



CITRUS GROWERS ASSOCIATION OF SOUTHERN AFRICA

CGA celebrates 10 years: 1997-2007 100 years of Citrus Exports: 1907-2007



Annual Report 2007



History of Citrus in South Africa

1654

First orange and lemon trees arrive from St Helena and planted in the gardens of the Dutch East India Company in the Cape.

1666

First citrus trees (lemons) are picked in these gardens.

1890

American citrus growers successfully export citrus under refrigeration on board ship to Europe thereby opening new doors for South African citrus growers.

1902

An American expert predicted that if South Africa were to irrigate fruit orchards, it could become one of the most important fruit producing countries of the world.

1906

South African citrus displays win a gold medal at the Colonial Fruit Show in London.

1907

3 000 cases of oranges are sold in Britain.

1908

14 454 cases of oranges are sold in Britain.

1910

A number of citrus farmers in the Rustenburg district form the first co-operative citrus growers association. Their fruit was packed in a packhouse under the name Koedoe.

1914

The inspection of all fruit for export becomes compulsory.

1918

An American millionaire Isidore Schlesinger buys Zebedelia Citrus Farm which later became the largest orange farm in the world.

1919

Number of boxes of citrus exported reaches 51 515.

1922

The formation of Vrugtekwekers Kooperatiewe Beurs van Suid-Afrika Beperk brings citrus, pineapple and deciduous growers together.

In 1922, 247 419 boxes of citrus exported.

1925

A million cases of citrus are exported for the first time.

1926

The Perishable Products Export Control Board is founded, taking over the responsibility for the shipping of perishable export products, the collections of growers' estimates and the allocation of pre-cooling and refrigerated shipping space.

1927

The link between the deciduous and citrus fruit industries is severed and the Citrus Exchange is formed. Citrus fruit produced in the Transvaal is exported through Lourenco Marques for the first time.



Miss Citrus: 1921 - Increased export volumes resulted in a shortage of shipping space.

1928

The number of citrus trees in South Africa reaches 3 million.

1930

1 706 803 boxes of citrus are exported.

1936

All South African citrus is exported under the name “Outspan”, originally the trademark of citrus produced on the farm Amanzi Estates, owned by Sir Percy Fitzpatrick, famous author of *Jock of the Bushveld*. (His descendants, the Nivens still farm citrus in the Eastern Cape.) Members could, however, still export under their own brand name.

1939

The threat of less commercial shipping space because of World War II and the difficulty of marketing in wartime lead the Citrus Exchange to ask the government to establish a Citrus Board to control distribution, marketing and prices of citrus in South Africa and overseas. The Board consists of twelve members – nine from the Citrus Exchange (80% of citrus growers are its members); two who represent non-Exchange citrus growers; and one who represents the Government.

1955

The Citrus Board stops applying the control measures instituted in the war years.

1961

Citrus export sales were so poor in 1960 that many growers have to pay in to cover the costs of exporting the fruit. The Citrus Board limits the amount of citrus that is exported by introducing a quota (pro-rata) system. The Exchange advertises and promotes fruit juicing in South Africa to increase the consumption of the much larger volumes of citrus now produced in South Africa.

1962

The Citrus Exchange establishes its own office in England and later sub-branches on the European Continent. Outspan becomes the only brand name under which the Exchange exports South African citrus. Advertising and promotions like the Outspan Girls and Mobile Cars are very successful in making it a well-known orange brand in Europe.

1966

The Citrus Exchange asks Government to re-introduce one-channel marketing for citrus, mainly because its members

feel that they pay large sums of money to develop the market for citrus, and growers who are not members of the Exchange and do not pay, still get the benefit of the market development.

1973

Outspan Citrus Centre formed in reaction to addressing increasing problems with fruit quality and very limited number of citrus cultivars that are marketed.

1992

Outspan International (Pty) Limited is formed as a subsidiary of the Citrus Exchange.

1994

The control measures used for local marketing of citrus cease.

The Citrus Exchange changes its status to that of a company and is now known as Outspan International Limited.

1995

The first consignment of citrus is shipped to Japan using in-transit cold sterilisation treatment.

1997

All the fruit industries in South Africa are de-regulated. Anyone may now apply to register as an export agent.

Selling South African oranges in Yorkshire - 1930's



History of Citrus in South Africa

continued

1997

The South African Citrus Growers Association is formed to manage research projects on behalf of all citrus growers and to keep a register of citrus growers.

This is funded by voluntary levies paid by the growers. This Association has representative regional directors.

1998

Mr Ian Moore appointed as Executive Officer to run CGA.

Outspan International and Unifruco Limited amalgamate as Capespan International Limited. They are still the largest single exporter of South African fruit.

1999

The number of fruit export agents in South Africa has grown to over 160.

The Fresh Produce Exporters Forum is formed by export agents to address problems like agents competing against each other overseas, which results in some markets being over-supplied and poorer prices for the growers.

Following on the retirement of Ian Moore in 1999, the Board of Directors appointed Justin Chadwick as Chief Executive Officer.

2001

Not all the growers pay the voluntary levy to the CGA. Government approves an application from the CGA for a statutory levy on all export citrus to fund research and market access.

Outspan Citrus Centre is taken over by Citrus Growers Association of Southern Africa and the name changes to Citrus Research International.

After a disastrous citrus season in 2000, Citrus SA is formed by a group of concerned citrus growers. For a membership fee and an additional voluntary levy, members are provided with marketing information and other services.

2002

The Outspan Foundation Block is taken over by the CGA.

Fruit South Africa is formed by Deciduous Fruit Producers Trust (DFPT), Fresh Produce Exporters Forum (FPEF), South African Sub Tropical Growers Association and Citrus Growers Association in order to co-ordinate joint actions.

2003

A Transformation Manager is appointed by CGA to steer the citrus industry along the path of commitment, assisting the emerging farmers and previously disadvantaged individuals in their bid to become

successful citrus farmers, and to ensure the smooth re-distribution of land where the opportunity arises.

Appointment of Industry Affairs Manager to ensure the industry is kept up to date with food safety issues. In particular, international revisions of chemical usage are monitored, and where necessary interventions are made.

2004

Long-awaited signing of Protocol to allow citrus into mainland China.

South Africa now overtakes USA as second largest exporter of citrus.

2005

Formation of Citrus Academy to develop a quality learning system for the citrus industry, and to improve access to skills development for all participants in the citrus industry.

2006

Appointment of Information Manager as CGA takes over the task of supplying relevant information to growers and industry stakeholders.

The formation of Variety Focus Group Committees.

Number of cartons exported – 72 million cartons.

2007

Marks 100 years of citrus exports from South Africa and 10 Years since the inception of the Citrus Growers Association.

Promotions Advert in Britain for South African Citrus - 1939 Weekly prize offered of a Hillman car valued at £169.



The Union-Castle Mail Steamship Company, Limited.

DONALD CURRIE & CO, Managers.

Telegraphic Address.
DONCURCO, LONDON.

Telephone
No 2415, AVENUE.

3 and 4, Fenchurch Street.

London.

7th December, 1907

ALL COMMUNICATIONS TO BE ADDRESSED TO
DONALD CURRIE & CO, Managers

In reply
please quote G

RECEIVED
24 DEC 1907
ANSWERED
25/12/07

Messrs The Union-Castle Mail Steamship Company, Limited
CAPE TOWN AGENCY

Dear Sirs,

FRUIT EXPORT.

We are obliged for your favor P of 13th ulto and we note you have applied the rate of 65/ & 10% to Apricot shipments which have been made, but lest our letter of 1st November might not be sufficiently definite we considered it advisable to cable you that the rates as per our letter of 25th October were meant to be adopted, Sir Donald Currie having informed Sir Thomas Fuller that we must adhere to these rates, viz,

Peaches and Nectarines	65/ & 10%
Pears and Plums	60/ & 10%
Grapes and Sundries	55/ & 10%.

The question of the rates from Natal, or whether any shipments can be made from Natal in the Cold Chambers, we mean shipments of Citrus fruits, is still open, and we are awaiting advices from Natal while perhaps you will be able to consult Mr Molteno on the subject, but it almost appears that it will scarcely be possible, according to figures we have from Natal, for Citrus fruits, to bear the Cold Chamber rates, any reduction in which is we are afraid impracticable, in fact, as you are aware, we naturally consider that from Natal we should have higher rates.

We shall be interested to hear from you further.

We are, Dear Sirs,

Yours faithfully,

The Union-Castle Mail Steamship Company, Limited

Donald Currie
Managers

Contents

Mission Statement

The Citrus Growers Association will maximise the long-term profitability of its members by:

- providing the industry with access to global markets
- optimising cost effective production of quality fruit
- continual commitment to research, development and communication with all stakeholders
- caring for the environment and the community within which we operate.

Key Objectives

- Gain and retain market access
- Set standards for fruit and quality
- Fund and control research and development
- Drive industry transformation
- Represent the growers
- Communicate effectively
- Optimise the structure of the CGA

History of Citrus in South Africa	IFC
Chairman's Report - 100 years	5
Voorsitter se Verslag - 100 jaar	7
Ceo's Statement	9
Administration	10
Information	14
Market Access	16
General	16
Quality Standards	16
European Union (EU)	16
Iran	17
Thailand	17
Australia	17
Indonesia	17
Jordan, Syria, Lebanon, Khazikstan, Cambodia and Pakistan	17
Vietnam	17
India	17
Citrus Producing Regions of Southern Africa	18
Market Acess continued	20
Japan	20
South Korea	21
United States of America	22
Exports 2006	23
Consumer Assurance	24
Research	27
Citrus Academy	30
Transformation	34
Abridged Financial Statements	36
Directors	IBC

The Citrus Growers Association would like to acknowledge that archive photos from the PPECB "160 Years of Export" and the Outspan Golden Harvest Publication of 1977 "A History of the South African Citrus Industry" have been used in this report.

Chairman's Report - 100 years

When the entrepreneurial citrus exporters watched their first few crates of oranges set sail for England back in 1907, one wonders if they could ever have envisaged the industry they had spawned; an industry that now exports over a million tons annually to every continent; an industry that ranks second in the world in terms of volume of citrus exported, and an industry that represents over half of all citrus exported from the southern hemisphere. They surely could not have foreseen the challenges that lay ahead for the South African citrus industry, challenges that have been met with the same entrepreneurial spirit and dogged perseverance that these forefathers possessed.

All of those who are presently involved in the citrus industry, and all those who have been involved over the past 100 years (and before) can be rightly proud of what has been achieved. Although we talk about the citrus industry – this is not one entity, but is made up of thousands of people, all representing a cog essential to keep the whole system running. To name them all would be a huge exercise, and one would run the danger of leaving some out – you all know who you are – so sit back and take some time off to celebrate this achievement; but not for too long as we still have a long road to travel, and complacency leads to the sort of gaps that competitors are quick to fill.

Reflecting back on the past reveals an incredible ability of citrus industry leaders to predict future trends and make plans to meet new challenges and take advantage of opportunities that arise. This is not an exhaustive list, but covers some of these plans and resultant strengths that have placed the citrus industry as a leader in the agricultural sector in South Africa.

The start of healthy citrus fruit is a healthy citrus tree. The Citrus Improvement Program/Scheme (CIP) ensures that orchards start with healthy, true to type and disease free trees. South



Antoine Rouillard
Chairman

Africa was a pioneer in the formation of the CIP. This scheme is soon to be statutory, meaning that only trees with a certificate will be planted. This essential element of the citrus industry is controlled by the Citrus Foundation Block (a section of Citrus Research International (CRI)) and is ably supported by nurseries and their umbrella body the South African Citrus Nurserymen's Association (SACNA). The Department of Agriculture's (DoA) role in quarantine and management of imported varieties is also essential in the scheme.

During the years of the Citrus Board the citrus industry invested considerable funds in construction of specialized fruit terminals at the major ports. With over a million tons exported through these ports, terminals have managed to handle all this fruit effectively and efficiently. More recently additional private and public investments have increased the capacity available at these ports.

As recently as the 1970's more than three quarters of citrus exported went to European Union countries. The DoA has successfully completed negotiations with many new export markets. In these negotiations citrus specific research has been supplied by Citrus Research International (CRI). In fact it was in the

1970's that the citrus industry bucked the system of relying on state owned research, and opened the predecessor of CRI – the Outspan Citrus Centre. When deregulation threatened the future of the OCC, it was the citrus growers who recognized the dual threats of phytosanitary and sanitary restrictions. These threats led growers to lodge a successful request for statutory levies to ensure that research capacity was preserved in order to meet new technical and research challenges. As a result these "new generation" trade barriers have been addressed and the industry has imposed production requirements to meet these challenges. Growers have adapted their practices to the satisfaction of our trade partners. This remains an ongoing threat and it is essential that technical capacity is available when a crisis happens, fortunately South Africa boasts some of the leading experts in citriculture. Through the efforts of the Citrus Academy (a subsidiary of Citrus Growers Association (CGA)) and their bursary fund, young, bright South Africans are being attracted to the industry to ensure that this capacity extends into the future.

As a result of market access activities of CGA, CRI and DoA South Africa has reduced its dependence on the EU. Although still our most important market (absorbing over 50% of exports), we now send considerable volumes to the Middle East (15%), Russia (10%), Japan (10%), America and Canada (8%) and Asia (7%).

