

Productivity is also adversely affected by major disease and pest problems such as greening, root diseases, citrus blight and insects which have become resistant to pesticides. In the past these problems have caused citrus production to be completely abandoned in some of our major production areas.

- Grower records

Although some citrus growers operate proper cost systems, there are a large number of growers who fail to do so. The almost total lack of planning systems, budgets and budgetary control are serious cause for concern, especially in these days of spiralling costs.

Growers are lately being inundated with offers by computer companies and the impression is often created that a computer will solve all problems. Often the computer will only aggravate problems where the implementation of a computer system is not properly planned.

A definite need exists for a co-ordinated investigation into the development of record systems for the Industry and this is being attended to at the moment.

2.2.3 Strengths

- One channel marketing system

The one channel marketing system enables the industry to exercise full control over the flow of fruit to various destinations. This not only prevents over-supplies of fruit in some individual markets and shortages in others, but it also makes it possible to manipulate quantities in order to maximise the industry's income within the potential limits.

Agreements have also been negotiated with neighbouring and national states for the marketing of their fruit in order to prevent overseas competition among Southern African citrus producing countries.

- Extension and research teams

The citrus industry has its own specialised extension and research teams.

A team of Extension Officers, stationed in each of the production areas, visits individual growers almost daily to advise them on technical matters. They also serve as an important link between growers and the central control body as far as the dissemination of information on general policy and procedures is concerned.

The research team, representing various specialised fields, carries out research and extension on pests, horticultural aspects, packaging, irrigation, etc. Various breakthroughs in the field of research are already being applied commercially to the benefit of the industry. Close liaison with the Department of Agriculture is being maintained on all aspects and many projects are undertaken in co-operation with the departmental research workers.

The soil and leaf analysis service of the industry plays an important part in fertilizer recommendations issued to growers.

- Self-sufficiency

Except for 1982, when it qualified for special Government assistance, the industry can be regarded as financially self-sufficient. Although the industry has had some difficult years in the past, of which 1983 was no exception, poor years have always been followed by better ones.

The industry finds itself in an unfavourable position at the moment and prospects for the coming season (1984) are far from rosy. It is nevertheless believed that the industry can remain viable in the long-term.

2.2.4 Technological development

- Tree injections and soil application of systemic pesticides

A breakthrough was made with the physical injection of trees

with insecticides and pesticides which give systemic control of pests and diseases. In addition, success has also recently been achieved with soil applications of pesticides which are systemically absorbed by the roots, thus resulting in the successful control of pests. Although this concept of systemic pest control is not generally applied in the industry at this stage, it has the advantage that pesticides remain effective for a longer period and at the same time fit in well with integrated pest control which is practised on a reasonably large scale.

- Super Plant Scheme

Although not a new concept in fruit production, a citrus improvement scheme was established in co-operation with the Department of Agriculture. By using horticulturally approved and partially virus-free budwood only for the production of trees, it is now possible to produce good quality nursery trees throughout. This scheme was recently extended to the use of virus-free budwood for the multiplication of buds for nursery tree production. For this purpose an isolated Foundation Block was purchased near Uitenhage, and is now being developed.

- Irrigation

Flood irrigation was applied fairly generally in the past. In recent years more and more use is being made of micro irrigation, which is a more effective method of irrigating and also a more efficient method of water utilization.

- Soft citrus cultivars

Suitable soft citrus cultivars, which would bear fruit acceptable to the consumer, had to be developed for the Southern African climate. A few of these cultivars have been successfully developed and are now being planted commercially.



- Integrated pest control

The intensive use of pesticides in the past has added considerably to production costs and resulted in the development of resistant pests and diseases. Integrated pest and disease control management programmes have been developed to deal with this situation and are now widely applied in the industry.

2.3 Production potential

Table 3 shows the actual production of oranges, grapefruit and lemons over the past three years, as well as the projected figures for 1984, 1988 and 1990.

