

**Required Report:** Required - Public Distribution

**Date:** June 25, 2024

**Report Number:** SF2024-0012

**Report Name:** Citrus Semi-annual

**Country:** South Africa - Republic of

**Post:** Pretoria

**Report Category:** Citrus

**Prepared By:** Masego Moobi and Amy Caldwell

**Approved By:** Ali Abdi

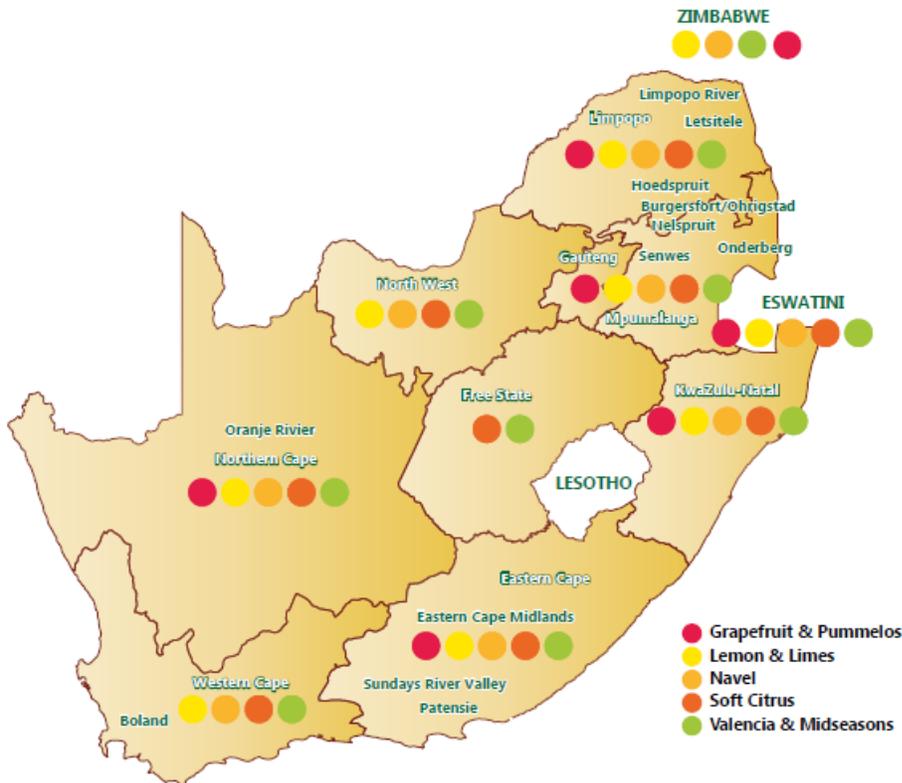
**Report Highlights:**

Record orange juice prices are expected to escalate orange juice production as growers increase deliveries for processing. Growers are diverting oranges from the export market and local sales towards processing on favorable prices. Good rainfall in the Spring of 2023 ensured sufficient rain for irrigation across all citrus producing regions. Production of all citrus types is expected to improve in both volumes and quality in MY 2023/24. However, the Northern production regions experienced some dry conditions during the growth period which led to smaller sized fruit, reducing the percentage of fruit that meets export specifications. Orange, grapefruit, and lemon exports for MY 2023/24 are revised downwards on smaller fruit size and diversion to local processing.