The role of Outspan in developing these markets cannot be underestimated. In the regulated marketing era new markets were developed strategically and effectively. This led to the tremendous growth in exports into Europe and Japan in the early days. More recently lack of co-ordination has meant that new markets are not developed according to a strategy for long term growth; there has rather been focus on short term gains. Fortunately voluntary co-ordination is being promoted in many markets – and

Chairman's Report - 100 years

continued

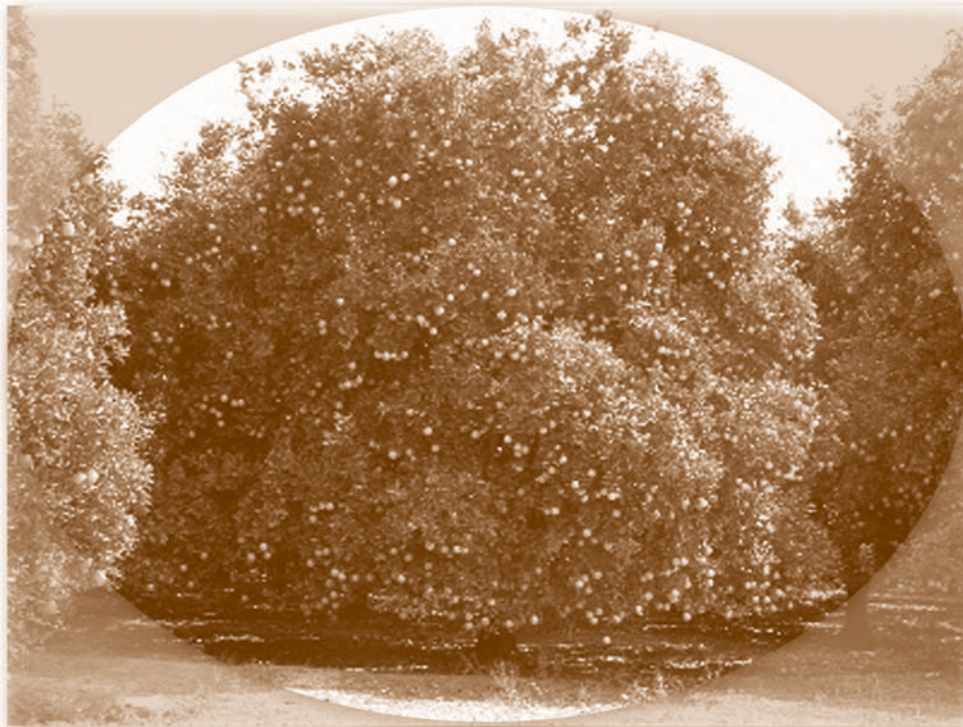
the role of the Citrus Marketing Forum (a partnership between CGA and the Citrus Exporters Forum (a chamber of the Fresh Produce Exporters Forum) in leading informed and wise decision-making should lead to citrus of the right quality going into the market at the right time.

Quality has always been the element that differentiates South African fruit from its competitors. Research has meant that growers have the technology to produce, harvest, pack and transport top quality fruit. The Agricultural Products Standards Act (administered by the DoA) gives the legislative framework for ensuring appropriate standards are set. The Perishable Products Export Control Board (PPECB) inspects every

export consignment, and their stamp of approval assures the market that the quality meets market requirements. Shippers have an essential role to play, particularly in those markets that require cold treatment for phytosanitary reasons. Although reefer vessels have got temperature control down to a fine art (ably assisted in cold chain management by the PPECB), there is still some work to be done with regard to containers.

There is a well worn saying that in a breakfast of egg and bacon the chicken is involved and the pig is committed. In the citrus industry many stakeholders are involved, but few are as committed as the growers. With a sizeable chunk of investment (in excess of four billion Rand) in the industry in the form of

land, orchards, packing and other infrastructure, it is the grower who has recognized that they need to take a lead and plan for the next 100 years. They commit annually in excess of twenty million Rand (administered by their own association, the CGA) towards research and technical resources and services (70%), information delivery (10%), market access (excluding technical 10%) and transformation (10%). With this sense of grower responsibility, the continued partnership between growers and export agents, and the efficiency of those who deliver services to the industry, we are sure that the first 100 years is merely a short step in the long term history of the southern African citrus industry.



Voorsitter se Verslag - 100 jaar

'n Mens wonder of die sitrusuitvoerders wat in 1907 die ondernemingsgees gehad het om die eerste paar kratte met lemoene na Engeland uit te voer, ooit 'n denkbeeld sou kon vorm van die bedryf waarvan hulle die grondslag gelê het; 'n bedryf wat nou meer as 'n miljoen ton jaarliks na markte op elke vasteland uitvoer; 'n bedryf wat as die tweede grootste uitvoerder van sitrus ter wêreld beskou word en vir meer as die helfte van die Suidelike Halfrond se sitrusuitvoere verantwoordelik is. Hulle het beslis nie geweet met watter uitdagings die Suid-Afrikaanse sitrusbedryf te kampe sou hê nie, uitdagings wat met dieselfde ondernemingsgees en volharding aangepak word as wat die voorvaders destyds getoon het.

Almal wat tans by die sitrusbedryf betrokke is en almal wat die afgelope 100 jaar (en meer) daarby betrokke was, kan tereg trots wees op wat bereik is. Hoewel ons van die sitrusbedryf praat, is dit nie een entiteit nie; dit bestaan uit duisende mense - elkeen 'n onmisbare onderdeel wat die hele stelsel aan die gang hou. Dit sou 'n reusetaak wees om almal op te noem en 'n mens loop die gevaar om name weg te laat. Julle weet egter wie julle is - ontspan dus en neem 'n tydjie af om hierdie prestasie te vier. Maar nie te lank nie, want ons het nog 'n ver pad om te loop en selftevreidenheid lei tot die soort leemtes wat baie gou deur ons mededingers gevul word.

As 'n mens nadink oor die verlede, besef jy dat die leiers van ons sitrusbedryf 'n ongelooflike vermoë gehad het om toekomsneigings te voorspel en om planne te beraam om nuwe uitdagings die hoof te bied en nuwe geleenthede te benut. Die volgende lys is nie volledig nie, maar dit dek sommige van dié planne en gevolglike sterkpunte wat van die sitrusbedryf 'n leier in Suid-Afrika se landbou gemaak het.

Gesonde sitrusvrugte begin by gesonde sitrusbome. Die sitrusverbeterings-program/skema (SVS) verseker dat



Antoine Rouillard
Voorsitter

boorde 'n goeie begin het met gesonde, tipe-egte en siektevrye bome. Suid-Afrika het pionierswerk gedoen met die stigting van die SVS. Dié skema kry een van die dae statutêre status, d.w.s. slegs bome met 'n sertifikaat sal aangeplant word. Hierdie essensiële element van die sitrusbedryf word deur die Sitrusgrondvesblok ('n afdeling van Citrus Research International (CRI)) beheer en geniet die volle ondersteuning van kwekerie en hulle oorkoepelende liggaam, die Suid-Afrikaanse Sitruskwekeryvereniging (SACNA). Die Departement van Landbou (DoA) se rol wat kwarantynmaatreëls en die bestuur van ingevoerde variëteite betref, is eweneens 'n noodsaaklike aspek van die skema.

Gedurende die bestaan van die Sitrusraad het die sitrusbedryf groot bedrae geld aan die bou van gespesialiseerde vrugteterminale by die vernaamste hawens bestee. Dit het hulle in staat gestel om die meer as 'n miljoen ton sitrus wat jaarliks uitgevoer is, doeltreffend te hanteer. Meer onlangs het bykomende private en openbare investering dit moontlik gemaak om die beskikbare kapasiteit by dié hawens verder te vergroot.

Tot so onlangs as die sewentigerjare was meer as driekwart van die uitvoersitrus

vir lande van die Europese Unie bestem. Die DoA het daarin geslaag om suksesvolle onderhandelings met baie nuwe uitvoermarkte aan te knoop. Sitruspesifieke navorsing is in dié onderhandelings deur die Citrus Research Institute (CRI) gelewer. Trouens, dit was in die sewentigerjare dat die sitrusbedryf besluit het om nie meer net op navorsing deur staatsinstellings te steun nie en die voorloper tot die CRI, die Outspan Sitrusentrum, tot stand gebring het. Toe die toekoms van die OSS deur deregulasie bedreig is, was dit die sitrusprodusente wat besef het watter gevaar fitosanitêre en sanitêre beperkings inhou. Dit het hulle genoop om 'n geslaagde versoek te rig dat statutêre heffings ingestel word om te verseker dat die navorsingskapasiteit wat nodig sou wees om nuwe tegniese en navorsingsuitdagings die hoof te bied, behoue bly. Gevolglik is daar begin deur produksievereistes te stel wat daarop gerig was om die "nuwe geslag" handelsversperrings die hoof te bied. Produsente het hulle praktyke in ooreenstemming met die vereistes van ons handelsgenote aangepas. Dit bly 'n voortdurende bedreiging en dus noodsaaklik dat die tegniese kapasiteit in krisistye beskikbaar sal wees. Gelukkig beskik Suid-Afrika oor toonaangewende deskundiges op die gebied van sitrusverbouing. Die Sitrusakademie ('n filiaal van die Sitrusprodusentevereniging (CGA)), beywer hom om, met behulp van sy beursfonds, intelligente jong Suid-Afrikaners na die bedryf te lok en dié kapasiteit sodoende ook vir die toekoms te verseker.

Danksy die werk wat die CGA, CRI en DoA doen om marktoegang te verhoog, het Suid-Afrika minder afhanklik geraak van die EU. Hoewel dit steeds ons vernaamste mark is (50% van uitvoere), word aansienlike hoeveelhede nou ook na die Midde-Ooste (15%), Rusland (10%), Japan (10%), Amerika en Kanada (8%) en Asië (7%) uitgevoer. Die opstelling van die Chinese mark

Voorsitter se Verslag - 100 jaar

vervolg

word as 'n kernfaktor in die toekomstige groei van die bedryf beskou en ons wens die personeel van die CGA, die CRI en die DoA geluk met dié mylpaal.

Die rol wat Outspan in die ontwikkeling van bogenoemde markte speel, kan nie onderskat word nie. Toe beheerde bemarking nog gegeld het, is nuwe markte strategies en doeltreffend ontwikkel. Destyds het dit daartoe gelei dat uitvoere na Europa en Japan geweldig toegeneem het. 'n Gebrek aan koördinasie die afgelope tyd het meegebring dat nuwe markte nie volgens 'n bepaalde strategie, met die oog op langtermyn groei, ontwikkel word nie, maar dat daar eerder op onmiddellike wins gefokus word. Gelukkig word vrywillige koördinasie op baie markte bepleit en behoort die leidende rol wat die Sitrusbemarkingsforum - 'n vennootskap tussen die CGA en die Sitrusuitvoerdersforum ('n afdeling van die Varsprodukte-uitvoerdersforum) – speel om ingeligte en wyse besluitneming te verseker, daartoe te lei dat sitrus van die regte gehalte die mark op die regte tyd bereik.

Gehalte was nog altyd die faktor wat Suid-Afrikaanse vrugte van dié van sy

mededingers onderskei het. Navorsing het verseker dat produsente oor die tegnologie beskik om vrugte van topgehalte te produseer, te oes en te verpak. Die Wet op Landbouprodukstandaarde (geadministreer deur die DoA) vorm die wetlike raamwerk waarbinne gepaste standaarde gestel kan word. Die Raad van Toesig op die Uitvoer van Bederfbare Produkte (PPECB) voer inspeksie uit op elke uitvoerbesending en hulle stempel van goedkeuring is die versekering aan die mark dat die gehalte aan markvereistes voldoen. Verskepers speel 'n noodsaaklike rol, veral waar markte om fitosanitêre redes vereis dat vrugte kouebehandeling moet ondergaan. Hoewel koelskepe temperatuurbeheer tot 'n fyn kuns ontwikkel het (goed bygestaan in koelkettingbestuur deur die PPECB), is die werk nog nie afgehandel wat houters betref nie.

Daar is baie belangegroepes wat 'n rol in die sitrusbedryf speel, maar min is so toegewyd as die produsente. Met aansienlike investering (meer as 4 miljard rand) in die vorm van grond, boorde, verpakkings- en ander

infrastruktuur, is dit die produsente wat besef het dat hulle die leiding moet neem en ook vir die volgende 100 jaar moet beplan. Hulle lewer jaarliks 'n bydrae van meer as twintig miljoen rand (wat deur hulle eie vereniging, die CGA geadministreer word) tot navorsing en tegniese hulpbronne en dienste (70%), aan inligtingvoorsiening (10%), marktoegang (tegniese dienste uitgesonderd (10%)) en transformasie (10%). Danksy produsente se verantwoordelikhedsin, die volgehoue vennootskap tussen produsente en uitvoeragente en die bekwaamheid van diensleweraars aan die bedryf, is ons oortuig dat die eerste 100 jaar maar net 'n treetjie is in die langtermyn geskiedenis van die Suid-Afrikaanse sitrusbedryf.

Vanjaar is my laaste jaar as Voorsitter. Dit was vir my 'n voorreg om dié posisie te beklee onder mense, in sowel die beheerliggaam (Direksie) as personeel, met so 'n passie vir sitrus. Van die Direksie is wyse leiding ontvang wat die werksaamhede van die CGA betref, terwyl die personeel (onder die bekwame leiding van Justin Chadwick) hulle mandaat met onderskeiding uitgevoer het.



Ceo's Statement

In the wake of deregulation (1997) growers formed the Citrus Growers Association (CGA) for one specific purpose – market access. With market access as the goal, research and technical development and transfer was the identified tool to make it happen. At a Board strategic planning session held in November 2006, the primary goal of market access was confirmed, as was continued commitment to fund research and technical work in the citrus industry.

Since those early days growers have identified additional requirements from their Association, which has resulted in resources dedicated to transformation, information, representation and communication. Although many may argue that transformation and provision of research and information is a State function – the reality is that if growers did not fund these activities market access would be severely threatened. A comparison of the accessible global markets for southern African citrus products as compared to other fruit types illustrates the point – citrus is now exported to just about every country around the world, while other fruit types are restricted to a few markets, and most export in excess of 80% of their product to the EU.

While gaining market access may be the sensational, headline capturing part of CGA's activities, it is the retaining and optimizing of markets that is equally



*Justin Chadwick
Chief Executive Officer*

(if not more) important. On a monthly basis trade magazines report of a number of markets that have been closed to some perishable product or other – including many examples from the citrus world. Yet we have managed to keep all these markets open, and continue to improve conditions of entry for citrus into these markets.

Two areas formerly covered by the Citrus Board are still not being adequately addressed – market intelligence and market development.