Projections for the future are very difficult to make, due mainly to the large number of factors involved. Even production estimates for one year in advance may differ considerably from actual production, as was the case in 1983.

Surveys during the second half of 1983 indicate a further downward tendency in production for 1984. Valencias and grapefruit in particular are expected to be adversely affected by the dry conditions still prevalent in the Transvaal and Swaziland areas at the beginning of October 1983.

The projections for 1988 and 1990 are based on normal years and the production potential of trees which should then be in production. To reach these future production levels, an adjustment in management practices will be required in order to improve productivity in general.

An abundance of small fruit which cannot be exported because of size, is still expected for the future - up to 10 per cent of production. Fertilization, irrigation and disease and yield control, as well as cultivar selections, will play an important part in relieving this problem.

Climate is an important factor in selecting cultivars suitable for planting in the various areas. Extension among growers continues, but the grower's ultimate choice may depend to a large extent on the future prices obtained for the various cultivars.

### 3. LOCAL AND OVERSEAS MARKETING

The citrus industry is export oriented and the emphasis in this section will be on overseas marketing.

#### 3.1 Size and Value

Table 1 shows the size and gross sales value of, as well as the free-on-rail income from local and overseas marketing for the years 1973 to 1983. During 1983 just over 60 per cent of the total citrus crop was exported at an estimated gross sales value of R228 million. The remainder of the crop was sold locally to processors and fresh fruit markets at R22 million.

Exports were responsible for about 90 per cent of gross grower income.

#### 3.2 Trends, problems, strengths and technological developments

##### 3.2.1 Trends

Despite fluctuations from year to year, exports showed an upward trend from 1973 to 1977, but remained fairly static from 1977 to 1982 (see table 1). A downward movement occurred in 1983 and will probably continue in 1984. Local quantities, on the other hand, fluctuated considerably and showed a downward trend.

The increase in exports was due in part to higher export packouts. During the early seventies just over 50 per cent of the total crop was exported, which increased to over 60 per cent since 1975.

Gross sales values and net free-on-rail earnings for both overseas and local marketing showed an upward trend during the years 1973 to 1983. Whereas export earnings increased at an annual compound rate of more than 12 per cent, the increase in revenue from fruit marketed locally was just over 7 per cent.

### 3.2.2 Problem areas

#### - Cost increases

Table 3 shows total costs involved in the export of one carton of citrus for 1972 and 1982 respectively and the estimated figure for 1983.

Total export costs increased by 240 per cent from 1972 to 1982, which represents an annual compound rate of 13,1 per cent.

Marketing costs prior to freight (railage, port and miscellaneous costs) showed a compound increase of 16,8 per cent per annum over the same period.

Railage costs accounted for approximately 29 per cent of this cost element in 1972, increasing to 44 per cent in 1982. It should be noted that railage costs doubled with the withdrawal of the export railage rebate in 1982.

Because of the tremendous pressure placed on it by the higher railage and port costs, the industry was compelled to suspend all movement of fruit through the Cape Town and East London pre-cooling facilities in 1983. Extensions had to be made to the Northern ports of Durban and Maputo at considerable capital expenditure in order to handle the Transvaal and Swaziland export crops at these ports.

Freight costs are still the single most important contributor to export costs, but compared with other items, freight costs increased within limits. In fact, a decrease in freight costs was possible in 1983 due to the poor demand for refrigerated

shipping space at that stage.

Notwithstanding the rate of cost increases since 1972, it was possible to keep cost increases from 1982 to 1983 down to a very low level, which was mainly due to savings on freight costs as well as an expected saving on overseas marketing costs.

- Exchange rates and overseas inflation

Exchange rate fluctuations have a definite influence on export earnings in rand terms. During October 1983 it was calculated that, despite the slight cost increases from 1982 to 1983 in rand terms, cost increases in local European currencies were as high as 19,3 per cent. In comparison, the inflation rate in Europe is estimated at an average of 5,3 per cent. The implication is that although the 1983 prices in terms of total export costs have to be 19 per cent higher, the average level of price increases for products within our market is only 5 per cent, which makes it extremely difficult to make up the difference through price increases.