## Background

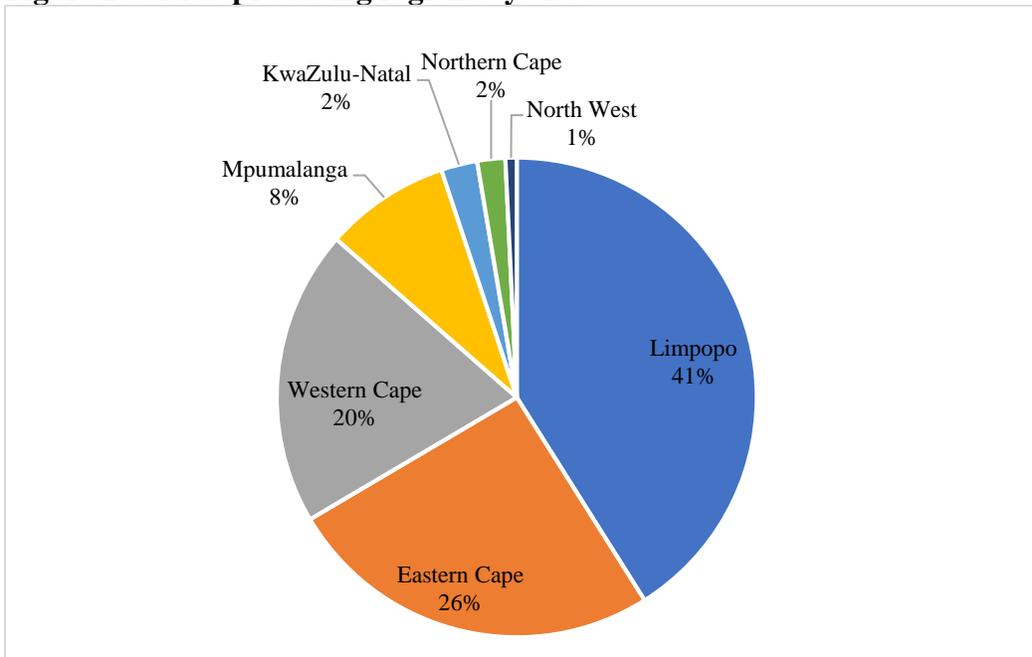
The total area planted to citrus in South Africa declined slightly by 0.3 percent to 95,980 ha in MY 2022/23 from 96,277 on MY 2021/22. This decline follows a period of rapid growth in the citrus industry that has led to concerns of oversupply given the limitations in processing and exporting opportunities. In addition, industry faced several challenges such as logistical challenges, rising input costs, erratic electricity supply and phytosanitary requirements particularly in the EU market. 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 provinces have a warmer climate, which is better suited to the cultivation of grapefruit and Valencia oranges.

**Figure 1: Citrus growing regions in South Africa**



Source: Citrus Growers Association (CGA)

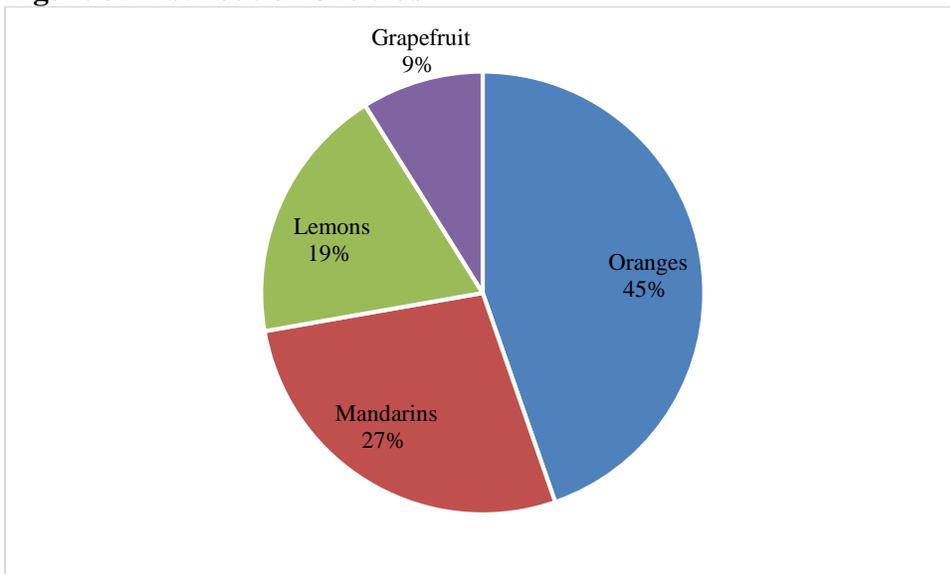
**Figure 2: Citrus producing regions by area**



Source: CGA

**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. Mandarins/Tangerines have, however, shown a 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**



Source: CGA

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**

<b>Citrus</b>	<b>Variety</b>
Grapefruit	Star Ruby, Marsh, Jackson, Pomelit, Rose, Redheart
Oranges	<b>Valencia/Midseason:</b> Midnight, Valencia Late, Delta, Turkey, Bennie, Du Roi, Gusocora, Jassie
	<b>Navels:</b> Cambria, Palmer, Bahianinha, Washington, Witkrans, Cara Cara, Navelina, Robyn, Lane Late, Autumn Gold, Newhall
Mandarins/ Tangerines	<b>Satsumas:</b> Miho Wase, Queen, Owari, Belabela, Miyagawa Wase
	<b>Clementines:</b> Mules, Andes-1, Octubrina, Esbal, Marisol
	<b>Mandarins:</b> 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**