Although CGA does provide some market intelligence, the industry lacks the resources necessary to fully research new and existing markets. In terms of

market development, growers have stepped up to the plate in some markets. In the USA growers have funded a promotion campaign, while growers exporting to Japan have funded research into promotions in that market (co-funded by Department Trade and Industry). But where are other stakeholders when it comes to funding these activities? Although other stakeholders have much to gain, it is only growers who commit funds to these initiatives. In China oranges are classified into three classes; local, imported and American – we have to develop a fourth category; South African. It will be interesting to see who will be prepared to fund such an exercise – but if it is not done then the anticipation of significant volumes exported to that market will probably not materialize.

Growers can be rightly proud of their Association. In ten years it has grown from a secretarial service to a strong institution capable of meeting the mandate as determined by its grower leaders. The return on the small investment that growers make (less than 0.5% of income) is enormous. Growers have realized that they should not rely on the State or other stakeholders to ensure that the citrus industry remains a market leader in the global citrus world (currently the second largest exporter of fresh citrus fruit in the world, and by far the largest citrus exporter in the southern hemisphere).



Administration

Governance

The Citrus Growers Association (CGA) is governed by a nineteen member Board of Directors representing seventeen citrus growing regions in southern Africa, and two directors representing emerging growers.

During the year under review four new directors were appointed to the CGA Board.

Region	Outgoing Director	New Director
Hoedspruit	Pieter Scholtz	Francois Erasmus
Southern KZN	Eddie Ueckermann	Mike Woodburn
Patensie	Sampie Groenewald	Herman Malan
Sundays River Valley	Charlie Miller	Pieter Nortjé

The Chairman welcomed new board members. Directors give selflessly of their time and expertise to direct the activities of the CGA in the interests of all its grower members. In addition, the Councillor of the National Agricultural Marketing Council responsible for citrus was invited to attend Board meetings as an observer.

During the year under review, two Executive Committee members resigned from the Board. Charlie Miller and Pieter Scholtz played an important part in the running of the Association; their contributions will be missed in the future.

The Executive Committee during 2006/07 was as follows:

Antoine Rouillard - Chairman CGA
 Pieter Scholtz - Vice Chairman CGA, resigned March 2007
 Hoppie Nel - appointed Vice Chairman, March 2007
 Charlie Miller - resigned August 2006
 Fanie Viljoen
 Gabrie van Eeden -appointed August 2006
 Tini Engelbrecht - appointed March 2007

Meetings of the CGA Information Committee

Members: P Nicholson (Chairman), M Slabber, P Nortjé, P Smit, J Alberts.

Date	Apologies
May 06	M Slabber
July 06	P Nortjé
January 07	J Alberts

Meetings of the CGA Citrus Training and Development Committee. Committee name changed to Citrus Transformation Committee during 2006.

Members: M Fry (Chairman), I Nemaorani, A van Rooyen, DJ Nel, H Gxotiwe.

Date	Apologies
June 06	I Nemaorani, A van Rooyen, DJ Nel
July 06	I Nemaorani
March 07	DJ Nel, H Gxotiwe

Meetings of the CGA Audit Committee

This new committee formed late in 2006, meeting once in March 2007.

Members: P Nortjé, Chairman
 SJ Viljoen, P Noddeboe - Resigned March 2007, CH Engelbrecht - Appointed March 2007

Meetings of the CGA Board and its Executive Committee

Date	Meeting	Apologies
May 06	Executive (telcon)	DJ Nel
June 06	Executive (telcon)	PPR Scholtz
August 06	Board	PS Noddeboe
October 06	Executive (telcon)	None
November 06	Board	PS Noddeboe, RA Rouillard, SJ Viljoen, G van Eeden, MI Nemaorani
January 07	Executive (telcon)	None
March 07	Board	PS Noddeboe, FRJ Reed, HF Malan

Representation:

The CGA is represented as follows:

Citrus Industry Trust	Mark Fry
Fruit South Africa	Pieter Scholtz (resigned March 2007), Gabrie van Eeden (appointed March 2007)
Market Access Work Group (Department of Agriculture)	Justin Chadwick and Vaughan Hattingh
Agricultural Trade Forum	Justin Chadwick
Logistic/Shipping Work Group	George Hall and Tini Engelbrecht
Citrus Research International (Pty) Ltd	Jock Danckwerts, Hoppie Nel, Gerhard Scheepers, Louis von Broembsen, Mark Fry, John Moll (deceased), Kobus de Kok
AgriSA	Antoine Rouillard and Israel Nemaorani
Standards Work Group	Martli Slabber, Jan Alberts, Piet Smit, Peter Nicholson, Pieter Nortje
River Bioscience Board	Pieter Scholtz (resigned March 2007), Pieter Nortje (appointed March 2007) and George Hall
Citrus Marketing Forum	Peter Nicholson, Hoppie Nel and Gabriele van Eeden
Sanitary and Phytosanitary Committee	Justin Chadwick
Market Access Work Group	Justin Chadwick, Vaughan Hattingh
Mediterranean Citrus Industry (CLAM)	Vaughan Hattingh
Southern Hemisphere Association of Fresh Fruit Exporters (SHAFFE)	Justin Chadwick

CLAM

Vaughan Hattingh attended the CLAM AGM held in Athens Greece, while Justin Chadwick attended the CLAM meeting held in Berlin, Germany in February 2007.

SHAFFE

At the Annual General Meeting held in October 2006 in Cape Town, Justin Chadwick was elected as President of SHAFFE.

PPECB

Two CGA nominations to the Minister for representatives on the PPECB Board were accepted, Maxwell Hawes (Chairman) and Tini Engelbrecht.

Department of Agriculture (DoA)

CGA's links with DoA are essential in carrying out its mandate.

Market Access Work Group: This work group is convened by DoA's Plant Health department, and meets on a six weekly basis throughout the year. Fresh fruit and vegetable representatives are invited

to these meetings. At these meetings all technical aspects of market access are discussed, and progress is monitored.

Agricultural Trade Forum (ATF): This high level forum is convened by DoA and includes representatives from all agricultural commodities. It deals with all agricultural trade issues, with an emphasis on World Trade Organisation matters such as tariffs and duties. The ATF meets on a monthly basis.

Annual Co-ordinating meeting: On an annual basis, the DoA convenes a meeting to discuss plant health and protocol issues arising from the past season, and plans for the next season. Variety Focus Group Chairmen attend these meetings.

Fruit South Africa (FSA)

FSA is a joint venture between CGA, Deciduous Fruit Producers Trust (DFPT), Sub Tropical Growers Association and Fresh Produce Exporters Forum. FSA is involved in trade shows and promotion activities.

During the year under review FSA finalised the Fruit Industry Plan (FIP). The FIP has been developed after extensive consultation with all fruit role-players across South Africa. This includes growers, packhouses, labour, government and service providers. The final FIP has been endorsed by all stakeholders.

Registration

The Department of Agriculture requested CGA to assist in the process of registering growers for certain export markets (EU, China, USA, South Korea and Japan). Mr Faisal Asmal (Special Export Program Co-ordinator for Japan) was employed during November, December (2006) and January 2007 to assist in this process. The DoA introduced a new registration fee. Many growers expressed their dissatisfaction with this new charge, which has been relayed to DoA.

Administration

continued

Variety Focus Groups

The Variety Focus Groups (VFG's) proved to be very useful during the 2006/7 season. These VFG's met regularly during the season, with the main business being updating crop predictions, dealing with dispensation requests (referred to them by the DoA), determining standards, discussing market conditions and monitoring packed and shipped information. The Chairmen of the VFG's serve as the CGA Information Committee, and also attend the Citrus Marketing Forum meetings.

Members of the variety focus groups as elected in February/March 2006 were as follows:

During November 2006, February and March 2007 all regions reviewed their representation, with the following changes for the 2007/8 season;

Region	Variety	Outgoing	Incoming
Patensie	Valencia	P Ferreira	I Grieb
Nelspruit	Valencia	J Warrington	A Muller
Senwes	Valencia	(vacant)	J van Zyl
Patensie	Lemon	(vacant)	P Dempsey
Nelspruit	Soft Citrus	(vacant)	W Potgieter
Letsitele	Soft Citrus	A van Rooyen	B Offer

During 2006/7 the following meetings were held by the VFG's:

Month	Grapefruit	Valencia	Navel	Lemon	Soft Citrus	Total
April	2	1	1		1	5
May	2	2	2	2	1	9
June	2	2	2		2	8
July	1	1	1	1	1	5
August		2	1	1	1	5
October		1	1			2
Total	7	9	8	4	6	34

Region	Valencia	Navel	Lemon	Grapefruit	Soft Citrus
Boland			R Allen		S Bruwer
Western Cape	G van der Merwe*	G van Eeden*	R Groenewald*		M Slabber**
Patensie	P Ferreira	P Ferreira			M Odendaal
Sundays River	D Joubert	P Nortjé**	J Alberts**	P Nortjé	J Ferreira
Eastern Cape Midlands		C Painter	D de Villiers		J Danckwerts*
Vaalharts		L du Preez			
KZN Midlands	K Claassen	R Crausaz	E Ueckermann (replaced by K Claassen)		
Pongola				J Jacobson (replaced by A Rouillard)	
Nkwalini	D du Toit			T Wafer*	
Onderberg	J Snyman			C van Veyeren	
Nelspruit	J Warrington	G Piner	P Kieviet		
Swaziland	P Noddeboe			P Noddeboe	
Letsitele	B Vorster	N Gubitz	C Landman	P Smit**	A van Rooyen
Hoedspruit	F Meyer		G Bezuidenhout	K van Staden	
Limpopo	P Nicholson**		P Nicholson	B Dillman	
Senwes		K Schoeman	W Engelbrecht		W Engelbrecht
** Chairman *Vice Chairman					

The CGA Information Manager is tasked with convening the meetings and acting as secretariat. During the year under review the Information Manager position was vacant from July to January. The secretarial duties were carried out as follows: soft citrus – Elma Carstens (CRI); navels – George Hendrikse (SEP), grapefruit – Justin Chadwick/Paul Hardman (CGA); lemons – Justin Chadwick (CGA); Valencia – Paul Hardman (CGA).

Communication

All growers receive the SA Fruit Journal on a bi monthly basis. The SA Fruit Journal is a joint venture between CGA, Deciduous Fruit Producers Trust and Fresh Produce Exporters Forum. Editions have comprehensive articles covering research, market access, transformation, and food safety and grower news. The S A Fruit Journal is a critical tool in keeping growers updated in respect of these issues. Any grower not receiving a copy of the Journal is asked to contact Gloria at gloria@cga.co.za.

The CGA website (www.cga.co.za) has had a face lift, resulting in many positive

reactions from growers and other citrus industry stakeholders. It is an essential source of information to any member of the broader citrus community. A section of the website is restricted to CGA members and is accessible through a password provided by the CGA. Included on the website is information prepared for the Citrus Marketing Forum – this includes all packed and shipped information – showing what volumes have been sent to which markets on a weekly basis. The information is updated every Thursday during the citrus season.

During February 2007 CGA staff visited all citrus growing regions. The staff split into two teams – with Justin Chadwick and Maxwell Hawes visiting Patensie, East Cape Midlands, Nelspruit, Onderberg, Swaziland and Pongola. Paul Hardman, Jacomien de Klerk and John Edmonds visited Boland, Western Cape, Senwes, Hoedspruit, Letsitele, Limpopo and Zimbabwe. Justin Chadwick and Jacomien de Klerk visited Sundays River in November 2006, while Paul Hardman visited Vaalharts in March 2007. At these meetings growers elected representatives to the variety focus groups, and the activities of CGA were presented.



Finances

Levy

Citrus Growers Association administers a levy which is utilised for research, market access, information, transformation, administration and communication. The levy is 32 cents per 15 kilogram carton, and is collected on every carton exported.

Income

The Board used sixty seven million cartons as a basis for determining levy income, the actual levy collected was on 71 million cartons, resulting in levy income exceeding budget by some one and a half million rand.

Other income included grants from the Department of Agriculture for a mentorship program (R1.75 million), S A PIP program (R 600 000) and AgriSETA (R180 000).

Expenditure

Budgeted expenditure was some R21.5 million. Actual expenditure was R2.5 million more than budget – due to a provision for doubtful debts. The auditors insisted on providing for any debtor over thirty days. The CGA will collect all levies due.

Budget 2007/8

Income is based on a crop of 72 million cartons. The employment of a Business Administrator has increased staff costs, rental and office items. Provision has been made under subscriptions for costs associated with implementing the Fruit Industry Plan. The employment of a lobbyist in the EU increases the market access costs. The budget requires a draw down from reserves of R1.6 million. A draw down from reserves is expected in the third year of a levy period.

Information

The CGA's information activities are carried out by the Information Manager. During 2006/7 the position was filled by Reshigan Govender (until July 2006), and John Edmonds (starting January 2007). For the period during which the post was vacant (6 months) the tasks were carried by Justin Chadwick and Paul Hardman.

The Information Committee oversees the activities of the Information Manager. This committee is made up of the chairmen of the different variety focus groups (see administration section) and forms a vital link between the CGA and these focus groups.

Citrus information supplied in terms of an agreement with PPECB is funded by CGA and the Fresh Produce Exporters Forum (FPEF), and is supplied on a regular basis to all members of the Citrus Marketing Forum (CMF).

Tree Census

Tree Census information was updated during the period under review by growers submitting their data to Paul Hardman. The accumulative citrus area on the Tree Census database declined from 57 168 ha in 2005/6 to 56 631 ha in 2006/7.

Citrus Statistics Booklet

Tree census information is included in the Citrus Statistics booklet, published by CGA on an annual basis. The booklet provides an overview of the southern African citrus industry and then shows key information for each of the major citrus types, giving readers a sense of the scope and direction of the industry over time.

Estimates

At the first CMF meeting the CGA provides estimates gleaned from the variety focus groups. These estimates are continuously reviewed as the season unfolds. The table on the right shows the original 2006/7 estimate, the actual volumes achieved, and the estimates for the 2007/8 season. All figures are in 15 kilogram equivalents.



