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Prepared By: Wellington Sikuka, Amy Caldwell

Approved By: Ali Abdi

Report Highlights:

The production of citrus is forecast to continue its strong growth in Marketing Year (MY) 2021/22, based on the increase in area planted, new-plantings coming into full production, available irrigation water, and normal weather conditions. Accessing new markets will be critical for South African producers, based on the growth in production, saturation in some traditional markets, global price decreases, and competition from other citrus producing countries. Duty-free exports of all citrus types to the United States under the African Growth Opportunity Act (AGOA) reached a peak of 91,402 MT in 2020, and are expected to continue their strong annual growth in 2021, as the United States is still considered a premium market.

Commodities:
Citrus, Other, Fresh
Grapefruit, Fresh
Oranges, Fresh
Tangerines/Mandarins, Fresh
Lemons, Fresh
Orange Juice

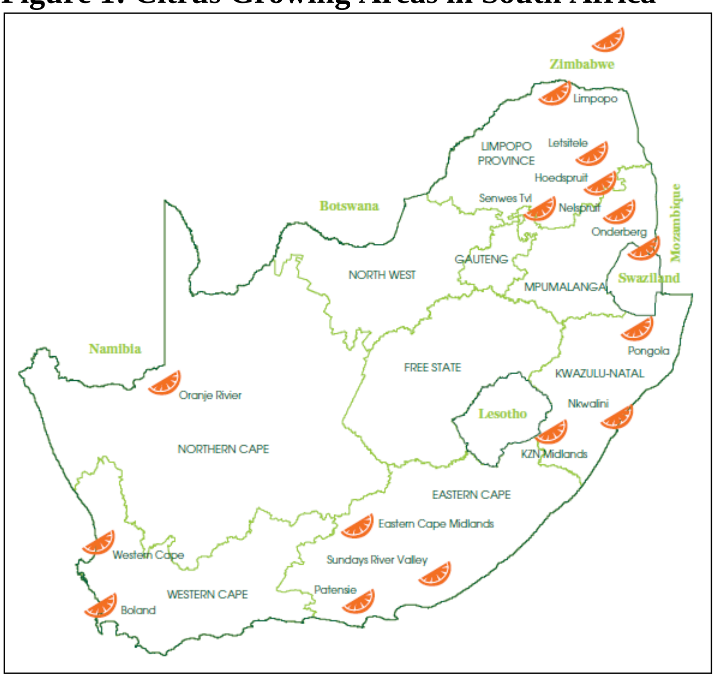
Exchange rate: Rand/US$ Exchange = 15.88 as of December 2, 2021
Marketing Year (MY) – January to December

Sources:
Citrus Growers Association - http://www.cga.co.za/
Summer Citrus South Africa - https://www.summercitrus.com/
Department of Agriculture, Land Reform and Rural Development - https://www.dalrrd.gov.za/
South African Revenue Services - https://www.sars.gov.za/

Background

Citrus in South Africa is grown across the country mainly in the Limpopo, Eastern Cape, Western Cape, Mpumalanga, Kwa Zulu Natal, Northern Cape, and North West provinces. Figure 1 shows the map of the citrus growing areas in South Africa. An estimated total of 98,700 hectares (ha) was planted to citrus in South Africa in 2021, a 5 percent increase from 94,329 ha in 2020. This growth trend is forecast to continue in 2022 to 101,500 ha, based on the significant investments and aggressive new plantings of soft citrus, lemons, and new varieties of oranges.

Figure 1: Citrus Growing Areas in South Africa



Source: Citrus Growers Association

The Limpopo province is the country's largest citrus production area, accounting for 40 percent of the total area planted, followed by the Eastern Cape (27 percent), Western Cape (19 percent), Mpumalanga (8 percent), KwaZulu Natal (3 percent), Northern Cape (2 percent), North West (1 percent), and Free State (less than 1 percent). The Western Cape and Eastern Cape have a cooler climate, which is more suited to produce navel oranges, lemons, limes, and tangerines/mandarins (soft citrus). The Mpumalanga, Limpopo and KwaZulu-Natal provinces have a warmer climate, which is better suited to the production of grapefruit and Valencia oranges.

While oranges are the biggest citrus type produced in South Africa and account for 48 percent of the total citrus area planted, there has been notable growth in soft citrus and lemon/lime area, which now account for 25 and 19 percent respectively. This growth is driven by the attractive investment returns, profit margins from soft citrus and lemon production, a spike in global demand, and favorable exchange rate. Table 1 shows the most common citrus varieties planted in South Africa. In 2016, the tango citrus variety, which was developed by the University of California Riverside, was granted the plant breeders right in South Africa and is expected to offer competition to the Nardocott variety. Table 2 shows that the citrus harvesting season typically ranges from February to September.

Table 1: Citrus Varieties

Citrus Type	**Varieties**
Grapefruit	Star Ruby, Marsh, Rose, Flame, Nelspruit Ruby (Nelruby), Flamingo
Oranges	**Valencias -** Delta, Midknight, Turkey, Oukloon (Olinda, Late), Du Roi, Benny. **Navels -** Palmer, Bahianinha, Washington, Robyn, Navelina, Lane Late, Newhall, Cambria, Cara, Rustenburg, Autumn Gold
Mandarins/ Tangarines	**Clementine -** Nules, Marisol, SRA, Oroval, Esbal, Clemenpons, Oronules. **Mandarin** – Tango, Nadorcott (Afourer), Nova, Or (Orri), Minneola, Mor, B17, Tambor, Naartjie, Thoro Temple, Sonet, B24 (African Sunset) **Satsuma -** Miho Wase, Owari, Kuno, Miyagawa Wase, Okitsu Wase, Aoshima.
Lemons/Lime	Eureka, Eureka SL, Lisbon, Limoneira, Genoa

Source: Citrus Growers Association

Table 2: South Africa Harvest Period for Citrus

Citrus	**Harvest Period**
Marsh Grapefruit	March to June
Star Ruby Grapefruit	April to September
Navel Oranges	March to July
Valencia Oranges	July to September
Mandarins/Tangarines	March to August
Lemons/Lime	February to September

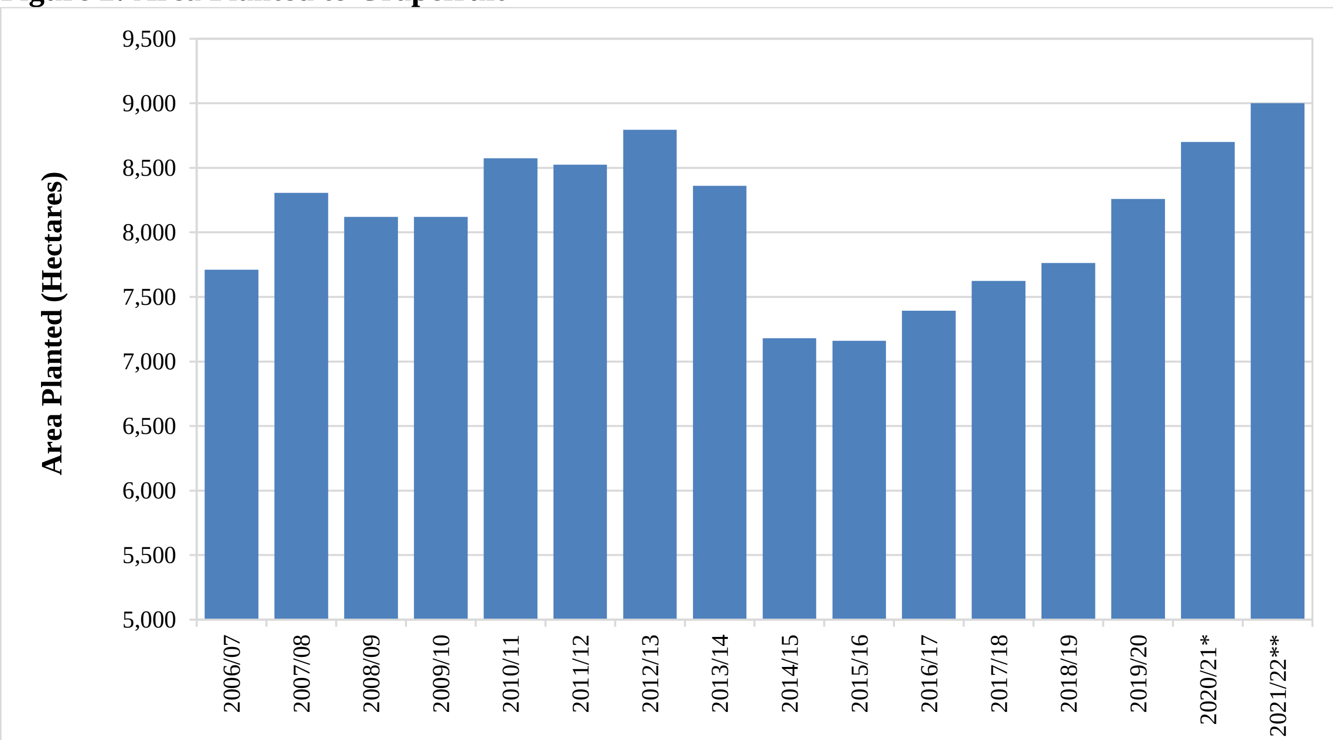
Source: Citrus Growers Association

Grapefruit, Fresh

Area Planted

The area planted to grapefruit is forecast to increase by 3 percent to 9,000 ha in Marketing Year (MY) 2021/22, from 8,700 ha in MY 2020/21, based on industry's response to the increasing global demand especially in Europe, Asia, and the Middle East. Figure 2 shows that grapefruit area planted has been increasing since MY 2014/15 and is forecast to reach the peak area planted of 9,000 ha in MY 2021/22.