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

Source: CGA

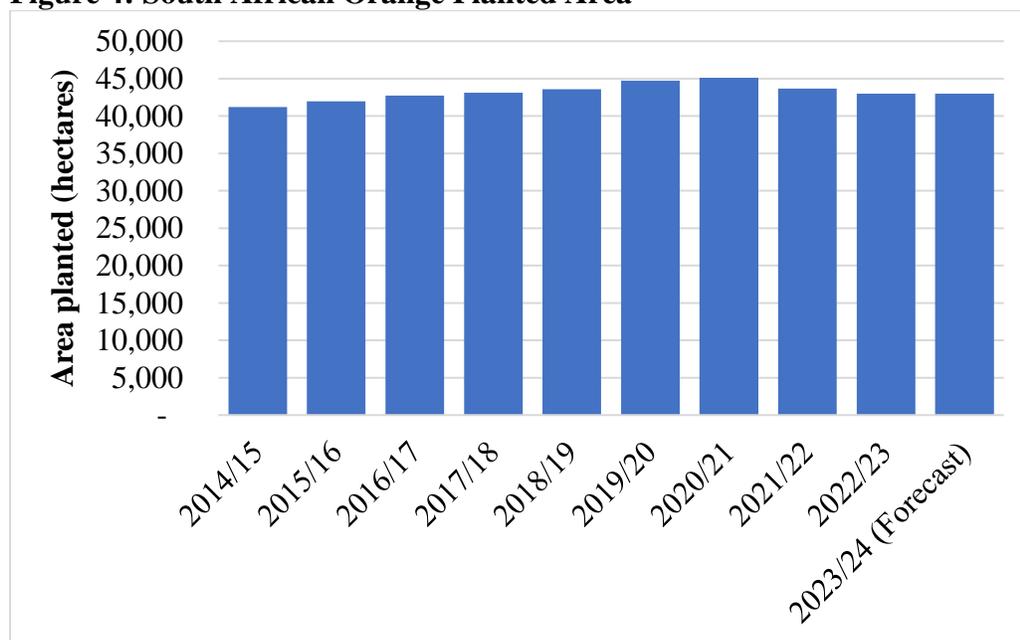
## Oranges, Fresh

### Crop Area

Post forecasts South Africa's MY 2023/24 orange area to remain relatively unchanged at 42,990 ha. Growers appear to be replacing some early navels with late navel varieties to follow market demand trends. New orange plantings are limited and appear to be replacing the orchards that are aging out of production. **Figure 4** illustrates the historical trend for planted area for oranges, which peaked in MY 2020/21. Growth in orange area has been limited by an aggressive shift to soft citrus in the growing regions of Western Cape and Limpopo provinces.

Due to erratic electricity supply in South Africa, growers and other players along the value chain continue to invest in alternate electricity sources to ensure uninterrupted irrigation and consistent cold chain access. Additionally, growers have increased investment in shade-netting to better manage climate risks and improve fruit quality, but this leaves few resources to expand area. Post contacts indicate that producers are limiting expansion due to concerns regarding export market access, especially due to EU phytosanitary requirements. Inefficient port operations, an under-performing rail network, deteriorating road infrastructure, and rising input costs are diminishing the profitability of orange producers and limiting continued investment by the industry. In MY 2022/23, planted area decreased by 2 percent to 42,993 ha, mainly due to a drop in navel plantings.

**Figure 4: South African Orange Planted Area**



Source: CGA & Post Estimates/Forecast

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. 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

