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Okuleerhout aanvraag en aanbod: tekort aan sekere kultivars

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Die suidelike Afrika sitrus-industrie het in onlangse jare ongekende groei ondervind. Dit is duidelik uit die groei in kwekery kapasiteit en aantal bome wat jaarliks gemaak word. Vier jaar gelede is 3.2 miljoen bome in 25 kwekerye gemaak. Die vorige seisoen (2016/17) het ons 6.72 miljoen gesertifiseerde ogies aan 30 kwekerye verskaf. Aanbod is meestal gedryf deur ‘n hoë aanvraag vir suurlemoene en mandaryne (die twee mees winsgewende sitrus tipes in onlangse jare) en 70% van totale verskaffing was vanaf hierdie sitrus tipes.

‘n Val in suurlemoenpryse en vrese vir moontlike óórproduksie, het egter tot ‘n 44% afname in suurlemoen okuleerhout aanvraag vir die 2017/18 seisoen vanaf Augustus tot Desember 2018 gelei, gebaseer op jaar-op-jaar vergelykings met 2016/17. Amper 3.1 miljoen ogies is in totaal gedurende hierdie periode hierdie jaar verskaf, en terwyl dit soortgelyk aan die vorige seisoen was, het die daling in suurlemoen aanvraag tot die onverwagte styging in aanvraag vir mandaryne (op met 17%), Clementine (op 32%), navels (op 14%) en veral pomelo’s (op 131%) en Valencia (op 94%) gelei.

Okuleerhout verskaffing is hoofsaaklik vanaf die Sitrus Grondvesblok (SGB) buite Uitenhage, en ongeveer 70% van enthout word direk vanaf SGB verskaf. Wanneer SGB nie betyds in die aanvraag kan voorsien nie, word kwekerye magtiging gegee om enthout vanaf gesertifiseerde bome (gemaak vanaf ogies wat deur SGB verskaf is) in die kwekery te sny. Hierdie BCIN (Buds Cut In Nursery) sisteem vul die SGB okuleerhoutbron aan, en in meeste gevalle voorkom dit tydelike tekorte; gegewe dat kwekerye materiaal van die spesifieke kultivar beskikbaar het by tye wanneer SGB tekorte ervaar. In sommige onlangse gevalle het aanvraag die SGB en BCIN voorraad beskikbaarheid heeltemal verbygesteek; hierdie kan in twee scenarios gegroepeer word:

Baie hoë aanvraag vir nuwe kultivars (byvoorbeeld: Addo Early navel, ARC Nadorcott ARCCIT9, Cultifort Clementine, Jassie Valencia, Kobus du Toit Late Valencia, Leanri mandaryn, Octubrina Clementine, Red Lina navel, Sigal mandaryn).

- Baie hoë aanvraag (hoër as historiese verskaffingsrekords) vir ou kultivars, maar vanaf ‘n lae basis in die vorige seisoen; dit beperk die beskikbaarheid van BCIN voorraad aangesien min bome in kwekerye is vanwaar okuleerhout gesny kan word (byvoorbeeld: Cara Cara navel, Du Roi Valencia, Midknight Valencia, Nules Clementine, Or 4 mandaryn, Star Ruby pomelo, Turkey Valencia).

- Vir nuwe kultivars gebruik SGB ‘n vinnige vermeerderingsisteem om okuleerhout voorraad te vermeerder, maar dit neem tyd om dit tot genoegsame vlakke te vermeerder, en beskikbaarheid word beperk wanneer groot boom bestellings die vermeerderingsproses vooraf gaan. In sulke gevalle word alle beskikbare ogies gebruik, om óf vermeerderingsbome by SGB te maak, óf om aan kwekerye vir boom bestellings te verskaf.

Dit is verstaanbaar dat produsente winsgewende kultivars wil verbou, en hulle gebruik dikwels die vorige seisoen se pryse om te besluit watter kultivars om te bestel. Kwekerye ervaar dikwels dat produsente hul bestellings op baie kort kennisgewing verander; of produsente sal onderstamme bestel en slegs die kwekery inlig watter kultivar om te okuleer wanneer die onderstamme gereed is. SGB vereis egter ‘n 1-jaar voorsprong ten einde okuleerhout voorraad te vermeerder, en kan nie altyd in hierdie skielike aanvraag toenames voorsien nie. [Lees asseblief “Planning your new citrus planting: availability of propagation material” in die SA Vrugtejoernaal van Januarie/Februarie 2018 vir meer oor dit].

