

# National Plantings Database 2011 Preliminary Report

## **Kym Thiel & Nathan Hancock**



Is this the

Citrus Australia Conference ??



Or is it the

Cricket Australia Conference??



# Overview

- National plantings surveys first conducted in 2003 and 2008
- Levy funded project commissioned in 2011 by Citrus Australia, funded by Horticulture Australia Ltd, and collated by SunRise21
- Regional data collected by Murray Valley Citrus Board, Riverina Citrus, Northern Territory Primary Industries and Citrus Australia
- South Australia data for 2011 has not been provided - SA data shown here is from 2008
- This project brings together **regional data** into a powerful **national overview** that has real value for industry

## National Plantings Database - value to industry

- Allows better decision making by **all sectors** of the value chain
- National long-term volume estimates for each citrus product
- Helps in setting market access priorities
- Assists with seasonal crop forecasting at a national, category level
- Decision making by growers on future plantings & tree removals
- Supply chain logistics e.g. packing & shipping capability



## Properties by region

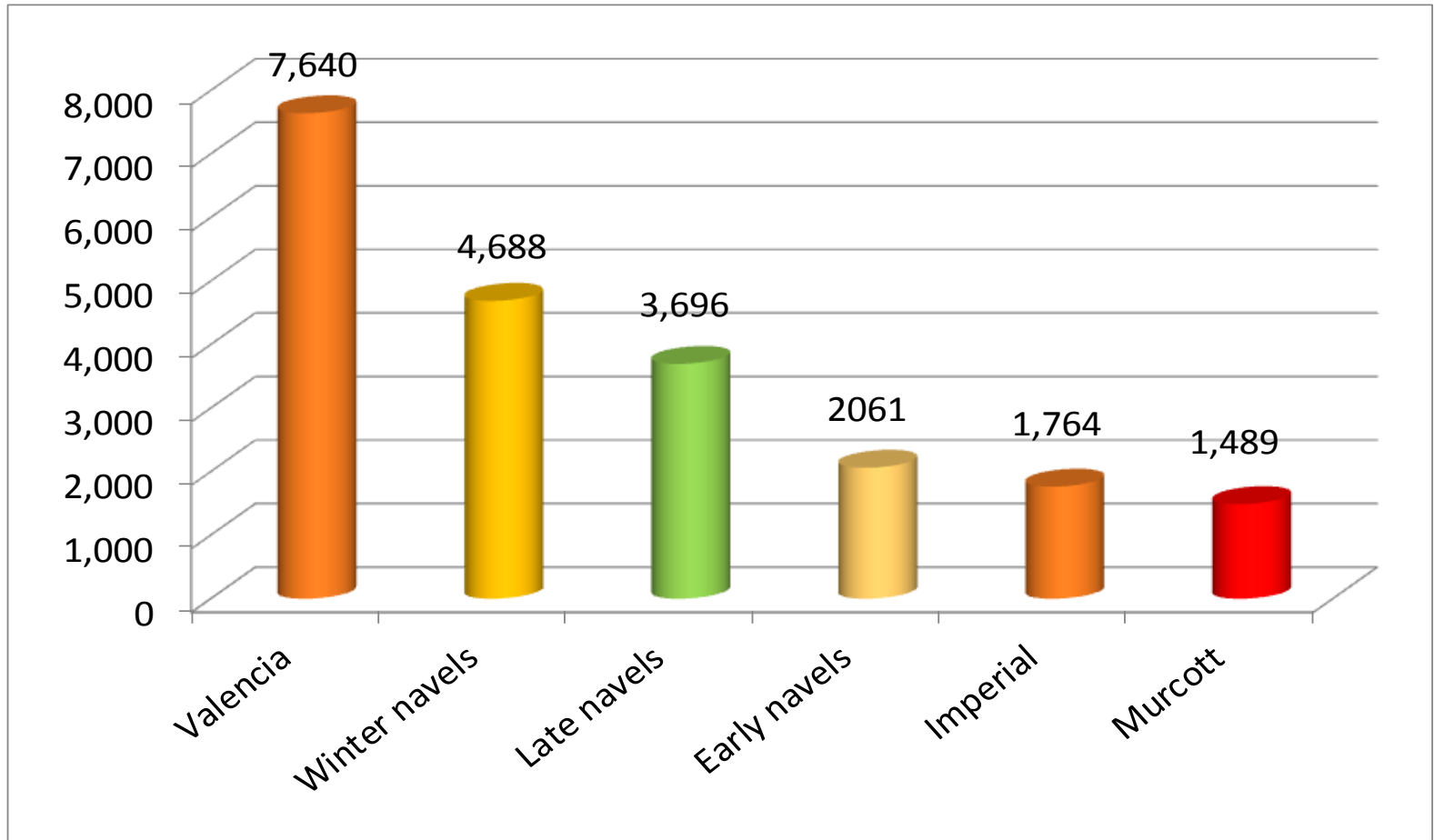
Region	No. of properties	% of total	Average hectares per property
Riverina	474	25%	18.6
Murray Valley	477	26%	13.8
Riverland	557	30%	11.3
Queensland	84	4%	42.7
WA	184	10%	8.5
Central NSW	15	1%	58.3
Coastal NSW	69	4%	5.3
NT	7	0.4%	19.6
<b>Total</b>	<b>1,867</b>		<b>15.1</b>