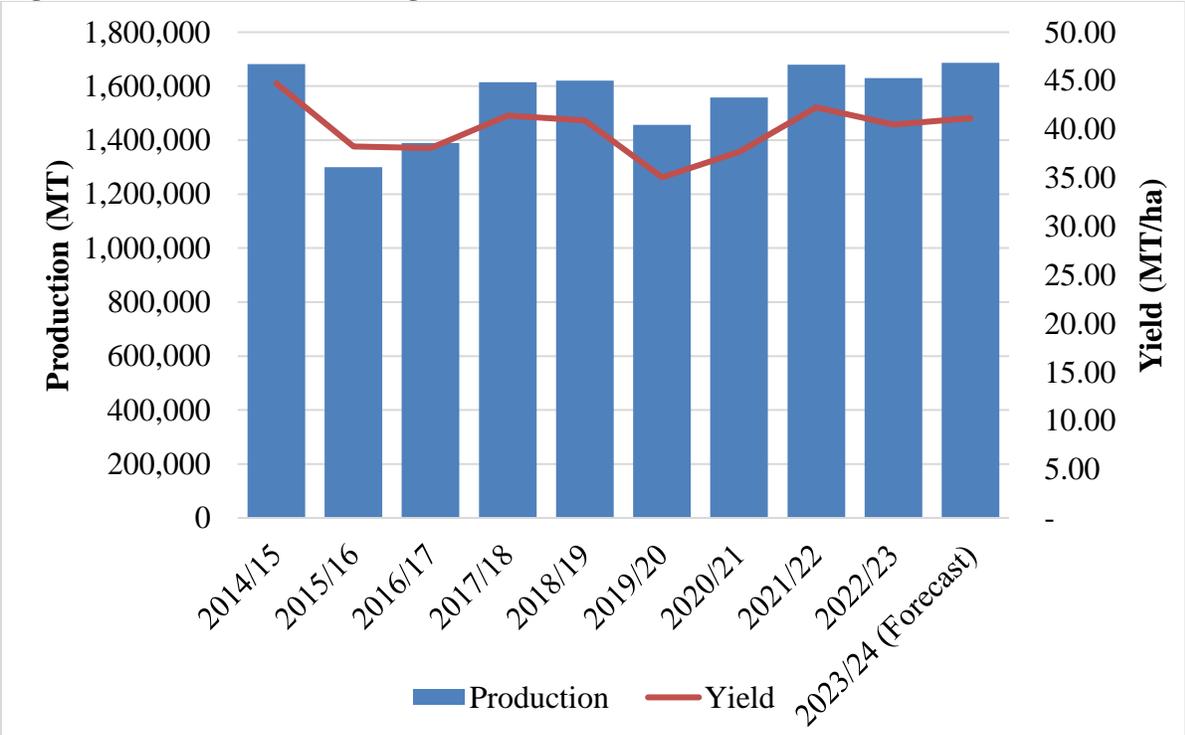
area, followed by the Valencia Late (10 percent), Delta (9 percent), Bennie (7 percent), and Turkey (7 percent) cultivars. Other cultivars planted in South Africa include Palmer, Cambria, Bahianinha, and Washington.

**Production**

Post increases its forecast for MY 2023/24 orange production to 1.69 million metric tons (MMT) due to sufficient rains received in November and December 2023, particularly in the Northern and Eastern Cape producing regions, ensuring sufficient water for irrigation. The Northern regions experienced very hot conditions for about 10 days in December 2023, and growers report that this led to smaller fruit sizes. With greater investment in netting, producers expect overall improved quality and yields for MY 2023/24. Therefore, Post forecasts that orange production will increase by 3 percent in MY 2023/24 year-on-year.

Post’s estimate for production in MY 2022/2023 remains unchanged. Production decreased by 3 percent from the prior MY due to heavy rains and hailstorms experienced in the production regions of Limpopo, Western Cape, and Eastern Cape. Further, erratic electricity supply impacted growers’ ability to irrigate as required. In MY 2021/22, production increased by 8 percent year-over-year, driven by above-average rainfall received throughout the season in the main growing regions, ensuring sufficient irrigation water and providing conducive growing conditions that boosted yields. **Figure 5** shows South Africa’s orange production volumes since MY 2014/15.

**Figure 5: South African Orange Production**



Source: Department of Agriculture, Land Reform and Rural Development (DALRRD) & Post Estimates/Forecast

## **Consumption**

South African producers prioritize supplying export markets, while fruit that does not meet export standards is usually used for fresh domestic consumption and for processing. Fresh oranges are the most widely consumed citrus in South Africa. However, orange juice prices are at historic highs due to a drop in Florida's orange production and concerns about Brazil's crop being reduced by drought. Post projects more oranges being sold for processing instead of fresh consumption due to the relatively higher returns. Furthermore, consumer preference is shifting towards 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 revises MY 2023/24 domestic consumption downwards, dropping by 31 percent year-on-year.

Post revises the domestic consumption estimate for MY 2022/23 and MY 2021/22 downward as increased volumes of oranges were sold for domestic processing. Consumption figures include fresh market sales for both human demand and animal feed.

## **Exports**

Post revises orange exports downwards to 1.1 MMT in MY 2023/24, a 12 percent decrease year-over-year, in response to the expectation for smaller orange sizes leading to a decrease in cartons shipped to overseas markets. Growers are sending more of the crop for juicing due to a hike in prices for oranges sent for processing. Post expects some class II fruit, usually meant for the export market, will be directed to processing. Post contacts reported production regions in Limpopo (Groblersdal) and the Western Cape provinces experienced severe winds and hail damage to fruit that was meant for the export market.