- Consumer preferences

The needs of the consumer play an important part in the marketing of fresh citrus, and fruit size is a major factor. An imbalance exists between what is produced and what the grower wants - to such an extent that approximately 15 per cent of the total crop does not comply with consumer needs. This imbalance is mainly due to an over-supply of small fruit.

Small fruit often has to be supplied to processors at uneconomic prices and sometimes even have to be dumped. Although research into the matter of fruit sizes is receiving serious attention, large scale commercial implementation of the results cannot be made at this stage.

Consumers also have specific preferences for certain cultivars and particularly for certain soft citrus cultivars. The Southern

African citrus industry finds itself in a very unfavourable position as far as soft citrus is concerned and it is only recently, after years of intensive research, that some of these cultivars have been identified as suitable for production in certain areas. However, suitable areas are limited and no suitable cultivar has yet been developed for the hot Transvaal areas in particular.

Convenience is also an important factor and in this regard fresh citrus has to compete with, among others, European deciduous fruit as well as processed products.

- Competition

Strong competition is being experienced from other citrus producing countries. South American exporters, in particular, are a great threat to the industry.

3.2.3 Strengths

- Quality

Southern African citrus has a reputation for good quality and long shelflife. This has enabled the industry to achieve prices in the European markets which are considerably higher than those of our competitors. Because of the high costs involved in the export of fresh citrus, the industry is not in a position to compete on a price basis, and quality is therefore of paramount importance.

- Infrastructure

The marketing of our citrus to the wholesale trade in Europe is handled by the industry's own marketing staff. In some countries fruit is also marketed direct to retail groups. The result is that an extremely valuable infrastructure has been developed over the years. Daily contact is being maintained by the marketing staff of the various European countries, which

makes it possible to ensure stability by manipulating the flow of fruit to the various markets. The infrastructure established over the years also places the industry in a very strong position to negotiate not only with buyers, but also with shipping companies, port authorities, etc.

- Perishable product

Although perishable products are subject to certain disadvantages, it should be borne in mind that Europe is a sophisticated market where fresh fruit is high on the priority list. The reputation for shelflife acquired by Southern African citrus fruit has contributed considerably towards its success in the past.

- Diversified outlets

Citrus is exported to fifteen Western European countries as well as certain countries outside Europe. The industry's dependence on the European market has been reduced in recent years to such an extent that in 1983 approximately 65 per cent of the export crop was marketed in this region, compared with 80 per cent in 1973.

Locally the processing industry serves as principle sales outlet for fruit surplus to export requirements and over 60 per cent of such non-exportable fruit is supplied to processors.

3.2.4 Technological development

- Handling of fruit

Although this is not a new development in the fruit industry, approximately 80 per cent of the citrus crop is transported on pallets from packhouse to port. Only a negligible proportion of the total export crop is palletised from packhouse to overseas destination. This is due mainly to cost factors,

especially loss of shipping space. However, pressure from buyers for palletised fruit is increasing and a considerable quantity of citrus is already being palletised on discharge in Europe.

Containerisation has become increasingly important in recent years and 42 per cent of the 1983 export crop to Europe was exported in containers. This method of transport has certain advantages in that it protects the fruit from repeated rough handling of individual cartons, but unfortunately cost factors are also a consideration in the full implementation thereof, especially in the United Kingdom.

- Direct shipping

Until recently all export citrus was subjected to pre-cooling before being stowed in the refrigerated holds of ships en route to overseas destinations. Pre-cooling, however, is very expensive and use has recently been made of direct shipping, i.e. fruit loaded without pre-cooling. This method requires that a certain proportion of pre-cooled fruit be mixed with the uncooled fruit in the ship's hold to ensure a faster temperature reduction of the latter.

- Decay control

The development of improved fungicides and fruit handling techniques has enabled the industry to overcome problems caused by decay organisms resistant to traditional fungicides and to limit overseas decay levels to an average of less than 1 per cent.

