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Report Highlights:

In Marketing Year (MY) 2024/25 growers in South Africa are forecast to divert more citrus volumes towards processing as elevated prices make juicing a lower risk alternative. The production of orange, grapefruit, tangerine/mandarin and lemon in MY 2024/25 are forecast to increase, assuming normal weather conditions, new trees coming into production, and sufficient water for irrigation. Export volumes of grapefruit, lemon and tangerine/mandarin in MY 2024/25 forecast to increase due to an improved production of export quality fruit. Domestic consumption of orange juice is forecast to decrease slightly on increased prices. South Africa is estimated to have exported record quantities of grapefruit to the United States in MY 2023/24.

Executive Summary

Oranges: Area under orange production is forecast to increase by one percent to 44,500 MT in MY 2024/25 on increased Valencia tree orders following higher than usual juicing prices. Production of oranges in MY 2024/25 is forecast to grow by one percent to 1.69 million Metric Tons (MMT) with improved quality compared to MY 2023/24 harvest which was affected by adverse weather. Growers are expected to divert some export fruit towards processing due to elevated juice prices. Therefore, Post forecasts that exports will shrink by one percent to 1.10 MMT in MY 2024/25.

Grapefruit: Area under grapefruit has been shrinking with budwood sales at their lowest according to the MY 2022/23 tree census, reflecting a downwards trend in global consumption. Post forecasts that area under production in MY 2024/25 will decrease by one percent to 7,900 ha from MY 2023/24. Production MY 2024/25 is expected to increase by one percent to 425,000 MT on normal weather conditions. The slight increase in production is forecast to translate into increased export supply. Growers are expected to increase processing volumes supply due to higher than usual prices. South Africa is estimated to export record grapefruit volumes to the United States in MY 2023/24 based a 23 percent year to date (February-October 2024) hike.

Tangerines/Mandarins: Post forecasts that tangerines/mandarins (categorized in South Africa as “soft citrus”) production in MY 2024/25 will increase by three percent to 790,000 MT on normal weather conditions and young trees coming into full production. Domestic consumption is expected to increase by two percent to 48,000 MT in MY 2024/25 on increased production and a growing domestic demand. Exports are forecast to improve by three percent to 674,000 MT on increased production.

Lemons: Lemon production in MY 2024/25 is forecast to grow by seven percent to 780,000 MT from MY 2023/24 based on normal weather condition and availability of water for irrigation. The rise in production is expected to grow exports by 11 percent to 590,000 MT on improved quality of the MY 2024/25 harvest. Lemon price for processing has weakened and deemed unprofitable. Therefore, volumes sold for processing in MY 2024/25 are forecast to decrease by three percent from MY 2023/24.

Orange juice: Post forecast that orange juice production in MY 2024/25 will increase by four percent to 57,100 MT from MY 2023/24 on higher than usual juicing prices. Growers are expected to divert fruit meant for exports towards processing, while reducing the costs of packaging and shipping and receiving good returns. Domestic consumption of orange juice in MY 2024/25 is forecast to decrease by one percent from MY 2023/24 due to increased retail prices. Orange juice exports in MY 2024/25 are forecast to increase by one percent to 41,500 MT on improved production.

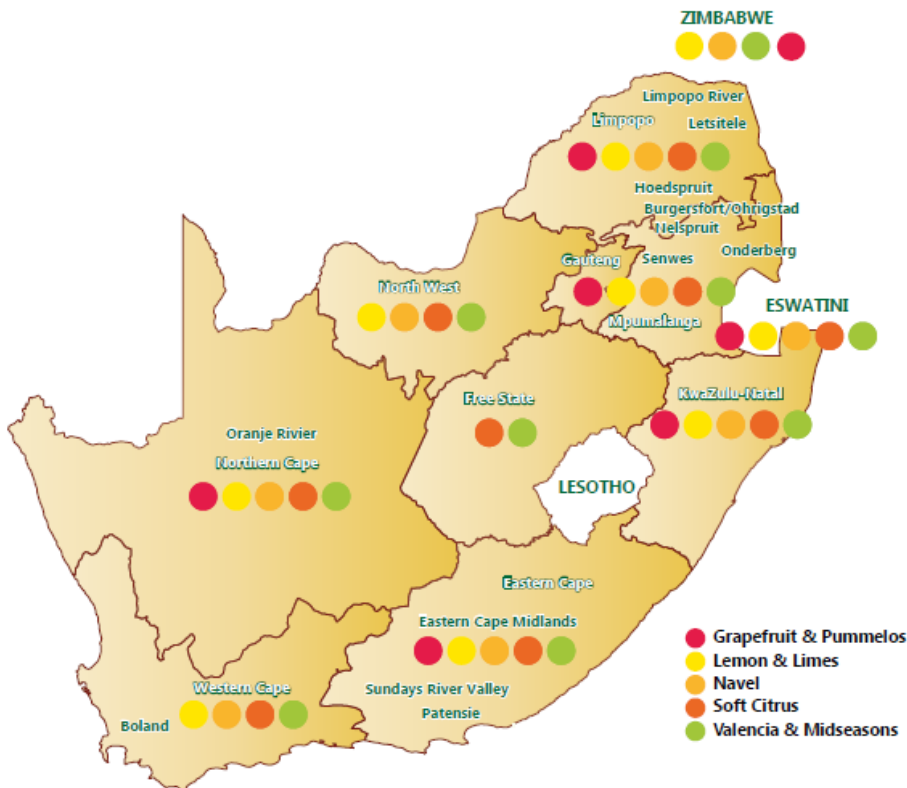
Report Notes

The marketing year (MY) for grapefruit and lemons is January-December, oranges and tangerines/mandarins MY is considered February-January while orange juice MY is April-March. The exchange rate used in this report (as of December 2, 2024) is 18.16 South African Rand (ZAR) to one U.S. dollar (USD).

Background

Citrus in South Africa is mainly produced in Limpopo, Eastern Cape, Western Cape and Mpumalanga provinces (see **Figure 1**). The Western Cape and Eastern Cape have a cooler climate, which is well suited for the production of the navel oranges, lemons and easy peelers such as Clementines and Satsumas. The Mpumalanga, Limpopo and KwaZulu-Natal (KZN) provinces have a warmer climate, which is better suited to the cultivation of grapefruit and Valencia oranges. The total area planted to citrus in South Africa declined slightly by 0.3 percent to 95,980 ha in MY 2022/23 from 96,277 on MY 2021/22.

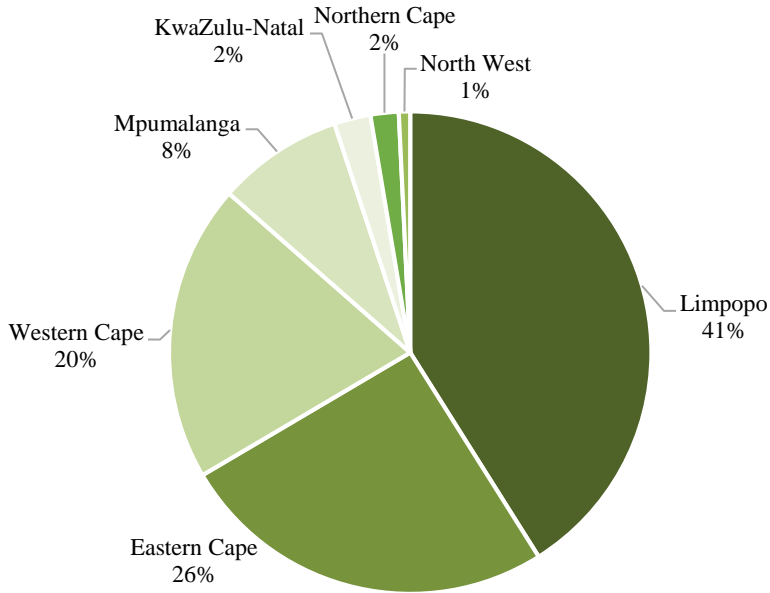
Figure 1: Citrus Growing Regions in South Africa



Source: Citrus Growers Association (CGA)

Note: Navel, Valencia and Midseason are categorized as oranges in the report, and soft citrus includes tangerines/mandarins.

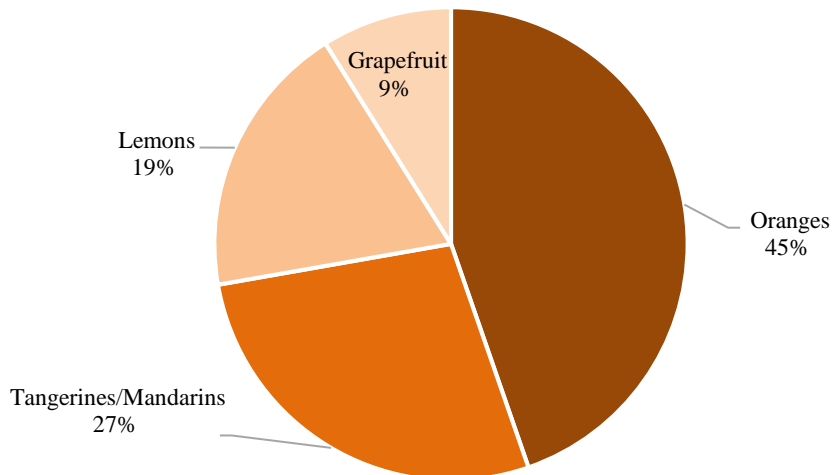
Figure 2: Citrus Producing Regions by Area



Source: FAS Pretoria using CGA data

Figure 3 shows that oranges are the biggest citrus type produced in South Africa and accounted for 45 percent of the total citrus area planted in MY 2022/23. Tangerines/Mandarins have, however, shown the largest increase in the share of total citrus production, from a share of about 16 percent in MY2015/16 to 27 percent in MY 2022/23.

Figure 3: Distribution of Citrus Types



Source: FAS Pretoria using CGA data

There are at least 210 commercial citrus varieties being planted in South Africa. Table 1 shows the most common citrus varieties planted in South Africa. Star Ruby is the most planted grapefruit variety, although recent budwood sales indicate significantly declining interest in grapefruits. Producers prefer Valencia oranges over Navels as Valencia's have a longer shelf life and produce higher yields than Navels. Nardocott is one of the most popular soft citrus cultivars in South Africa.

Table 1: Citrus Varieties

Citrus	Variety
Grapefruit	Star Ruby, Marsh, Jackson, Pomelit, Rose, Redheart
Oranges	Valencia/Midseason: Midnight, Valencia Late, Delta, Turkey, Bennie, Du Roi, Gusocora, Jassie
	Navels: Cambria, Palmer, Bahianinha, Washington, Witkrans, Cara Cara, Navelina, Robyn, Lane Late, Autumn Gold, Newhall
Tangerines/Mandarins	Satsumas: Miho Wase, Queen, Owari, Belabela, Miyagawa Wase
	Clementines: Mules, Andes-1, Octubrina, Esbal, Marisol
	Mandarins: Nadorcott, Nadocorcott Ls, Tango, Nova, Leanri, Orri, Rhm, Mor, Valley Gold, Tambor, Sigal
Lemons/Lime	Eureka, Lisbon, 2Ph Seedless, Limoneira 8A, Genoa, Eureka Seedless, Lemoneria

Source: CGA

Table 2: South Africa Harvest Period for Citrus

Citrus	Harvest Period
Marsh Grapefruit	March to June
Star Ruby Grapefruit	March to September
Navel Oranges	March to July
Valencia Oranges	May to September
Tangerines/Mandarins	March to August
Lemons/Lime	January to August