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 industry continues to engage with port authorities to manage risks to exports.

Post decreases its MY 2022/23 export estimate to 1.2 MMT, a 5 percent year-on-year drop. 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 the prevalence of CBS and FCM.

On April 24, 2024, the South African government requested a consultation with the EU at the World Trade Organization over trade phytosanitary regulations regarding CBS. South Africa also initiated a dispute in July 2022 with the EU at the WTO regarding cold treatment prescribed within the new regulations. 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.

**Table 3: South African Fresh Orange Exports**

Partner Country	MY 2021/22 (MT)	MY 2022/23 (MT)	% change	Feb – Apr		
				MY 2022/23 (MT)	MY 2023/24 (MT)	% change
Netherlands	264,586	280,832	6%	20	24	20%
United Arab Emirates	109,228	140,540	29%	198	239	21%
Russia	85,153	96,484	13%	62	14	-77%
China	96,892	84,345	-13%	87	0	-100%
Portugal	59,261	64,704	9%	0	0	-
United States	59,192	57,543	-3%	2	1	-50%
United Kingdom	73,686	54,389	-26%	95	46	-52%
Hong Kong	47,692	48,094	1%	48	335	598%
Saudi Arabia	66,208	46,605	-30%	25	102	308%
Canada	42,630	44,229	4%	46	384	735%
Italy	34,538	38,758	12%	0	0	-
Malaysia	49,160	34,980	-29%	24	26	8%
Bangladesh	59,977	30,682	-49%	0	0	-
India	28,173	26,945	-4%	0	0	-
Iraq	41,475	21,181	-49%	120	0	-100%
Spain	6,630	16,720	152%	0	0	-
France	10,091	14,667	45%	0	20	-
Singapore	12,894	9,691	-25%	24	129	438%
<i>Others</i>	<i>150,722</i>	<i>120,649</i>	<i>-20%</i>	<i>4,493</i>	<i>4,975</i>	<i>11%</i>
<b>Total</b>	<b>1,298,188</b>	<b>1,232,038</b>	<b>-5%</b>	<b>5,244</b>	<b>6,295</b>	<b>20%</b>

Source: 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 is substantially closer to Maputo than the Port of Durban. However, only 0.6 percent of oranges were shipped through Maputo last season, but a higher percentage is expected to be exported via Maputo in MY 2023/24.

South Africa’s exports to the United States are expected to continue growing despite a 3-percent drop in MY 2022/23 on lower production. Benefitting from duty-free access under the African Growth Opportunity Act (AGOA), exports of oranges to the United States increased to a record of 59,192 MT in the MY 2021/22, up 25 percent from the 47,501 MT in MY 2020/21. South Africa predominantly exports Midnight oranges during the U.S. summer months. The first shipment of South African orange to the United States in MY2023/24 arrived the first week of June, and weekly exports are expected to continue through the end of October.

## Imports

Post forecasts South Africa's orange imports will remain unchanged at 3,000 MT in MY 2023/24 on steady demand for domestic consumption during the festive holiday season. 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**

<b>Marketing Year</b>	<b>Local Market Average Price (rand/MT)</b>	<b>Export Market Average Price (rand/MT)</b>	<b>Processed Average Price (rand/MT)</b>
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: CGA