### 3.3 Marketing Potential

Table 4 shows the quantities expected to be available for export and local marketing during 1984, 1988 and 1990.

Although a decrease is expected for 1984, there will probably be an increase in future available quantities. Materialisation of the projected quantities for 1988/1990 will depend to a large extent on the availability of sufficient water supplies.

In the light of the expected decrease in available export fruit for 1984, the market can be expected to be under-supplied. Table 5 shows the potential export market for citrus fruit in the longer term. According to this table, export levels could exceed those of the past, with the potential export market amounting to about 30 million cartons.

Although the potential supply of oranges will exceed the expected demand by 1988 and 1990, it should be borne in mind that a proportion of the available export supply will consist of undesirable sizes, to such an extent that a net shortage of exportable sizes could be expected. An imbalance in suitable cultivars is also expected, and a gradual change will have to be made in the industry's cultivar mix.

A net shortage of the required sizes is also expected for grapefruit, while a surplus of lemons is expected for 1988 and 1990. This surplus of unsuitable sizes for export will undoubtedly place a heavy burden on local marketing.

To remain viable, high yields of good quality fruit will have to be produced and high export percentages maintained. Management at all levels will play an important part in this regard.

#### 4. PRICES

Table 6 shows gross producer prices as well as wholesale prices from 1973 to 1983.

Despite fluctuations, wholesale price levels remained firm. A decrease is expected in 1983 export prices. This is due to the negative influence of exchange rates on export earnings in 1983 and the very low inflation rates in Europe.



As far as the local market is concerned, it is important to note the tremendous price difference between fresh fruit and fruit used for processing. The price of fruit for processing amounts to a mere 20 to 25 per cent of fresh fruit prices. A narrowing of this gap is unlikely in the near future. Producer prices were marked by an upward trend from 1973 to 1983, but fluctuations occurred in export prices for certain years.

Price estimates for the coming season (1984) are impossible. Export prices, which are the major contributor to income, depend on so many unknown factors that even if various assumptions are made, an estimate will still not be possible.

Export prices for 1984 will depend, inter alia, on the following :

- competition
- exchange rate fluctuations in 1984
- the extent of any improvement in the economies of European countries
- inflation rates in European countries
- the eventual supply of export fruit.

It can therefore only be hoped that attempts to improve on the 1983 prices will be successful. Prices may well be lower if the above factors have a negative influence on the citrus industry, but will eventually be determined by supply and demand.

On the local market, attempts could be made to increase the proportion of fresh fruit sales, but supplies to processors will have to be carefully monitored. Fresh fruit market prices will be determined by supply and demand.

## 5. SUBSTITUTION

### 5.1 Oranges

There are various substitutes for oranges, such as fresh deciduous fruit, processed fruit and juices. Oranges nevertheless occupy a unique place in the diet of most households in the developed countries of the world.

In terms of other citrus fruit, oranges are to a great extent being substituted by soft citrus cultivars. This is a very definite trend in European countries and the industry is facing a great challenge to fill the gap. However, there is and will always be a market for high quality oranges.

### 5.2 Grapefruit

Apart from processed grapefruit products such as segments and juice, it is unlikely that any specific substitute for grapefruit will be found. Grapefruit is considered a luxury which is often consumed for reasons of health and slimming. The result is that even if the demand for grapefruit is limited, there is and will always be a group of dedicated consumers of fresh grapefruit.

### 5.3 Lemons

A lemon is a lemon and apart from processed juice, there is no substitute for lemons - only a lemon can give a lemon flavour to fish, tea and drinks.

## 6. FUTURE OUTLOOK

### 6.1 Contribution of Citrus to Agriculture

In 1981 citrus contributed approximately 5,5 per cent of the total value of agricultural exports and approximately 14 per cent of the value of unprocessed agricultural products.