Figure 2: Area Planted to Grapefruit



*Estimate. **Forecast.
Source: Citrus Growers Association Actual Data & Post Estimates

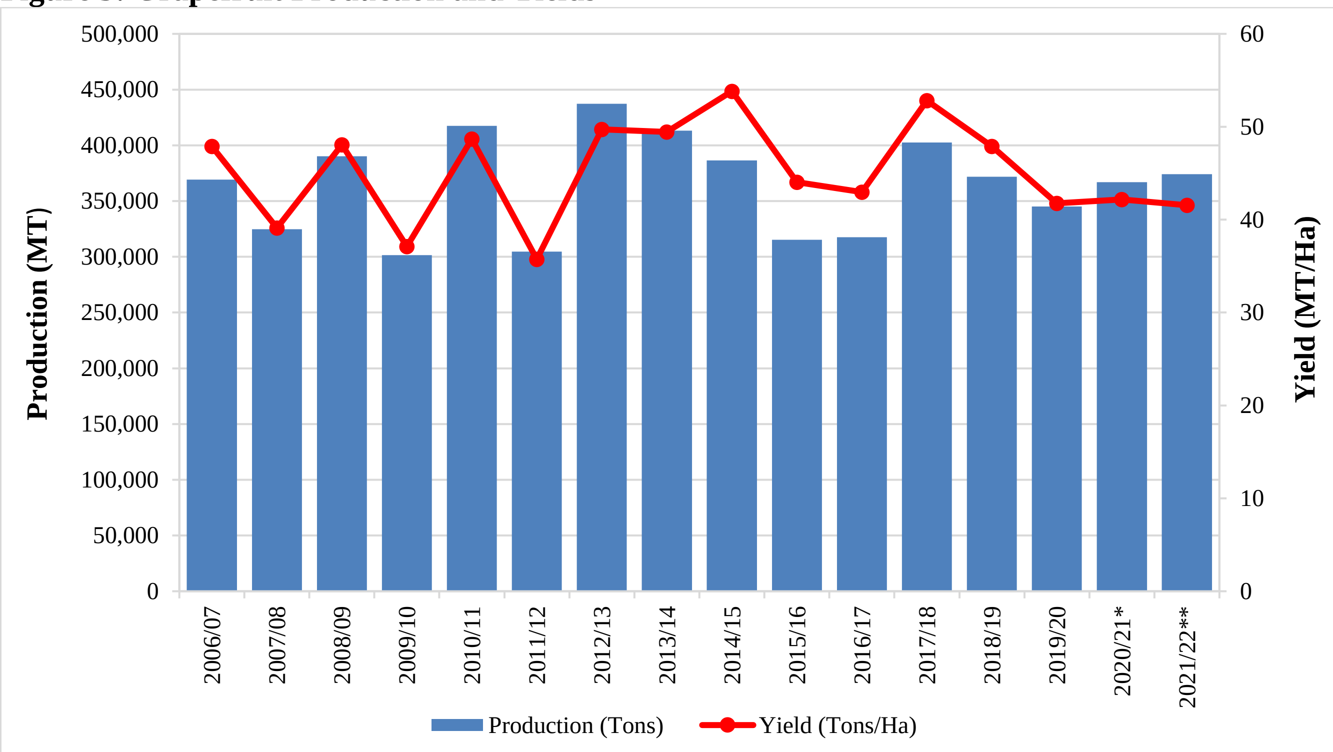
Limpopo is the leading growing region for grapefruit accounting for 56 percent of the total area planted, followed by Mpumalanga (21 percent), Kwa-Zulu Natal (11 percent), Northern Cape (7 percent), Eastern Cape (5 percent) and the Western Cape (less than 1 percent). The predominant variety planted is the Star Ruby accounting for 84 percent of the area planted due to its high global demand, followed by the Marsh variety at 11 percent. Other grapefruit varieties planted include Rose, Redheart, Pomelit, Java Shaddock, Flame, Nartia, and Fe 1(Jackson).

Production

The production of grapefruit is forecast to increase marginally by 2 percent to 374,000 Metric Tons (MT) in MY 2021/22, from 367,000 MT in MY 2020/21. This is based on normal weather conditions, good rainfall received in the main growing areas, and newly planted areas coming into full production. The MY 2021/22 summer rainfalls started normally in most growing regions, and Post anticipates that there will be sufficient irrigation water in the upcoming MY 2021/22. Grapefruit is normally harvested between March and September, and the impact of COVID-19 on production has been minimal to date.

Figure 3 shows grapefruit production and yields since MY 2006/07. Grapefruit production is cyclical in nature, where one or two seasons of upward growth in production are normally followed by downward production. Thus, there are possibilities that the increase in production in MY 2021/22, may be partially offset by the cyclical nature of grapefruit production, since MY 2020/21 experienced upward production.

Figure 3: Grapefruit Production and Yields



*Estimate. **Forecast.
Source: Citrus Growers Association Actual Data & Post Estimates.

Consumption

Grapefruit consumption is forecast to increase to 9,500 MT in MY 2021/22, from 8,500 MT in MY 2020/21. This is based on the rise in production, and to the growing awareness and perceived health benefits of grapefruit in the domestic market. Citrus has seen a surge in demand due to the assumed benefits of Vitamin C in boosting immunity against COVID-19.

Notably, grapefruit is not a very popular citrus fruit in the domestic market, with many consumers largely unfamiliar with its qualities and taste in South Africa. As a result, the fresh grapefruit per capita consumption in South Africa is still relatively low at below 1 kg per annum because the majority of the population has not acquired the taste for grapefruit.

Processing

On average, 17-29 percent of total grapefruit produced is used for processing. Post forecasts that the grapefruit delivered for processing will decrease by 6 percent to 65,000 MT in MY 2021/22, from 69,000 MT in MY 2020/21, based on the increase in fresh exports which offer better prices to producers. Grapefruit is processed to juice and concentrate, the majority of which is exported to Europe. The left-over pulp from commercial juice extraction is an important source of grapefruit oil which is used as a flavoring agent in many soft drinks. 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. The grapefruit peel oil is used in scented fragrances.

Exports

Post forecasts that grapefruit exports will increase by 3 percent to 300,000 MT in MY 2021/22, from 290,000 MT in MY 2020/21, based on the rise in production and continued demand for citrus in global markets for perceived health benefits. The MY 2020/21 exports were revised upwards to 290,000 MT, based on the pace of exports up to September 2021. Despite the global shipping crisis, civil unrest in Kwa-Zulu Natal, and cyber-attacks in the Transnet port systems, the industry managed to export record levels. This may be due to industry-coordinated efforts and a surge in citrus demand due to the assumed benefits of Vitamin C in boosting immunity against COVID-19. Despite increased export volumes, the increases in logistical costs may lower the profit margins from citrus production.

Europe is the largest market for South African grapefruit exports, accounting for 42 percent of total exports in 2020, followed by Asia at 38 percent. Although South Africa has a free trade agreement with the European Union (EU) which allows duty free access for its citrus exports, South Africa continues to face challenges in the EU market due to Citrus Black Spot (CBS) and False Coddling Moth (FCM). Industry estimates that it is costing South Africa almost R4 Billion ($253 million) in these additional phytosanitary measures and to comply with the CBS and FCM requirements in the EU market. The costly measures which have allowed South Africa to comply with CBS and FCM requirements to maintain and grow their EU market access include pre-export inspections, strict spraying protocols, field surveillance programs, adherence to shipping protocols, and comprehensive CBS risk management systems riven by the industry and DALRRD. For more information, see the Policies and Regulations section.

In 2021, South Africa (“Fruit South Africa”) and China (Chamber of Commerce) signed a Memorandum of Understanding (MOU) to promote greater cooperation and statistical information exchange between the two countries` fresh fruit industries. Year to date grapefruit exports to China are already up 63 percent to 77,039 MT in 2021, from 48,083 MT in 2020.

While total volumes are still low, grapefruit exports to the United States have been growing exponentially by an average of 65 percent per annum in the past five years, from 76 MT in MY 2012/13, to 5,310 MT in MY 2019/20. Year to date exports to the United States are already up by 66 percent to 8,827 MT in 2021. Grapefruit exports to the United States are expected to continue rising based on the growing demand, good quality fruit, and the continuation of duty-free access through the African

Growth and Opportunity Act (AGOA). The Middle East, Canada, and Africa are also growing markets for South African grapefruit. Exports to Africa are currently restricted by limited infrastructure.

Table 3: South African Fresh Grapefruit Exports

South Africa Exports to the World							
Commodity: 080540, Grapefruit, Fresh Or Dried							
Annual & YTD Series							
Partner Country	Unit	Calendar Year			January-September		
		2018	2019	2020	2020	2021	%Δ 2021/20
World	T	288,155	258,423	244,334	242,600	287,863	19%
Netherlands	T	68,184	75,083	71,975	71,953	73,056	2%
China	T	54,530	36,439	48,083	47,229	77,039	63%
Japan	T	37,688	30,072	27,046	26,826	30,029	12%
Russia	T	20,064	14,128	21,931	21,861	21,962	0%
Hong Kong	T	13,761	12,130	13,603	13,270	12,746	-4%
United Kingdom	T	12,275	11,779	10,498	10,498	10,306	-2%
Italy	T	12,858	10,434	9,399	9,399	11,118	18%
Canada	T	9,504	6,665	6,252	6,252	8,019	28%
United States	T	4,729	5,347	5,310	5,310	8,827	66%
Portugal	T	7,768	7,384	4,522	4,522	5,475	21%
South Korea	T	9,732	6,918	4,113	4,095	4,464	9%
United Arab Emirates	T	4,156	4,128	3,517	3,471	4,609	33%
Eswatini	T	4,861	7,459	3,339	3,301	2,030	-39%
Taiwan	T	3,268	2,233	2,429	2,429	3,536	46%
Ukraine	T	1,427	1,339	2,029	2,029	1,736	-14%
Germany	T	3,912	4,135	968	968	719	-26%
Romania	T	694	267	818	818	685	-16%
Saudi Arabia	T	1,168	1,033	748	748	632	-16%
France	T	4,328	5,106	712	699	775	11%
Greece	T	1,535	1,326	647	647	1,093	69%
Singapore	T	729	688	624	607	787	30%
Iraq	T	93	595	557	556	1,186	113%
Ireland	T	1,011	3,321	516	516	673	30%
Malaysia	T	1,085	614	483	468	829	77%
Sweden	T	481	2,857	481	481	517	7%
Bulgaria	T	914	751	429	429	438	2%
Denmark	T	0	481	421	421	59	-86%
Lithuania	T	624	550	381	381	285	-25%
Spain	T	1,105	1,053	295	295	842	185%
Georgia	T	178	225	283	283	299	6%
Belgium	T	1,735	113	272	272	282	4%
Mauritius	T	584	516	259	235	214	-9%
Qatar	T	264	281	229	229	347	52%

Source: Trade Data Monitor

Imports

South Africa is not a major importer of grapefruit. Imports mainly originate from Eswatini (formerly Swaziland), Spain, Turkey, and Israel to fill the small demand gap towards the end of the season. Eswatini benefits from duty free access to South Africa under the Southern African Customs Union (SACU) and low transportation costs as a neighboring country.