John Edmonds
Information Manager

The goal of the Association is for estimates to be within 10% of final actual shipped volumes. This was achieved for navels (6%) and valencias (8%). Total citrus export volumes were within 11% of the estimate, as was the case for lemons. Soft citrus estimates were off by 15%, while grapefruit was way off the mark (by some 23%).

The estimate for 2007/8 was prepared for the first CMF meeting in March 2007. There is an expectation that all citrus varieties will experience an increase in volumes shipped, with grapefruit showing the most significant recovery. The estimated volume (in total) is estimated to be 7% greater than 2006/7.

Packed Figures

Information on volumes packed was supplied by PPECB on a weekly basis. These figures were then placed on the CGA website (www.cga.co.za). The packed figures reflected the actual volumes packed to date, previous years packed figures and the estimated packed figures for the current season. These figures were presented on a weekly and cumulative basis.

Shipped Figures

Information on volumes shipped was also supplied by PPECB and posted on the website on a weekly basis. These figures showed per variety, per week what had been shipped into the different markets. Previous year's shipping was also reflected.

Long Term Crop Projections

The model developed in 2005 to determine the long term crop forecasts was revisited between August and October 2006, and modified to include new parameters thought to be important to the accuracy of the forecast. The revised model predicts peak production of 110 million cartons in 2013, and thereafter stabilizing at this level, which is lower than the original peak predicted in the 2005 model (120 million cartons). These results were presented at various grower meetings and also included in important studies investigating the logistical needs of the citrus industry going forward.

Type	2006/7 Estimate	2006/7 Actual	Difference (Actual vs. Estimate)	2007/8 Estimate	% Diff Actual 2006/7 vs. Estimate 2007/8
Grapefruit	12 567 000	9 612 733	-23%	11 500 000	+20%
Soft Citrus	6 315 517	5 339 642	-15%	5 500 000	+3%
Lemons	7 470 457	6 630 617	-11%	7 000 000	+6%
Navels	16 431 368	15 487 265	-6%	16 500 000	+7%
Valencia	35 524 415	32 600 995	-8%	34 200 000	+5%
Total	78 308 757	69 671 439	-11%	74 700 000	+7%

International Information Exchange

Mediterranean Citrus Industry:

The CLAM organization represents interests of citrus industries in the Mediterranean region, the largest citrus trading block in the world, representing 6 million tons (66%) of the world trade in fresh citrus fruit (total 9 million tons). CGA is a member of CLAM, and was represented by Vaughan Hattingh and Justin Chadwick at meetings held during 2006/7. CLAM supplies CGA with excellent information pertaining to production and exports from their members. CGA reciprocates by sending similar information to CLAM.

CLAM members held a meeting in South Africa in May 2006. They met citrus industry representatives, were hosted by growers around the country, and attended a Citrus Marketing Forum meeting.

Southern Hemisphere Association of Fresh Fruit Exporters (SHAFFE):

During 2006/7 SHAFFE members supplied information of shipped citrus, by volume and destination, to the SHAFFE secretariat who in turn supplied this information to SHAFFE members.

Information is shared on the basis of “if you submit information, you get back information”. All southern hemisphere countries except Brazil participated in this initiative. SHAFFE members have committed to continue with this initiative in 2007/8.

Citrus Marketing Forum (CMF)

The CMF is a joint forum between growers, export agents and other role-players. It provides a platform for the sharing of information, initiating research and investigations, and making recommendations on a wide range of industry issues. During the year under review the CMF met monthly during the export season (May to October), with a season preview meeting in March 2007 (for the 2007/8 season). During 2006 the CMF was chaired by Arend Venter, with Peter Nicholson as Vice Chairman. Marguerite van Rensburg provided secretarial services to the CMF. The CGA would like to thank Arend, Peter and Marguerite for the time and energy they put into making the CMF work. In addition, PPECB (and particularly Cyril Julius) played a crucial role in carrying out many of the activities and investigations identified by the CMF.



Market Access

General

Section 7 Committee: Sustainability of Citrus Exports

Following poor returns to citrus in general in 2005/6, the National Agricultural Marketing Council (NAMC) was approached to form a committee under section 7 of the Marketing of Agricultural Products Act to investigate measures to ensure the sustainability of citrus exports. Peter Nicholson, Hoppie Nel and Israel Nemaorani represented CGA on this committee. Lina Keyter (Citrus Councillor on the NAMC) chaired the committee. This committee met on a number of occasions during 2006.

Key outcomes of the meeting are as follows;

- The committee identified quality standards and information as the key elements of any solution.
- The committee spent much time deliberating the alternatives of licensing versus registration. The registration option involved government licensing both growers and export agents. The regulatory measures for this option already exist. Registration would be dependent on the submission of information and compliance with quality standards. The licensing option involved licensing of industry bodies, who would in turn register growers and export agents.

- In a meeting with Department of Agriculture (DoA), it was made clear that the DoA wanted less involvement by government; the industry was urged to use present regulatory measures to achieve their goals.
- It is clear that growers will need to determine and introduce their own measures to ensure sustainability, as government is not willing to introduce new regulations.

Shipping Matters

Tini Engelbrecht and George Hall were tasked with addressing shipping related matters on behalf of the CGA Board. During the year under review the following issues were attended to:

- Competition issues arising from a merger in the shipping industry.
- Container capacity.
- Availability of plug in points.

Quality Standards

In preparation for the annual Standards Workshop convened by DoA, CGA held discussion sessions in September 2006. These were well attended by members of the variety focus groups; however, the poor turnout of export agents and key DoA personnel was disappointing. Nevertheless, the meetings were very successful in getting consensus on a wide range of quality related issues. It was noticeable that growers grasp the importance of matching quality

standards with market requirements. However, improving quality standards and maintaining high quality is not as high a priority for those who depend on volume for financial gain.

At the DoA Standards Workshop in November 2006 all the recommendations from the September meetings were accepted – this included a raising of the minimum standards for certain varieties, and differentiated standards for Japan, USA, South Korea and South East Asia. These standards will be promulgated, and will come into effect in the 2007 season.

During the season the variety focus groups (VFG's) spent considerable time discussing quality standards, and assisted DoA by making recommendations on dispensation requests forwarded to the VFG's. All in the industry agree that the key to long term sustainability of the citrus industry is to differentiate our product based on quality. Short term gains in filling markets with substandard fruit will be at the cost of long term orders for good quality fruit.

European Union (EU)

A pest risk assessment (PRA) developed in 2000 proved that citrus black spot (CBS) cannot establish itself in the EU. Since lodging the PRA, the EU has challenged certain aspects of the risk assessment, all of which have been addressed. In May 2006 Vaughan Hattings (CEO CRI) visited the EU in

A post-war display of South African oranges in a Swiss store.





A pre-war display of oranges and grapefruit in London.

an attempt to get a response from the last round of technical submissions, and to mobilise various people and institutions. He met with technical and political contacts in the EU. This was followed up by a further meeting in October 2006, with similar objectives. On his return, Vaughan Hattingh recommended that the CGA look into getting political influence to bring about finality to this process. It was recommended that CGA have a representative in Brussels to ensure that the issue received ongoing attention.

Finally, in January 2007 a response was received from the EU. Although the twenty four page document has not been studied in detail, it does not seem that any insurmountable issues or concerns have been raised. The CRI and DoA are working on a response, which should be provided to the EU by June 2007.

In February 2007 Justin Chadwick met with a potential representative in Brussels, who was tasked with preparing a stakeholder analysis, and developing a message to use in getting political support for finalisation of the process.

The political process will begin in earnest once the response has been submitted.

In 2001 a CBS risk management system was introduced. The objective of the system was to identify orchards with CBS risk, in order to terminate their registration for the EU market. Once agricultural management practices had been rectified, and an assessor had

reported that the risk had been reduced to an acceptable level, the orchard could be reinstated. It is interesting to note that since 2001, only 24 production units remain on the list deregistered for the EU, out of a total of 1 600 production units.

Iran

Under the auspices of the DoA a task group was convened to look at pre-cooling and cold sterilisation requirements for this market.

In March 2007 the industry was informed that tariffs of 45% would be applied to this market, seriously limiting shipments to Iran.

Thailand

During the year under review bilateral meetings were held with Thai authorities. Pest lists were obtained, and mitigation treatments provided. There is concern regarding delays in communicating between the DoA and Thai plant health authorities.

Australia

A response from Australia was received. Information on certain pests of concern was requested, and responses provided.

Indonesia

A change in regulations allowing in-transit cold sterilisation treatment was received following requests from the citrus industry.

Jordan, Syria, Lebanon, Kazakhstan, Cambodia & Pakistan

Requests for citrus fruit to be exported to these markets was lodged with DoA.

Vietnam

During November 2006 the CEO accompanied a Department Trade and Industry mission to Vietnam. The full report is available on the CGA website (www.cga.co.za). The key findings are as follows;

- High tariff rates (40%) and VAT (10%) are restricting trade.
- Presently no phytosanitary treatments are required.
- Membership of WTO could change both of the above.
- Most citrus trade is with China.
- There is growing concern regarding food safety.
- Port handling infrastructure is poorly developed.

India

During November 2006 Paul Hardman accompanied a Department Trade and Industry mission to India. The full report is available on the CGA website (www.cga.co.za). The key findings are as follows;

- High tariff levels (35%), lack of cold chain infrastructure, uncertain payment terms and long shipping periods means that this market has not been supplied to its true potential.
- The Indian Government's commitment to addressing these issues could make this market more attractive. More retailers are moving into the country, and imported fruit does earn a premium. It is estimated that the market could absorb 3 to 5 million cartons annually within the next five years.
- Exports from South Africa require a phytosanitary certificate and cold sterilisation treatment.

Citrus Producing Region



Namibia

Vaalharts

23

41

403

41

176

Northern Cape

Western
Cape

25

921

4936

2705

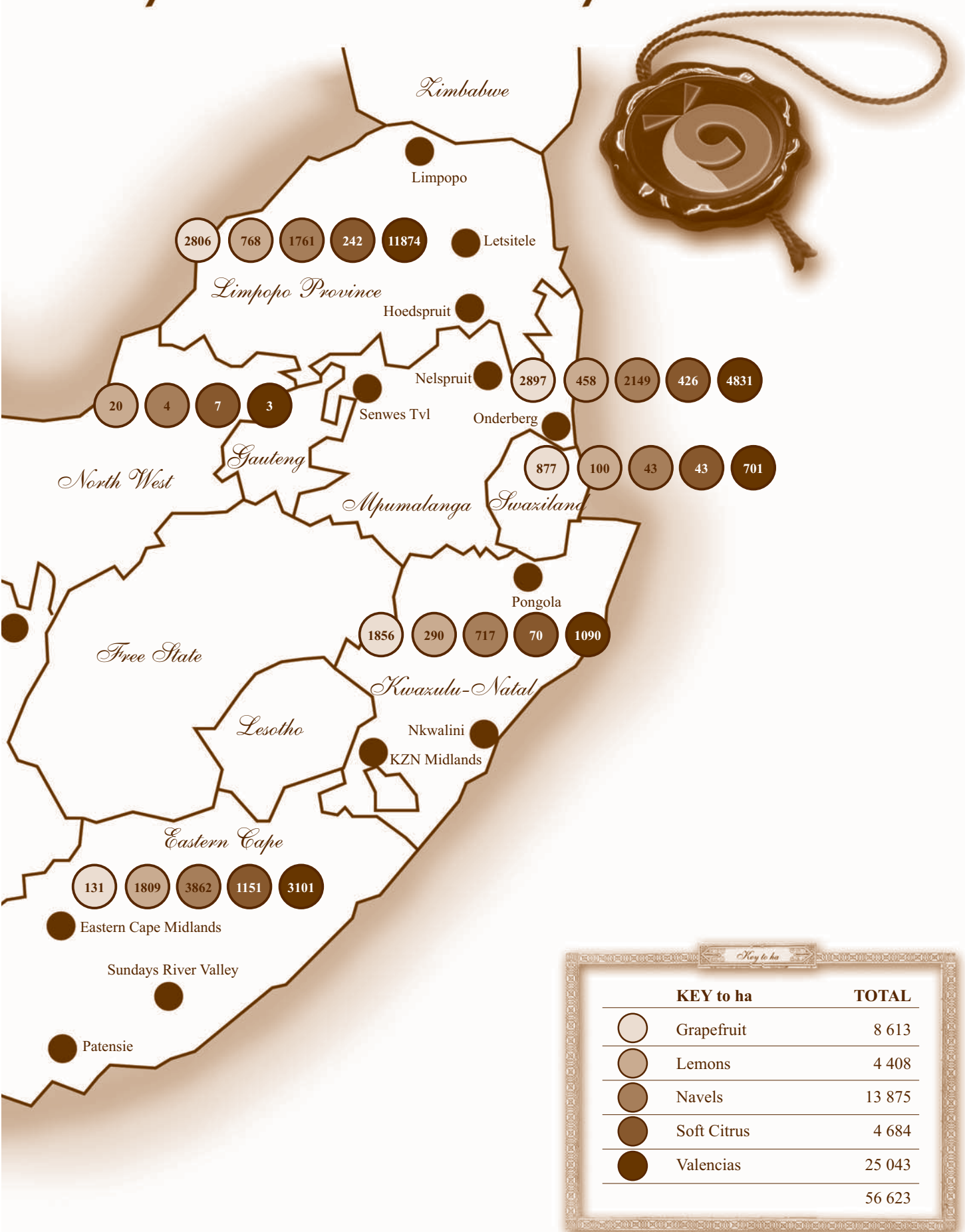
3267

Western Cape

Boland

Total ha	
TOTAL ha	
Eastern Cape	10 054
KwaZulu-Natal	4 022
Limpopo	17 451
Mpumalanga	10 762
North West	34
Northern Cape	638
Swaziland	1 764
Western Cape	11 853

Regions of Southern Africa



Japan

Exports to Japan in total showed a significant decrease over the 2005 season – a decrease of over 50%. Exports of citrus to Japan were back to levels last seen in 2001. The overall decrease in volumes was due to a huge increase in grapefruit (52%), and decrease in orange (32%) volumes, while lemon volumes decreased by 14%.