During the same year citrus contributed approximately 10 per cent of the gross value of the horticultural industry, which, in turn, rendered a 15 per cent contribution towards the total gross value of agricultural products.

The citrus industry is export oriented and can therefore be expected to continue rendering a significant contribution to total agricultural exports and exports in general.

## 6.2 Geography

In the light of consumer preferences and the need for more good quality fruit, the industry can be expected to undergo a gradual structural change as far as the cultivars it produces are concerned. The increased future demand expected for Navels and soft citrus in particular, will require changes in the intermediate and cooler Transvaal and Natal areas as well as the so-called colder areas of the Eastern and Western Cape in order to be able to comply with the demand for these cultivars. This does not necessarily mean a decrease in production in the warm/hot areas, although expansion possibilities will be limited.

Neighbouring countries currently contribute 9,6 per cent of total Southern African citrus production.

The contribution made by present independent national states is negligible, amounting to an estimated 0,5 per cent. Although expansion in these states is being planned, a significant change in their contribution to total citrus production is unlikely.

Self-governing national states including citrus estates forming part of or intended to be included in these states, are responsible for approximately 8,6 per cent of the current total citrus crop.

Full co-operation regarding the export of citrus fruit is being received from all these states, and agreements have been entered into with most of them for the handling of fruit under one trademark. These agreements will be maintained in future to the benefit of the Southern African citrus industry.

### 6.3 Contribution to the Economy of the Country

#### 6.3.1 Citrus industry as an earner of foreign exchange

The net foreign exchange earnings of the citrus industry since 1973 have been as follows :

1973 : R45,8 million	1978 : R129,2 million
1974 : R56,3 million	1979 : R142,4 million
1975 : R78,0 million	1980 : R137,3 million
1976 : R72,9 million	1981 : R153,3 million
1977 : R98,4 million	1982 : R177,2 million

As a net exporter of citrus fruit, the industry is an important earner of foreign currency. The upward trend of the past 10 years can be expected to continue, but fluctuations will undoubtedly occur. In view of the smaller export crop expected for 1983, a decrease in foreign currency earnings is likely.

#### 6.3.2 Self-sufficiency in food

Fresh fruit forms an important part of the daily diet of South Africa's population and citrus fulfils an important function in this respect.

Although the industry is export oriented, more than 30 per cent of the total crop is marketed locally. Based on the projected quantities which will be available for local marketing in future, an increase in the available volume of fruit may be expected. There is a large potential market for fresh citrus within the Republic, and the Black market in particular has a tremendous potential for fresh citrus sales.

#### 6.3.3 Self-sufficiency in raw materials

The citrus industry is fully dependent on other industries for the provision of essential raw materials required for the production of citrus.

During 1982 the following estimated amounts were paid to Commerce and Industry in the Republic in respect of goods and services received :

Packing material	R28,6 million
Pesticides and fungicides	R12,1 million
Fertilizer	R 7,7 million
Fuel and oil	R 4,7 million
Electricity	R 3,5 million
<b>Total</b>	<b><u>R56,6 million</u></b>

In the citrus industry, Commerce and Industry in South Africa has a tremendous potential market for essential production inputs, and the industry will continue to constitute a market for such goods and services. However, if price increases are not within limits, it will be forced to look more closely at the possibility of using suppliers from other countries, as was the case with paper for carton manufacturing in 1982 and 1983, when limited quantities of this material were imported.

#### 6.3.4 Employment

Although the exact number of workers employed by the industry is not available, approximately R45 million was paid by the industry in respect of remuneration for labour during 1982. The industry is relatively labour intensive as far as the picking and packing of citrus fruit is concerned and, as mechanisation in this field is unlikely, the industry will probably remain an important creator of employment opportunities in future.

The citrus industry is also an important creator of employment opportunities in neighbouring countries, the independent national states and existing self-governing national states in Southern Africa - but first and foremost in the Republic of South Africa.