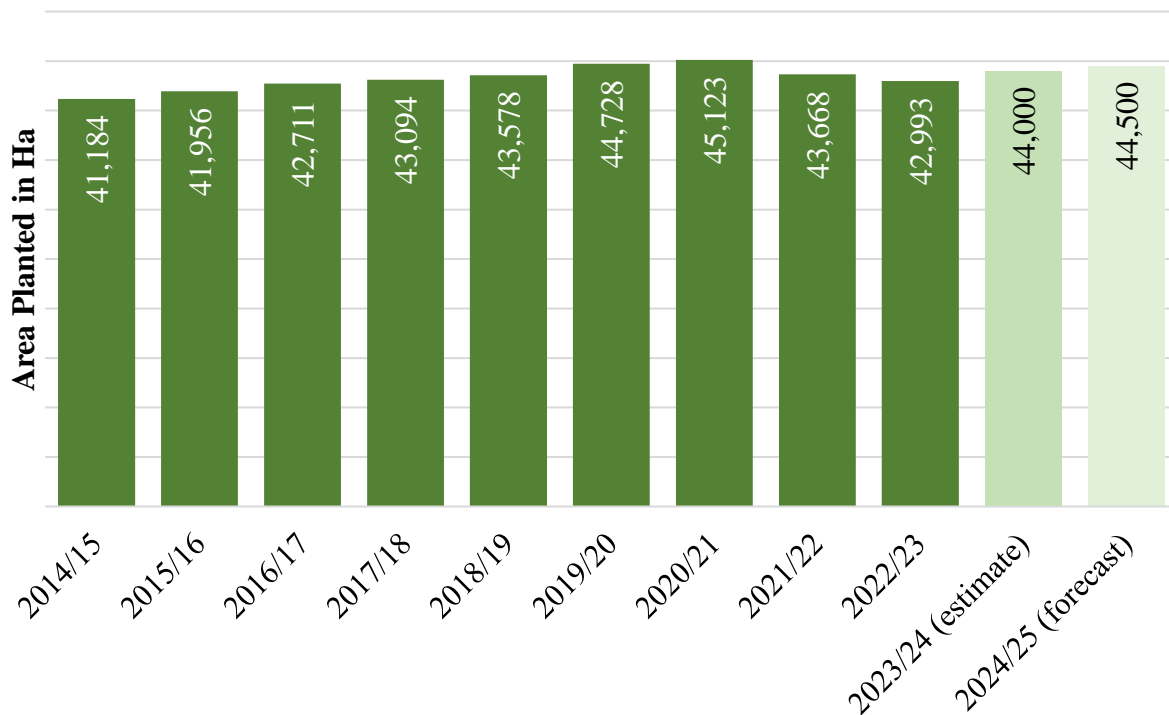
Source: CGA

Oranges, Fresh

Crop Area

Post forecasts that South Africa's MY 2024/25 orange area will increase by one percent to 44,500 MT from MY 2023/24. Nursery orders for orange trees have picked up following higher juicing prices due to a drop in orange production from Brazil. Post contacts report that Valencia nursery stocks for MY 2023/24 have sold out, and tree orders were dominated by Bennie, Jassie, Turkey and Midnight Valencia varieties. Therefore, Post expects that MY 2024/25 orders will be in favor of Valencia varieties. Post contacts report that there is some optimism that juicing prices will remain higher than normal in the short term and growers are expected to send more fruit for juicing which is a lower risk market alternative, without shipping and packing costs. Growers also appear to be replacing some early navels with late navel varieties to follow market demand trends. **Figure 4** illustrates the historical trend of planted area for oranges, which peaked in MY 2020/21. In MY 2023/24, planted area is estimated to have increased by two percent to 44,000 ha, mainly due to favorable juicing prices.

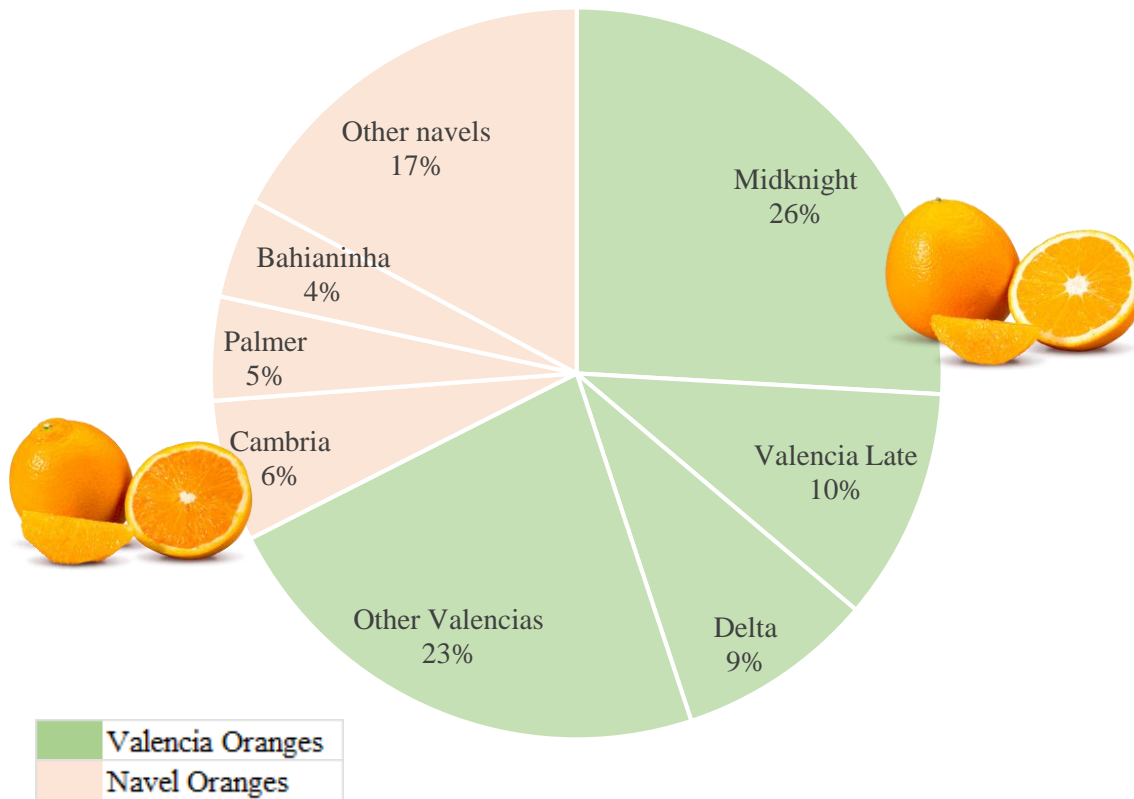
Figure 4: South African Orange Planted Area



Source: FAS Pretoria using CGA data

Limpopo province is the leading orange-growing region in South Africa, accounting for 50 percent of total area, followed by the Eastern Cape (24 percent) and Western Cape (15 percent) provinces (see **Figure 5**).

Figure 5: Orange Varieties Produced in South Africa



Source: FAS Pretoria using CGA data

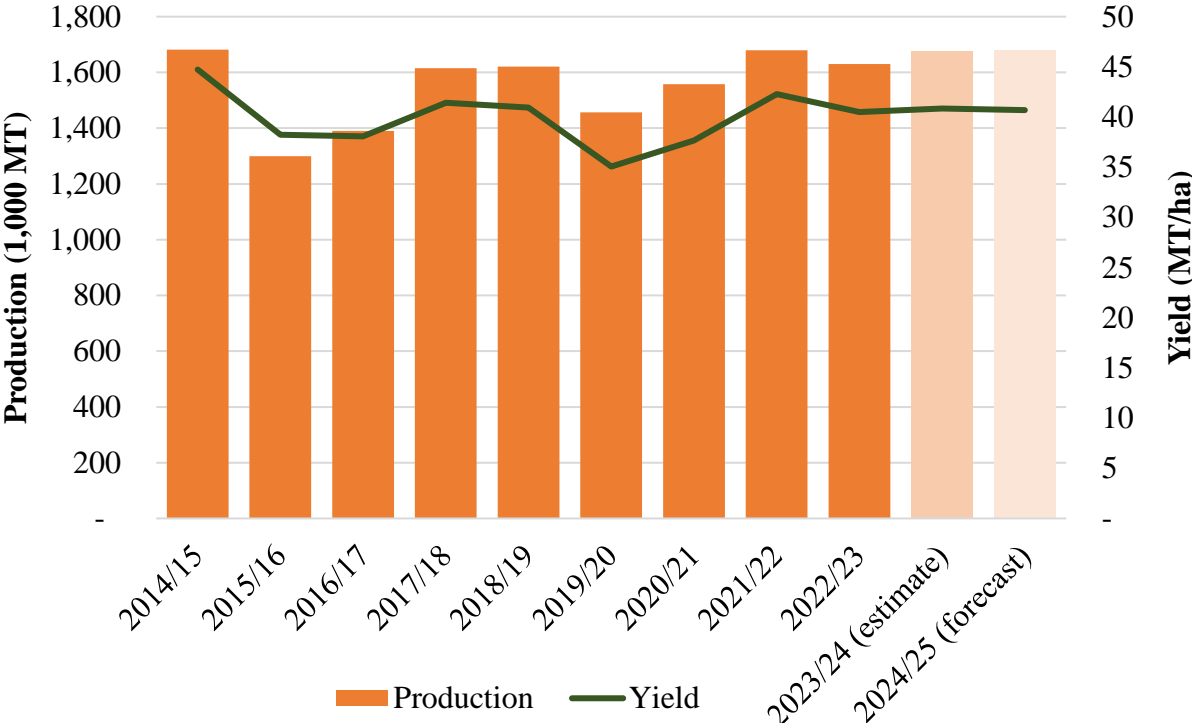
Valencias account for two-thirds of total orange area, with Navels accounting for the other third. The predominant cultivar planted is the Midnight, representing 26 percent of total area, followed by the Valencia Late (10 percent), Delta (9 percent), Bennie (7 percent), and Turkey (7 percent) cultivars. Other cultivars planted in South Africa include Cambria, Palmer, Bahianinha, and Washington.

Production

Post forecasts that orange production will increase by one percent to 1.69 million metric tons (MMT) in MY 2024/25 year-on-year on normal weather conditions and availability of water for irrigation. Post expects improvement in fruit quality and yields compared to the MY 2023/24 harvest. Post lowers its MY 2023/24 orange production estimate to 1.68 MMT due to adverse weather conditions, which led to fruit loss. These conditions also reduced fruit quality through color development issues and smaller sized fruit. The season started with very hot conditions for approximately 10 days in December 2023 in the Northern regions, which growers report that this led to smaller fruit sizes. Unseasonal rain and flooding in the Western Cape, frost in Senwes production regions and strong wind in the Eastern Cape led to some fruit loss. Further, unfavorable weather conditions also led to color development issues and a loss of fruit quality. However, MY 2023/24 production is estimated seven percent higher compared to MY 2022/23 on availability of water for irrigation.

MY 2022/23 production decreased by three percent to 1.63 MMT from the prior MY due to heavy rains and hailstorms experienced in the production regions of Limpopo, Western Cape, and Eastern Cape. **Figure 6** shows South Africa’s orange production volumes since MY 2014/15.

Figure 6: South African Orange Production



Source: FAS Pretoria using Department of Agriculture, Land Reform and Rural Development (DALRRD) data

Consumption

Fresh oranges are the most widely consumed citrus in South Africa. Producers prioritize supplying export markets, while fruit that does not meet export standards is usually used for fresh domestic consumption and for processing. However, orange juice prices are at historic highs due to a drop in Brazil’s orange production. Post observes increased volumes sold for processing instead of fresh consumption due to the relatively higher returns. Furthermore, consumer preference is shifting towards fresh consumption of soft citrus.

Post contacts report that early navels, which would traditionally be sold in the local market, were sold for processing. Therefore, Post forecasts that consumption in MY 2024/25 will remain unchanged from MY 2023/24 at 22,000 MT as growers supply the export and processing markets. Consumption figures include fresh market sales for both human demand and animal feed.

Exports

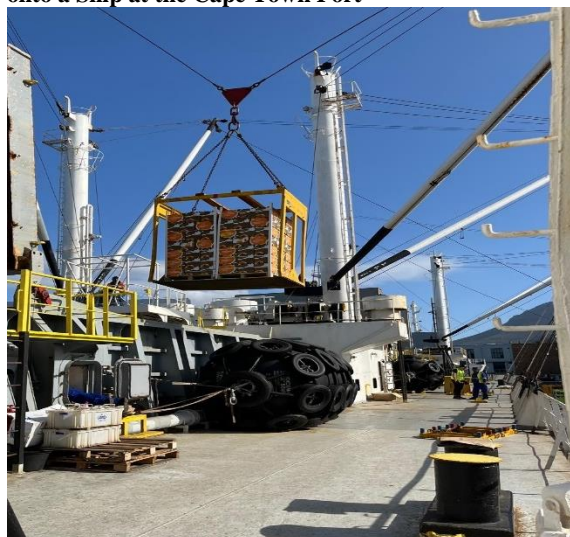
Post forecasts that orange exports in MY 2024/25 will decrease by one percent to 1.10 MMT from MY 2023/24 due to higher than usual processing prices, which is expected to divert volumes from exports. Orange exports typically leave South Africa through the Port of Durban (54 percent) and the Port of Cape Town (21 percent). Industry sources remain concerned about port performance due to breakdowns of essential equipment hampering the timely movement of fruit to the export market. The South African fruit industry continues to engage with port authorities to manage risks to exports.

Post lowers MY 2023/24 South African orange export estimates to 1.11 MMT, a ten percent drop from MY 2022/23. Oranges produced in MY 2023/24 were smaller in size: Post contact report that four percent higher fruit count was required to fill a carton compared to MY 2022/23. Adverse weather also led to loss of export quality fruit and growers struggled to obtain sufficient volumes for exports. Further, juicing prices in MY 2023/24 were higher than usual, leading to growers sending fruit for processing, taking away from exported.