As in the previous years, the cartons passed at inspection points was excellent – lemons 99% (2005 99%), oranges 93% (2005 95%) and grapefruit 96% (2005 96%).

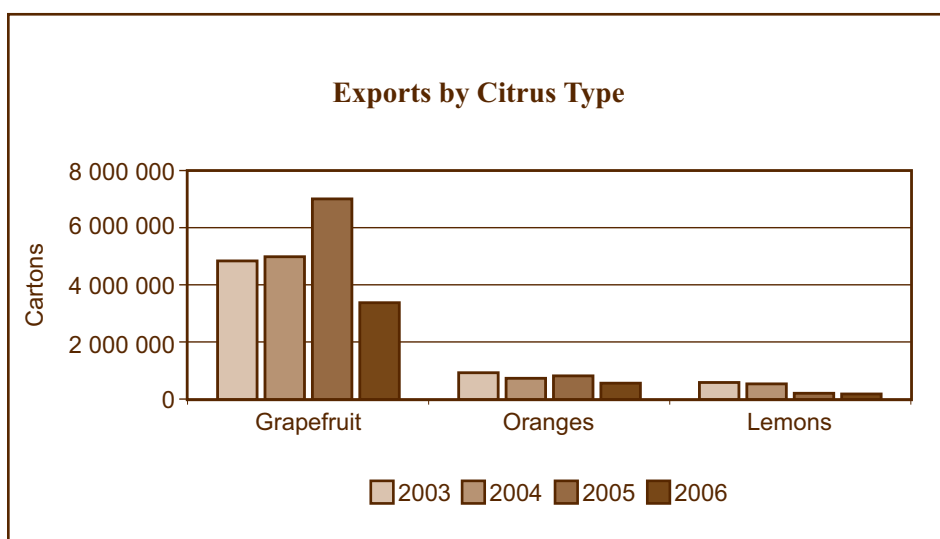
Two port terminals in Durban handled exports to Japan. Fresh Produce Terminals handled 1.8 million cartons, while Maydon Wharf Fruit Terminals handled 2.4 million cartons. Both terminals recorded 96% approval rates for cartons inspected. Twenty three (2005 – 22) exporters exported fruit to Japan.

The decreased volumes were in part a reaction to the abysmal returns generated from the Japan market in 2005. In addition, prices of grapefruit for juice were very high, making this an attractive alternative, while the overall grapefruit crop was significantly lower than 2005.

The introduction of differentiated standards for this market, where quality specifications at inspection are set at the required level for this market, also meant that the market was supplied with fruit of the desired quality.

Grapefruit growers (through the vehicle of the Grapefruit Focus Group) employed co-ordinators in both South Africa and Japan. These individuals kept growers, exporters and importers aware of fruit flow and stock build ups which was a contributing factor to the successful Japanese program. Export agents also contributed towards the funding of these positions.

One of the elements identified in growing exports to Japan is promotions. In order to make sure that a promotion



effort is effective, grapefruit growers have contracted research to be done. This research is jointly funded by grapefruit growers and the Department Trade and Industry (DTI).

These lower volumes into the market meant an equilibrium between supply and demand which resulted in good returns from the market.

Despite being assured that the Clementine access process was almost complete, and just required a public comment period, by the end of the period under review there was no indication as to whether the process had proceeded any further. The South African Embassy in Tokyo has been called on to assist, as has the Agricultural attaché for the region. During March 2007 the DoA received communication asking for confirmation that South Africa accepted the terms of treatment for clementines to Japan. Acceptance of the terms has been communicated to Japan. It is hoped

that this means that the process is nearing finalisation, and that there will be no unforeseen problems in the process.

With Japan reviewing their maximum residue level (MRL) regulations, a few problems were experienced during the 2006 season. This is covered in the Industry Affairs section.

South Africa was one of the earliest exporters of citrus to Japan. Although most countries citrus is subject to cold sterilisation treatments for pest disinfestations, the temperature applied to South African fruit is lower than the other exporters (with also a shorter treatment period). Requests for equivalency were denied. CGA has funded research at CRI with the objective of increasing the treatment temperature (and increasing the treatment period). The first phase has been completed, once this has been approved by Japanese officials the second phase will follow.

Market Access

continued

South Korea

After a severe reduction in volumes exported in 2005, export volumes improved markedly in 2006 to over 300 000 cartons. This is the second highest volume ever exported to this market. In addition, approval rates improved markedly with 96% of cartons presented for inspection being passed. This is the highest pass rate ever.

During the 2006/7 season all South Korean exports took place through the eThekweni facility in Durban. Seven export agents were involved in this program (2005 – five agents took part).

South Korea revised their cold treatment period from 22 to 24 days, without any technical justification. Despite attempts to get this reversed, it had to be accepted in order to facilitate trade in 2006. The South Koreans have been informed that South Africa does not accept the changes, but will work within the requirements until resolution can be reached.

All the necessary information for inclusion of grapefruit and lemons to the protocol has been supplied. In addition, a request has been made to include soft citrus in the South Korean protocol.



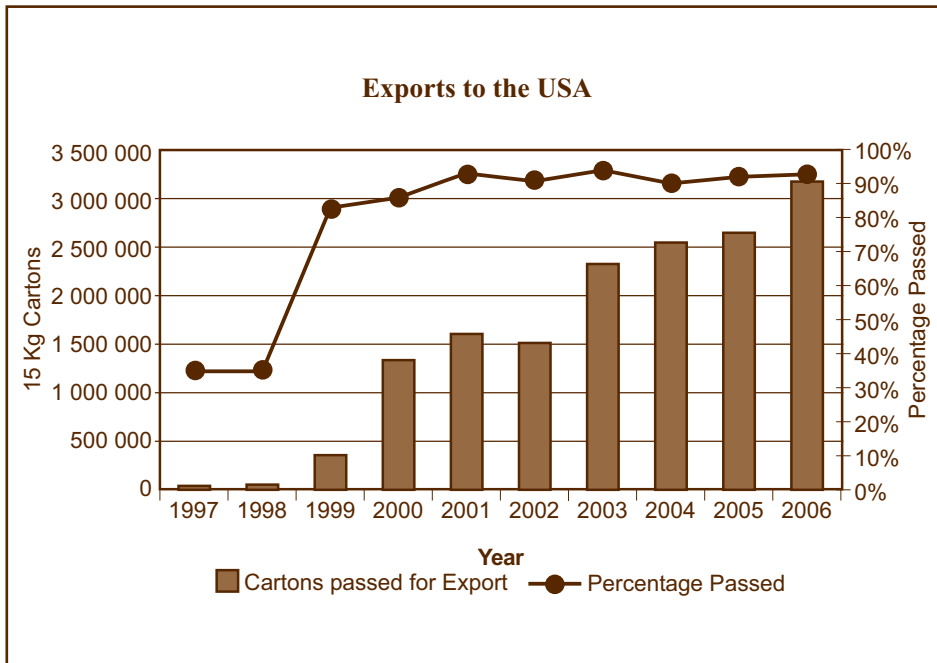
	Cartons Presented	Cartons Approved	Cartons Rejected	Percentage Rejected
2000	270 390	173 410	96 980	36%
2001	144 300	91 480	52 820	37%
2002	206 250	134 410	71 840	35%
2003	422 290	297 430	124 860	30%
2004	462 884	432 535	30 349	7%
2005	325 845	243 995	81 850	25%
2006	321 945	308 235	13 710	4%

South African oranges once again on sale in Japan in 1995.



Market Access

continued



Cultivar	Cartons Presented	Cartons Approved	Cartons Rejected	% Approved	% Rejected
Clementines	804 810	60 217	44 593	94%	6%
Navels	1 945 780	1 680 104	265 676	86%	14%
Midknights	699 715	645 740	44 593	92%	8%
Minneola's	72 472	66 605	5 867	92%	8%
Lemons	882	882	-	100%	-
Grapefruit	330	330	-	100%	-
Mandarins	22 715	21 064	1 651	93%	7%
TOTALS	3 546 784	3 174 942	371 842	90%	10%

United States of America

Citrus exports to the USA increased in volume to more than 3.17 million (2005 – 2.64 million) cartons, with a pass rate of some 90% (2005 89%).

The split between the different cultivars is presented above (all in 15Kg equivalents):

Comparisons with 2005 Program:

There was a 20% increase in the volume of clementines exported, and a 43% increase in the volume of navels. Midnight exports decreased by 10%, with a decrease of 30% in minneolas. Lemon volumes decreased markedly (from 24 000 cartons in 2005).

New Magisterial Districts: In May 2006, after many requests, USDA finally accepted the inclusion of 12 additional magisterial districts to the work plan for exporting to the USA. This was first requested in April 2004.

Wider Access: All the necessary information to support access for the Northern Cape and western Free State has been lodged with USDA.

Additional surveys have been done in the north of the Limpopo province, and producers have been informed of the results. An application for the inclusion of pest free places of production in a low prevalence CBS area has been lodged with USDA. During her visit to the USA in December 2006 the Minister

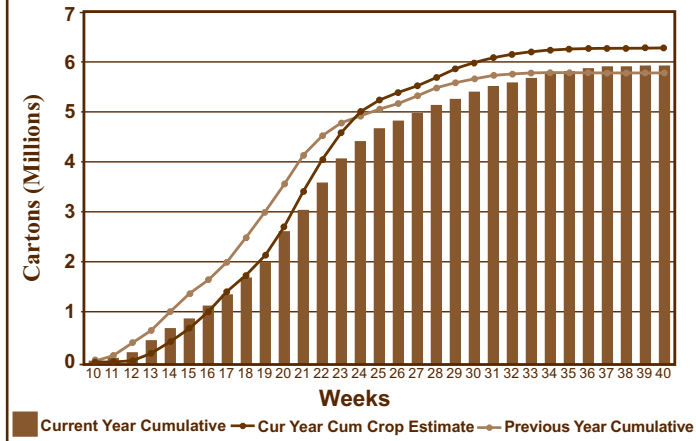
of Agriculture raised the importance of wider access to the USA – and stressed the importance of addressing the applications that have been lodged. The citrus industry appreciates the Minister taking this issue to the highest level, and also wishes to thank Embassy staff (Dr Mkhize and Mr du Toit), and the CGA representative in Washington (Ron Campbell) for all their work in keeping momentum on this issue.

Cold Treatment for FCM: Despite complaints regarding the unjustified increase in the cold sterilisation period, the USDA have not reversed their decision. In order to get consensus between scientists in the USA and South Africa, CGA sent Vaughan Hattingh and Hendrik Hofmeyer to meet with their counterparts in the US. Unfortunately this meeting was unsuccessful in meeting the objective of acceptance of the previous treatment period. In September 2006 a USDA delegation visited South Africa – in addition to pushing the treatment reversion issue, a management system for good agricultural practices (GAP) for FCM was developed. During her visit to the USA, the Minister of Agriculture also stressed the importance of resolving this issue – our thanks once again. We are also grateful to Ron Campbell, Dr Sipiwe Mkhize and Hennie du Toit for taking this matter forward. As a result of the Minister's visit, a USDA delegation will travel to South Africa in April 2007. The citrus industry met with DoA in March 2007 to prepare for this meeting. Reversion of the treatment period back to the technically justified level is a priority for CGA.

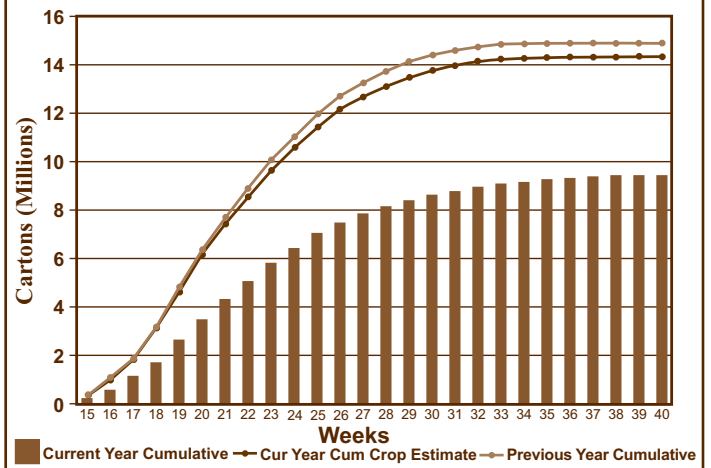


Exports 2006

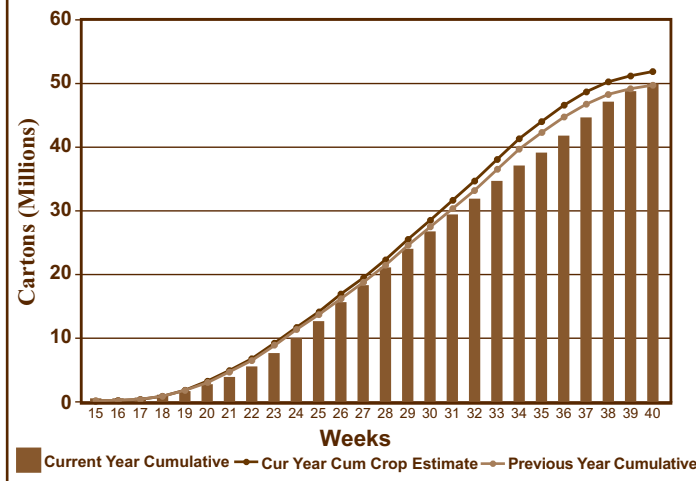
Soft Citrus passed for Export



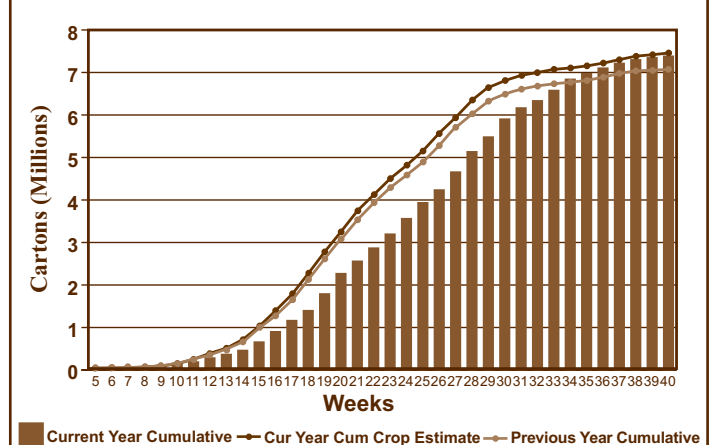
Grapefruit passed for Export



Oranges passed for Export



Lemons passed for Export



Consumer Assurance

It is of concern that over the 2006/07 financial year some importers of southern African citrus intensified their use of the consumer assurance concepts and perceived “food safety” as a means to differentiate their offering and to compete with rivals. There is no doubt that ALL food placed on the market must be absolutely safe, but using “food safety” to create competitive advantage is unacceptable.