Table 4: South African Fresh Grapefruit Imports

South Africa Imports from the World							
Commodity: 080540, Grapefruit, Fresh Or Dried							
Annual & YTD Series							
		Calendar Year			January-September		
Partner Country	Unit	2018	2019	2020	2020	2021	%Δ 2021/20
World	T	2,703	1,476	1,325	1,052	1,123	7%
Eswatini	T	2,083	685	753	753	262	-65%
Turkey	T	93	122	220	45	478	962%
Spain	T	374	382	196	166	259	56%
Israel	T	134	248	127	59	124	110%
Egypt	T	0	0	29	29	0	-100%

Source: Trade Data Monitor

Prices

Table 5 shows the local, export, and processed market prices for grapefruit since MY 2004/05. Grapefruit prices for the export and local markets have increased over the past five years based on the weakening rand to the U.S. dollar exchange rate. Processed and local market prices tend to fluctuate based on supply. Export prices continue to provide the highest prices for South African grapefruit, which explains why the industry is export oriented.

Table 5: Grapefruit Prices

MY	Local Market Average Price Rand/ MT	Export Market Average Price Rand/ MT	Processed Average Price Rand/ MT
2004/05	1,487	925	325
2005/06	1,493	1,764	386
2006/07	1,796	2,712	237
2007/08	2,283	3,658	152
2008/09	1,839	1,846	240
2009/10	1,437	4,351	268
2010/11	2,107	3,723	383
2011/12	2,275	4,371	377
2012/13	2,352	5,060	376
2013/14	3,020	5,247	401
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

Source: CGA

USD $1 = Rand R15.88 (as of December 2, 2021)

Table 6: Production, Supply and Distribution of Grapefruit, Fresh

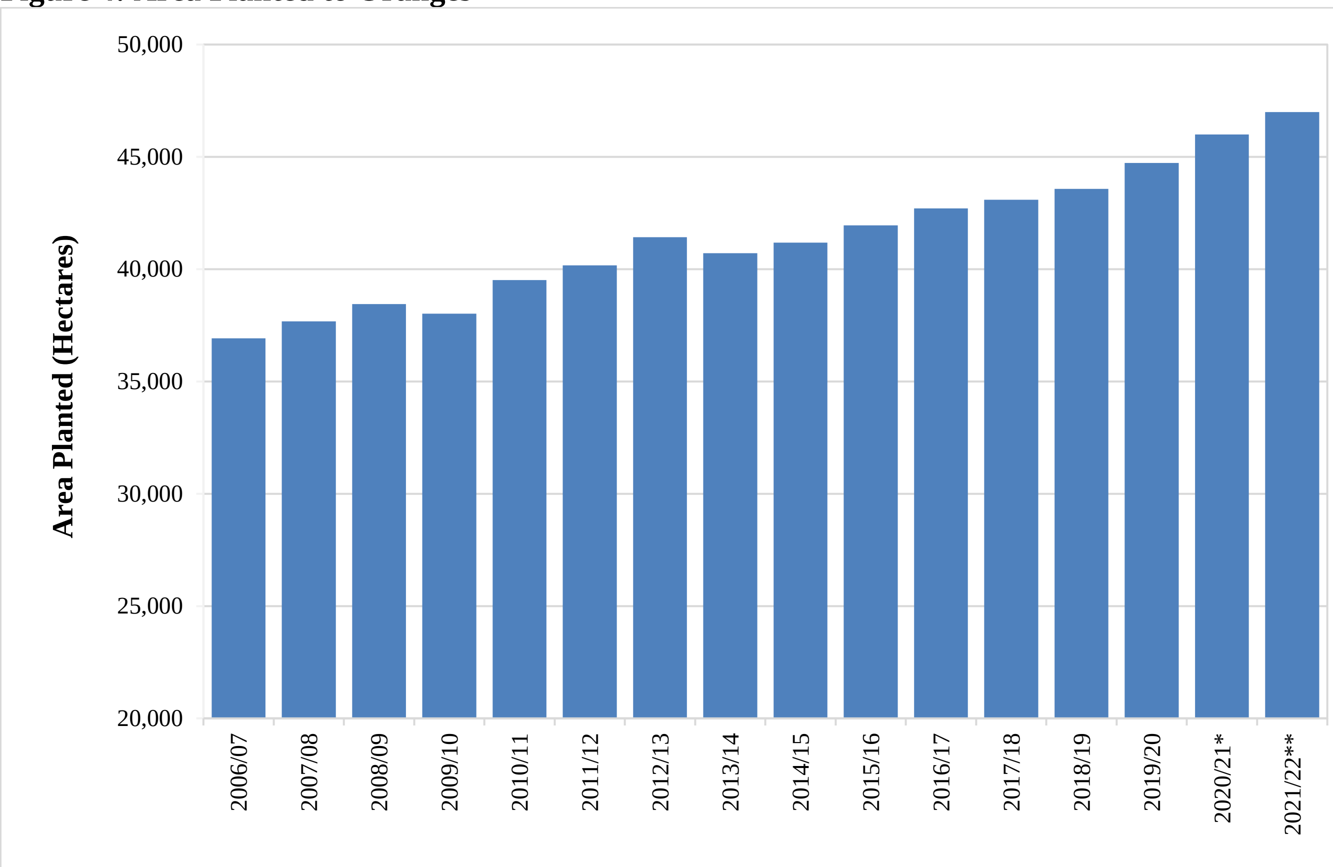
Grapefruit, Fresh	2019/2020		2020/2021		2021/2022	
Market Year Begins	Jan 2020		Jan 2021		Jan 2022	
South Africa	USDA Official	New Post	USDA Official	New Post	USDA Official	New Post
Area Planted (HECTARES)	8259	8259	8700	8700	0	9000
Area Harvested (HECTARES)	7700	7700	7900	7900	0	8100
Bearing Trees (1000 TREES)	7600	7600	7800	7800	0	8000
Non-Bearing Trees (1000 TREES)	900	900	920	920	0	950
Total No. Of Trees (1000 TREES)	8500	8500	8720	8720	0	8950
Production (1000 MT)	345	345	373	367	0	374
Imports (1000 MT)	1	1	1	1	0	1
Total Supply (1000 MT)	346	346	374	368	0	375
Exports (1000 MT)	244	244	260	290	0	300
Fresh Dom. Consumption (1000 MT)	8	8	9	9	0	10
For Processing (1000 MT)	94	94	105	69	0	65
Total Distribution (1000 MT)	346	346	374	368	0	375
(HECTARES) ,(1000 TREES) ,(1000 MT)						

Oranges, Fresh

Area Planted

The area planted with oranges is forecast to grow by 2 percent to 47,000 ha in MY 2021/22, from 46,000 ha in MY 2020/21, based on the increase in area planted to seedless orange varieties and late maturing varieties. This rise will be partially offset by the industry shift from orange production to soft citrus in the Western Cape and Limpopo growing regions. Figure 4 below shows the growing trend in the area planted to oranges since MY 2006/07.

Figure 4: Area Planted to Oranges



*Estimate. **Forecast.
Source: Citrus Growers Association Actual Data & Post Estimates.

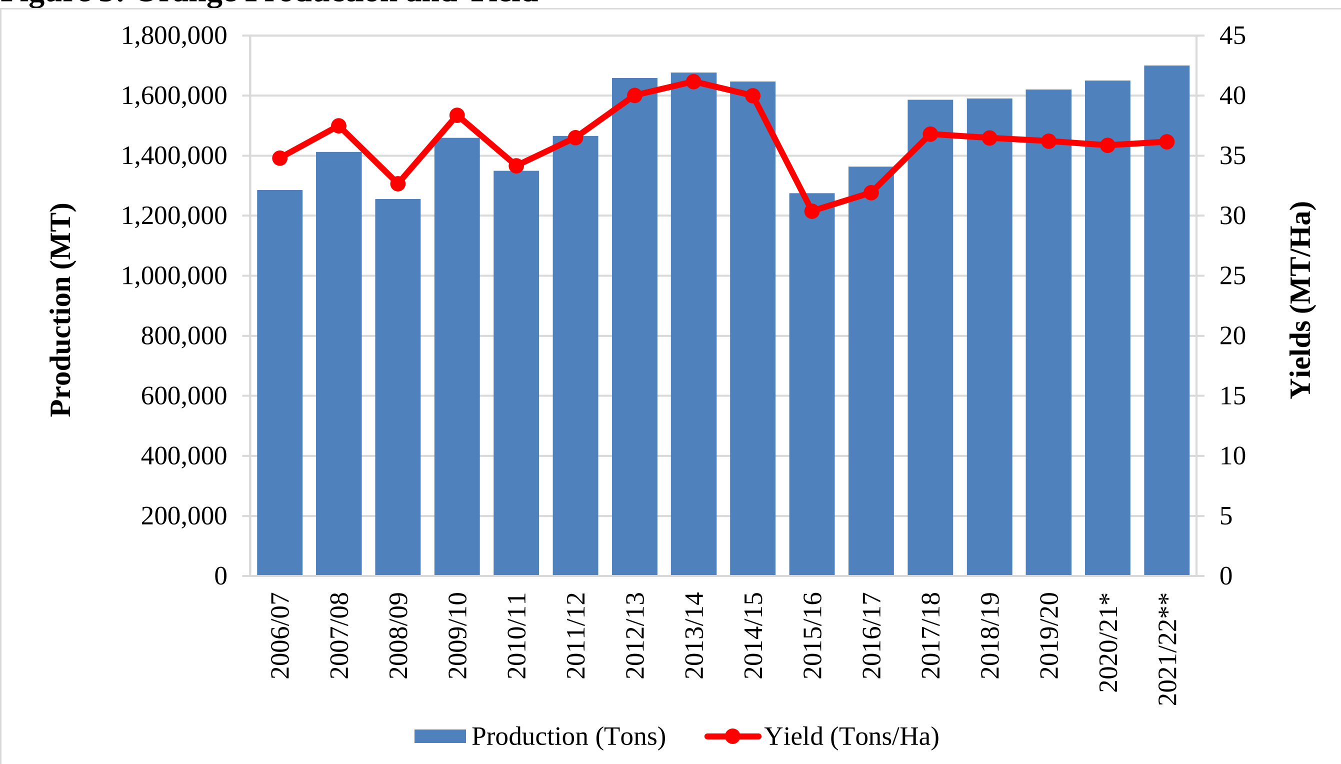
Limpopo is the leading growing region for oranges accounting for 48 percent of the total area planted, followed by the Eastern Cape (26 percent), Western Cape (15 percent), Mpumalanga (7 percent), Northern Cape (2 percent), KwaZulu Natal (2 percent), North West Province (less than 1 percent), and the Free State (less than 1 percent). Valencia's account for about 64 percent of the total area planted to oranges, and Navels account for 36 percent. The predominant variety planted is the Midnight accounting for 25 percent of the total area planted, followed by the Valencia Late variety at 12 percent, Delta (10 percent), Turkey (7 percent), Bennie (7 percent), Palmer (6 percent), Cambria (6 percent), Bahianinha (5 percent), and Washington (4 percent).