**Table 5: Orange Production, Supply, and Distribution**

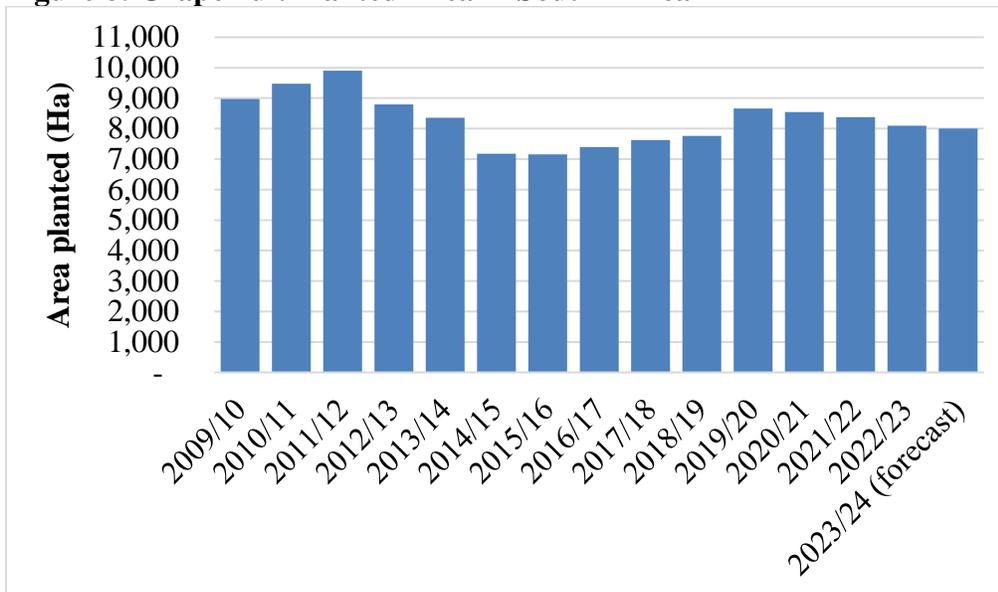
Oranges, Fresh Market Year Begins South Africa	2021/2022		2022/2023		2023/2024	
	Feb 2022		Feb 2023		Feb 2024	
	USDA Official	New Post	USDA Official	New Post	USDA Official	New Post
<b>Area Planted</b> (HECTARES)	43668	43668	43900	42993	43700	42990
<b>Area Harvested</b> (HECTARES)	39738	39738	40250	40250	40000	41000
<b>Bearing Trees</b> (1000 TREES)	42130	39898	42500	39281	42150	39280
<b>Non-Bearing Trees</b> (1000 TREES)	4495	4344	4000	4276	4100	4274
<b>Total No. Of Trees</b> (1000 TREES)	46625	44242	46500	43557	46250	43554
<b>Production</b> (1000 MT)	1609	1680	1630	1630	1620	1687
<b>Imports</b> (1000 MT)	5	5	3	3	3	3
<b>Total Supply</b> (1000 MT)	1614	1685	1633	1633	1623	1690
<b>Exports</b> (1000 MT)	1299	1298	1338	1232	1370	1080
<b>Fresh Dom. Consumption</b> (1000 MT)	100	32	130	32	93	22
<b>For Processing</b> (1000 MT)	215	355	165	369	160	588
<b>Total Distribution</b> (1000 MT)	1614	1685	1633	1633	1623	1690
(HECTARES) ,(1000 TREES) ,(1000 MT)						
OFFICIAL DATA CAN BE ACCESSED AT: <a href="#">PSD Online Advanced Query</a>						

## Grapefruit, Fresh

### Crop Area

Post forecasts that area planted to grapefruit in MY 2023/24 will continue its downward trend, shrinking by 1 percent to 8,000 ha due to limited planting of new trees and uprooting of old orchards in recent years. Grapefruit budwood sales continue to fall as producers are choosing to move toward other citrus types. South Africa's grapefruit area peaked at around 9,900 ha in MY 2011/12. This growth was mainly driven by a surge in global demand, especially in Europe, Asia, and the Middle East. However, since the 2012/13 season, growth has declined at an annual average of 2 percent due to softening global demand. In addition, rising input costs are diminishing the profitability of grapefruit producers, which limits investments in the industry.