On the positive side however, institutions underpinning both public and private quality assurance schemes have been compelled to devote more resources to confirming and updating food safety standards. CGA was active in promoting the interests of growers during this process and continues to support the legal and scientifically justified parameters as the basis for Food Safety Standards (see table of food safety related meetings).

Good Agricultural Practices (GAP)

Both the SA GAP, (the official food safety standard used for on-farm audits in South Africa) and the EUREPGAP Standard were revised during the period under consideration. Since the adoption of the initial SA GAP Standard in 2005, changes were necessary to simplify the checklists, to try and reduce the financial and administrative burden on growers, and to make the audit system more efficient. The revision process will be complete when the final version is endorsed by the Food Safety Forum in April 2007. Despite objection by CGA the audit fee increased from R1400 to R2400 per audit.

CGA provided the EUREPGAP Technical Steering Committee (TSC) with input for Version 3 of the EUREPGAP Standard via Fruit South Africa. The key changes in the latest version include a move toward specific audit checklists and questions per type of production and per crop. Version 3 was published on 1 March 2007, and will become compulsory from the 1 January 2008. CGA alerted growers to these changes via email and during



*Paul Hardman
Industry Affairs Manager*

roadshow meetings held in various regions in February 2007.

The EUREPGAP TSC was also replaced with a Sector Working Committee. Lindi Benic from South Africa was elected onto the Fruit and Vegetable Sector Working Committee as the SHAFPE representative. Ms Benic was part of the previous TSC and continues to bring a southern African fruit growers' perspective to the meetings.

Through collective action by SHAFPE an objection to the EUREPGAP fee increase (up to 400% for larger growers) was successful. It was argued that the motivations for an increase were not consistent with economic reasoning or prevailing citrus returns. Looking forward it is important that CGA continues to support and hold accountable the EUREPGAP leadership to deepen the integrity of the EUREPGAP Standard while making it affordable to growers.

CGA and CRI have continued to engage with retailers on an ad hoc basis to address specific concerns around plant protection products (PPP) residues and permissible uses of PPPs. Retailers' recognition/rejection of authorized uses of PPP's and their corresponding MRL is the most apparent use of “food safety” as a competitive tool. The constant

challenge before citrus growers is to encourage these retailers to use the **Recommended Usage Restrictions for Plant Protection Products on Southern African Export Citrus (RUR)** as the basis for PPP food safety standards.

Appropriate use of Plant Protection Products

Despite indications that the harmonization of EU Maximum Residue Levels (MRLs) would be complete by March 2007, further delays were noted, making it difficult to predict what the short and long-term fate of some EU MRLs will be. CGA/CRI were compelled to adopt a conservative approach in the RUR, which was updated and published in July and November 2006, and again in January 2007; reflecting 89 important MRL changes. This document was also re-formatted to include MRL details and specific usage restrictions for fruit destined for Korea and countries that apply the Codex MRLs (Middle East, China, Hong Kong, Russia, Singapore).

European Union Carbendazim MRL

Following the revocation of the EU Carbendazim MRL in 2005, a revised EU Carbendazim MRL of 0.5 ppm was set as a time-limited MRL on 26th February 2007 (Directive 2007/12/EC). This was a positive move by the EU Pesticide Residue Committee (PRC) to accommodate the use of carbendazim in third countries in response to the inputs made by CGA and CRI. In practice, however, there was no immediate benefit from the revised MRL for SA citrus growers as EU member states are only compelled to apply the new level from 28th August 2007. This means fruit treated with carbendazim may only be placed on the EU market after 28th August 2007. The time-limited MRL for carbendazim on citrus will expire on the 31st December 2007 unless CGA/CRI submits further supportive data showing appropriate GAP. CGA/CRI has been generating

Consumer Assurance: List of meetings 1 April 2006 to 31 March 2007

Food Safety Forum	MRL Task Group	Traceability Workgroup	PQMS	FVO Mission	SA PIP	SA PIP Citrus
22 May 06	23 May 06	8 Aug 06	16 May 06	1 Aug 06	23 May 06	14 Jun 06
14 Aug 06	15 Aug 06	21 Feb 07	28 Sept 06	5 Sept 06	15 Aug 06	13 Jul 06
20 Nov 06	21 Nov 06	7 Mar 07	24 Oct 06		5-6 Sept 06	20 Jul 06
26 Mar 07	27 Mar 07	19 Mar 07	1 Dec 06		21 Nov 06	14 Aug 06
16 Nov 06*			16 Jan 07		27 Mar 07	8 Sept 06
1 Sept 06*			30 Mar 07			14 Nov 06
4-5 Dec 06 *						8 Feb 07
						7 Mar 07
						16 Mar 07

**Technical workgroup*

such data over the last three years and a completed dossier will be submitted before the December 2007 deadline for consideration by the EU PRC. CGA is anticipating a positive response by the EU PRC before October 2007 and therefore the continued use of carbendazim sprays to control key diseases on southern African citrus.

FVO Mission

During June 2006 the DoA were requested to prepare for a visit by the EU Food and Veterinary Organization (FVO) in October 2006. Their purpose was to investigate that the official Food Safety control mechanisms were adequate since third countries supplying food to the EU are required to meet the EU Food Safety Regulations (178/2005/EC; 882/2004/EC, 852/2004/EC). While the focus of the Mission was on the official controls, CGA was invited to participate in the preparatory meetings in August and September 2006, and in the subsequent follow up meetings. In general the FVO was satisfied with the efforts made by all stakeholders in the SA fruit export supply chain, but did raise concern about domestic food safety controls. Their recommendations on how these systems can be improved will be considered at the Food Safety Forum at their next meeting in May 2007.

Japan Residue Concerns

The SA citrus industry became aware of an exceedance of a Japanese MRL on citrus in September 2006. A small delegation comprised of representatives from Department of Agriculture (Directorate Food Safety and Quality Assurance, and Directorate Analytical Services) and CGA visited Japan from the 11th – 15th September 2006 to investigate the issue. The key objectives were firstly to facilitate the release of fruit found to have residues at or below the MRL, and secondly strengthen the relationship between the Food Safety authorities in both countries. The SA Embassy in Tokyo, and particularly Mr Ray Medhurst and Mr Shinji Yamamoto, compiled a highly relevant itinerary and must be thanked for all their efforts both before and during the visit.

The Japanese authorities were impressed with how proactive DoA and the SA citrus industry had been to address this issue. They acknowledged the work done by SA to apply appropriate systems, but regrettably would not be in a position to consider the requests to release unaffected fruit without more evidence to support the argument. Furthermore, it would be up to the local authorities who had originally detected the exceedance of the MRL to make a decision about the fate of the unaffected fruit.

The SA Embassy and the Importer involved visited local Japanese officials (following the return of the SA delegation to SA). Unfortunately, these officials only agreed to release a small amount of fruit, while the remaining fruit (5 349 cartons) were not approved for release.

Product Quality Management

In May 2006 DoA re-emphasized their concerns with introducing alternatives to End Point Inspections (EPI), including firstly the costs for EPI users once Product Quality Management Systems (PQMS) were introduced, secondly whether or not PPECB should be the only body conducting PQMS audits, and thirdly whether the EU would accept an audit (QMS) approach. Currently SA has a favourable status under EU1148 whereby fruit is not re-inspected on arrival in the EU. DoA undertook to enquire from the European Commission (EC) whether the introduction of alternatives to EPI would compromise the EU1148 status. During October 2006 DoA reported that it would be inadvisable for SA to authorize PQMS before having gained approval from each of the 25 EU member states to do so. The EC indicated that audit-based quality management systems were under consideration at the Commission level, and may be permitted in a few years.

Consumer Assurance

continued

The PQMS Steering Committee took the decision to not undermine the EU1148 status, and therefore exclude fruit destined for the EU in any further discussions.

To address the first two DOA concerns Paul Hardman and Anton Rabe (Deciduous Fruit Producers Trust) then picked up the initiative and called an industry meeting later in October 2006. Possible solutions would apply the following principles:

- Official inspection/PQMS should be against the minimum quality standards.
- All alternatives must support/provide similar phytosanitary functions currently conducted by the official inspection body.
- Alternatives to EPI MUST provide equivalent or better quality assurance than the EPI itself.
- A medium to long-term view is

necessary when evaluating the cost/benefit of introducing an alternative to EPI.

- Transformation of the fruit industry is crucial, and the introduction of alternatives to EPI must not create barriers to entry for emerging growers.

Four resulting scenarios were considered with a view to introducing pilot studies to determine feasibility.

- DoA subsidise any increases in quality inspections.
- Product Quality Management System (PQMS) only.
- Reduce visits and inspections by official on EPI (reduce 2% inspection ratio).
- Combination of Scenario 2 and 3 above.

Before pilot studies were undertaken, the proposed way forward was put to DoA. It became clear that DoA were

not convinced that the pilot studies would reveal any new information, although the deciduous and citrus packhouses involved were interested to learn what the actual costs and benefits of official PQMS would be. DoA indicated industries would need to create more concrete proposals to address their concerns. A further meeting was then called between interested citrus and deciduous packhouses in March 2007. A final proposal that focused on scenario three above was compiled. This proposal will be tested with DoA in April 2007.

Therefore, effectively no further progress with respect to the introduction of Product Quality Management Systems (PQMS) as an alternative to End Point Inspections (EPI) was made by end March 2007. EPI remained the only method to officially verify citrus quality. Nevertheless CGA is optimistic that greater progress will be made in 2007/08 and appropriate alternatives to EPI will be introduced in due course.

Labelling machine used in the early 1930's.



First re-packing shed in Table Bay Harbour during the 1930's.



Research

Introduction

The southern African citrus industry's research and technical support services continued to be operated in accordance with the highly successful CRI Group Alliance model. The following sketches an outline of some of the processes:

- Industry research and technical support priorities are annually quantified through a process of consultation with the 27 regional grower Technology Transfer Groups, the Citrus Exporters Forum technical panel and researchers;
- The extension specialists transpose these inputs into research topics and technical support needs;
- Research organizations are advised of the priorities and are invited to submit research proposals, that are then consolidated into project proposals by subject specialists acting as project coordinators, with further consolidation into programme (research discipline) portfolios;
- Each programme portfolio is referred to a specialist committee, that makes recommendations to the CRI Board on the strategic direction of the programme, its composition and the funding of projects;
- The CRI Board, encompassing representation from the main CRI Group Alliance Partner Organisations, annually considers the overall Research and Technical budget;
- The CRI budget is referred to the CGA for consideration and approval;
- The resultant resource allocation and alignment of research with priorities, as well as research progress, is communicated back to growers through the extension network.

Pursuit of a diversified funding base continued with strong performance by River Bioscience, the industry-owned company tasked with the commercialization of new technologies arising from research. A new company, Xsit (Pty) Ltd was established as a



Vaughan Hattingh
CEO

subsidiary of River Bioscience, with co-investment from PlantBio Trust, to commercially implement the Sterile Insect Technique (SIT) for the control of False Codling Moth (FCM), as developed by CRI. Valuable additional funding was also derived from the SA-EU Pesticide Initiative Programme (PIP), for research both to support the retention of key residue tolerances in the EU and to advance research aimed at reducing the industry's reliance on conventional pesticides.

Market access technical coordination

The gaining, retaining and optimising of market access remained the overarching top priority of CRI, with the CEO CRI personally maintaining responsibility for the portfolio of market access technical coordination, in close collaboration with the CEO CGA. Good progress was made in 2006 and projects in progress hold good prospects for both accelerating progress with market access into the future and supporting sustained access.

Research programmes

Phytosanitary requirements continued to be the driving force behind most **Integrated Pest Management (IPM)** research and False Codling Moth (FCM) again received the most funding and attention. The research breakthrough of

the year was the successful control of FCM on 35ha of citrus using the Sterile Insect Technique (SIT). This led to further development of apparatus and techniques for the mass rearing of FCM and the formation of the spin-off company Xsit. Fruit fly research also continued to be a priority due to the phytosanitary importance of this pest. The control of cosmetic pests often has a detrimental effect on natural enemies of other pests and the search for more IPM-compatible treatments continued. A considerable amount of attention was given to the development of residue breakdown data for the determination of pre-harvest intervals for old insecticides that are no longer being supported by the original manufacturers. This work is important in supporting retention of residue tolerances in export markets and providing guidelines on the continued effective use of such products, combined with continued compliance in light of changing residue tolerances in the markets.

Within the **Disease Management** programme, Citrus Black Spot (CBS) remained a top priority in light of its phytosanitary importance. Several aspects of the CBS research were completed during the year. Having completed the various detailed academic issues required by SA's engagement with the EU on CBS phytosanitary regulations, the focus of CBS research shifted back to improving CBS control. Good progress was made in the Project Graft Transmissible Diseases in support of Citrus Improvement Programme (CIP) and in maintaining biosecurity of the citrus industry. Post-Harvest Diseases remained a very high priority and several experiments were directly aimed at improving post-harvest disease management in packhouses.