Production

The production of oranges is forecast to increase by 3 percent to 1.70 million MT in MY 2021/22, from 1.65 million MT in MY 2020/21. This increase is based on normal weather conditions, good rainfall in the main growing regions, stable yields, and the rise in area planted. Oranges are normally harvested between March and September, and the impact of COVID-19 to production, harvest, and labor has been minimal to date.

Figure 5 shows the production and yield of oranges since MY 2006/07. Orange production has only grown marginally since MY 2017/18, due to industry shifts to soft citrus production and stable yields.

Figure 5: Orange Production and Yield



*Estimate, **Forecast.
Source: Citrus Growers Association Actual Data & Post Estimates.

Consumption

Post forecasts that the consumption of oranges will increase by 6 percent to 95,000 MT in MY 2021/22, from 90,000 MT in MY 2020/21, based on the rise in production, high available supply and increase in demand due to the associated benefits of Vitamin C in boosting immunity against COVID-19. South Africa prioritizes supplying export markets, and the surplus oranges or those that do not meet the export standards are supplied to the fresh domestic and processed markets. Fresh oranges are the most popular citrus consumed in South Africa with a per capita consumption of about 1.5 kg per annum.

Exports

The export of oranges is forecast to rise by 3 percent to 1.24 million MT in MY 2021/22, from 1.20 million MT in MY 2020/21, based on the increase in production, and continued spike in demand due to the perceived benefits of Vitamin C in boosting immunity against COVID-19. The MY 2020/21 exports of oranges are revised down to 1.20 million MT, based on the slower pace of exports through September 2021, associated with disruptions to the supply chain from the main growing region of Limpopo due to civil unrest in Kwa-Zulu Natal and cyber-attacks at the Durban port.

The EU remains South Africa's largest export market for oranges, accounting for 44 percent of the total export market. However, orange exports are also impacted by the CBS and FCM challenges in the EU market. While the industry has gone to great lengths and expense to ensure compliance with EU requirements, in cases when there are high interceptions, South Africa has in the past voluntarily suspended all exports or exported only from CBS areas to prevent the EU from imposing more stringent measures.

The exports to Asia and the Middle East have grown steadily over the years due to the industry's focus on growing these markets.

Exports to the United States are expected to continue based on the duty-free access under the African Growth and Opportunity Act (AGOA). However, a gradual shift from oranges to easy peelers and soft citrus exports is expected over time, as South African farmers supplying the U.S. market have been re-planting their orchards from oranges to soft citrus and new orange varieties in response to market preferences and the higher premium received in the U.S. market. Exports to the United States increased to a record 53,121 MT in the 2020, based on available production and industry marketing efforts. Exports to the U.S. in 2021 are expected to be slightly lower based on the pace of exports up to September 2021 and logistical challenges faced by the industry in 2021.

Table 7: South African Fresh Orange Exports

South Africa Exports to the World							
Commodity: 080510, Oranges, Fresh							
Annual & YTD Series							
Partner Country	Unit	Calendar Year			January-September		
		2018	2019	2020	2020	2021	%Δ 2021/20
World	T	1,278,935	1,186,426	1,259,714	1,177,367	1,099,649	-6.6
Netherlands	T	233,619	224,343	288,463	272,624	263,214	-3.45
Portugal	T	79,998	58,390	104,774	104,238	69,407	-33.41
United Arab Emirates	T	80,989	75,602	89,527	80,082	76,420	-4.57
China	T	109,995	150,388	81,289	78,603	68,669	-12.64
Russia	T	87,147	71,665	79,408	76,038	63,404	-16.62
United Kingdom	T	75,954	62,362	72,879	69,304	59,744	-13.79
Bangladesh	T	59,399	44,041	66,001	56,925	40,127	-29.51
Saudi Arabia	T	84,448	83,587	61,823	59,489	59,411	-0.13
Hong Kong	T	66,255	54,827	55,459	49,790	43,035	-13.57
United States	T	45,120	30,990	53,121	49,952	42,478	-14.96
Italy	T	42,667	31,355	41,244	40,413	41,449	2.56

Canada	T	36,722	29,957	38,239	33,802	32,372	-4.23
Malaysia	T	30,704	32,601	29,461	25,395	31,562	24.28
Iraq	T	26,413	34,692	28,465	28,073	35,385	26.05
Oman	T	10,339	9,926	13,171	10,057	9,939	-1.17
India	T	9,705	10,044	11,500	11,393	18,044	58.38
Kuwait	T	21,029	15,062	10,258	8,848	12,336	39.42
Singapore	T	14,384	9,343	9,521	8,076	8,301	2.79
Qatar	T	12,287	10,389	8,800	7,762	8,687	11.92
Germany	T	16,276	13,073	7,442	7,432	6,237	-16.08
France	T	17,456	18,186	7,421	6,736	4,719	-29.94
Sweden	T	6,141	7,167	6,981	6,776	8,606	27.01
Ukraine	T	3,686	3,772	6,722	6,695	6,196	-7.45
Ireland	T	6,136	5,405	6,314	6,209	5,594	-9.9
Botswana	T	3,310	3,446	5,742	5,358	4,333	-19.13

Source: Trade Data Monitor

Imports

The import of oranges is forecast to remain flat at about 3,000 MT in MY 2021/22, based on the high available supply. Relatively small volumes of oranges are usually imported into South Africa in November and December to close supply gaps and satisfy year-end demand.

Table 8: South African Fresh Orange Imports

South Africa Imports from the World							
Commodity: 080510, Oranges, Fresh							
Annual & YTD Series							
Partner Country	**Unit**	**Calendar Year**			**January-September**		
		2018	**2019**	**2020**	**2020**	**2021**	**%Δ 2021/20**
World	T	3,672	3,834	2,147	1,853	2,353	26.98
Spain	T	645	991	1,063	834	810	-2.88
Eswatini	T	2,270	2,671	720	720	1,322	83.61
Egypt	T	136	52	161	161	149	-7.45
Sweden	T	0	0	64	0	0	0
Morocco	T	0	0	46	46	0	-100
Israel	T	0	0	37	37	19	-48.65
Unidentified	T	51	69	29	29	23	-20.69
Other	T	570	0	26	26	26	0
Portugal	T	0	24	0	0	0	0

Source: Trade Data Monitor

Prices

Table 9 shows the local, export and processed market prices of oranges. The export market provides the highest prices, mainly due to the weaker rand/US$ exchange rate. As a result, the South African citrus industry is export-oriented because the domestic and processed markets offer lower prices.

Table 9: Oranges Prices

MY	Local Market Average Price Rand/ MT	Export Market Average Price Rand/ MT	Processed Average Price Rand/ MT
2003/04	1,090	2,425	274
2004/05	1,111	1,580	229
2005/06	1,025	1,843	301
2006/07	1,278	2,832	354
2007/08	1,430	3,443	419
2008/09	1,483	3,235	268
2009/10	1,599	4,043	349
2010/11	1,762	4,691	529
2011/12	1,895	4,318	564
2012/13	2,054	4,975	591
2013/14	2,230	5,781	618
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

Source: CGA

Table 10: Production, Supply and Distribution of Oranges, Fresh

Oranges, Fresh	2019/2020		2020/2021		2021/2022	
Market Year Begins	Jan 2020		Jan 2021		Jan 2022	
South Africa	USDA Official	New Post	USDA Official	New Post	USDA Official	New Post
Area Planted (HECTARES)	44728	44728	46000	46000	0	47000
Area Harvested (HECTARES)	40500	40500	41000	41000	0	42000
Bearing Trees (1000 TREES)	39500	39500	40000	40000	0	41000
Non-Bearing Trees (1000 TREES)	4300	4300	4400	4400	0	4600
Total No. Of Trees (1000 TREES)	43800	43800	44400	44400	0	45600
Production (1000 MT)	1620	1620	1650	1650	0	1700
Imports (1000 MT)	2	2	2	3	0	3
Total Supply (1000 MT)	1622	1622	1652	1653	0	1703
Exports (1000 MT)	1260	1260	1285	1200	0	1240
Fresh Dom. Consumption (1000 MT)	80	80	82	90	0	95
For Processing (1000 MT)	282	282	285	363	0	368
Total Distribution (1000 MT)	1622	1622	1652	1653	0	1703
(HECTARES) ,(1000 TREES) ,(1000 MT)						