TABEL/TABLE 1

**OMVANG EN BRUTO EN NETTO WAARDE VAN SITRUS PRODUKSIE/  
SIZE AND GROSS AND NET VALUE OF CITRUS PRODUCTION**

Jaar/ Year	Produksie/Production ( '000 15kg kartonne/cartons)			Waarde/Value - (R'000)					
	Plaaslik/ Local	Uitvoer/ Export	Totaal/ Total	Bruto verkoopswaarde/ Gross Sales Value			Netto vry-op-spoor/ Net free on rail		
				Plaaslik/ Local	Uitvoer/ Export	Totaal/ Total	Plaaslik/ Local	Uitvoer/ Export	Totaal/ Total
73	19 774	20 006	39 780	10 722	71 125	81 847	7 482	32 962	40 444
74	20 753	23 093	43 846	12 444	92 690	105 134	8 721	45 479	54 200
75	14 059	25 366	39 425	10 731	114 350	125 081	6 581	58 313	64 894
76	17 137	25 675	42 812	12 292	115 997	128 289	8 243	51 118	59 361
77	13 113	24 418	37 531	11 963	147 893	159 856	7 365	79 865	87 230
78	16 364	28 107	44 471	14 197	181 268	195 465	9 148	94 906	104 054
79	15 577	27 252	42 829	14 686	204 030	218 716	10 204	112 964	123 168
80	14 918	28 879	43 797	15 315	200 096	215 411	10 547	97 087	107 634
81	18 287	28 562	46 849	21 642	227 692	249 334	15 086	112 564	127 650
82	13 573	26 144	41 717	19 545	270 603	290 148	13 852	129 388	143 240
83 <sup>1)</sup>	14 000	24 613	38 613	22 000	228 000	250 000	15 000	105 000	120 000
84 <sup>2)</sup>	13 100	23 000	36 100						

1) Voorlopig/Preliminary

2) Raming/Estimate

TABEL/TABLE 2

TOTALE AANTAL BOME EN OPPERVLAKTE BEPLANT MET SITRUS SOOS OP  
31 DESEMBER 1982 EN PRODUKSIE VIR 1982/  
TOTAL NUMBER OF TREES AND AREA UNDER CITRUS AS AT  
31 DECEMBER 1982 AND 1982 PRODUCTION

Produksiestreke/ Production areas	Bome/Trees ('000)				Oppervlakte/ Area		Produksie/Production 1982	
	Lemoene/ Oranges	Pomelo's/ Grapefruit	Suurlemoene/ Lemons	Totaal/ Total	ha.	%	'000 kartonne/ cartons	%
Transvaal	4 843	698	395	5 936	22 114	57,0	25 155	60,3
Natal	192	288	17	497	1 761	4,5	2 336	5,6
Oos-Kaap/East Cape	2 036	65	371	2 472	8 864	22,8	6 800	16,3
Wes-Kaap/West Cape	748	12	149	909	3 223	8,3	3 421	8,2
Swaziland	241	295	-	536	2 142	5,5	3 254	7,8
Mosambiek/ Mocambique	48	92	8	148	549	1,4	459	1,1
Zimbabwe	40	6	2	48	179	0,5	292	0,7
Totaal/Total	8 148	1 456	942	10 546	38 832	100	41 717	100

TABEL/TABLE 3

**TOTALE WERKLIKE UITVOERKOSTE VIR 1972 EN 1982 EN BERAAMDE  
1983 KOSTE PER UITVOERKARTON/  
TOTAL ACTUAL EXPORT COST FOR 1972 AND 1982 AND THE  
ESTIMATED 1983 COST PER EXPORT CARTON.**