**Figure 6: Grapefruit Planted Area in South Africa**



Source: CGA & Post Estimates/Forecast

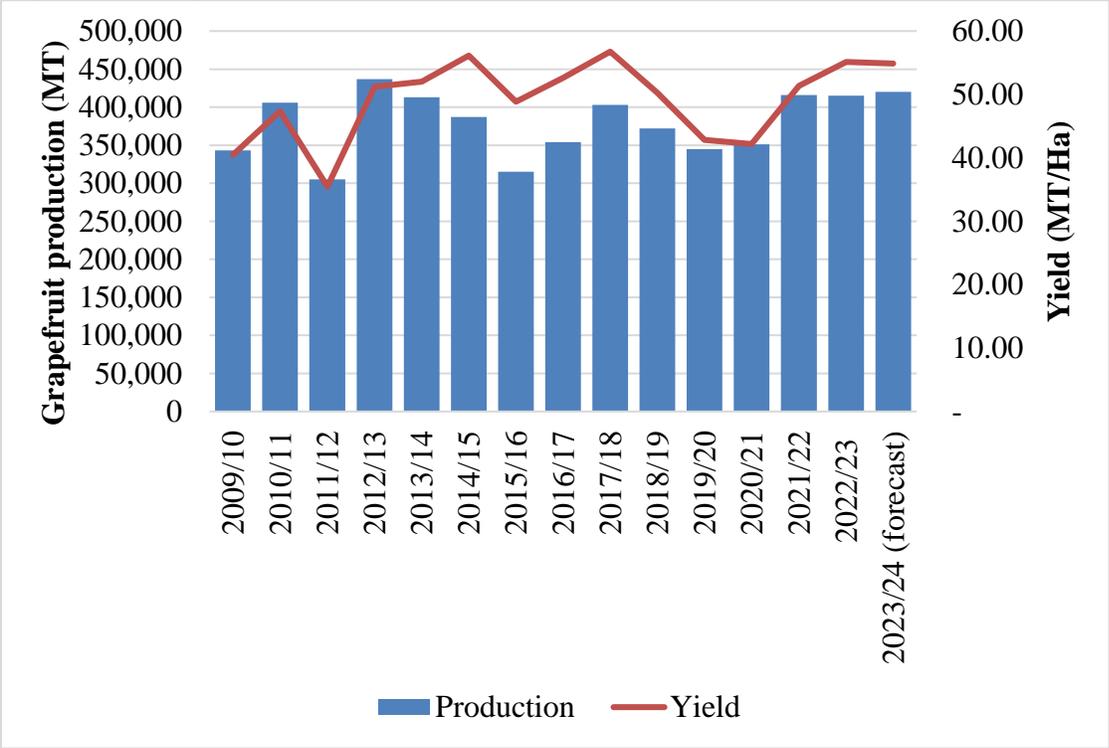
Limpopo province is the leading growing region for grapefruit in South Africa, accounting for 56 percent of total area planted, followed by Mpumalanga (20 percent), KwaZulu-Natal (10 percent), and Northern Cape (6 percent) province. Star Ruby is the predominant cultivar planted, accounting for 88 percent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

### Production

Post raises its forecast for MY 2023/24 production to 420,000 MT, which would represent a 1 percent increase over MY 2022/23, due to overall adequate rains received in November and December 2023, ensuring adequate water for irrigation. However, Post contacts expect smaller average fruit sizes due to a 10-day dry period in December, particularly in the northern producing regions.

In MY 2022/23, Post estimates grapefruit production at 415,000 MT based on sufficient rainfall received in major grapefruit producing regions. South Africa’s production of grapefruit in MY 2021/22 increased by 19 percent over the prior season. The summer rainfall season in MY 2021/22 started normally in most growing regions with widespread rains that continued throughout the season, ensuring sufficient irrigation water, and providing conducive growing conditions that supported greater production. **Figure 7** illustrates grapefruit production and yields in South Africa since MY 2009/10.

**Figure 7: Grapefruit Production in South Africa**



Source: DALRRD & Post Estimates/Forecast

**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. Post estimates local grapefruit consumption in MY 2022/23 at 5,000 MT and forecasts that volume will remain unchanged in MY 2023/24.

**Processing**

Local processing of grapefruit offers an alternative to exports. Post revises grapefruit sold for processing upwards to 202,000 MT in MY 2023/24 as smaller size grapefruit are likely to be sold for processing. Post contacts report improved prices for processing grapefruit since MY 2022/23. In MY 2022/23, grapefruit sent for processing is estimated to have increased by 12 percent year-over-year based on the industry’s decision to hold off on exports of class 2 and non-standard sized grapefruit. In MY 2021/22, the volume of grapefruit delivered for processing

surged by 203 percent over the previous year, reaching 179,000 MT due to a decrease in exports as shipping costs diminished the profitability of exports.

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

Post revises MY 2023/24 exports of grapefruit downwards to 218,000 MT, virtually unchanged from MY 2022/23 export volumes. The size of fruit in the current season is smaller, leading to more fruit packed per carton and fewer cartons overall for the export market. Growers are likely to export the larger fruits, while smaller and class II grade fruit will be sent for processing. Overall export volumes appear to have slower growth, reflecting shrinking demand for grapefruit in most markets. MY 2022/23 exports are estimated to have dropped by 9 percent year-over-year, to 217,000 MT as some grapefruit regions reduced packing of class 2 fruit for exports and moved it instead to domestic processing and consumption. In MY 2021/22 grapefruit exports decreased by 18 percent year-over-year. Accelerating input costs and higher shipping rates meant that certain grades of grapefruit could not be exported profitably.