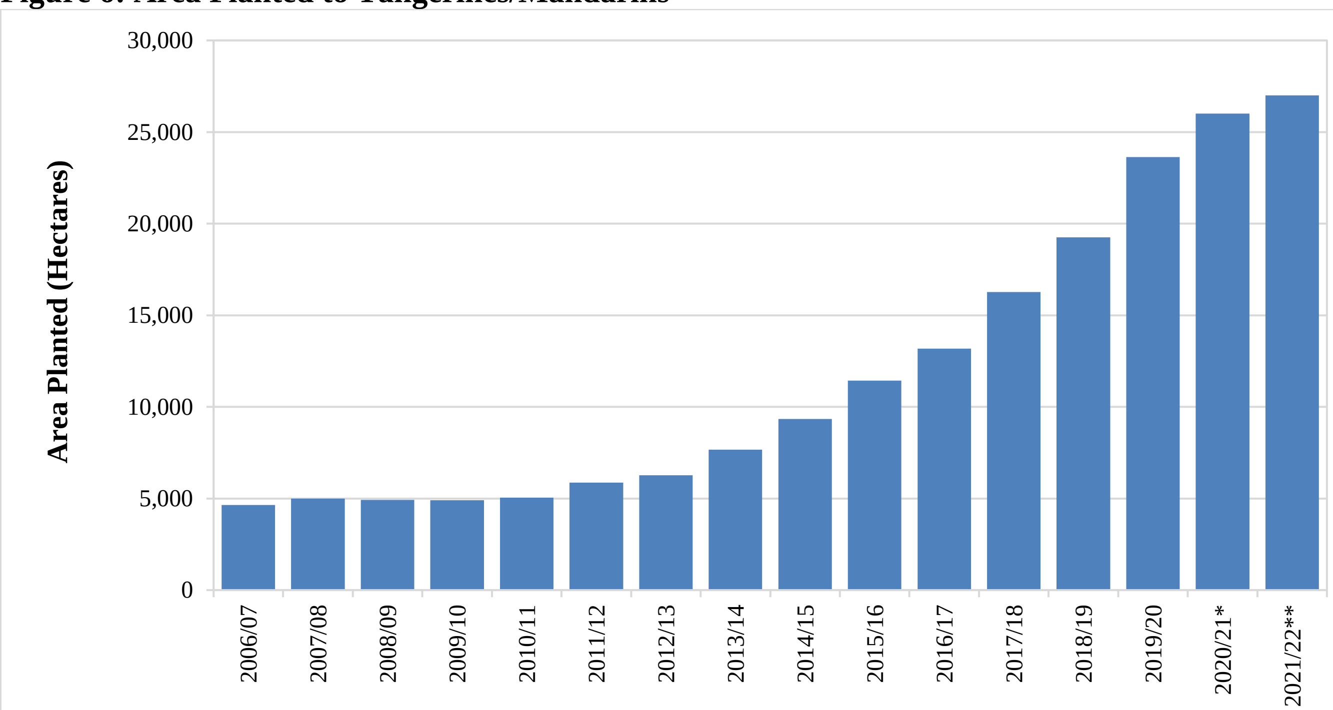
Tangerines/Mandarins (Soft Citrus), Fresh

Area Planted

The area planted to tangerines/mandarins (soft citrus) is forecast to increase by 4 percent to 27,000 ha in MY 2021/22, from 26,000 ha in MY 2020/21. This is based on growers responding to the increasing global demand for seedless tangerines/mandarins, and high margins from soft citrus relative to other citrus types. Figure 6 shows that the area planted with tangerines/mandarins was flat from the MY 2006/07 to MY 2010/11. Thereafter, there has been significant annual increases in area planted, due to the increased investment in new orchards in response to global demand and high revenue. Most tangerine/mandarin production are under shed-netting to protect the fruit from adverse conditions such as hail or sun damage in some areas and as part of water management techniques.

The predominant variety planted in South Africa is the Nardocott, accounting for 22 percent of the area planted, followed by the Nules variety at 12 percent, Nova (11 percent), Tango (10 percent), Orri (8 percent) and Leanri (8 percent).

Figure 6: Area Planted to Tangerines/Mandarins



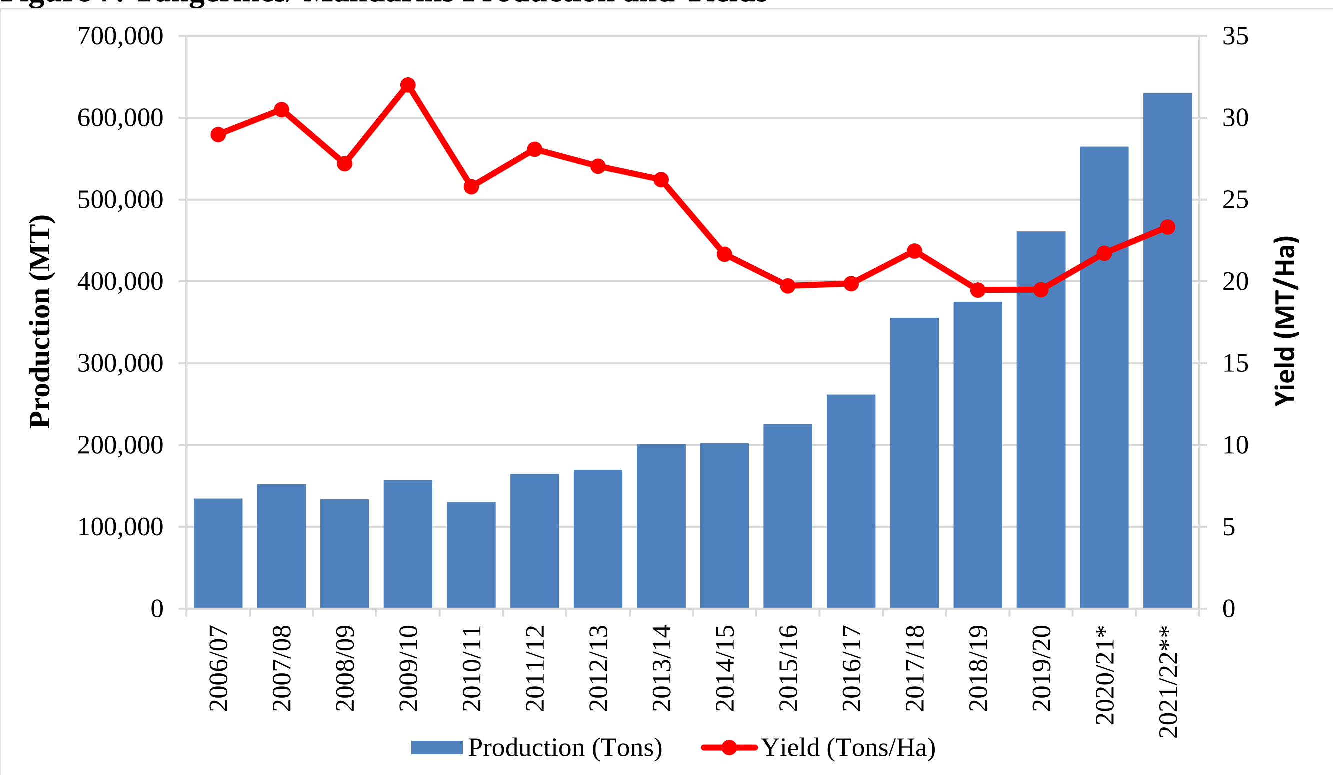
*Estimate. **Forecast.
Source: Citrus Growers Association Actual Data & Post Estimates.

Production

The production of tangerines/mandarins is anticipated to continue its aggressive growth and is forecast to increase by 11 percent to 630,000 MT in MY 2021/22, from 567,000 MT in MY 2020/21. This is based on the rise in area planted, improvement in yields, normal weather conditions, improved winter rainfall received in the main production area of the Western Cape, and the high level of new plantings in the past years coming into full production. The COVID-19 pandemic has had a minimal impact on production.

There is a growing trend of farmers aggressively establishing new orchards under netting which has improved the water efficiency, yields and the overall quality of soft citrus production in South Africa. In addition, there is an increasing trend of late varieties being planted, which has seen the peak harvest of soft citrus shift from week 20 (beginning of May) to between weeks 21 to 30 (mid-May to July). About 37 percent of tangerines/mandarins are produced in the Western Cape, followed by 27 percent in the Eastern Cape and 26 percent in Limpopo. The Western Cape is a winter rainfall region, and the 2020 winter rainfall will only be used for irrigation in the following year in 2021. Improved dam levels in the Western Cape in 2021 are expected to have a positive impact to MY 2021/22 crop.

Figure 7: Tangerines/ Mandarins Production and Yields



*Estimate. **Forecast.
Source: Citrus Growers Association Actual Data & Post Estimates.

Consumption

The consumption of tangerines/mandarins is forecast to increase by 3 percent to 30,000 MT in MY 2021/22, from 29,000 MT in MY 2020/21, due to the increase in production and a surge in demand driven by the perceived health benefits of Vitamin C in fighting COVID-19. The industry prioritizes export markets for soft citrus and only supplies surplus fruit to the local market. However, some high-end retail chains such as Woolworths also sell some export-grade citrus to the domestic consumers. The increased use of netting has reduced the number of defects found in soft citrus, thereby decreasing the percentage of non-export grade fruit produced and available on the local market.

Exports

The export of tangerines/mandarins is forecast to increase by 12 percent to 550,000 MT in MY 2021/22, from 490,000 MT in MY 2020/21, based on the increase in production, the industry strategy of prioritizing export markets over domestic markets, and a surge in demand due to the assumed benefits of Vitamin C in boosting immunity against COVID-19.

Demand for tangerines/mandarins remains strong in the export markets, with the United Kingdom as the leading export market accounting for 23 percent of the total exports, followed by the Netherlands (21 percent), the United States (8 percent), Russia (8 percent), and the United Arab Emirates (6 percent). Tangerines/mandarins exports are not impacted by South Africa's CBS challenges in the EU market.

Exports to the United States under the AGOA have grown by an average of 35 percent per year over the past four seasons, from 7,444 MT in MY 2013/14, to 32,458 MT in MY 2019/20. This growth trend is expected to continue based on the rising U.S. market preference for easy peelers, and continued duty-free market access under AGOA.

Table 11: South African Fresh Tangerines/Mandarins Exports

South Africa Exports to the World							
Commodity: 080520,080521,080522,080529, Mandarins (Including Tangerines And Satsumas); Clementines, Wilkings And Similar Citrus Hybrids, Fresh Or Dried/Mandarins (including tangerines and satsumas)/Clementines/Other citrus hybrids							
Annual & YTD Series							
Partner Country	Unit	Calendar Year			January-September		
		2018	2019	2020	2020	2021	%Δ 2021/20
World	T	260,850	295,607	389,467	380,768	480,789	26%
United Kingdom	T	69,344	75,941	87,938	86,263	82,864	-4%
Netherlands	T	51,404	61,403	82,522	80,977	103,756	28%
United States	T	13,695	18,690	32,458	32,187	40,345	25%
Russia	T	28,425	23,709	32,379	31,735	37,305	18%
United Arab Emirates	T	10,457	13,022	24,136	23,137	37,949	64%
Bangladesh	T	6,170	15,760	24,130	22,925	32,009	40%
Canada	T	11,554	11,972	18,898	18,580	18,885	2%
China	T	6,520	9,827	13,785	13,602	24,098	77%
Portugal	T	6,309	6,275	7,762	7,713	9,637	25%
Hong Kong	T	11,427	12,366	7,298	7,189	6,610	-8%
Saudi Arabia	T	5,412	6,950	6,658	6,574	9,063	38%
Ireland	T	6,889	4,853	5,265	5,244	7,797	49%
Iraq	T	947	3,336	4,886	4,886	10,064	106%
Germany	T	3,307	3,683	4,184	4,183	2,957	-29%
Senegal	T	832	2,540	3,958	3,937	4,883	24%
France	T	2,559	2,690	3,574	3,409	4,891	43%
Malaysia	T	3,314	3,762	3,000	2,897	5,727	98%
Norway	T	788	1,359	2,713	2,713	3,825	41%

Singapore	T	2,413	1,260	2,297	2,238	2,520	13%
Qatar	T	969	1,054	2,063	1,993	2,604	31%
Mauritius	T	1,556	1,989	1,988	1,803	1,700	-6%
Kuwait	T	1,803	2,293	1,916	1,715	4,183	144%
Oman	T	340	542	1,501	1,435	1,841	28%
Italy	T	585	430	1,435	1,435	2,414	68%
Finland	T	526	635	1,338	1,338	945	-29%
Taiwan	T	158	374	1,142	1,097	4,350	297%
Bahrain	T	602	743	1,007	986	1,503	52%
Nigeria	T	171	256	750	603	887	47%
Denmark	T	47	394	690	690	387	-44%
Namibia	T	363	682	648	582	606	4%
India	T	550	550	596	572	2,798	389%
Sweden	T	140	49	535	535	653	22%
Gabon	T	489	595	534	504	436	-13%

Source: Trade Data Monitor

Imports

Post forecasts that MY 2021/22 imports of tangerines/mandarins will remain flat at 3,000 MT. South African imports satisfy off season demand and are minimal.