MY 2022/23 exports decreased by five percent year-on-year to 1.23 MMT. Growers held back on exports of late Valencia oranges to the EU due to concerns of the fruit being quarantined for citrus black spot (CBS) or false codling moth (FCM).

South Africa exports oranges to more than 100 countries around the world, but the EU remains South Africa's largest export market, accounting for approximately 36 percent of orange export share. Despite a free trade agreement with the EU that allows duty-free access for citrus exports, South Africa continues to face phytosanitary challenges in the market because of CBS and FCM (see policy section, page 35). Orange exports to the EU from February to September MY 2023/24 dropped by nine percent from the same period in MY 2022/23. In addition to an overall drop in South African export volumes, some orchards were prohibited from exporting to the EU due to CBS.

Figure 7: Citrus Destined for the United States Loaded onto a Ship at the Cape Town Port



Source: *FAS Pretoria during crop travel in September 2024*

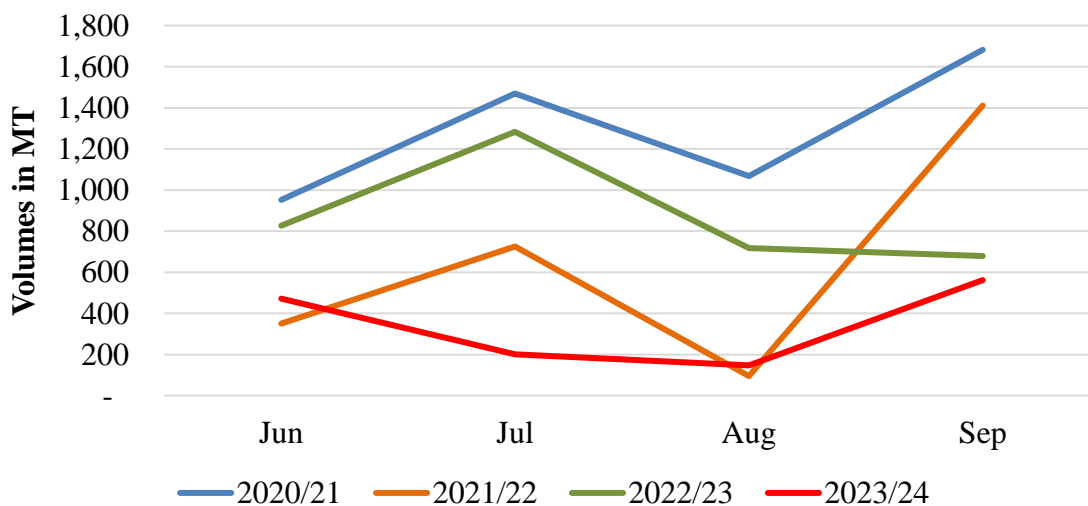
South Africa’s MY 2024/25 exports to the United States through September show a 26 percent drop compared to the same period in MY 2023/24. Unseasonal rains in the Western Cape disrupted harvesting and packing of fruit destined to the United States.

South Africa predominantly exports Midnight oranges during the U.S. summer months. The first shipment of South African oranges to the United States in MY 2023/24 arrived the first week of June, and weekly exports continued until October. South Africa benefits from duty-free access under the African Growth and Opportunity Act (AGOA).

South Africa exported approximately 890 MT of oranges to Vietnam in MY 2023/24 after an establishment of a new bilateral protocol announced in March 2024 (see policy section page 36).

South Africa exports just below 7,000 MT of oranges to Botswana. However, in 2024 Botswana imposed a temporary ban on South African oranges between the third week of June until the end of August to support local producers during the peak period, which has since been extended into 2025. Exports from South Africa to Botswana dropped by 71 percent between June and August of MY from the same period in MY 2022/23 as a result of the ban (see **Figure 8**).

Figure 8: South African Orange Exports: June-September



Source: *FAS Pretoria using Trade Data Monitor, LLC. data*

Table 3: South African Fresh Orange Exports

Rank	Partner Country	Calendar Year: 1,000 MT				Feb - Sept: 1,000 MT		
		MY 2021/22	MY 2022/23	Market share %	%Δ 2023/22	MY 2022/23	MY 2023/24	%Δ 2024/23
1	Netherlands United Arab	265	281	23%	6%	257	239	-7%
2	Emirates	109	141	11%	29%	122	106	-12%
3	Russia	85	96	8%	13%	87	69	-21%
4	China	97	84	7%	-13%	82	63	-23%
5	Portugal	59	65	5%	9%	63	56	-12%
6	United States United	59	58	5%	-3%	54	40	-26%
7	Kingdom	74	54	4%	-26%	49	47	-3%
8	Hong Kong	48	48	4%	1%	46	25	-45%
9	Saudi Arabia	66	47	4%	-30%	41	49	20%
10	Canada	43	44	4%	4%	42	41	-2%
	<i>Others</i>	394	314	26%	-20%	286	277	-3%
	Total	1,298	1,232	100%	-5%	1,129	1,011	-10%

Source: FAS Pretoria using Trade Data Monitor, LLC.

The export of South African citrus from the Port of Maputo in Mozambique, which started in 2021, is a breakthrough that lowers shipping time and costs to Asia and the Middle East. Significant volumes of South Africa's oranges are produced in the northeastern parts of the country, which are substantially closer to Maputo than the Port of Durban. Although only 0.6 percent of oranges were shipped through Maputo last season, a higher percentage is expected to be exported via Maputo in MY 2024/25.

Imports

Post forecasts that orange imports will drop from 5,000 MT in MY 2024/25 to 3,000 MT due to sufficient production of reduced quality that increased domestic supply. Post raises MY 2023/24 orange imports estimate to 5,000 MT based on the rate of imports through September 2024. Relatively small volumes of oranges are imported into South Africa in November and December to close supply gaps. In MY 2022/23, imports were estimated to have dropped 40 percent on increased domestic production.

Prices

Table 4 indicates the average local, export, and processed market prices of oranges over the past seven years. The export market continues to provide the highest prices, mainly due to the depreciation of the South African rand and strong foreign demand. Average prices for processing started a steady increase in MY 2022/23, and Post contacts report that these prices have further increased in MY 2023/24, which will also lead to a further increase in local market prices.

Table 4: Orange Prices in South Africa

MY	Average Price (rand/MT)		
	Local Market	Export Market	Processed
2014/15	2,535	6,576	652
2015/16	3,799	8,570	1,002
2016/17	3,604	8,656	1,069
2017/18	3,361	8,600	693
2018/19	3,643	8,268	699
2019/20	4,897	10,329	519
2020/21	3,999	8,989	639
2021/22	3,350	9,635	643
2022/23	4,389	11,827	1,090

Source: FAS Pretoria using CGA data

Table 5: Orange Production, Supply, and Distribution

Oranges, Fresh Market Year Begins	2022/2023		2023/2024		2024/2025	
	Feb 2023		Feb 2024		Feb 2025	
South Africa	USDA Official	New Post	USDA Official	New Post	USDA Official	New Post
Area Planted (HECTARES)	42993	42993	42990	44000	0	44500
Area Harvested (HECTARES)	40250	40250	41000	41000	0	41300
Bearing Trees (1000 TREES)	39281	39281	39280	39280	0	39150
Non-Bearing Trees (1000 TREES)	4276	4276	4274	4800	0	5100
Total No. Of Trees (1000 TREES)	43557	43557	43554	44080	0	44250
Production (1000 MT)	1630	1630	1687	1675	0	1690
Imports (1000 MT)	3	3	3	5	0	3
Total Supply (1000 MT)	1633	1633	1690	1680	0	1693
Exports (1000 MT)	1232	1232	1080	1111	0	1100
Fresh Dom. Consumption (1000 MT)	32	32	22	22	0	22
For Processing (1000 MT)	369	369	588	547	0	571
Total Distribution (1000 MT)	1633	1633	1690	1680	0	1693

(HECTARES) ,(1000 TREES) ,(1000 MT)

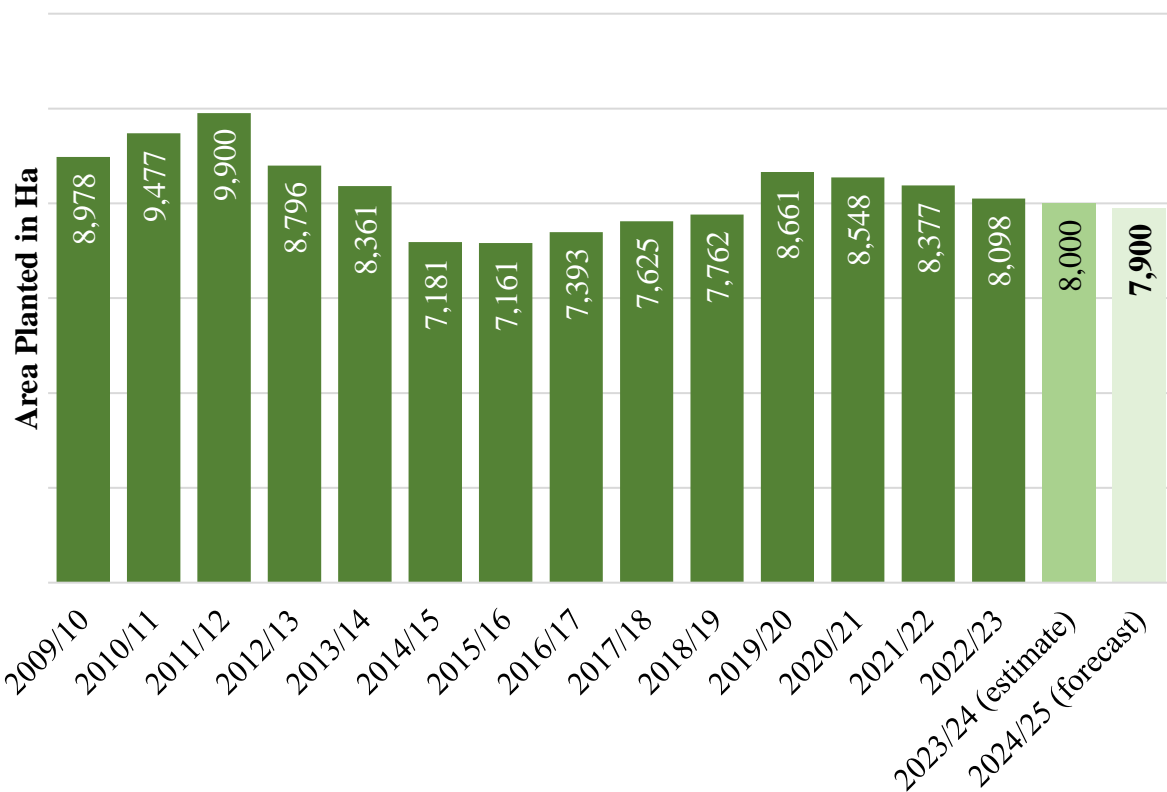
OFFICIAL DATA CAN BE ACCESSED AT: [PSD Online Advanced Query](#)

Grapefruit, Fresh

Crop Area

Area under grapefruit production has been on a decline since MY 2020/21 as growers limit new plantings and uproot old trees. The decline reflects a steady downward trend in global grapefruit consumption. Budwood sales were at their lowest in MY 2022/23 since MY 2016/17, suggesting that grower is moving towards other citrus types. Therefore, Post forecasts that area under grapefruit production in MY 2024/25 will decrease further by one percent to 7,900 ha from an estimated 8,000 ha MY 2023/24.