# Average property sizes are increasing

Area	2003	2008	2011
< 10 ha	1,560	1,294	1,198
10-20 ha	358	333	338
20-40 ha	217	187	190
> 40 ha	141	149	141
Total	2,259	1,957	1,867
Av. area	13.1 ha	14.2 ha	15.1 ha



# Our Top Six Citrus Categories (hectares)



## New plantings by region

Region	2011 ha	non-bearing ha	% of region	Main non-bearing varieties
Riverina	8,800	n/a		
Murray Valley	6,580	746	11%	Afourer, Imperial
Riverland	6,303	n/a		
Queensland	3,591	1,217	34%	Murcott, Imperial
WA	1,561	630	40%	Late Lane, Washington
Central NSW	875	496	57%	Salustiana, Hamlin
Coastal NSW	368	13	4%	Eureka
NT	137	45	33%	Eureka, Tahitian
<b>Total</b>	<b>28,217</b>	<b>3,147</b>	<b>11%</b>	

# Changing tree densities

- As growers strive for a quicker return on investment, planting densities are changing:
  - 2003 – 418 trees/ha
  - 2008 – 439 trees/ha
  - 2011 – 443 trees/ha
- The most significant commercial changes have been:
  - \* Murray Valley: 23% increase in mandarin non-bearing vs bearing
  - \* Queensland only a 6% increase - rapid growth of trees
  - \* Murray Valley and WA both have a 14% increase in navels
  - \* Overall for all varieties Murray Valley have a 21% increase, WA 27% and Qld just 7%

## Mandarin trends - Queensland

- Queensland still dominates the mandarin industry at 55% but its share of area has declined since 2003 (66%) and 2008 (58%)
- Mandarin area has declined 18% since 2003 from 3,492 ha to 2,860 ha
- Seeded Murcotts have been removed & replaced with low seeded Murcotts (now 19% of total Murcott ha)
- Decline in mid-season mandarins: Ellendale, Hickson, Taylor Lee & Sunburst (492 ha removed since 2003)
- After Murcotts, Imperial is the second biggest non-bearing variety in Queensland (228 ha out of 917 ha)

## Mandarin trends – the Afourer story

- Of the estimated 570 ha of Afourer mandarins in the ground 287 ha (50%) are non-bearing
- The majority are planted in the Murray Valley (286 ha) and the Riverland (153 ha)
- Production will reach approx 25,000 tonnes in 3 – 5 years
- Afourers (and Imperials) from the Riverland/Murray Valley are competing in the same time slot as Queensland Murcotts



# Navel trends

- Steady removal of Washington (618 ha)
- Older varieties with production issues are also being removed: Thomson (49 ha), Navelina (226ha) and Leng (266ha)
- Some of this area is being replaced by M7 early navel (200 ha)
- Significant new plantings of late/summer navels: Chislett 153 ha, Lane Late 120 ha (all still non bearing)
- Cara Cara red-fleshed navel plantings have increased by 112 ha since 2003 to 179 ha following good export opportunities



# Changes in juice supply

- Over 600 ha of Hamlin and Salustiana are in the ground, replacing some of the 1,600 ha of Valencias that have been removed
- These mid-season/common oranges are narrowing the already limited use of navels for fresh juice, and are producing a superior juice product



# Potential alerts for industry

- Imperials, Imperials, Imperials - where will they all go?!  
- domestic market only and potential quality issues
- Early navels - M7 is a superior early variety and will overtake the Navelina – volumes will clash with imported navels and this must be communicated to retailers
- Mid-season navels: despite removals there are still too many in the ground unless new markets can be found



## Summary

- The National Plantings Database provides statistical data that when overlaid with seasonal data from InfoCitrus gives industry a tool for making important and meaningful decisions on future supply & demand
- Citrus Australia will update the national plantings database every 3 years
- The completed, detailed database will be posted on our website [www.citrusaustralia.com](http://www.citrusaustralia.com) or hard copy supplied on request – available December 2011
- We commend all our growers who make the effort to update their orchard figures – thank you!