Table 12: South African Fresh Tangerines/Mandarins Imports

South Africa Imports from the World							
Commodity: 080520,080521,080522,080529, Mandarins (Including Tangerines And Satsumas); Clementines, Wilkings And Similar Citrus Hybrids, Fresh Or Dried/Mandarins (including tangerines and satsumas)/Clementines/Other citrus hybrids							
Annual & YTD Series							
Partner Country	**Unit**	**Calendar Year**			**January-September**		
		2018	**2019**	**2020**	**2020**	**2021**	**%Δ 2021/20**
World	T	1,246	1,833	2,446	2,146	2,741	28%
Spain	T	712	1,524	1,466	1,215	806	-34%
Morocco	T	0	47	793	769	1,830	138%
Israel	T	346	181	105	105	56	-47%
Other	T	73	42	47	24	0	-100%
United Kingdom	T	0	0	22	22	0	-100%
Egypt	T	43	39	12	12	21	75%

Source: Trade Data Monitor

Prices

Export markets provide the highest prices for South African soft citrus as shown in Table 13.

Table 13: Tangerines/Mandarins Prices

MY	Local Market Average Price Rand/ MT	Export Market Average Price Rand/ MT	Processed Average Price Rand/ MT
2003/04	1,705	3,638	251
2004/05	1,279	3,977	165
2005/06	2,133	4,423	188
2006/07	2,543	3,758	214
2007/08	3,038	4,965	367
2008/09	3,042	4,635	275
2009/10	3,805	5,618	214
2010/11	4,091	5,637	315
2011/12	3,760	7,133	419
2012/13	5,159	8,542	334
2013/14	5,442	10,004	465
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

Source: CGA

Table 14: Production, Supply and Distribution of Tangerines/Mandarins, Fresh

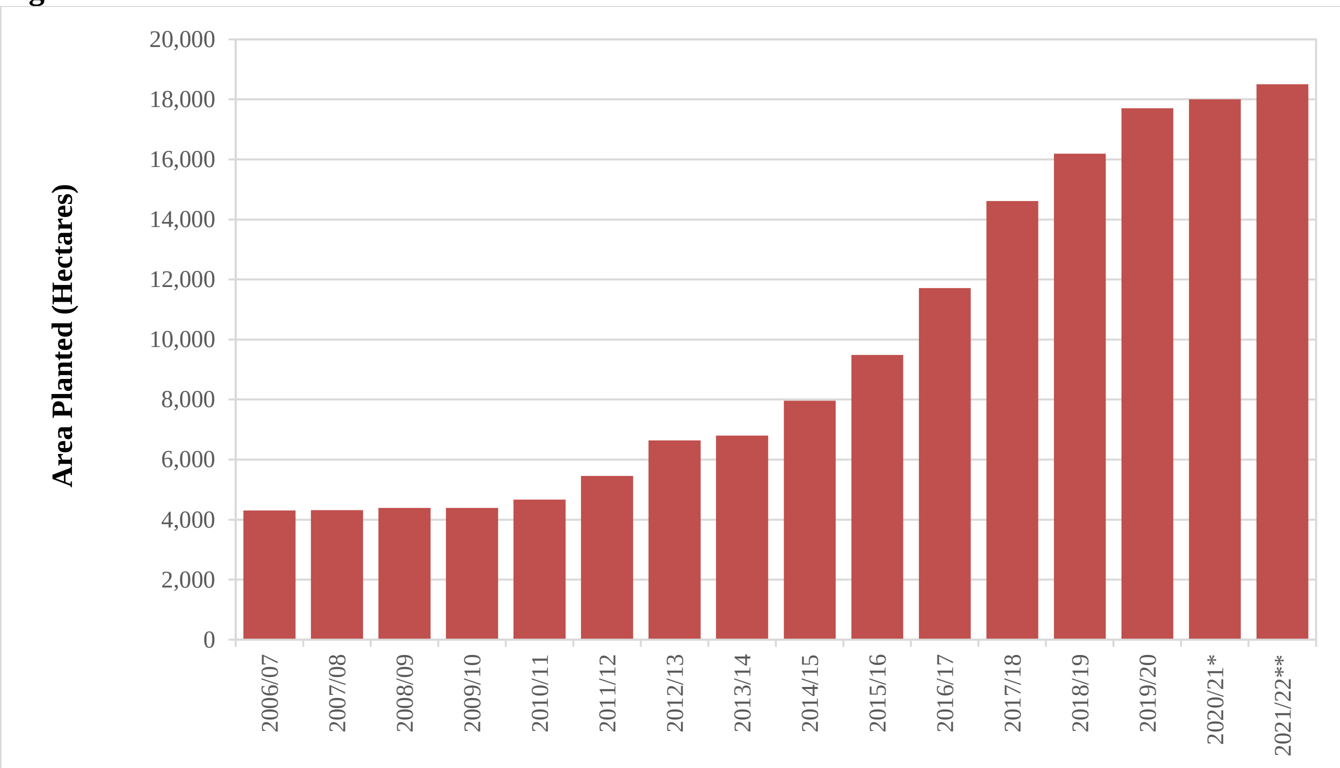
Tangerines/Mandarins, Fresh	2019/2020		2020/2021		2021/2022	
Market Year Begins	Jan 2020		Jan 2021		Jan 2022	
South Africa	USDA Official	New Post	USDA Official	New Post	USDA Official	New Post
Area Planted (HECTARES)	23635	23635	26000	26000	0	27000
Area Harvested (HECTARES)	14500	14500	16000	16000	0	17000
Bearing Trees (1000 TREES)	8500	8500	9000	9000	0	9500
Non-Bearing Trees (1000 TREES)	3100	3100	3500	3500	0	4000
Total No. Of Trees (1000 TREES)	11600	11600	12500	12500	0	13500
Production (1000 MT)	461	461	500	567	0	630
Imports (1000 MT)	2	2	2	3	0	3
Total Supply (1000 MT)	463	463	502	570	0	633
Exports (1000 MT)	389	389	415	490	0	550
Fresh Dom. Consumption (1000 MT)	27	27	29	29	0	30
For Processing (1000 MT)	47	47	58	51	0	53
Total Distribution (1000 MT)	463	463	502	570	0	633
(HECTARES) ,(1000 TREES) ,(1000 MT)						

Lemons/Limes, Fresh

Area Planted

Figure 8 shows that the area planted with lemons/limes was initially flat from MY 2006/07 to MY 2009/10. However, the area planted increased gradually from 4,667 hectares in MY 2010/11, to 18,500 hectares in MY 2021/22, in response to the growth in demand and higher prices in the export market.

Figure 8: Area Planted to Lemons/ Lime



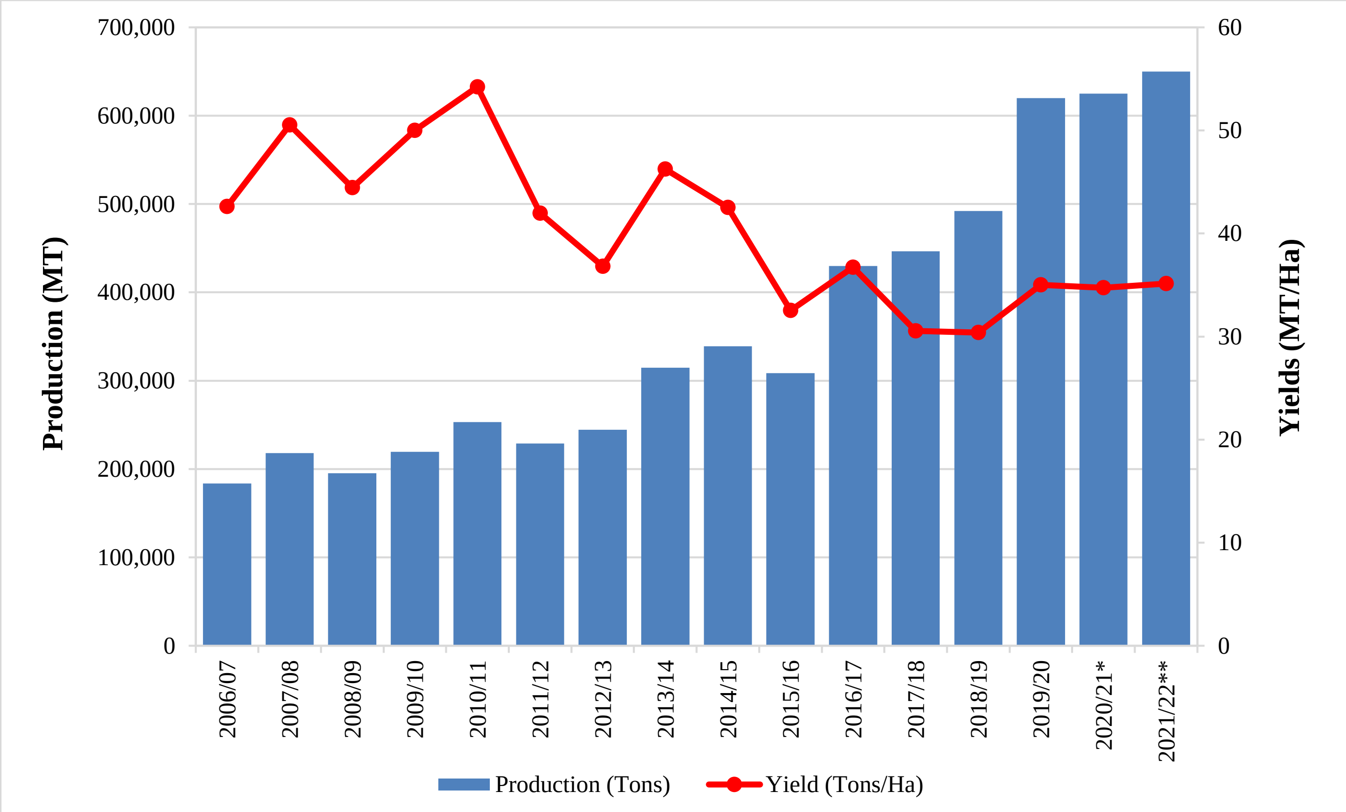
*Estimate. **Forecast.
Source: Citrus Growers Association Actual Data & Post Estimates.