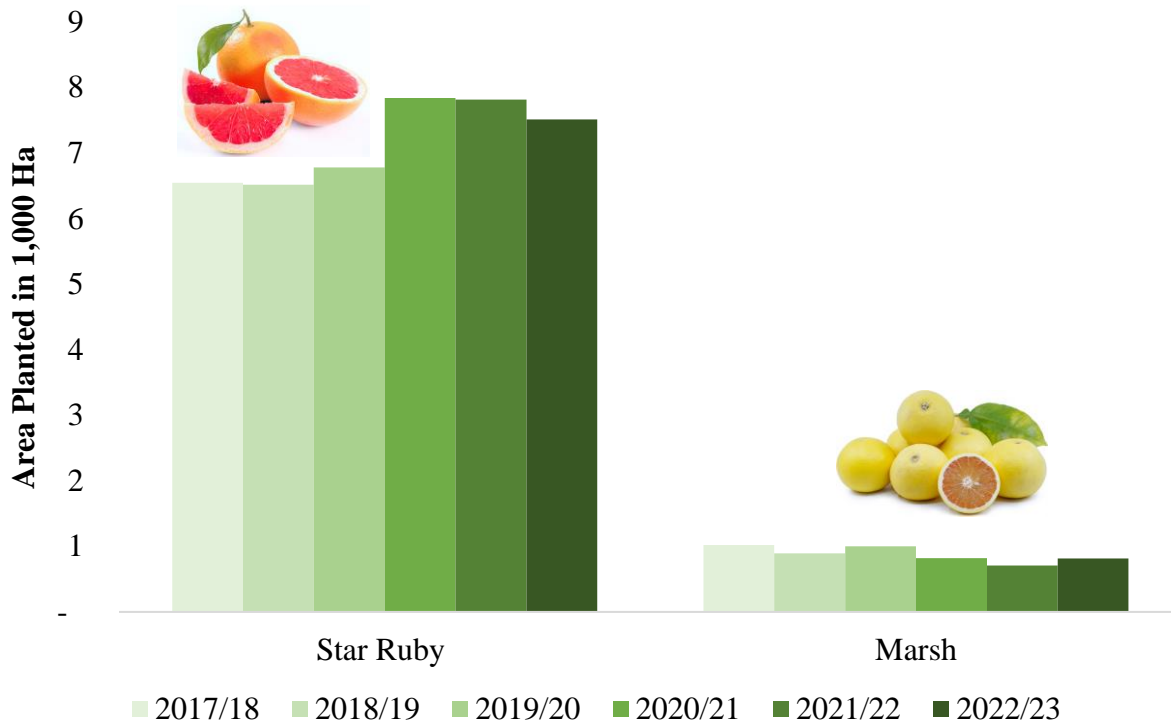
Figure 9: Grapefruit Planted Area in South Africa



Source: FAS Pretoria using CGA data

Limpopo province is the leading growing region for grapefruit in South Africa, accounting for 56 percent of total area planted, followed by Mpumalanga (20 percent), KwaZulu-Natal (10 percent), and Northern Cape (6 percent) provinces. Star Ruby is the predominant cultivar planted, accounting for 88 percent of total area. Other grapefruit cultivars planted in South Africa include Marsh, Fe 1 (Jackson), Pomelit, Rose, and Redheart.

Figure 10: South African Grapefruit Planted Area

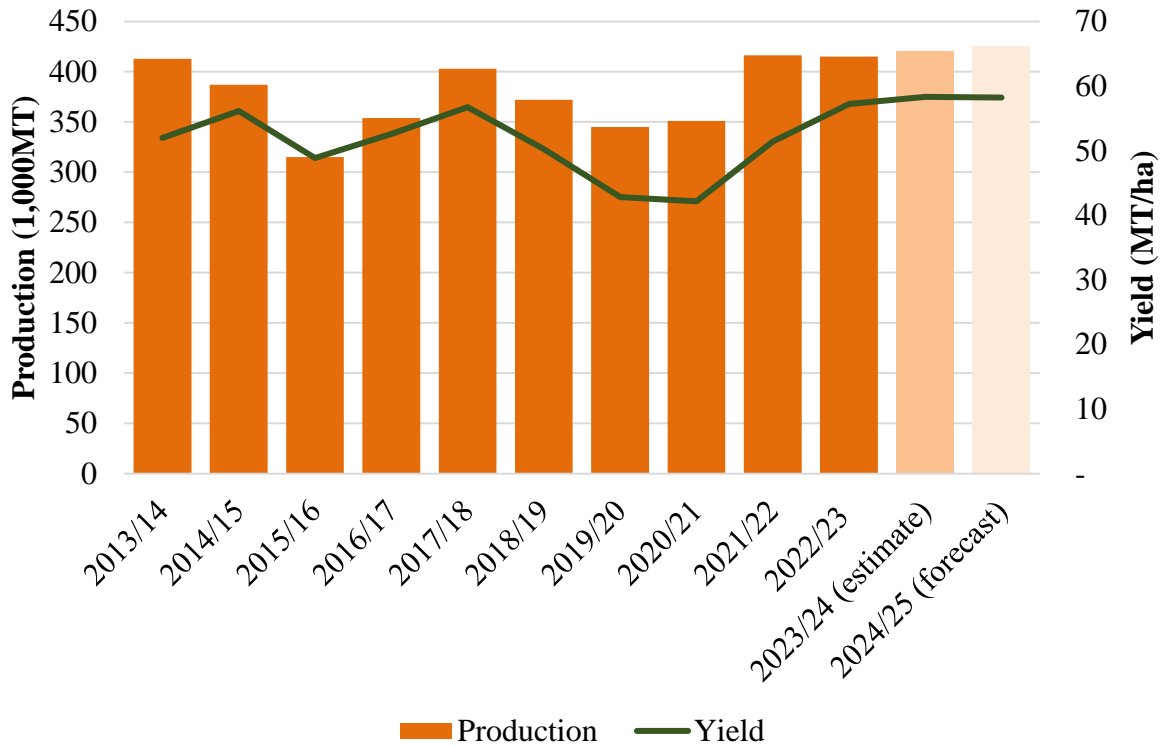


Source: FAS Pretoria using CGA data

Production

Post forecasts that grapefruit production in MY 2024/25 will increase by one percent to 425,000 MT normal weather conditions and available water for irrigation. Post maintains MY 2023/24 production estimates at 420,000 MT, a one percent increase year on year, due to overall adequate rains received in November and December 2023, ensuring adequate water for irrigation. However, Post contacts reported smaller average fruit sizes, particularly in the northern regions, due to a ten-day dry period in December. In MY 2022/23, Post grapefruit production was 415,000 MT based on sufficient rainfall received in major grapefruit producing regions. **Figure 11** illustrates grapefruit production and yields in South Africa since MY 2009/10.

Figure 11: Grapefruit Production in South Africa



Source: *FAS Pretoria using DALRRD data*

Consumption

Grapefruit is an unpopular citrus fruit in the South African domestic market, with many consumers largely unfamiliar with its qualities and taste. As a result, there is little demand for fresh grapefruit in South Africa. Juicing prices for grapefruit have been higher than usual since MY 2022/23, taking away volumes from fresh consumption sales. Therefore, Post lowers local grapefruit consumption estimates in MY 2023/24 to 2,000 MT and forecasts that volume will remain unchanged in MY 2024/25.

Processing

Post contacts report improved prices for processing grapefruit starting in 2023, which have redirected volumes that would have otherwise been sent to the export market. Post therefore forecasts that grapefruit sold for processing will increase by two percent to 211,000 MT in MY 2024/25 on improved production and sustained higher than usual juicing prices. Post revises grapefruit sold for processing upwards to 207,000 MT in MY 2023/24 as smaller size grapefruit were reported to be sold for processing. Grapefruit sent for processing is estimated to have increased by 12 percent year-over-year based on the industry’s decision to limit exports of class 2 and non-standard sized fruit.

Grapefruit is processed to juice and concentrate, the majority of which is exported to Europe. The leftover pulp from commercial juice extraction is an important source of grapefruit oil, which is used as a flavoring agent in many soft drinks and an ingredient in fragrances. The inner peel is a source of pectin and citric acid, which are both used by the food industry to preserve fruits, jams, and marmalades. Naringin is also extracted from grapefruit peel and gives tonic-water its distinctive bitter flavor.

Exports

The grapefruit export season typically starts at week 10 (March), peaks at week 16-22 (April – June) and concludes around week 42 (October). Exports of grapefruit are dominated by Class 1 fruit, with restricted volumes of processing and class 2 fruit. The most exported variety is the Star Ruby, as it is the dominantly grown in South Africa. About 82 percent of grapefruit is exported through the port of Durban, while 14 percent moves through the Port of Cape Town.

Post forecast that exports in MY 2024/25 will increase by one percent to 215,000 MT from MY 2023/24 on minimal improvement in production, although growers are expected to move some export quality fruit towards domestic processing in response to sustained higher than usual processing prices. Post lowers MY 2023/24 estimates of grapefruit exports to 214,000 MT as demand in the EU and UK fell compared to MY 2022/23 (see **Table 6**). South African grapefruit exports in MY 2023/24 are also estimated to decrease by one percent from MY 2022/23 because the size of the fruit was smaller, leading to more fruit packed per carton and fewer cartons overall for the export market. Further, higher than usual processing prices have led to growers diverting some fruit initially intended for exports towards processing. Overall export volumes appear to have slower growth, reflecting shrinking demand for grapefruit in most markets.

Exports to China for MY 2023/24 until September 2024 show a seven percent improvement, where grapefruit is used for processing as opposed to fresh consumption. However, volumes have dropped by almost 50 percent compared to MY 2021/22 as growers restrict exporting grapefruit for processing. Post contacts report that China was the only market that imported processing class from South Africa in MY 2023/24.

MY 2022/23 exports are estimated to have dropped by nine percent year-over-year to 216,569 MT as some grapefruit regions reduced packing of class two fruit for exports and moved it instead to domestic processing and consumption.

While total volumes are still low, grapefruit exports to the United States have been growing at an annual average rate of 68 percent, from 275 MT in MY 2010/11 to 8,990 MT in MY 2022/23. South Africa is estimated to export record volumes to the United States in MY 2023/24 as exports through September are recorded at 11,061 MT, a 23 percent hike compared to the same period in MY 2022/23. The increase in exports is attributed in part to a smaller crop produced in Florida. Star Ruby grapefruit produced in the Northern Cape province is a popular export to the United States during the American summer months.

Table 6: South African Fresh Grapefruit Exports

Rank	Partner Country	Calendar Year: 1,000MT				Jan-Sept: 1,000MT		
		MY 2021/22	MY 2022/23	Market share %	%Δ 2023/22	MY 2022/23	MY 2023/24	%Δ 2024/23
1	Netherlands	63.4	72.9	34%	15%	72.5	59.7	-18%
2	China	63.5	31.4	14%	-51%	30.9	33.2	7%
3	Russia	19.4	21.6	10%	11%	21.1	21.2	1%
4	Japan	22.9	17.4	8%	-24%	17.3	20.4	18%
5	United Kingdom	9.0	9.3	4%	4%	9.1	8.0	-12%
6	United States	6.2	9.0	4%	45%	9.0	11.1	23%
7	Italy	4.9	7.2	3%	48%	7.2	7.6	7%
8	Canada	7.2	6.9	3%	-4%	6.8	6.4	-6%
9	Hong Kong	6.9	6.4	3%	-7%	6.3	4.5	-29%
10	Portugal	4.5	5.4	2%	20%	5.4	5.8	9%
	<i>Others</i>	30.1	29.2	13%	-3%	28.4	32.1	13%
	Total	237.8	216.6	100%	-9%	214.0	210.1	-2%

Source: FAS Pretoria using Trade Data Monitor, LLC. data

Imports

South Africa is not a major importer of grapefruit, as supply far exceeds domestic demand. Imports mainly originate from Eswatini to fill the small demand gap towards the end of the season. Imports are forecast to decrease to 3,200 MT in MY 2024/25 based on sufficient local production volumes and limited consumption of grapefruit in the domestic market. Post lowers MY 2023/24 estimates to 3,300 MT on lower consumption of grapefruit in the domestic market.

Prices

Table 7 illustrates the average local, export, and processed market prices for grapefruit since MY 2014/15. Grapefruit prices in the export market have increased steadily, reaching record levels in MY 2019/20 on the weakening of the South African currency (rand) and growing demand. Domestic prices for fresh grapefruit and processing tend to fluctuate based on supply.