Registration trials with a new fungicide in the citrus post-harvest arena, pyrimethanil, were promising for the control of blue and green mould. Pyrimethanil is of unrelated chemistry to imazalil and guazatine and will prove invaluable in anti-resistance management strategies. In the Fruit and Foliar Diseases project good progress was made in the control of *Alternaria* Brown Spot. The cause of the collar rot symptoms on Clementines in the southern Cape was established as being *Phytophthora citrophthora*. Whereas, this can be a devastating disease for susceptible cultivars under suitable climatic conditions, effective and practicable control strategies were rapidly developed. The Soilborne Diseases Project, continued investigating alternative control strategies to address growing concerns about the future acceptability of chemicals for the control of soilborne diseases caused by fungal pathogens and nematodes.

The **Horticultural research** programme was conducted in the three projects, namely rind condition, fruit quality enhancement, and crop load management. Most resources were allocated to the rind condition project due to the severe losses that can be experienced from creasing, rind breakdown, chilling injury and Peteca spot. This field of research is highly challenging, but valuable advances are being made in understanding the causes of rind breakdown and the importance of carbohydrate levels. Late in 2006 a decision was taken to establish a research project focusing on cold chain management and packaging. Future research in this project should dovetail with current advances in rind condition and fruit quality research.

Cultivar development

Within cultivar development, progress was made with the international sourcing of new cultivars, the coordination of a local mutation screening project to identify potential new cultivars, the objective evaluation of cultivars and



Quality testing and inspection.

rootstocks, the provision of planting advice and facilitating the movement of new cultivars through quarantine.

Citrus Improvement Programme (CIP)

The Citrus Foundation Block has been operated by CRI with the objective of providing a financially self-sufficient industry support service. However, a down turn in budwood and seed sales in 2006, resulted in the CFB operating at a net loss for the first time since 2001. A total of 2 076 851 buds and 1537 litre seed were supplied in 2006, being 550 000 buds and 800 litre seed less than in 2005. The CIP continued to operate on the basis of voluntary participation. A high level of participation was maintained in 2006, with certification of 1 614 000 trees and 20 nurseries meeting the CIP standards. The DoA and affected parties were consulted about transforming the CIP into a statutory scheme under the Plant Improvement Act, 1976 (Act No. 53 of 1976). Discussions with the DoA are ongoing with regard to various details of the scheme.

Extension

The extension model, whereby CRI provides a central coordination role, engaging 27 regional Technology Transfer Groups, continued to grow in strength. In 2006 the services of the following members of SASSCON (Citrus Consultants Association) were

contracted by CRI to assist with the coordination of some of the technology transfer groups: Chris Kellerman - Pongola/Swaziland and Komatipoort/Malelane; Tom van der Meulen - Hoedspruit; Clive Pountney - Burgersfort/Ohrigstad; and Isak Bruwer - Breede River.

Due to concern about quality problems experienced in the previous season, meetings were held in all areas to provide training in picking, orchard practices and packhouse procedures before the start of the new season. Attendance in all areas represented at least 70% of the total quantity export cartons.

The 4th Citrus Research Symposium was held in Port Elizabeth in August 2006 and was a resounding success, with attendance of approximately 350 delegates and a wealth of world class presentations. The highlights of the Citrus Research Symposium were presented to each Technology Transfer group in southern Africa, culminating in the establishment of each area's research priorities for 2007.

An Exporters Technical Forum was established to facilitate ongoing communication with exporters regarding technical requirements and the integration of these needs into the research portfolio. The Citrus Marketing Forum (CMF), Exporters Technical

Research

continued

Panel and various study groups requested that all research on post-harvest related subjects be coordinated. A series of meetings with affected parties culminated in the formation of the Citrus Cold Chain Forum. Other methods of technology transfer that were also used included the CRI website, CRI Net, Cutting Edge Newsletters, direct mailing to the Technology Transfer Groups, study group meetings, the SA Fruit Journal and scientific journal publications.

CRI Executive Committee

Jock Danckwerts Chair
Gerhard Scheepers
Hoppie Nel
CEO: Vaughan Hattingh

CRI nominees on River Bioscience (Pty) Ltd Board of Directors

Jock Danckwerts
Gerhard Scheepers

CRI nominees on Xsit (Pty) Ltd Board of Directors

Gerhard Scheepers

Crop Load & Fruit Quality Management

Gerhard Scheepers Chair
Piet van Rensburg
Graham Barry
Ballie Wahl
John Bower
Steve Turner
Mark Fry

Routinely invited:

V Hattingh • T Grout • H le Roux

Disease Management

John Moll*
Chris Kellerman Acting Chair
John Mildenhall
Ballie Kotze
Barry Manicom
Hans la Grange
Lise Korsten

Routinely invited:

V Hattingh • T Grout • H le Roux

Integrated Pest Management

Hoppie Nel Chair
Deon Begemann
Martin Gilbert
Kerstin Kruger
Dave Gerber
Kevin Language

Routinely invited:

V Hattingh • T Grout • H le Roux

Composition of CRI Advisory Committees

CRI Board of Directors

Jock Danckwerts	Chair – grower nominee
Gerhard Scheepers	Vice chair – grower nominee
John Moll*	Grower nominee
Hoppie Nel	Grower nominee
Louis von Broembsen	Grower nominee
Mark Fry	Grower nominee
Chris Kellerman	Consultants association nominee
Steve Turner	Exporters Forum nominee
Anton Ströh	University of Pretoria nominee
Gerhard Jacobs	Stellenbosch University nominee
Org van Rensburg	ARC nominee

CEO: Vaughan Hattingh

Routinely invited:

Antoine Rouillard	Chair CGA
Justin Chadwick	CEO CGA

Cultivar Development & Evaluation Committee

Jock Danckwerts Chair
Thys du Toit
Arthur Sippel
Peter Turner
James Miller
Graham Barry
Charlie Miller
Bryan Offer

Routinely invited:

V Hattingh
H le Roux
P Kingston

Replaced in November 2006 by the **Cultivar & Rootstock Evaluation Committee**

Jock Danckwerts	Chair
Hennie le Roux	Rootstocks
James Miller	Cultivars
Graham Barry	Cultivar Development Manager

V Hattingh
T du Toit
P Turner

Cultivar Development Committee
CRI Executive Committee

CIP Advisory Committee

Standing committee:

Chairperson (*endorsed by designated authority*)
Manager CIS (*convenor*)
CGA
SACNA
CRI
Post Entry Quarantine
Industry Pathologist
Industry Virologist
Industry Manager Cultivar Development
Cultivar Management Companies

J Danckwerts
T du Toit
M van Niekerk
P Kingston
V Hattingh
B Manicom
H le Roux / P Fourie
F van Vuuren / G Pietersen
G Barry
P Turner

Routinely invited /co-opted:

DoA Agricultural Products Inspection Services
DoA Registrar Plant Improvement Act
DoA Plant Breeders Rights Act
DoA Agricultural Pests Act
South African Nurseries Assoc (SANA)
CEO CGA
CEO CRI
Industry Manager Research & Technical
Industry Manager Extension Services

M Holtzhausen
C Arendse
M Schaffner
JH Venter
P Vonk

*deceased

Citrus Academy

Introduction

The Citrus Academy made significant progress towards its objectives during its second year of operation. At the same time, significant progress was made in building relationships with other role-players in the skills development arena.

The Citrus Academy addresses four major challenges to the citrus industry, being general skills shortages on farms, specific scarce skills, the transition of production unit ownership, and employment equity. These challenges are addressed through the Citrus Academy Bursary Fund, the development of learning material and learning programs, the registration and development of service providers, the circulation of information to farmers, and other support services, such as skills needs assessments and skills development planning.

Citrus Academy Learning Material

Significant progress was made with the development of citrus-specific production learning material, although the project has still not been concluded. Learning material is being developed for seventeen production-related skills areas, ranging from irrigation and plant manipulation, to production management and marketing.

The learning material is being developed for the industry by the industry, with some of the most highly-qualified experts in the industry being involved in the process. This approach has had the added benefit of creating a repository for skills and knowledge that need to be made accessible to the wider industry.

During the past year, the Citrus Academy was able to secure funding to the amount of R180,000 from the AgriSETA for the



*Jacomien de Klerk
Manager - Citrus Academy*

development of learning material. In turn, the learning material of the Citrus Academy was made available to the AgriSETA to be used for the development of generic learning material.

Die kwessie van die vertaling van die Sitrus Akademie opleidingsmateriaal het gedurende die afgelope jaar na vore gekom. Om al die gidse te vertaal wat as deel van die projek ontwikkel word, sal nie moontlik wees nie weens die hoë koste wat daaraan verbonde sal wees. Die alternatief wat huidige oorweeg word is om visuele fasiliteringshulpmiddele te ontwikkel wat vertaal kan word in enige taal teen 'n redelike koste.

The development of learning material for packhouses has been delayed because of the pending registration of new unit standards and qualifications specifically aimed at packhouses. This project will be undertaken in the coming year.

Learning Programs

The Citrus Academy has embarked on the development of a number of learning programs, based partly on the production learning material. Learning programs are developed by combining unit standards or even parts of unit standards, and developing the necessary guides for the presentation of the program.

The first program development that was undertaken is the unit standard alignment of the Citrus Short Course. The course will be available in English at the end of 2007, and in Afrikaans in 2008. Other programs that are being planned at the moment are a program focussing on recordkeeping, a requirement for many accreditation systems, and a program on institutional information, aimed at new farmers.

Service Providers

The Citrus Academy has collected information of all the service providers that are active in the citrus production areas, and will be making this information available on its website soon. There has been a marked increase over the past year in the number of service providers accredited by the AgriSETA and the Citrus Academy continually works at making sure that its database remains up to date. This is an essential tool to ensure that farmers have the information that they need, when they need it.

The Citrus Academy will also undertake a project to build capacity amongst service providers, with the aim of providing them with access to technical experts in various fields. This project will be launched in 2007.

We would like to urge all growers to consult the Citrus Academy service provider database before making their choice in service provider.

Dissemination of Information

The Citrus Academy fulfils the dual role of generating the tools required by the industry to effectively implement skills development and of disseminating information firstly to growers and then to other stakeholders.

The most powerful tool for the dissemination of information is the Citrus Academy website. The website contains information on all the activities of the Citrus Academy and many helpful tools can be downloaded, including the Citrus Academy learning material and assessment

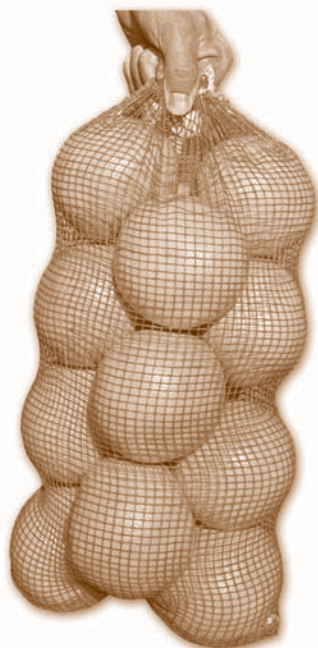


documents. Please visit us at www.citrusacademy.co.za. Die webwerf van die Sitrus Akademie is nou ook in Afrikaans beskikbaar by www.sitrusakademie.co.za.

Other Support Services

The Academy continually strives towards providing a better service for the citrus industry and wherever a skills development need is identified amongst citrus growers, steps are taken to address it. To date, the need for accurately identifying the skills needs of a production unit has been addressed through the development of workplace skills assessments, and the need for determining the current skills levels of workers and emergent farmers has been addressed through the development of skills level assessment documents.

We would like to know if there is any other way in which we can be of service and would be happy to hear from you. Please contact us at (031) 208-8960 or learnmore@citrusacademy.co.za.



The Citrus Academy Bursary Fund

Introduction

The main focus of the Citrus Academy Bursary Fund during its first fully operational year was to implement and establish the necessary procedures and systems to accomplish the stated aims of the Bursary Fund, these being to:

- Support previously disadvantaged learners in citrus-related fields of study thereby ensuring wider access to the citrus industry.
- Support learners in fields of study that are related to scarce skills in the industry.
- Promote the citrus industry as an industry that presents exciting career opportunities.
- Ensure a maximum return on investment for the citrus industry as a whole and particularly for contributors to the fund.

Certain key factors were identified as being vital to the achievement of these goals, being student selection, candidate care, experiential training, and the successful integration of students into the industry on completion of their studies, based on their bona fide skills and ability to contribute to the welfare of the industry.

An evaluation of the performance of the Bursary Fund during the period under review, confirms that the approach described above is not only ground-breaking but produces results beyond all expectations.



Desiree Schonken
Assistant Manager

Student Selection

The Academy has designed the manner in which bursaries are awarded to ensure an equitable distribution. During 2006 the Bursary Fund supported 35 learners with bursaries to the value of R417 100. The criteria that are used to select successful candidates are PDI status, financial need, field of study, academic performance, and background/family involvement in citrus. Female candidates and candidates with disabilities receive special consideration. The table below indicates how bursaries were distributed:

Category	Amount	Total No of Learners	PDI	Female
Secondary Education Support	57 500	9		3
Tertiary Education Support	153 500	14	14	5
Scarce Skills Support	206 100	12	6	6
Total	417 100	35	23	11

Our sincerest thanks to the Citrus Industry Trust for their continued and invaluable support! Your generous contribution has enabled us to make a difference in the lives of many talented, deserving young South Africans!

Citrus Academy

continued

Care was taken to ensure a broad spectrum of courses at a variety of suitable academic institutions across the different regions of South Africa. In order to address scarce skills in the citrus industry, the Academy collaborated with Citrus Research International in aligning our choice of especially post-graduate candidates with previously identified research priorities in the industry.