The Eastern Cape Province is the leading growing region for lemons and limes in South Africa accounting for 42 percent of the total area planted, followed by Limpopo (31 percent), Western Cape (14 percent), Mpumalanga (6 percent), Kwa-Zulu Natal (5 percent), Northern Cape (2 percent) and North West (1 percent). The most popular variety of lemons planted in South Africa is the Eureka, accounting for 75 percent of the area planted, followed by Lisbon (8 percent), 2Ph Seedless (6 percent), Limoneira 8A (4 percent), and Genoa (3 percent).

Production

The production of lemons/limes is forecast to increase by 4 percent to 650,000 MT in MY 2021/22, from 625,000 MT in MY 2020/21. This is based on the rise in area planted, normal weather conditions, and the high level of new plantings in the past five years coming into full production. The impact of COVID-19 on production is expected to be minimal.

Figure 9: Lemons/Lime Production and Yields



*Estimate. **Forecast.
Source: Citrus Growers Association Actual Data & Post Estimates.

Consumption

The domestic consumption of lemons and limes is forecast to increase by 4 percent to 28,000 MT in MY 2021/22, from 27,000 MT in MY 2020/21, based on the growth in production, and increasing demand driven by health-conscious consumers.

Processing

Post forecasts that lemons and limes delivered for processing will increase to 114,000 MT in MY 2021/22, from 110,000 MT in MY 2020/21, based on the increase in production.

Processed lemons and limes are used as flavoring for savory dishes, and food ingredients for confectionary and dairy products. In the beverage industry lemons/limes are used to make 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 exports of lemons and limes is forecast to increase by 4 percent to 510,000 MT in MY 2021/22, from 490,000 MT in MY 2020/21, based on the increase in production, and growth in demand from the

Middle East and Asian markets. The EU remains the main export market for South African lemons and limes, accounting for 42 percent of the total exports.

Table 15: South African Fresh Lemons/Limes Exports

South Africa Exports to the World							
Commodity: 080550, Lemons And Limes, Fresh Or Dried							
Annual & YTD Series							
		Calendar Year			January-September		
Partner Country	Unit	2018	2019	2020	2020	2021	%Δ 2021/20
World	T	315,197	350,245	457,886	445,207	479,380	7.68
Netherlands	T	43,059	45,046	92,152	91,933	90,298	-1.78
United Arab Emirates	T	46,566	43,332	56,570	53,678	56,809	5.83
Saudi Arabia	T	30,864	41,762	37,520	36,780	32,638	-11.26
Russia	T	27,750	26,957	37,175	36,749	40,114	9.16
United Kingdom	T	29,897	26,049	36,967	36,526	37,894	3.75
Iraq	T	7,340	20,638	36,918	36,691	31,750	-13.47
Canada	T	14,381	15,740	22,879	20,783	24,499	17.88
Italy	T	14,564	17,526	21,664	21,664	27,913	28.85
Portugal	T	10,216	15,184	15,503	15,498	25,657	65.55
Hong Kong	T	20,119	22,262	15,385	14,421	15,780	9.42
Kuwait	T	9,940	11,962	11,653	11,188	11,207	0.17
Malaysia	T	8,599	11,305	9,242	7,883	11,915	51.15
Germany	T	4,059	6,891	6,593	6,590	7,198	9.23
Qatar	T	4,097	5,254	6,109	6,082	4,517	-25.73
Spain	T	1,955	2,094	5,609	5,609	10,718	91.09
Singapore	T	4,632	4,176	5,088	4,382	4,314	-1.55
Bahrain	T	3,298	2,564	3,671	3,596	2,518	-29.98
Ukraine	T	1,567	1,334	3,089	3,089	4,059	31.4
Greece	T	2,091	2,255	2,966	2,966	7,414	149.97
Oman	T	3,456	3,243	2,922	2,844	2,384	-16.17
Jordan	T	180	684	2,330	2,330	3,828	64.29
Denmark	T	428	811	1,910	1,910	1,030	-46.07
France	T	3,111	1,559	1,877	1,770	1,264	-28.59
Ireland	T	2,404	1,760	1,770	1,770	1,935	9.32
Azerbaijan	T	1,608	780	1,603	1,603	907	-43.42
Belgium	T	3,915	5,618	1,497	1,497	2,692	79.83
Japan	T	920	1,050	1,449	1,449	2,916	101.24
Mauritius	T	1,121	1,106	1,256	1,122	807	-28.07
Georgia	T	306	722	1,250	1,250	910	-27.2
Namibia	T	521	629	1,042	841	630	-25.09

Source: Trade Data Monitor

Imports

Post forecasts that MY 2021/22 imports of lemons/limes will remain flat due to the available domestic production which sufficiently meets the local demand. Imports are minimal from Spain, Eswatini, and Brazil.

Table 16: South African Fresh Lemons/Limes Imports

South Africa Imports from the World							
Commodity: 080550, Lemons And Limes, Fresh Or Dried							
Annual & YTD Series							
		Calendar Year			January-September		
Partner Country	Unit	2018	2019	2020	2020	2021	%Δ 2021/20
World	T	1,193	983	2,012	1,894	1,467	-22.54
Eswatini	T	280	355	1,801	1,799	1,242	-30.96
Brazil	T	142	168	158	66	25	-62.12
Spain	T	97	326	52	28	80	185.71

Source: Trade Data Monitor

Prices

Export markets provide the highest prices for South African lemons/limes as shown in Table 17.

Table 17: Lemons/Limes Prices

MY	Local Market Average Price Rand/ MT	Export Market Average Price Rand/ MT	Processed Average Price Rand/ MT
2004/05	1,692	1,476	258
2005/06	1,753	2,478	178
2006/07	2,460	3,238	396
2007/08	3,105	3,961	611
2008/09	3,346	2,120	542
2009/10	3,940	5,329	731
2010/11	3,489	5,426	982
2011/12	4,291	5,426	720
2012/13	5,668	6,994	596
2013/14	6,619	11,058	1,288
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

Source: CGA

Table 18: Production, Supply and Distribution of Lemons/Limes, Fresh

Lemons/Limes, Fresh	2019/2020		2020/2021		2021/2022	
Market Year Begins	Jan 2020		Jan 2021		Jan 2022	
South Africa	USDA Official	New Post	USDA Official	New Post	USDA Official	New Post
Area Planted (HECTARES)	17707	17707	18000	18000	0	18500
Area Harvested (HECTARES)	12100	12100	14000	14000	0	14500
Bearing Trees (1000 TREES)	7100	7100	7500	7500	0	7800
Non-Bearing Trees (1000 TREES)	2600	2600	2900	2900	0	3000
Total No. Of Trees (1000 TREES)	9700	9700	10400	10400	0	10800
Production (1000 MT)	620	620	625	625	0	650
Imports (1000 MT)	2	2	2	2	0	2
Total Supply (1000 MT)	622	622	627	627	0	652
Exports (1000 MT)	458	458	461	490	0	510
Fresh Dom. Consumption (1000 MT)	26	26	27	27	0	28
For Processing (1000 MT)	138	138	139	110	0	114
Total Distribution (1000 MT)	622	622	627	627	0	652
(HECTARES) ,(1000 TREES) ,(1000 MT)						

Orange Juice

Production

The production of orange juice is forecast to increase by 2 percent to 56,000 MT in MY 2021/22, from 55,000 MT in MY 2020/21, based on the increase in the quantity of fresh oranges delivered for processing. The MY 2020/21 production of orange juice was revised upwards to 55,000 MT, based on updated volume of oranges delivered for processing.

Concentrated orange juice accounts for at least 90 percent of the total orange juice produced in South Africa. The South African citrus industry prioritizes the export of fresh citrus, and only processes the fruit that does not meet export standards.

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

Consumption

The domestic consumption of orange juice is forecast to increase by 15 percent to 30,000 MT in MY 2021/22, from 26,000 MT in MY 2020/21, based on the increase in production and supply availability. Post updated MY 2019/20 and MY 2020/21 consumption of orange juice to align with average per capita consumption in South Africa. The relatively high food price inflation has resulted in restricted growth in the domestic consumption of fresh fruit juices and a shift in demand to orange juice concentrates.

Export

Post forecasts that MY 2021/22 exports of orange juice will rebound and increase to 40,000 MT, from 30,000 MT in MY 2020/21, based on the increase in production. The MY 2020/21 exports of orange juice were revised down to 20,000 MT, based on the pace of exports up to September 2021.

Post adjusted all the orange juice export data to the equivalent of 65 Degrees Brix based on the respective conversion factors shown on the export tables below. The orange juice exports under HS200919 were converted using a factor of 1.02. The orange juice exports under HS200911 were converted using a factor of 1.00. The orange juice exports under HS200912 were converted using a factor of 0.18. 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 orange juice.

Producers in South Africa prefer to export fresh oranges rather than to sell to processors as export prices are at least eight times higher than prices achieved from processors. Netherlands, Botswana, Mozambique, Mauritius, Namibia, Eswatini, Zambia, and Zimbabwe are the biggest markets for South African orange juice exports.