Table 7: Grapefruit Prices in South Africa

MY	Average Price (rand/MT)		
	Local Market	Export Market	Processed
2014/15	3,866	5,737	310
2015/16	5,154	7,898	409
2016/17	2,472	7,762	596
2017/18	5,246	8,234	1,593
2018/19	2,908	7,990	1,523
2019/20	6,563	8,960	1,571
2020/21	6,147	8,185	1,345
2021/22	4,636	8,606	784
2022/23	6,918	8,183	1,708

Source: CGA

Table 8: Grapefruit Production, Supply, and Distribution

Grapefruit, Fresh Market Year Begins South Africa	2022/2023		2023/2024		2024/2025	
	Jan 2023		Jan 2024		Jan 2025	
	USDA Official	New Post	USDA Official	New Post	USDA Official	New Post
Area Planted (HECTARES)	8097	8097	8000	8000	0	7900
Area Harvested (HECTARES)	7530	7530	7650	7200	0	7300
Bearing Trees (1000 TREES)	8250	8250	8200	8200	0	8150
Non-Bearing Trees (1000 TREES)	900	900	850	850	0	830
Total No. Of Trees (1000 TREES)	9150	9150	9050	9050	0	8980
Production (1000 MT)	415	415	420	420	0	425
Imports (1000 MT)	8	8	5	3	0	3
Total Supply (1000 MT)	423	423	425	423	0	428
Exports (1000 MT)	217	217	218	214	0	215
Fresh Dom. Consumption (1000 MT)	5	5	5	2	0	2
For Processing (1000 MT)	201	201	202	207	0	211
Total Distribution (1000 MT)	423	423	425	423	0	428
(HECTARES) ,(1000 TREES) ,(1000 MT)						
OFFICIAL DATA CAN BE ACCESSED AT: PSD Online Advanced Query						

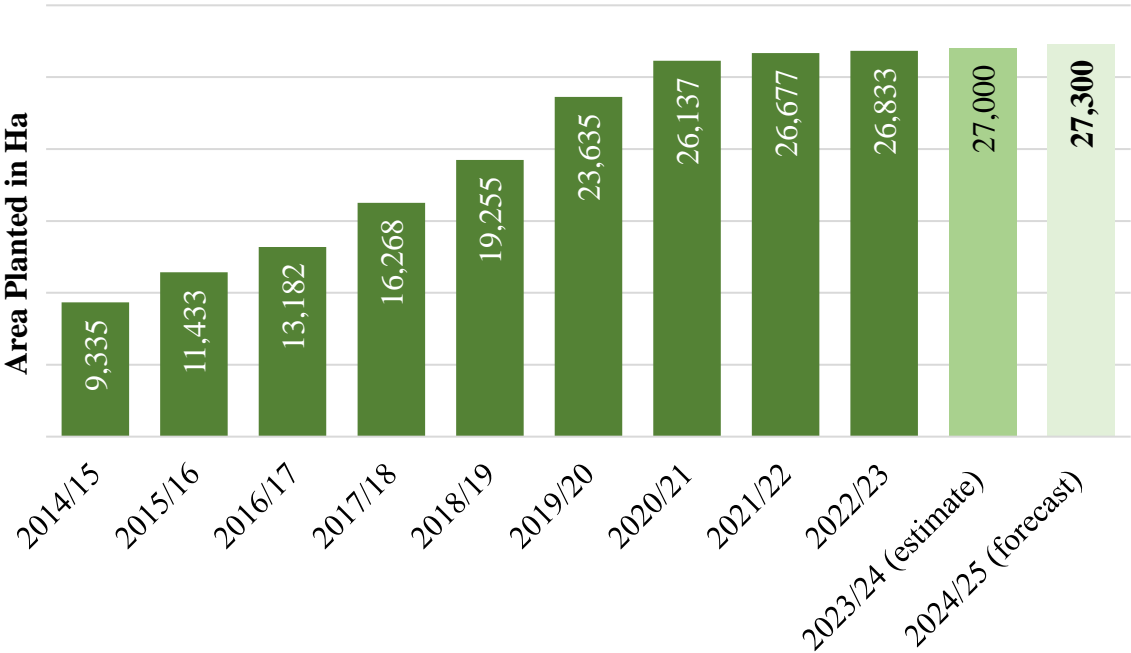
Tangerines/Mandarins, Fresh

Crop Area

Post expects that the area planted to tangerines/mandarins (also known as “soft citrus”) will increase by one percent to 27,300 ha in MY 2024/25. The slight increase reflects a move from other citrus types such as grapefruit to soft citrus due to relatively higher demand for soft citrus in the export market.

South Africa’s expansion of tangerines/mandarins area has slowed, and Post estimates area under tangerines/mandarins increased by one percent in MY 2023/24. Driven by higher global demand for seedless soft citrus and relatively high profit margins compared to other citrus types, farmers planted much new area in the latter half of the 2010s (see **Figure 12**). Since then, growers have expanded the number of hectares under netting to better control pests, enable better water-management practices, and protect the fruit from strong winds, hail, or sun damage. Further investment is focused on alternative sources of energy supply to manage the risk of power and water loss. However, wider infrastructure inefficiencies such as ineffective port operations, an underperforming rail system, and deteriorating road networks are diminishing profitability and limiting continued investments. In MY 2022/23, the area planted to tangerines/mandarins increased by one percent again, as the rate of budwood sales declines. A slight area expansion was observed in the Western Cape, Limpopo, and KwaZulu-Natal growing regions.

Figure 12: South African Tangerine/Mandarin Area

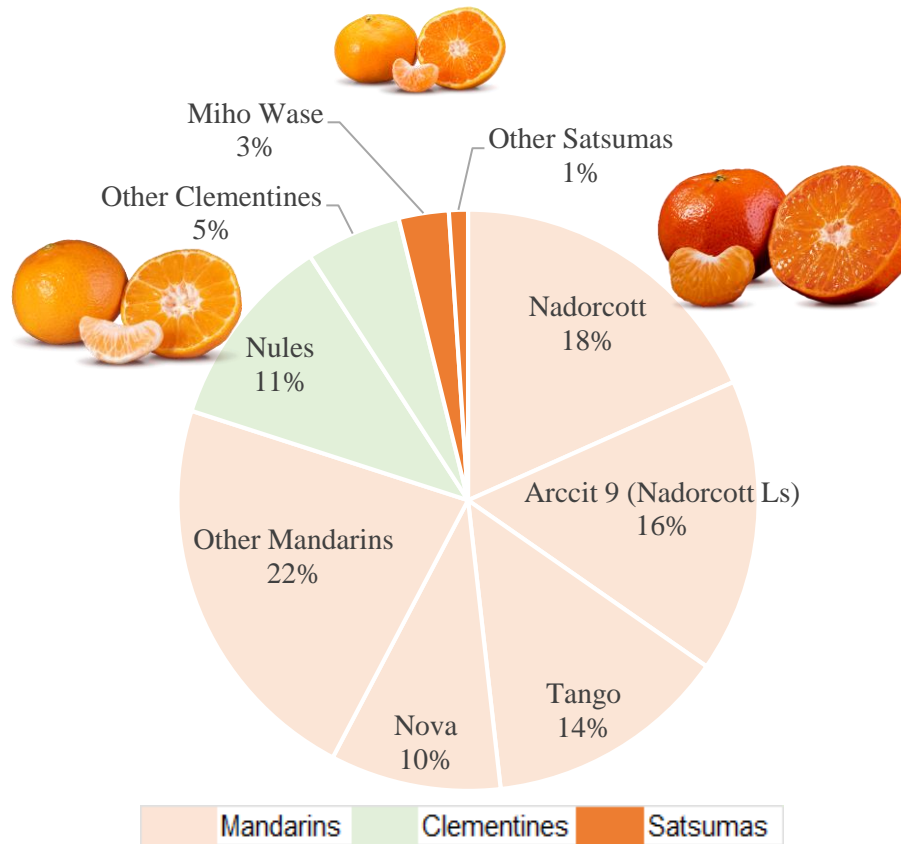


Source: FAS Pretoria using CGA data

The Western Cape province is the predominate producer of soft citrus, increasing by two percent from MY 2022/23 to account for 38 percent of South Africa’s total production, followed by

Limpopo (28 percent) and Eastern Cape (24 percent) provinces. Orchards four years and younger make up almost 18 percent of the soft citrus area in South Africa, meaning that a growing volume of soft citrus will reach the market in coming years.

Figure 13: Tangerine/Mandarin Varieties Produced in South Africa



Source: FAS Pretoria using CGA data

The predominant cultivar planted is the Nardocott, accounting for almost 18 percent of total area. Nardocott is followed by Arccit 9 (16 percent), Tango (14 percent), Nules, (11 percent), Nova (10 percent), Leanri (7 percent), and Orri (7 percent).

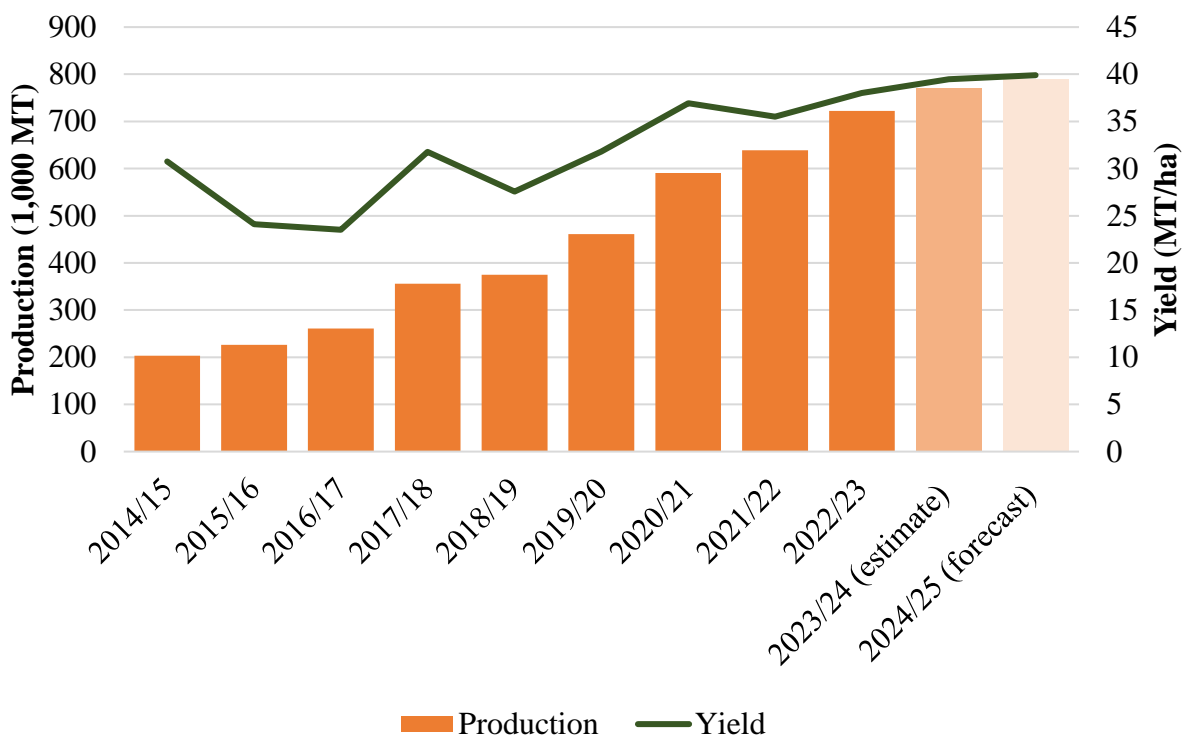
Production

Post forecasts that MY 2024/25 production will increase by three percent to 790,000 MT (see **Figure 14**) from MY 2023/24, expecting normal weather conditions, young trees coming into full production and availability of water for irrigation. Growers are observed to be putting up hail nets, which is expected to support both yield and fruit quality.

Post lowers its MY 2023/24 production estimates to 770,000 MT due to unfavorable weather conditions in production areas. The Eastern Cape experienced strong winds, and the Western Cape experienced flooding, which led to loss of fruit. Even with these conditions, production in MY 2023/24 is estimated to have grown seven percent compared to MY 2022/23 as young trees

came into production and harvested area expanded. In MY 2022/23, tangerine/mandarin production surged 13 percent to 723,000 MT based on newly bearing trees and decent rains that replenished water resources for irrigation in major production areas.

Figure 14: Tangerine/Mandarin Production



Source: FAS Pretoria using DALRRD data

Consumption

The South African industry prioritizes export markets for soft citrus and usually only supplies surplus fruit to the local market. The increased use of netting has yielded higher-quality produce, leading to larger exports and lower domestic supply for consumers. However, some high-end retail chains such as Woolworths sell export-grade citrus to domestic consumers. Domestic consumption figures include both human consumption and animal feed.

Post forecast that domestic consumption of tangerines/mandarins will grow by two percent in MY 2024/25 from MY 2023/24, based on increased production and improved preference for soft citrus. Post revises MY 2023/24 consumption upwards to 47,000 MT due to a drop in export quality produce caused by adverse weather conditions. Consumption in MY 2023/24 is estimated to have increased by 31 percent from MY 2022/23 as growers diverted produce that would have been exported towards local sales. Further, consumer preference is shifting towards soft citrus as they are considered sweeter and easier to peel than other citrus types. In MY 2022/23, local consumption of tangerines/mandarins dropped by 20 percent to 36,000 MT, corresponding to the greater export volumes.

Processing

Post forecasts that tangerine/mandarin processing in MY 2024/25 will remain unchanged from MY 2023/24 due to an increased supply towards the export and domestic market. Post revises tangerine/mandarin processing in MY 2023/24 upwards to 71,000 MT, increasing by three percent from MY 2022/23. The increase in processing volumes is due to higher production of produce that does not meet the export standard because of adverse weather. In MY 2022/23, Post estimated tangerine/mandarin deliveries for processing decreased by nine percent to 69,000 MT based on exports and growing domestic demand. South Africa prioritizes supplying export markets, while fruit that does not meet export standards is usually used for processing. South African tangerines/mandarins are mostly processed into juice and concentrate.