Koste-items/ Cost items	1972		1982		1983	
	R/karton R/carton	%	R/carton R/carton	%	R/carton R/carton	%
Produksie, Oes en Verpakking/ Production, Harvesting & Packing	R0,89	30,1	R2,72	27,0	R3,16	31,0
Pakmateriaal/Packing Material	R0,28	9,4	R0,90	8,9	R0,98	9,6
Totale Koste op Plaas/ Total Farm Cost	R1,17	39,5	R3,62	35,9	R4,14	40,6
Bemarkingskoste tot voor verskeping/Marketing cost up to before shipment	R0,34	11,5	R1,61	16,0	R1,75	17,1
Skeepsvrag/Freight	R0,80	27,0	R2,75	27,2	R2,24	22,0
Oorsese bemarkingskoste/ Overseas marketing cost	R0,65	22,0	R2,11	20,9	R2,07	20,3
Totale uitvoerkoste/ Total Export Cost	R2,96	100	R10,09	100	R10,20	100



TABEL/TABLE 4

GEPROJekteERDE SITRUSPRODUKSIEPOTENSIAAL/  
 PROJECTED CITRUS PRODUCTION POTENTIAL ('000 kartonne/cartons)

Jaar/ Year	Lemoene/Oranges			Pomelo's/Grapefruit			Suurlemoene/Lemons			Sitrus/ Citrus
	Plaaslik/ Local	Uitvoer/ Export	Totaal/ Total	Plaaslik/ Local	Uitvoer/ Export	Totaal/ Total	Plaaslik/ Local	Uitvoer/ Export	Totaal/ Total	Totaal/ Total
<u>Werklik/ Actual</u>										
1970	14 778	15 526	30 304	2 220	3 717	5 937	547	307	854	37 095
1980	12 298	21 927	34 225	1 913	5 400	7 313	707	1 552	2 259	43 797
1982	11 040	21 660	32 700	1 537	4 575	6 112	996	1 908	2 904	41 716
1983	11 048	18 956	30 004	1 652	4 165	5 817	1 300	1 492	2 792	38 613
<u>Projek- sie/Pro- jection</u>										
1984	10 300	17 800	28 100	1 500	3 700	5 200	1 300	1 500	2 800	36 100
1988	12 626	23 223	35 849	2 170	6 256	8 426	1 584	3 099	4 683	48 958
1990	12 839	23 570	36 409	1 975	5 891	7 866	1 601	3 152	4 753	49 028

TABEL/TABLE 5VERWAGTE UITVOERMARK VIR SUIDER-AFRIKAANSE SITRUS 1988 EN 1990  
POTENTIAL EXPORT MARKET FOR SOUTHERN AFRICAN CITRUS - 1988 AND 1990

Jaar/Year	Lemoene/Oranges	Pomelo's/Grapefruit	Suurlemoene/Lemons	Sitrus/Citrus
<u>Werklik/ Actual</u>				
1982	21 660	4 575	1 908	28 143
1983	18 956	4 165	1 492	24 613
<u>Projeksie/ Projection</u>				
1988	22 592	4 623	2 038	29 253
1990	22 851	4 723	2 238	29 812

TABEL/TABLE 6

## SITRUSPRYSE/CITRUS PRICES

Jaar/ Year	Produsentepryse/Producer Prices (R/15 kg)		Groothandelprijs/Wholesale Prices (R/15 kg)		
	Uitvoer/Export	Plaaslik/Local	Uitvoer/Export	Plaaslik Vars/ Local Fresh	Plaaslik Verwerk/ Local Processed
1973	R1,65	R0,38	R3,56	R1,01	R0,26
1974	R1,97	R0,42	R4,01	R1,18	R0,33
1975	R2,30	R0,47	R4,51	R1,16	R0,40
1976	R1,99	R0,48	R4,52	R1,54	R0,34
1977	R3,27	R0,56	R6,06	R2,01	R0,41
1978	R3,38	R0,56	R6,45	R1,96	R0,59
1979	R4,15	R0,66	R7,49	R2,32	R0,66
1980	R3,36	R0,71	R6,93	R2,72	R0,63
1981	R3,94	R0,82	R7,97	R2,87	R0,73
1982	R4,60	R1,02	R9,61	R3,49	R0,69
1983 <sup>1)</sup>	R4,27	R1,07	R9,26	R3,66	R0,80

1) Voorlopig/Preliminary