Table 19: South African Orange Juice Exports – HS200919, HS200911 and HS200912

South Africa Exports to the World									
Commodity: 200911,200912,200919, Orange Juice, Frozen, Whether Or Not Sweetened/Orange Juice, Not Frozen, Of A Brix Value Not Exceeding 20/Orange Juice, Other Than Frozen, Whether Or Not Sweetened									
Annual & YTD Series									
Partner Country	Unit	Calendar Year					January-September		
		2016	2017	2018	2019	2020	2020	2021	%Δ 2021/20
World	T	34,724	27,764	39,249	29,563	29,549	21,541	14,069	-34.69
Netherlands	T	5,897	3,036	12,077	10,340	12,962	9,952	4,682	-52.95
Spain	T	1,747	187	274	567	2,851	2,465	1,117	-54.69
Eswatini	T	3,461	3,013	3,300	3,183	2,797	2,096	1,716	-18.13
Botswana	T	7,825	6,888	7,434	5,562	2,789	1,044	1,761	68.68
Namibia	T	4,969	4,593	4,770	2,899	2,025	1,046	1,163	11.19
Italy	T	605	194	375	867	1,159	991	230	-76.79
India	T	138	133	346	790	656	596	164	-72.48
Greece	T	0	0	0	57	615	552	0	-100
Zimbabwe	T	1,989	2,539	2,044	520	477	419	482	15.04
Lesotho	T	2,031	1,350	1,369	959	430	158	572	262.03
Zambia	T	1,052	1,270	623	562	404	234	313	33.76
Nigeria	T	14	1	22	1	369	365	5	-98.63
Mozambique	T	1,454	948	780	327	279	254	255	0.39
United States	T	21	60	193	700	256	244	27	-88.93
Taiwan	T	16	56	78	62	142	94	92	-2.13
Congo (DROC)	T	180	139	152	123	120	89	123	38.2
Japan	T	35	8	6	7	97	95	90	-5.26
Unidentified	T	1	0	60	10	96	48	76	58.33
Ghana	T	87	144	199	44	86	65	68	4.62
Gabon	T	0	11	0	153	86	41	82	100
Mauritius	T	318	185	391	243	78	72	21	-70.83
Ethiopia	T	799	674	456	264	77	55	128	132.73
China	T	0	26	20	46	76	76	52	-31.58
Philippines	T	37	178	270	52	63	53	41	-22.64
Israel	T	378	19	511	615	61	61	339	455.74
France	T	11	10	35	38	57	46	33	-28.26
Madagascar	T	105	108	139	61	43	30	24	-20

Source: Trade Data Monitor

Imports

The imports of orange juice are forecast to remain flat at 2,000 MT in MY 2021/22 MY. Zimbabwe, Brazil, and Spain are the main suppliers of orange juice to South Africa. Post also adjusted the orange juice import data to the equivalent of 65 Degrees Brix based on the respective conversion factors.

Table 20: South African Orange Juice Imports – HS200919, HS200911 and HS200912

South Africa Imports from the World									
Commodity: 200911,200912,200919, Orange Juice, Frozen, Whether Or Not Sweetened/Orange Juice, Not Frozen, Of A Brix Value Not Exceeding 20/Orange Juice, Other Than Frozen, Whether Or Not Sweetened									
Annual & YTD Series									
Partner Country	**Unit**	**Calendar Year**					**January-September**		
		2016	**2017**	**2018**	**2019**	**2020**	**2020**	**2021**	**%Δ 2021/20**
World	T	1,101	2,691	1,322	1,942	2,410	1,498	1,761	17.56
Zimbabwe	T	698	771	845	1,652	2,304	1,415	1,361	-3.82
Botswana	T	4	19	2	31	36	35	6	-82.86
South Korea	T	0	1	2	0	17	17	0	-100
Malaysia	T	0	5	10	11	10	5	5	0
Eswatini	T	2	163	1	8	9	9	2	-77.78
Turkey	T	0	0	8	9	6	6	0	-100
Thailand	T	0	0	0	18	3	3	0	-100
France	T	0	0	0	0	3	2	2	0
Unidentified	T	0	44	7	1	2	1	4	300
Pakistan	T	6	28	9	13	2	0	0	0
Taiwan	T	0	0	0	0	2	2	0	-100
Portugal	T	23	13	17	0	2	2	3	50
Malawi	T	0	0	0	0	1	1	0	-100
Jordan	T	0	0	0	0	1	1	0	-100
Germany	T	0	1	0	2	1	0	0	0
Austria	T	0	0	0	0	1	0	0	0

Source: Trade Data Monitor

Table 21: Production, Supply and Distribution of Orange Juice

Orange Juice	**2019/2020**		**2020/2021**		**2021/2022**	
Market Year Begins	**Jan 2020**		**Jan 2021**		**Jan 2022**	
South Africa	**USDA Official**	**New Post**	**USDA Official**	**New Post**	**USDA Official**	**New Post**
Deliv. To Processors (MT)	282000	282000	285000	363000	0	368000
Beginning Stocks (MT)	36349	36349	48704	38704	0	39704
Production (MT)	49494	49494	50000	55000	0	56000
Imports (MT)	2410	2410	2000	2000	0	2000
Total Supply (MT)	88253	88253	100704	95704	0	97704
Exports (MT)	29549	29549	40000	30000	0	40000
Domestic Consumption (MT)	10000	20000	11000	26000	0	30000
Ending Stocks (MT)	48704	38704	49704	39704	0	27704
Total Distribution (MT)	88253	88253	100704	95704	0	97704
(MT)						

Policies and Regulations:

U.S Authorizes Imports of Cold-Treated Citrus from South Africa into 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 imports of cold-treated fresh citrus fruit from South Africa into all U.S. ports of entry. APHIS determined that citrus fruit from South Africa, which is cold-treated in transit, can safely enter all U.S. ports of entry without increasing the risk of introducing the false coddling moth 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: Newark, Philadelphia, Houston, and New Orleans. This action broadened the reach of South African citrus to other regions within the U.S. market, provided flexibility to U.S. retailers and wholesalers, and lowered transportation costs of imported citrus.

United States Cold Sterilization Protocol

South Africa exports citrus to the United States under the cold treatment schedule to address False Codling Moth (FCM). APHIS has reduced the cold treatment schedule from 24 to 22 days, which has been very beneficial to South Africa in terms of reducing shipping costs and in reducing 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 official CBS free areas. The CBS-free areas are found in the Western Cape and Northern Cape, as well as relevant districts of the Free State and North West provinces. In 2014, APHIS issued a notice proposing to amend the fruits and vegetables 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 citrus black spot has been known to occur. The regulation would authorize imports on the condition of satisfying certain systems and SPS treatment procedures. This proposal can be found on the following link: http://www.regulations.gov/#!documentDetail;D=APHIS-2014-0015-0001. The comment period closed, and the regulation is still in the process of being finalized.

Citrus Black Spot Challenges in the European Union Market

South Africa still faces challenges in the EU market as a result of the stringent CBS requirements, and normally voluntarily suspends citrus exports to the EU every season to avoid any further interceptions of fruit with CBS. For example, in October 2017, South Africa voluntarily suspended citrus exports to the EU, as a precaution and risk mitigation measure to prevent a ban on citrus exports to the EU. Complying with the EU requirements for CBS costs the industry a lot of money, constrains the already limited government capacity and the scientific basis for these measures have been questioned. In addition, Argentina and Uruguay are reported to have higher CBS interceptions than South Africa. Thus, South Africa considers these EU measures an unnecessary technical trade barrier, and DALRRD has publicly indicated that the internal process of lodging a WTO dispute has been initiated.

South Africa Fresh Produce Importers Association

The Fresh Produce Importers Association assists members with the importation of fresh fruit and vegetables in South Africa. Information on their members, contact details, and services they provide can be obtained from the following website link, http://www.fpia.co.za/.

Custom Duties

United States citrus exports face a 4 percent customs duty in South Africa. Table 22 reflects the applicable custom duties when exporting citrus to South Africa

Table 22: Custom Duties Applicable to Exports to South Africa

HS Code	Article description	Unit	Rate of Duty				
			General	EU	EFTA	SADC	MERCOSUR
08.05	**Citrus fruit, fresh or dried:**						
0805.10	**Oranges**						
0805.10.10	Fresh	kg	4%	free	4%	free	4%
0805.10.90	Other	kg	4%	free	4%	free	4%
0805.2	**Mandarins (including tangerines and satsumas); clementines, wilkings and similar citrus hybrids:**						
0805.21	**Mandarins (including tangerines and satsumas)**						
0805.21.10	Fresh	kg	4%	free	4%	free	4%
0805.21.90	Other	kg	4%	free	4%	free	4%
0805.22	**Clementines:**						
0805.22.10	Fresh	kg	4%	free	4%	free	4%
0805.22.90	Other	kg	4%	free	4%	free	4%
0805.29	**Other:**						
0805.29.10	Fresh	kg	4%	free	4%	free	4%
0805.29.90	Other	kg	4%	free	4%	free	4%
0805.40	**Grapefruit, including pomelos:**						
0805.40.10	Fresh	kg	4%	free	4%	free	4%
0805.40.90	Other	kg	4%	free	4%	free	4%
0805.50	**Lemons (CitrusLimon, Citrus Limonium) and limes (Citrus aurantifolia, Citrus latifolia):**						
0805.50.10	Fresh	kg	4%	free	4%	free	4%
0805.50.90	Other	kg	4%	free	4%	free	4%
0805.90	**Other:**						
0805.90.10	Fresh	kg	4%	free	4%	free	4%
0805.90.90	Other	kg	4%	free	4%	free	4%
2009.1	**Orange juice**						
2009.11	Frozen	kg	25%	free	25%	free	25%
2009.12	Not frozen, of Brix value not exceeding 20	kg	25%	free	25%	free	25%
2009.19	Other	kg	25%	free	25%	free	25%

Source: South African Revenue Services (SARS)

South African Import Regulations:

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

Export Procedures to South Africa
http://www.nda.agric.za/doaDev/sideMenu/plantHealth/docs/importProcedure.pdf.

Maximum Residue Limits
http://www.nda.agric.za/doaDev/sideMenu/foodSafety/doc/South%20African%20Citrus%20MRLs%20 2013.pdf

Agriculture Product Standards Act No 119 of 1990
http://www.nda.agric.za/doaDev/sideMenu/Food%20Import%20&%20Export%20Standard/docs/Agric %20Product%20Standards%20Act%20No%20119%20%20of%201990.pdf

Agricultural Pests Amendment Act, 9 of 1992
http://www.nda.agric.za/doaDev/sideMenu/APIS/doc/Agricultural%20Pests%20Act.pdf

South African Special Export Protocols/ Programs/ Directives
https://www.nda.agric.za/doaDev/sideMenu/plantHealth/exportsProg.htm

Attachments:

No Attachments