Exports

The tangerine/mandarin export season typically starts around week 11 (March) and continues through to week 44 (November). Exports typically have two peaks at around weeks 19-23 (May-June) and 27-34 (July-August). Most mandarins are exported through the Port of Cape Town (48 percent) and the Durban Port (34 percent), near production areas. The Narcodott and Tango mandarins are the most exported varieties followed by Clementine and Nova varieties. The Satsumas and Clementines are early export varieties while Narcodott and Tango dominate the mid-to-late export season.

Post forecasts that increased production of export-quality fruit due to investments in quality improvements will increase tangerine/mandarin exports by three percent to 674,000 MT. Growth will also be driven by a growing global demand, especially in leading markets such as the EU, UK, Middle East, Asia, and North America.

Post estimates that tangerine/mandarin exports in MY 2023/24 increased by five percent from MY 2022/23 on increased production. The downward revision in MY 2023/24 exports from previous forecasts is due to adverse weather, which led to a loss of export quality fruit. In MY 2022/23, tangerine/mandarin exports increased by 19 percent on the back of high production volume and more reasonable shipping rates (see **Table 9**).

Table 9: South African Fresh Tangerine/Mandarin Exports

Rank	Partner Country	Calendar Year: 1,000MT				Jan-Sept: 1,000MT		
		MY 2021/22	MY 2022/23	Market share %	%Δ 2023/22	MY 2022/23	MY 2023/24	%Δ 2024/23
1	Netherlands	102.0	134.2	22%	32%	127.4	141.2	11%
2	United Kingdom	87.8	97.4	16%	11%	90.9	84.4	-7%
3	United Arab Emirates	40.0	57.4	9%	44%	52.6	49.2	-6%
4	Russia	51.3	52.0	8%	1%	49.8	66.1	33%
5	United States	53.5	49.6	8%	-7%	49.0	38.8	-21%
6	China	23.1	30.9	5%	33%	30.7	25.7	-16%
7	Canada	22.9	29.3	5%	28%	26.9	33.1	23%
8	Bangladesh	21.8	22.2	4%	2%	21.5	18.2	-15%
9	Portugal	10.9	17.3	3%	59%	17.1	18.2	6%
10	Hong Kong	9.5	11.4	2%	21%	11.2	9.7	-13%
11	Saudi Arabia	9.4	10.3	2%	9%	10.0	10.4	5%
12	India	5.2	9.0	1%	75%	8.7	13.6	57%
	<i>Others</i>	<i>83.3</i>	<i>101.0</i>	<i>16%</i>	<i>21%</i>	<i>94.9</i>	<i>119.1</i>	<i>25%</i>
	Total	520.6	622.0	100%	19%	590.7	628.0	6%

Source: FAS Pretoria using Trade Data Monitor, LLC. data

The EU and the United Kingdom are the largest foreign markets for South African soft citrus, accounting for 45 percent of total exports, followed by the United Arab Emirates (9 percent), Russia (8 percent), the United States (8 percent), China (4 percent), and Canada (5 percent) (see **Table 9**). South Africa’s exports of soft citrus to the United States under AGOA have grown at an annual average of 42 percent from 13,695 MT in MY 2017/18, to 53,489 MT in MY 2021/22. Even though exports to the United States are estimated to have decreased in MY 2023/24, Post expects the growth trend to continue based on the expanding American consumer preference for “easy peeler” varieties.

Imports

South Africa’s imports are minimal and are forecast to remain below 4,000 MT in MY 2024/25 on improved availability of locally produced tangerines/mandarins. South Africa imports small volumes of citrus to satisfy off-season demand.

Prices

Table 10 indicates the local, export, and processed market prices for tangerines/mandarins since MY 2014/15. Export market prices for tangerines/mandarins remain the highest of all citrus categories for South Africa, supporting the surge in production. Because domestic demand is also high but growers prefer export markets whenever possible, average prices in MY 2022/23 for fresh and processed fruit also increased to R7,383/MT (\$394.81/MT) and R390/MT (\$20.86/MT), respectively.

Table 10: Tangerine/Mandarin Prices

MY	Average Price (rand/MT)		
	Local Market	Export Market	Processed
2014/15	5,606	11,392	391
2015/16	6,785	14,242	532
2016/17	6,037	13,489	614
2017/18	6,617	13,498	709
2018/19	5,586	13,344	502
2019/20	6,866	16,387	280
2020/21	6,552	14,565	366
2021/22	5,938	14,360	320
2022/23	7,383	17,587	390

Source: CGA

Table 11: Tangerine/Mandarin Production, Supply, and Distribution

Tangerines/Mandarins, Fresh Market Year Begins	2022/2023		2023/2024		2024/2025	
	Feb 2023		Feb 2024		Feb 2025	
	USDA Official	New Post	USDA Official	New Post	USDA Official	New Post
South Africa						
Area Planted (HECTARES)	26833	26833	27000	27000	0	27300
Area Harvested (HECTARES)	1900	1900	19500	19450	0	19800
Bearing Trees (1000 TREES)	10405	10405	10470	10470	0	10550
Non-Bearing Trees (1000 TREES)	3850	3850	3870	3870	0	3910
Total No. Of Trees (1000 TREES)	14255	14255	14340	14340	0	14460
Production (1000 MT)	723	723	780	770	0	790
Imports (1000 MT)	4	4	3	3	0	3
Total Supply (1000 MT)	727	727	783	773	0	793
Exports (1000 MT)	622	622	670	655	0	674
Fresh Dom. Consumption (1000 MT)	36	36	43	47	0	48
For Processing (1000 MT)	69	69	70	71	0	71
Total Distribution (1000 MT)	727	727	783	773	0	793
(HECTARES) ,(1000 TREES) ,(1000 MT)						
OFFICIAL DATA CAN BE ACCESSED AT: PSD Online Advanced Query						

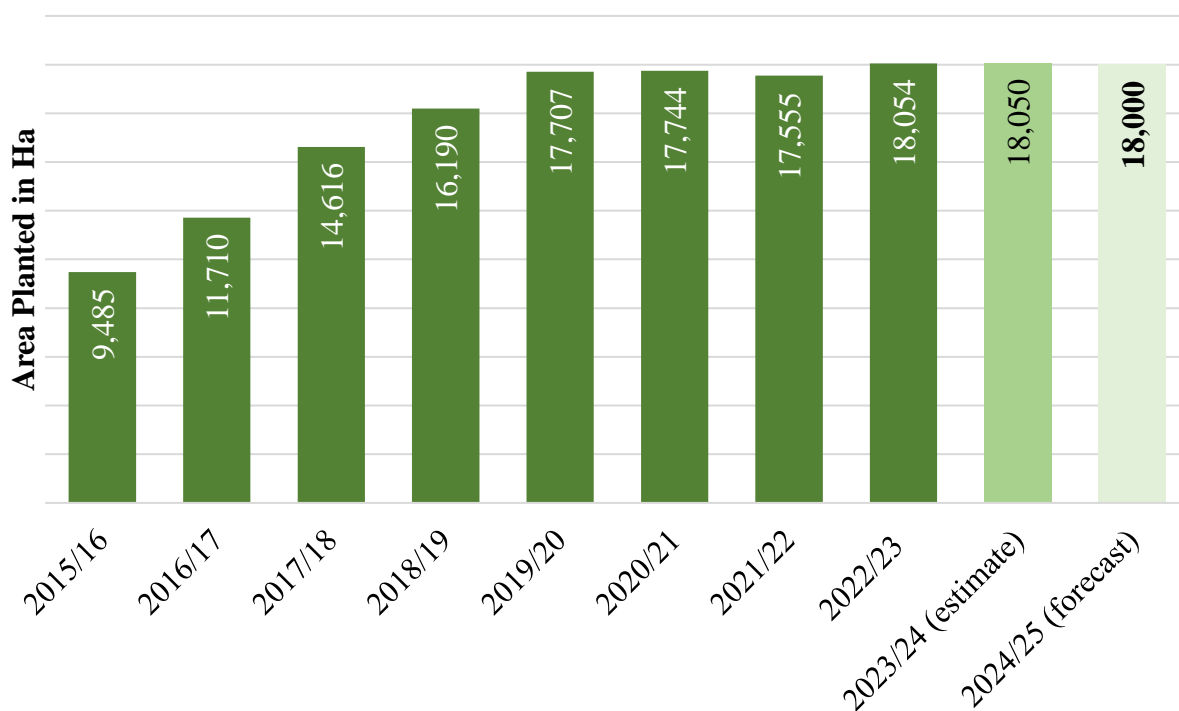
Lemons/Limes, Fresh

Crop Area

Post forecasts that South African lemon area will remain unchanged at 18,000 ha in MY 2024/25 as producers are holding back from planting any more lemons due to an oversupply and limited intake for processing. The area planted with lemons in South Africa more than doubled in the previous decade, driven by global demand and rising global prices, but has flattened since 2020 due to bearish export prices (see **Figure 15**).

In MY2022/23, area planted expanded by three percent to 18,054 ha with growth coming from Limpopo (+470 ha), Eastern Cape (+233 ha), and KwaZulu-Natal (+69 ha) provinces. However, other regions saw a drop in planted area, reflecting a shift towards other crops and citrus types. The pace of expansion for lemon area has slowed as orchards five years and younger only make up eight percent of total area, compared to the 66 percent that are six to ten years old.

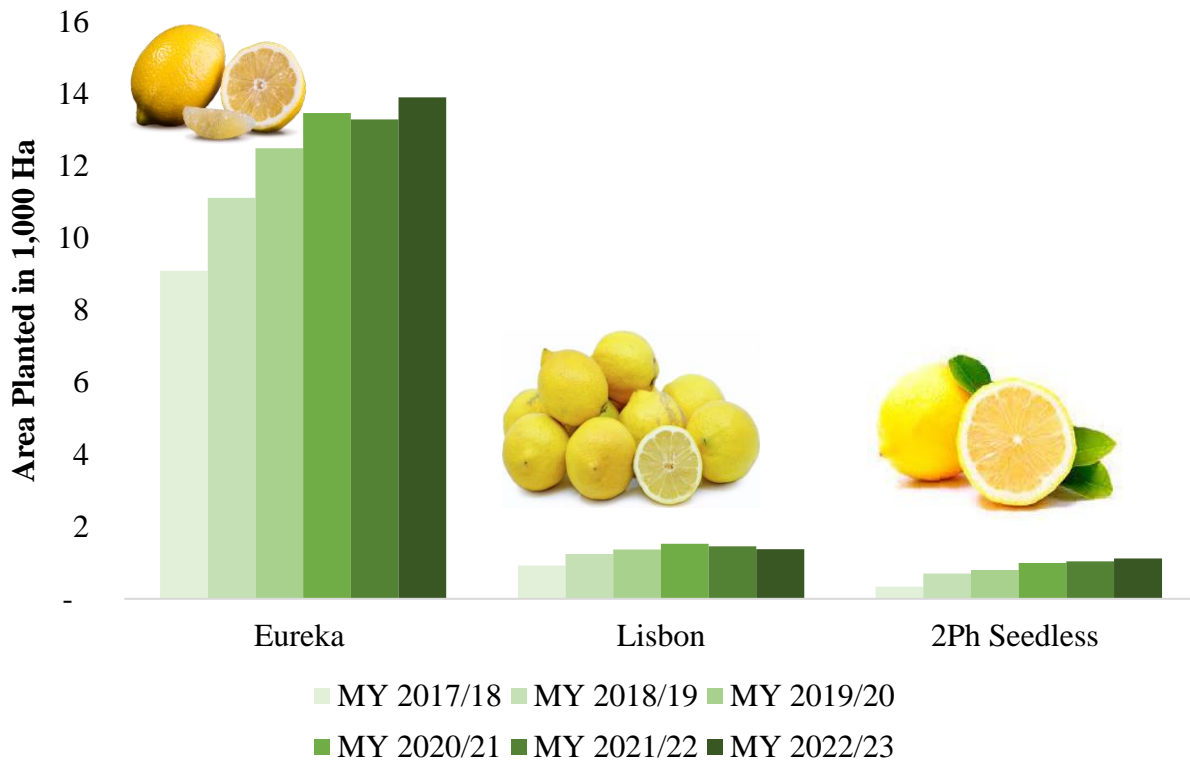
Figure 15: South African Lemon Area



Source: *FAS Pretoria using CGA data*

The largest growing region for lemons in South Africa is the Eastern Cape province, accounting for 41 percent of total area planted, followed by Limpopo (34 percent) and Western Cape (14 percent) provinces. By far, the most popular cultivar of lemons planted in South Africa is Eureka, representing 75 percent of total area. Eureka is followed by the Lisbon (seven percent) and 2Ph Seedless (six percent) cultivars.