Byvoorbeeld, aan die begin van die seisoen het SGB ‘n potensiële voorraad van 190-duisend Star Ruby ogies gehad. Dit was meer as genoeg om die 106-duisend ogies wat die vorige seisoen deur kwekerye bestel is, te voorsien, en slegs 1100 ogies moes deur die BCIN sisteem verskaf word. Die seisoen daarvoor (2015/16) was Star Ruby aanvraag minder as 30 duisend ogies. Hierdie seisoen het Star Ruby aanvraag skielik toegeneem, meestal as gevolg van veranderde bestellings by kwekerye. Meer as 137-duisend ogies is alreeds verskaf: 122-duisend vanaf SGB en 15-duisend vanaf BCIN. Ongelukkig het die totale Star Ruby aanvraag by verre die aanbod oorskry en baie kwekery bestellings kon nie vanaf SGB of BCIN verskaf word nie. As ‘n gevolg hiervan kan ‘n vertraging in die aflewering van bome verwag word. ‘n Soortgelyke situasie is ook vir Midknight Valencia en Turkey Valencia waargeneem.

Private kultivars word meestal deur kultivar bestuursmaatskappye bestuur, en in tye van okuleerhout tekorte, bestuur hierdie maatskappye die allokasie van die beskikbare ogies. Vir oop kultivars word die beskikbare ogies op ‘n pro rata basis aan kwekerye verskaf wat hul bestellings by SGB geplaas het.

Die doel van hierdie Snykant is om produsente rakende die situasie in te lig en dat, weens die voorafgaande redes, vertraging in die verskaffing van bome vir sekere kultivars verwag kan word (soos gelys hierbo). Die Skema en die Suid-Afrikaanse Sitrus Kwekersvereniging vra dat produsente die moeilike situasie wat ons in die gesig staar, moet verstaan, en dat hulle met kwekerye moet saamwerk om die langtermyn effekte op toekomstige bestellings te verminder.

SGB sal voortgaan om nuwe vermeerderingsbome vir hierdie hoë aanvraag kultivars te maak, en met meer bome van hierdie kultivars wat in kwekerye gemaak word, sal SGB en BCIN voorraadvlakke in die medium termyn verhoog.

Die enigste oplossing in die korttermyn, is egter om die gebruik van ogies wat in die BCIN sisteem beskikbaar is, tot die maksimum te vergroot. Produsente word dus versoek om saam met hul kwekery te werk en om waar moontlik, in te stem tot ‘n vertraging in verskaffing/plant van bome van hierdie kultivars ten einde ten minste een okuleerhout oes vanaf hierdie bome in die kwekery toe te laat. Soortgelyk moet kultivar bestuursmaatskappye verskaffing van die eerste

besendings van bome vertraag ten einde okuleerhout opbrengs deur die BCIN sisteem tot die maksimum te vergroot.

Terwyl hierdie korttermyn oplossing nie in die belang van die produsent mag wees wie se bome se aflewering vertraag word nie, sal dit verseker tot voordeel van die kwekerye en produsente wees wat onderstamme het wat gereed staan vir okulering. Help asseblief ander, en hopelik sal jy in die toekoms gehelp word.

CRI Cutting Edge
RESEARCH NEWS FROM
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Budwood demand and supply: shortage for certain cultivars

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The southern African citrus industry has been experiencing unprecedented growth in recent years. This is evident from the growth in nursery capacity and number of trees made annually. Four years ago, 3.2 million trees were made in 25 nurseries. Last season (2016/17) we supplied 6.72 million certified buds to 30 nurseries. Supply was mostly driven by demand for lemons and mandarins (the two most profitable citrus types in recent years) and 70% of total budwood supply was from these citrus types.