The shortlist of bursary applicants for the 2007 academic year was submitted to the Citrus Industry Trust in October 2006. Out of 363 applications received, 45 bursaries to the value of R736 950 were granted in the following categories:

Category	Amount	Total No of Learners	PDI	Female
Secondary Education Support	56 650	8	3	
Tertiary Education Support	215 500	16	14	8
Scarce Skills Support	464 800	21	16	4
Total	736 950	45	33	12

Details of the different fields of study can be found on the Citrus Academy website.

Candidate Care Program

The success of the Bursary Fund depends on the commitment and personal triumph of each individual student. Building a constructive relationship with each student contributes to ensuring that they successfully complete their studies and go on to play an important role in the citrus industry. Such a relationship also leads to an appreciation for and loyalty to the citrus industry.

During the course of 2006, individual meetings were held with bursary students with the purpose of assessing their academic progress and discussing their future plans and other requirements. During these meetings, students are also evaluated in terms of aptitude and

potential, and provided with career guidance.

The Citrus Academy also launched a rewards program in 2006, which was given a kick-start by the much appreciated donation of three top-of-the-range Acer notebook laptops from the Development Bank of South Africa. The best undergraduate academic performers for 2006 received their prizes at the Citrus Academy Launch function on 29 March 2007.

Experiential Training Program

The Citrus Academy regards experiential training, in support of formal education, as an essential ingredient to student development and preparation for permanent employment. All undergraduate bursary students are obligated to perform four weeks vacation work every year at a citrus-related company.

Accordingly, vacation work was arranged for 16 bursary students during June/July and December 2006. Care was taken to expose candidates to a wide range of experiences, while simultaneously attempting to match students to the environment which would be most relevant for them in terms of their chosen careers.

Vacation Work – CGA head office in Hillcrest. Sipha Ndawonde was tasked with a research project concerning trends in price and volume of fruit sales on the local fresh produce markets.

He passed his last exam with three distinctions, a certificate of merit and a Dean's Commendation.



Sipha Ndawonde, Second year BSc Agric at University of KwaZulu-Natal, with Paul Hardman, CGA.

Vacation Work – Du Roi Nursery, Tzaneen.

The advantages of vacation work for students were obvious, with students displaying increased self-confidence as well as improved academic performance since they were now able to contextualise theoretical knowledge.



Left to right: Maxwell Qomonde, Lindiwe Masina, Velly Ngobeni, Second year students in Higher Certificate in Agriculture at Lowveld College and Abraham van Rooyen, Du Roi Nursery.

For employers the benefits are long-term and intangible, while the sacrifices required are very immediate and tangible. Participation was voluntary and without the pioneering individuals and companies willing to take the risk and make the necessary sacrifices, the vacation work program would not have endured. These are the inductees to the Citrus Academy "Hall of Fame".

Citrus Academy Hall of Fame

Justin Chadwick and Paul Hardman (CGA), Harry Gxotiwe (CTC), Abraham van Rooyen and Bryan Offer (Du Roi Nursery), Ashwin Bhugeloo (Fresh Produce Terminal Durban), Pieter Benade (Golden Frontier Products), Jock Danckwerts and Claire Wasdell (Kat River Citrus Cooperative), Johan van der Westhuizen (Letsitele Cooperative), Shane Dellis (Nkwalini), Llew Roberts (Riverside Enterprises) and John Perold (Sundays River Citrus Company).

When required, the Citrus Academy also assists learners in completing their practical course requirements by finding suitable employment for them within the citrus industry in the form of internships. At the end of 2006 the Academy secured six internships for 2007, and successfully applied to AgriSETA for funding for these internships to the value of R180 000.

Conclusion

Through the Bursary Fund the Citrus Academy has made great strides towards ensuring that the citrus industry will be supplied with a steady stream of qualified, capable and enthusiastic entrants for years to come.

The proof, however, is in the pudding. The ultimate measure of success for the Bursary Fund will be when our students are absorbed into the industry and start to make a noticeable difference. The biggest challenge facing the Bursary Fund in the next twelve months will be to procure suitable employment for our candidates.



The Citrus Academy Launch



Desiree Schonken, Nhlanhla Nkuna, Kate Hlongo, Siphamandla Ndawonde and Jacomien de Klerk at the Citrus Academy Launch.

On Thursday 29th March 2007, the Citrus Academy was launched at Pierneef Estate in Pretoria during a gala event that was sponsored by the Development Bank of Southern Africa (DBSA) and ABSA Bank.

The Citrus Academy has been a division of the CGA since its establishment at the beginning of 2005. From the 1st April 2007 it will be operating as a separate Section 21 company, wholly owned and controlled by the CGA, but able to stand on its own two feet.

The Citrus Academy launch was a celebration of its coming-of-age and the accomplishments of the past two years.

The event was attended by representatives of the fruit industries, government and government agencies, skills development service providers, organised agriculture, organised labour, and a number of current and potential donors to the Academy. Authors of the Citrus Academy learning material also attended the function, along with three students that benefit from the Citrus Academy Bursary Fund. One of the students, Sipa Ndawonde was the Master of Ceremonies on the evening.

The evening began with a word of welcome and a vote of thanks from Jacomien de Klerk, the general manager of the Citrus Academy.

Antoine Rouillard, CGA Chairman, then took the stage, and expounded on the role of the Citrus Academy from the CGA perspective and the importance of skills development to the citrus industry. Antoine also presented academic awards to three Citrus Academy Bursary Fund students. After enjoying a lovely dinner, the guests were entertained by the after-dinner speaker, Carolien Samson who is the Manager of Product Development at ABSA AgriBusiness.



Transformation

Introduction

The period under review is seen as a maturation stage for transformation of emerging citrus farmers. Despite various constraints faced by emerging citrus farmers, stakeholders have agreed to create partnerships to deal with issues of transformation. This period was expected to have an increase in the number of blacks owning citrus farms, considering the number of citrus farms under claim, but there was no movement in this regard. The activities undertaken through partnership agreements were mentorship programmes, training of extension officers on responsible use of agrochemicals, training Mariveni and Mabunda on food health and safety issues and an agreement was reached with Limpopo Department of Agriculture to resuscitate the extension service for citrus farmers. In support of the resuscitation of extension service, the CGA board has approved the appointment of an extension service officer to co-ordinate the project.

The other highlights for 2007 were support by the Eastern Cape Department of Agriculture (ECDA) to resuscitate citrus orchards in the Alice-Kat river valleys, and support to revive Peter Family Trust farm into an operational unit. The Limpopo Department of Agriculture (LDA), in support of the mentorship programme, have also provided funding for the installation of irrigation systems for Lungane farm in Makonde. The Mpumalanga



*Andile Maxwell Hawes
Transformation Manager*

Department of Agriculture also provided support to revive the Cairn Lemon Oil project. Mr Israel Nemaorani's visit to Fruitlogistica in 2005 has resulted in the signing of a marketing agreement with a buyer in the Netherlands.

Database for Emerging Farmers

The number of emerging citrus farmers has not increased as anticipated. The share of emerging citrus farmers in terms of area under production still remains 8 % of the total of 41 939 ha of commercial farmers. The slow pace is due to delays in the transfer of land under claim, and inaccessibility to capital by black farmers to purchase land available on the market. The Department of Land Affairs has brought in a proactive land acquisition policy with the aim of speeding up the process of

transfer to previously disadvantaged individuals and to augment the policy of willing seller willing buyer. This policy creates an opportunity for increasing the number of black farmers that own citrus farms.

Partnership

Experience has shown that success in developing and settling of emerging citrus farmers would only be realised through creation of partnerships. For partnerships to be sustainable, trust and emotional commitment have to be the main ingredients.

The partnerships are categorised as follows:

Operational Support Service

Since the beginning of the transformation programme in 2003, CGA has been promoting an integrated approach in dealing with diverse needs of emerging citrus farmers. The creation of partnerships has been the most favoured method of implementation.

The partnerships of various stakeholders are now starting to bear fruit.

Limpopo Department of Agriculture, through partnership with farmers, have invested R2.1 million to resuscitate the irrigation systems of Lungane farms in Makonde in Vhembe district.

Eastern Cape farmers have invested R4 million for replanting of orchards in the Alice-Kat River valleys.

Mpumalanga Department of Agriculture invested R360 000 to assist Cairn Lemon Project, which is a land reform project, to get back into production.

The **National** Department of Agriculture supported a mentorship programme for the citrus industry with an amount of R2 million. DoA and CGA are in partnership with the implementation of the programme.

Mbombela municipality has seen its first harvest of seedless lemon of the project that was developed in partnership with Sibonelo community at Elandshoek

Seloane Farmers - Du Roi



in Mpumalanga. The products were sold to local shops and will be exported from 2007.

More and more land reform projects are in need of turnaround strategies in order for them to deliver to local economic and food security objectives. In support of such a challenge the Western Region Department of Agriculture in the Eastern Cape provided an amount of R340 000 to purchase much needed inputs to get the farm in operation.

CGA believes that emerging farmers should be given an opportunity to explore how the global world operates in marketing of fresh fruit. It was under these convictions that Mr Israel Nemaorani was sent to Fruit Logistica in 2005. Israel is an independent black citrus farmer who has a potential to market his own fruit. He used the opportunity to network with various buyers and has been able to strike a deal with a Netherlands buyer and is now in the process of improving his packing house for exporting in 2007.

Institutional Support Service

Emerging citrus farmers in all provinces do not have a dedicated advisory service and CGA cannot provide such a service. Realising the need for such a service CGA has entered into a partnership with the South African Pest Initiative Programme (SA PIP) to build capacity of extension services and farmers, and to help farmers to set up institutional structures that would act as a stepping stone for inclusion in regional study groups. The Department of Agriculture

Israel Nemaorani in his orchard.



and European Union are in partnership in co-funding SA PIP, and PPECB has been appointed to project manage the programme.

Three projects were implemented in 2006:

- Training of Extension Officers on responsible use of Agrochemicals;
- The farmers in three regions, Eastern Cape, Limpopo and Mpumalanga are being facilitated to form institutional structures for future communication and study groups;
- Pilot projects of training Mabunda and Mariveni projects on food safety issues were started. The aim is to ensure that emerging farmers are able to comply with requirements for export.

LAND REFORM

Security of tenure has become an important criteria for any investors within the agricultural sector, but its effects remain to be seen.

The Honourable Minister Lulu Xingwana has approved the transfer of twelve citrus farms belonging to government to black citrus farmers. These are located in the Alice-Kat River Valleys. This is a milestone as these farmers have been waiting for this opportunity since 1996.

MENTORSHIP

The mentorship programme is a direct support to emerging citrus farmers' decision making process. The mentor uses his experience and knowledge to guide the farmers towards good decision making. The effectiveness of mentorship relies on the completeness of the support service given to the emerging farmers. CGA appreciates the funding of R2 million from DoA and would continue to improve understanding of continued support for this programme for the next five years.

FUTURE PERSPECTIVE OF EMERGING SECTOR

Despite all the support that was received through partnerships created, the environment under which emerging citrus farmers operate continues to demand improvement on the following:

- Use of title deeds as a form of collateral.
- Capacity and capability of Trust and Community Property Associations (CPA) to engage on commercial ventures.
- Accessibility to support programmes from the provincial departments
- Credit policies of various financial institutions.



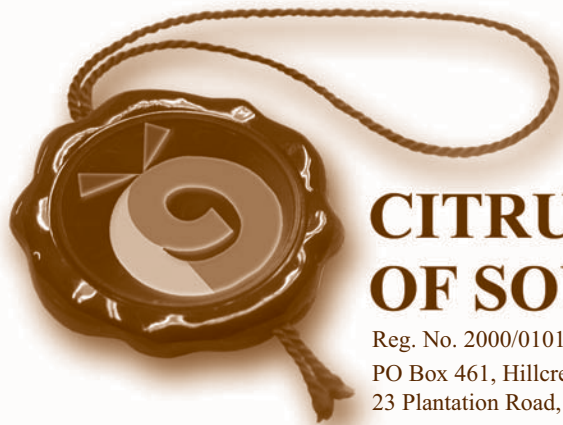
Joint owners in their citrus orchard.

Abridged Financial Statements

	Actual 2005/6	BUDGET 2006/7	Actual 2006/7	BUDGET 2007/8	
INCOME	26,394,239	21,540,000	26,594,491	22,632,400	
RSA Levy	25,204,734	20,800,000	22,422,552	21,542,400	**
Swaziland/Zimbabwe Levy	419,507	540,000	372,219	540,000	**
Bad Debts Recovered			360,887		
Interest	401,998	200,000	345,165	250,000	
Other Income	368,000		3,093,668	300,000	
EXPENDITURE	22,815,449	21,534,326	24,049,184	22,632,400	
Staff Costs	1,499,144	1,433,142	1,606,090	1,873,163	
Travel & Accom	84,043	108,000	100,911	116,000	
Office (Rent & Equipment)	120,582	163,301	163,594	216,582	
Office Expenses (Stationery, tel, copies)	187,274	181,000	228,735	250,000	
Board Expenses	381,239	344,000	346,081	330,500	
Services (Accounting and Legal)	40,120	40,000	136,448	60,000	
Subscriptions	5,517	231,000	224,980	421,000	
S A Fruit Journal	83,345	231,000	51,917	180,500	
Market Access	946,482	1,586,000	1,320,118	1,992,000	
Research Programmes Citrus Research International	11,422,114	14,826,883	13,186,570	16,000,000	
Research Programmes Citrus Research Trust		-570,000		-1,616,345	*
Transformation	1,813,776	2,000,000	2,001,992	2,176,000	
RSC Levy	18,932		17,496		
Depreciation	27,558	30,000	34,700	15,000	
General	441		29,204		
Information	436,562	930,000	730,348	618,000	
Provision for Doubtful Debts/Bad Debts	5,748,320	0	3,870,000		**
NET SURPLUS / (LOSS) FOR YEAR	3,578,790	5,674	2,545,307	0	

* Reserves in Citrus Industry Trust used to fund shortfall.

** Subject to final audit.



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A very early consignment of South African oranges displayed on the Glasgow fruit market in 1930.