Figure 16: Lemon Varieties Produced in South Africa



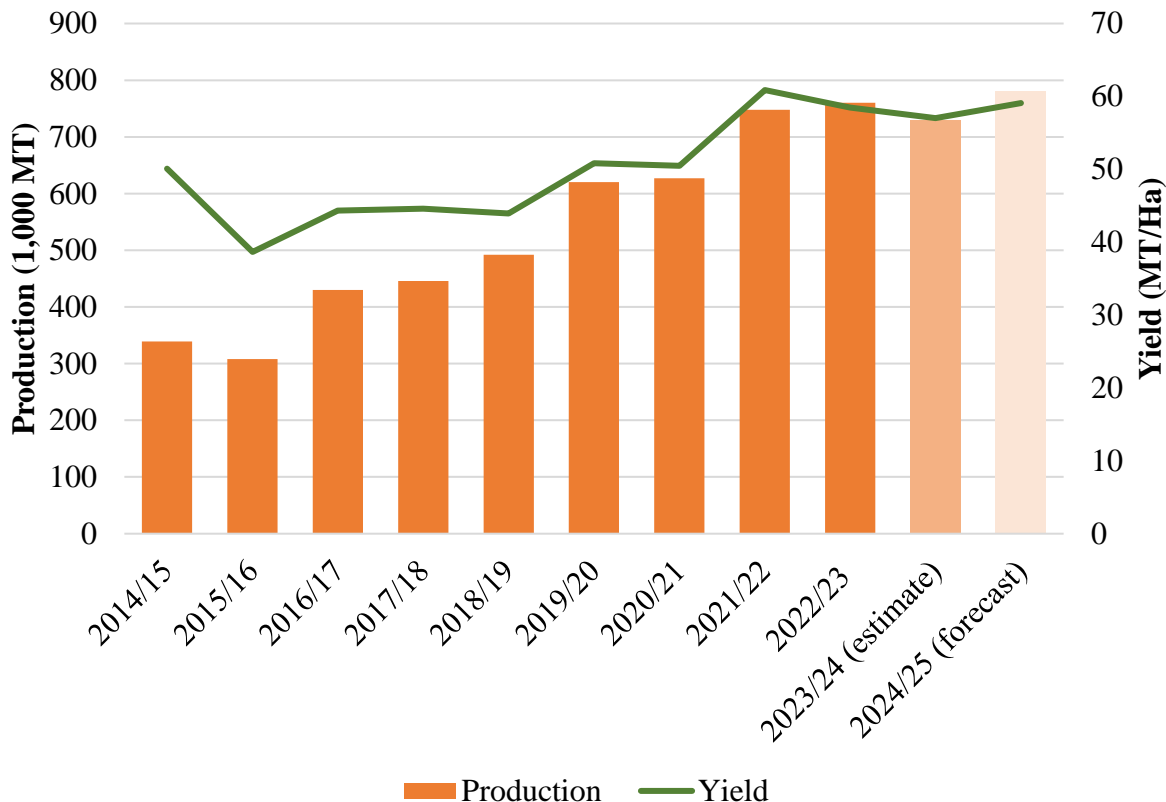
Source: FAS Pretoria using CGA data

Production

Post forecast that lemon production in MY2024/25 will grow by seven percent to 780,000 MT from MY 2023/24, expecting normal weather, improved yields, and expanded harvested area. Dam reservoir levels in major growing regions are reported to be at sufficient levels for irrigation.

Post revises lemon production for MY 2023/24 downwards to 730,000 MT, dropping by four percent from MY 2022/23 due to adverse weather conditions. The Sundays River Valley, a leading production area for lemons, experienced strong winds reducing both the quantity and quality of the fruit. The Citrusdal area in the Western Cape experienced high rainfall causing fruit loss and delays in harvesting. Further, the Northern region experienced hot and dry conditions especially in February 2024, which led to smaller sized fruit. MY 2022/23 production was 760,000 MT, up by two percent year-on-year due to young trees coming into production and availability of water for irrigation.

Figure 17: South African Lemon Production



Source: FAS Pretoria using DALRRD data

Consumption

Post forecasts that increased production of export quality fruit will cause lemon consumption in MY 2024/25 to decrease by 11 percent to 39,000 MT from MY 2023/24. Post revised MY 2023/24 domestic lemon consumption upwards to 44,000 MT, a 13 percent increase from MY 2022/23 due to the drop in export quality fruit and a weakening demand for processing. Consumption also accounts for lemons used for livestock feed, as was the case for a significant portion of the domestic consumption in MY 2021/22 and MY 2022/23.

Lemons and limes are considered luxury food items in South Africa and are primarily associated with garnishing of beverages at restaurants. Limes are very rarely found in dishes in South Africa, as most consumers are unfamiliar with the taste. They are not consistently found in grocery stores. Producers have indicated that although lime demand increases in the summer for garnishing cocktails, there is negligible demand in the remainder of the year.

Processing

Lemon prices for processing in South Africa have weakened and are deemed unprofitable due to a drop in exports of lemon juice. Processors are reported to have high stocks of lemon juice and appear to have minimized purchases. Post estimates that lemon intake for processing in MY 2024/25 will decrease by three percent to 154,000 MT from MY 2023/24 on increased exportable supply and reduced demand for lemon juice. Post revises lemons for processing upwards to 159,000 MT in MY 2023/24, a modest one percent increase from MY 2022/23, based on smaller sized lemons, a drop in export quality fruit, and a lack of alternative markets. Post maintains its estimate for MY 2022/23 processing at 158,000 MT based on larger production volumes.

Processed lemons and limes are used as flavorings for confectionary and dairy products. In the beverage industry, lemons are used to make lemon juice, lemonade, smoothies, and liquors. In the cleaning industry, lemon juice is used as a degreaser and disinfectant due to its high concentration of citric acid, which can inhibit the proliferation of some molds and bacteria.

Exports

The lemon export season typically starts around week 3 (January) until week 41 (October), with a bulk of lemons exported between weeks 17 and 29 (April-July). About 48 percent of lemons are exported from Port Elizabeth and Coega in the Eastern Cape, 36 percent from Durban Port, and 17 percent from the Port of Cape Town.

Post forecasts that in MY 2024/25 lemons exports will increase by 11 percent to 590,000 MT on production of exportable supply. Exports are expected to continue rising for destinations in the Middle East, Europe, and Asia, where there is sustained growth in demand. Post contacts report that lemon exports are expected to benefit from a recently introduced real-time data model used to coordinate and inform weekly export distribution, particularly to the EU market. This will aid growers to optimize periods when supply from Spain is low and avoid oversupplying the market.

Post revises MY 2023/24 lemon exports downwards to 530,000 MT, down six percent from MY 2022/23. The hot and dry conditions, particularly in the Northern regions, resulted in smaller fruit size and fewer cartons sent for exports. Rain and wind damage in the Eastern Cape reduced the volumes of export quality fruit. Further, Post contacts reported that Spain's long season with improved production of Verna and Fino lemons delayed South Africa's entry to the EU that year.

The EU remained the largest market for South African lemons in MY 2022/23, accounting for almost 40 percent of total exports (see **Table 12**). Lemon exports to the United Arab Emirates represented 12 percent (65,037 MT) and Russia represented 9 percent (48,104 MT) of total exports last season. Lemon exports to China continued to grow in MY 2022/23 after the easing of cold-treatment requirements in August 2021, which has reduced the risk of chilling injury and decay.

MY 2022/23 exports improved slightly by one percent to 565,298 MT, based on improved supply of export-quality lemons. The Middle East imports a portion of South Africa's class 2

lemons. MY 2021/22 exports of lemons were up 12 percent year-over-year due to record production.

Table 12: South African Fresh Lemon Exports

Rank	Partner Country	Calendar Year: 1,000 MT				January-September: 1,000 MT		
		MY 2021/22	MY 2022/23	Market share	%Δ 2023/22	MY 2022/23	MY 2023/24	%Δ 2024/23
1	Netherlands	116.1	123.1	22%	6%	122.8	113.3	-8%
2	United Arab Emirates	68.4	65.0	12%	-5%	62.1	72.4	17%
3	Russia	41.1	48.1	9%	17%	47.9	43.0	-10%
4	United Kingdom	43.6	43.2	8%	-1%	42.8	38.4	-10%
5	Iraq	30.1	39.4	7%	31%	39.3	42.6	8%
6	Italy	29.8	32.6	6%	10%	32.6	33.0	1%
7	Saudi Arabia	34.2	30.6	5%	-11%	30.3	30.5	1%
8	Canada	30.8	30.1	5%	-2%	29.5	31.7	7%
9	Portugal	42.2	25.9	5%	-39%	25.8	24.2	-6%
10	Spain	8.5	18.7	3%	120%	18.7	8.1	-56%
11	Malaysia	16.1	15.0	3%	-7%	14.6	6.1	-58%
12	Hong Kong	18.3	14.3	3%	-22%	14.1	9.1	-35%
13	China	9.3	10.5	2%	13%	10.3	2.6	-75%
...30	<i>United States</i>	<i>0.3</i>	<i>1.3</i>	<i>0%</i>	<i>373%</i>	<i>1.3</i>	<i>1.4</i>	<i>9%</i>
	<i>Others</i>	<i>68.6</i>	<i>67.4</i>	<i>12%</i>	<i>-2%</i>	<i>63.4</i>	<i>66.8</i>	<i>5%</i>
	Total	557.5	565.3	100%	1%	555.5	523.1	-6%

Source: FAS Pretoria using Trade Data Monitor LLC. data

Imports

Domestic production meets local demand for most of the year, so South African lemon imports are usually under 3,000 MT. Post forecasts that lemon imports in MY 2024/25 will decrease to 2,000 MT on sufficient local production. Post estimates MY 2023/24 imports at 2,590 MT, a slight increase from 2,358 MT in MY 2022/23.

Prices

Table 13 indicates the average local, export, and processed market prices for lemons since MY 2014/15. Export and domestic prices improved in MY 2022/23, while processing prices hit an historic low. Export markets provide higher prices for South African lemons compared to local fresh and processed prices.

Table 13: Lemon/Lime Prices

MY	Average Price (rand/MT)		
	Local Market	Export Market	Processed
2014/15	7,453	12,340	1,378
2015/16	7,697	16,483	1,842
2016/17	7,445	13,289	1,657
2017/18	6,697	11,151	1,463
2018/19	6,494	11,710	2,301
2019/20	5,804	13,570	770
2020/21	5,695	10,359	568
2021/22	5,061	10,508	307
2022/23	5,573	12,104	145

Source: CGA

Table 14: Lemon/Lime Production, Supply, and Distribution

Lemons/Limes, Fresh Market Year Begins	2022/2023		2023/2024		2024/2025	
	Jan 2023		Jan 2024		Jan 2025	
	USDA Official	New Post	USDA Official	New Post	USDA Official	New Post
South Africa						
Area Planted (HECTARES)	18054	18054	18000	18050	0	18000
Area Harvested (HECTARES)	13000	13000	13100	12800	0	13200
Bearing Trees (1000 TREES)	7940	7940	7915	7915	0	7940
Non-Bearing Trees (1000 TREES)	2507	2507	2500	2500	0	2490
Total No. Of Trees (1000 TREES)	10447	10447	10415	10415	0	10430
Production (1000 MT)	760	760	780	730	0	780
Imports (1000 MT)	2	2	2	3	0	2
Total Supply (1000 MT)	762	762	782	733	0	782
Exports (1000 MT)	565	565	585	530	0	590
Fresh Dom. Consumption (1000 MT)	39	39	40	44	0	39
For Processing (1000 MT)	158	158	157	159	0	153
Total Distribution (1000 MT)	762	762	782	733	0	782
(HECTARES) ,(1000 TREES) ,(1000 MT)						
OFFICIAL DATA CAN BE ACCESSED AT: PSD Online Advanced Query						

Orange Juice

Production

South African growers traditionally produce oranges mainly for the fresh export market; however, some growers, particularly those in areas prone to hailstorm damage and other quality-degrading weather effects, produce oranges primarily to supply processing facilities.

Since MY 2023/24, domestic juicers are reported to be paying such high prices for juice that producers are considering sending export quality fruit for processing. This hike in orange juice prices is attributed to a downward trend of orange production in Brazil due to adverse weather and the citrus greening disease. Post contacts report that juicing prices are expected to remain elevated in the short term, with growers expected to send more fruit to processors. Post forecast that orange juice production in MY 2024/25 will increase by four percent from MY 2023/24 to 57,100 MT as juicing becomes a viable alternative with reduced risks. While juice prices remain elevated, growers are expected to divert fruit meant for exports towards processing, reducing costs of packaging and shipping while receiving good returns.