However, a drop in lemon prices and fears of possible overproduction led to a 44% drop in lemon budwood demand for the 2017/18 season from August to December 2018, based on year-on-year comparisons with 2016/17. Almost 3.1 million buds were supplied in total during this period this year, and whilst this was similar to last season, the downturn in lemon demand led to unexpected upturn in demand for mandarins (up 17%), Clementine (up 32%), navels (up 14%) and particularly grapefruit (up 131%) and Valencia (up 94%).

Budwood supply is primarily from the Citrus Foundation Block (CFB) outside Uitenhage, and about 70% of budwood is supplied directly from CFB. When CFB cannot timeously supply demand, nurseries are authorised to cut budwood from certifiable trees (made from buds supplied by CFB) in the nursery. This BCIN (Buds Cut In Nursery) system augments CFB supply, and in most cases prevents a temporary budwood shortage, provided nurseries have material of the specific cultivar at the times when CFB are in short supply. In some recent cases demand outstripped the CFB and BCIN stock availability; these can be grouped into two scenarios:

- Very high demand for new cultivars (for example: Addo Early navel, ARC Nadorcott ARCCIT9, Cultifort Clementine, Jassie Valencia, Kobus du Toit Late Valencia, Leanri mandarin, Octubrina Clementine, Red Lina navel, Sigal mandarin)

- Very high demand (higher than historical records) for old cultivars, but from a low supply base in the previous seasons; this limits the availability of BCIN stock as few trees are in nurseries from which budwood can be cut (for example: Cara Cara navel, Du Roi Valencia, Midknight Valencia, Nules Clementine, Or 4 mandarin, Star Ruby grapefruit, Turkey Valencia)

For new cultivars, CFB uses a rapid multiplication system to increase budwood stock, but it takes time to increase budwood to sufficient levels, and budwood availability is limited when large tree orders precede the multiplication process. In such cases, all available buds are used, either to make multiplication trees at CFB, or to supply tree orders.

Understandably, growers want to grow profitable cultivars, and often use the past season's prices to decide which cultivars to order. Nurseries often experience growers changing their orders at very short notice; or growers will order rootstocks and only inform the nursery what cultivar to bud when the rootstocks are ready for budding. However, CFB requires a 1-year lead time to increase budwood stock and cannot always meet these sudden demand increases. [Please read "Planning your new citrus planting: availability of propagation material" in the SA Fruit Journal of January/February 2018 for more on this].

For example, at the start of the season, CFB had a potential stock of 190 thousand Star Ruby buds. This was more than sufficient to supply the 106 thousand buds ordered by nurseries last season, and only 1100 buds had to be supplied via the BCIN system. The season before (2015/16), Star Ruby demand was less than 30 thousand buds. This season, Star Ruby demand rapidly increased, mostly as a result of changed orders at nurseries. Already, more than 137 thousand buds were supplied: 122 thousand from CFB and 15 thousand from BCIN. Unfortunately, the total Star Ruby demand by far outstripped supply and many nursery orders could not be supplied from CFB or BCIN. As a result, a delay in tree delivery can be expected. A similar situation was also observed for Midknight Valencia and Turkey Valencia.

Private cultivars are mostly managed by cultivar management companies and in times of budwood shortages, these companies manage the allocation of the available buds. For open cultivars, the available buds are supplied on a pro rata basis to nurseries who have placed orders at CFB.

The purpose of this Cutting Edge is to inform growers of the situation and that due to the aforesaid reasons, delay in tree delivery can be expected for some cultivars (as listed and above). The Scheme and SACNA ask that growers be understanding of the difficult situation being faced, and that they work with nurseries to minimise the long-term effects on future orders.

CFB will continue to make new multiplication trees for these high demand cultivars, and with more trees of these cultivars being made in nurseries, the CFB and BCIN stock levels will increase in the medium term.

The only remedy in the short term, however, is to maximise use of buds available in the BCIN system. Growers are therefore requested to work with their nursery and where possible, agree to a delay in delivery/planting of trees of these cultivars to allow at least one budwood harvest from these trees in the nursery. Likewise, cultivar managing companies should delay supply of the first consignments of trees to maximise budwood yield via the BCIN system.

Whilst this short-term remedy might not be in the interest of the grower whose trees are being delayed, it will certainly benefit the nurseries and growers that have rootstocks ready to be budded. Please help others, and hopefully you will be helped in future.