Orange juice production in MY 2023/24 is revised downwards to 54,700 MT due to fruit loss in major production regions, but this production is estimated to be 48 percent higher than in MY 2022/23. The adverse weather also resulted in smaller sized fruit, increasing fruit delivered for processing. Post contacts reported that early orange varieties, usually sold as fresh fruit in the domestic market, were sent for processing. Some producers reported that the minimal price difference offered in markets abroad compared to local juicers made them reconsider their plans, potentially earning less at the end of the season, but also reducing risk and uncertainty with port and shipping challenges.

Orange juice production in MY 2022/23 increased by four percent based on an improvement in deliveries for processing and improved prices for producers. The industry keeps carry-over stocks from the previous season to ensure year-round availability. Concentrated orange juice accounts for at least 90 percent of total orange juice produced in South Africa.

Industry statistics for orange juice are largely unavailable in South Africa. The production, consumption, and stock levels represent Post's estimates and forecasts based on information derived from various sources, contacts, and calculations of extractions from data regarding fresh oranges delivered for processing.

Consumption

Domestic consumption of orange juice in MY 2024/25 is forecast to decrease by one percent from MY 2023/24 due to increased prices. Post expects that consumers may likely shift towards other available beverages. Domestic consumption of orange juice is estimated to have fallen by two percent in MY 2023/24 for the same reason, and there are other juices available in local juice blends. In MY 2022/23 domestic juice consumption is estimated to have remained unchanged from the previous estimates at 3,200 MT.

While higher-end juices in domestic retail are pure orange, juice consumed on the local market is typically made from a juice blend of both apple and orange juices and often contains varying amounts of grape, mango, and/or pear juice based on market conditions. Processors primarily source apple and pear concentrate from China, which is used as a base for blended juice.

South Africa imposes a Health Promotion Levy also known as sugar tax of 2.1 cents per gram on soft drinks and fruit juice with added sugar of more than 4 grams of sugar content per 100 grams (see GAIN report, [South African Sugar Industry Crushed by Not So Sweet Tax](#)). The tax is expected to increase again in 2025, and the government is considering extending the sugar tax to apply to 100 percent fruit juices, which, if enacted, could limit orange juice consumption.

Exports

Post forecasts that orange juice exports in MY 2024/25 will increase by one percent to 41,500 MT on improved production. Post lowers MY 2023/24 orange juice export estimates downwards to 41,000 MT, reflecting a slowed pace of exports between April and September of MY 2023/24 compared to the same period in MY 2022/23. Orange juice exports in MY 2022/23 are estimated to have improved by 32 percent on improved global demand and favorable price levels. Post adjusted all orange juice export data to the equivalent of 65 Degrees Brix based on the respective conversion factors shown on the export tables below. Orange juice exports under HS200919 were converted using a factor of 1.02, while orange juice exports under HS200912 were converted using a factor of 0.18. Orange juice exports under HS200911 were not converted as it is already equivalent to 65 Degrees Brix. Degrees Brix represents the strength of the juice based on the sugar content. Thus, 65 Degrees Brix means that the orange juice has at least 65 grams of sucrose per 100 grams of juice.

South Africa exports orange juice mainly to countries in Southern Africa, including Eswatini, Botswana, Namibia, Lesotho, and Zimbabwe (see **Table 15**). Europe is also an important market for South African orange juice. The U.S. is the sixth largest market for South African orange juice exports, accounting for a four percent export share in MY 2022/23. Although exports in MY 2023/24 between April and September show a 46 percent decrease, Post expects that exports will recover to just above 1,000 MT by the end of the marketing year.

Table 15: South African Orange Juice Exports (HS200919, HS200911 and HS200912)

Rank	Partner Country	MY: April - March (unit FOJ)				Year to Date: April - September		
		MY	MY	Market	%Δ	MY	MY	%Δ
		2021/22	2022/23	Share %	2023/22	2022/23	2023/24	
1	Netherlands	9,275	13,040	32%	41%	7,066	8,448	20
2	Botswana	3,860	9,067	22%	135%	3,387	2,891	-15
3	Eswatini	2,924	2,899	7%	-1%	1,278	1,466	15%
4	Namibia	2,014	2,669	6%	33%	1,124	1,066	-5%
5	Israel	1,959	1,722	4%	-12%	700	675	-4%
6	United States	1,871	1,540	4%	-18%	618	334	-46%
7	Spain	928	1,523	4%	64%	797	95	-88%
8	Italy	930	1,230	3%	32%	997	178	-82%
9	Lesotho	1,005	1,132	3%	13%	327	370	13%
10	Ethiopia	803	880	2%	10%	443	504	14%
11	Zimbabwe	896	828	2%	-8%	314	220	-30%
12	Zambia	677	631	2%	-7%	365	108	-70%
	<i>Others</i>	<i>4,033</i>	<i>3,902</i>	<i>10%</i>	<i>-3%</i>	<i>1,798</i>	<i>1,331</i>	<i>-26%</i>
	Total	31,175	41,063	100%	32%	19,214	17,686	-8%

Source: FAS Pretoria using Trade Data Monitor, LLM. data

Imports

Post forecasts that MY 2024/25 orange juice prices will decrease to around 1,500 MT from MY 2023/24 increased production. Imports are estimated to increase from 1,112 MT in MY 2022/23 to 2,574 MT in MY 2023/24 with increased imports from Italy. In MY 2022/23 South Africa imported 1,112 MT of orange juice imports, an increase by 13 percent year-on-year. Zimbabwe was the main supplier of orange juice to South Africa in MY 2022/23 as it exports a popular juice brand which has gained popularity in South Africa, especially amongst Zimbabwean nationals who reside in South Africa.

Table 16: Orange Juice Production, Supply, and Distribution

Orange Juice Market Year Begins South Africa	2022/2023		2023/2024		2024/2025	
	Apr 2023		Apr 2024		Apr 2025	
	USDA Official	New Post	USDA Official	New Post	USDA Official	New Post
Deliv. To Processors (MT)	369000	369000	588000	547000	0	571000
Beginning Stocks (MT)	13240	13240	6989	6989	0	20113
Production (MT)	36900	36900	58800	54700	0	57100
Imports (MT)	1112	1112	800	2574	0	1500
Total Supply (MT)	51252	51252	66589	64263	0	78713
Exports (MT)	41063	41063	47000	41000	0	41500
Domestic Consumption (MT)	3200	3200	3200	3150	0	3120
Ending Stocks (MT)	6989	6989	16389	20113	0	34093
Total Distribution (MT)	51252	51252	66589	64263	0	78713
(MT)						
OFFICIAL DATA CAN BE ACCESSED AT: PSD Online Advanced Query						

Policies and Regulations

Export Policies and Regulations

United States

Exports of Cold-Treated Citrus from South Africa to All U.S. Ports of Entry: On November 4, 2020, the U.S. Department of Agriculture’s Animal and Plant Health Inspection Service (APHIS) announced that it had authorized the import of cold-treated fresh citrus fruit from South Africa into all U.S. ports of entry. APHIS determined that South African citrus from approved areas that is cold treated in transit can safely enter all American ports of entry without increasing the risk of introducing false codling moth (FCM) or other pests of concern. Previously, APHIS restricted the entry of cold-treated citrus fruit from South Africa to four U.S. ports that have cold treatment facilities, namely, Newark, Philadelphia, Houston, and New Orleans. This action broadened the reach of South African citrus to other regions within the United States, provided flexibility to retailers and wholesalers, and lowered transportation costs of imported citrus.

U.S. Cold Sterilization Protocol: South Africa exports citrus to the United States under a cold treatment schedule to address FCM. APHIS has reduced the cold treatment schedule from 24 to 22 days, which has been beneficial to South Africa by reducing shipping costs and fruit loss from cold damage.

South African Citrus Exports from Citrus Black Spot (CBS) Areas to the United States: Currently, South Africa can only export citrus to the United States from officially recognized CBS-free areas. The CBS-free areas are found in the Western Cape and Northern Cape provinces, as well as relevant districts of the Free State and North West provinces. In 2014, APHIS issued a notice proposing to amend fruit and vegetable regulations to allow the import of several varieties of fresh citrus fruit, as well as citrus hybrids, into the United States from areas in South Africa where CBS has been known to occur. The regulation would authorize imports on the condition of satisfying certain systems and SPS treatment procedures. The comment period closed, and the regulation remains under departmental review.

European Union

The EU requires that imports of citrus first undergo specified cold treatment processes and precooling for specific periods before importation to ensure protection against FCM.

EU Requirements Related to CBS: South Africa faces challenges in the EU market because of CBS requirements, and often voluntarily suspends citrus exports to the EU to avoid any further interceptions of fruit with CBS. For example, in September 2023 South Africa voluntarily suspended citrus exports to the EU as a precaution and risk mitigation measure to prevent a ban on all citrus exports to the market.

Citrus case at the World Trade Organization: On April 15, 2024, the South African government requested a consultation with the EU at the World Trade Organization (WTO) over trade phytosanitary regulations regarding Citrus Black Spot, citing that these measures were not based on scientific principles and appear to be trade restrictive. South Africa and the EU failed to settle the dispute within the set 60 days. South Africa then requested an establishment of a panel at the Dispute Settlement Body (DSB) of the WTO to review import measures imposed by the EU on citrus imports (on June 24, 2024). The panel will hear the case and rule on the trade dispute between South Africa and the EU.

Botswana

Botswana imposes a temporary ban on South African oranges: Botswana enforced a ban on South African vegetables since 2022. The Botswana government added oranges to the import ban list of vegetable and fruits from South Africa in 2024. The import ban was implemented from June 17 until the end of August in 2024 and is announced to continue until 2025.

Vietnam

South Africa gains market access for oranges in Vietnam: In March 2024, the South Africa government announced a bilateral protocol granting South African orange access to the Vietnamese market. The new protocol came a decade after the Vietnamese government changed import regulations which necessitated a new protocol. The final adjustment was the removal of two pests from the official pest list and a new cold treatment protocol was set out in the phytosanitary import requirements by the Plant Protection Department of the Vietnamese Ministry of Agriculture and Rural Development. The Southern African Citrus Growers Association estimates that this market offers an export potential of approximately 15,000 tons of oranges.

India

Trial shipments to India: India currently requires land based cold treatment rather than in-transit for citrus exported by South Africa. Trial shipments from South Africa with in-transit cold treatment have been sent to India. Industry awaits a decision and if successful, South Africa may increase its citrus exports to this market.

Import Policies and Regulations

The following links provide useful resources and regulations pertaining to importing fruit into South Africa.

- Procedures for importing to South Africa: [Import Procedure](#)
- Maximum Residue Limits: [South African Citrus MRLs](#)
- Agricultural Pests Amendment Act No. 9 of 1992: [Agricultural Pest Act](#)
- South African Special Export Protocols/Programs/Directives: [Special-export-protocols](#)

Citrus exports to South Africa from Most Favored Nations face a 4 percent customs duty. **Table 17** reflects the applicable custom duties when exporting citrus and orange juice to South Africa.

Table 17: Custom Duties Applicable to Citrus Exports to South Africa

HS Code	Article description	Unit	Rate of Duty					
			General	EU	EFTA	SADC	MERCOSUR	AFCFTA
08.05	Citrus fruit, fresh or dried:							
0805.10	Oranges							
0805.10.10	Fresh	kg	4%	free	4%	free	4%	2.4%
0805.10.90	Other	kg	4%	free	4%	free	4%	2.4%
0805.40	Grapefruit, including pomelos:							
0805.40.10	Fresh	kg	4%	free	4%	free	4%	2.4%
0805.40.90	Other	kg	4%	free	4%	free	4%	2.4%
0805.50	Lemons (Citrus Limon, Citrus Limonium) and limes (Citrus aurantifolia, Citrus latifolia):							
0805.50.10	Fresh	kg	4%	free	4%	free	4%	2.4%
0805.50.90	Other	kg	4%	free	4%	free	4%	2.4%
0805.90	Other:							
0805.90.10	Fresh	kg	4%	free	4%	free	4%	2.4%
0805.90.90	Other	kg	4%	free	4%	free	4%	2.4%
2009.1	Orange juice							
2009.11	Frozen	kg	25%	free	25%	free	25%	25%
2009.12	Not frozen, of Brix value not exceeding 20	kg	25%	free	25%	free	25%	25%
2009.19	Other	kg	25%	free	25%	free	25%	25%

Source: South African Revenue Service (SARS) updated December 3, 2024

South Africa Fresh Produce Importers Association: The Fresh Produce Importers Association (FPIA) assists members with the importation of fresh fruit and vegetables in South Africa. Information on their members, contact details, and services can be found on the [FPIA website](#).

Sources:

Citrus Growers' Association (CGA) - <http://www.cga.co.za/>

Ministry of Agriculture, Land Reform and Rural Development (DALRRD) - <http://www.dalrrd.gov.za/>

South African Revenue Service (SARS) - <https://www.sars.gov.za/>

Attachments:

No Attachments