The Netherlands was the leading market for South African grapefruit in MY 2022/23 (accounting for 34 percent or 72,948 MT), followed by China (14 percent or 31,352 MT), Russia (10 percent or 21,561 MT), and Japan (8 percent or 17,353 MT). Together, these four countries represented two-thirds of South Africa's total grapefruit exports last year. China was the leading market for South African grapefruit exports in MY 2021/22, accounting for 27 percent (63,470 MT) of foreign sales (see **Table 6**). However, MY 2022/23 exports dropped by 51 percent, as China imports grapefruit for processing and South African growers exported less PP class (processing grade) fruit, instead putting it toward local processing.

While total volumes are still low, grapefruit exports to the United States have been growing exponentially over the past 10 years, from 275 MT in MY 2010/11, to 8,990 MT in MY 2022/23. Although grapefruit exports to the United States dropped by 30 percent in MY 2021/22, mirroring lower exports across the board, exports shot up by 45 percent in MY 2022/23. Star Ruby grapefruit produced in the Northern Cape province is a popular export to the United States during American summer months.

**Table 6: South African Fresh Grapefruit Exports**

Partner Country	MY	MY	% Change	Jan - Mar		% Change
	2021/22 (MT)	2022/23 (MT)		MY 2022/23	MY 2023/24	
Netherlands	63,408	72,948	15%	335	688	105%
China	63,470	31,352	-51%	296	215	-27%
Russia	19,429	21,561	11%	95	133	40%
Japan	22,866	17,353	-24%	0	0	
United Kingdom	8,978	9,342	4%	150	67	-55%
United States	6,184	8,990	45%	0	4	
Italy	4,854	7,181	48%	0	255	
Canada	7,168	6,889	-4%	99	79	-20%
Hong Kong	6,862	6,381	-7%	0	9	
Portugal	4,472	5,375	20%	0	0	
UAE	3,831	5,270	38%	21	0	-100%
South Korea	7,427	3,844	-48%	0	0	
Taiwan	2,970	2,798	-6%	0	21	
Eswatini	3,372	2,737	-19%	23	24	4%
Greece	1,439	1,539	7%	0	0	
France	812	1,199	48%	0	21	
Germany	1,744	1,127	-35%	176	41	-77%
Ireland	656	672	2%	0	0	
<i>Others</i>	<i>7,811</i>	<i>10,010</i>	<i>28%</i>	<i>94</i>	<i>129</i>	<i>37%</i>
<b>Total</b>	<b>237,753</b>	<b>216,568</b>	<b>-9%</b>	<b>1,289</b>	<b>1,686</b>	<b>31%</b>

Source: Trade Data Monitor, LLC

## 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 5,000 MT in MY 2023/24 based on higher production volumes and limited consumption of grapefruit in the domestic market. In MY 2022/23, grapefruit imports were estimated at 7,600 MT, up from 5,000 MT in 2021/22.

## 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 availability.

**Table 7: Grapefruit Prices in South Africa**

MY	Local Market	Export Market	Processed
Average Price (rand/MT)			
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	2021/2022		2022/2023		2023/2024	
	Jan 2022		Jan 2023		Jan 2024	
	USDA Official	New Post	USDA Official	New Post	USDA Official	New Post
<b>Area Planted</b> (HECTARES)	8377	8377	8477	8097	8450	8000
<b>Area Harvested</b> (HECTARES)	8100	8100	8307	7530	8350	7650
<b>Bearing Trees</b> (1000 TREES)	8500	8350	8595	8250	8450	8200
<b>Non-Bearing Trees</b> (1000 TREES)	1000	950	955	900	900	850
<b>Total No. Of Trees</b> (1000 TREES)	9500	9300	9550	9150	9350	9050
<b>Production</b> (1000 MT)	416	416	420	415	400	420
<b>Imports</b> (1000 MT)	5	5	8	8	5	5
<b>Total Supply</b> (1000 MT)	421	421	428	423	405	425
<b>Exports</b> (1000 MT)	238	238	218	217	230	218
<b>Fresh Dom. Consumption</b> (1000 MT)	4	4	5	5	5	5
<b>For Processing</b> (1000 MT)	179	179	205	201	170	202
<b>Total Distribution</b> (1000 MT)	421	421	428	423	405	425
(HECTARES) ,(1000 TREES) ,(1000 MT)						
OFFICIAL DATA CAN BE ACCESSED AT: <a href="#">PSD Online Advanced Query</a>						

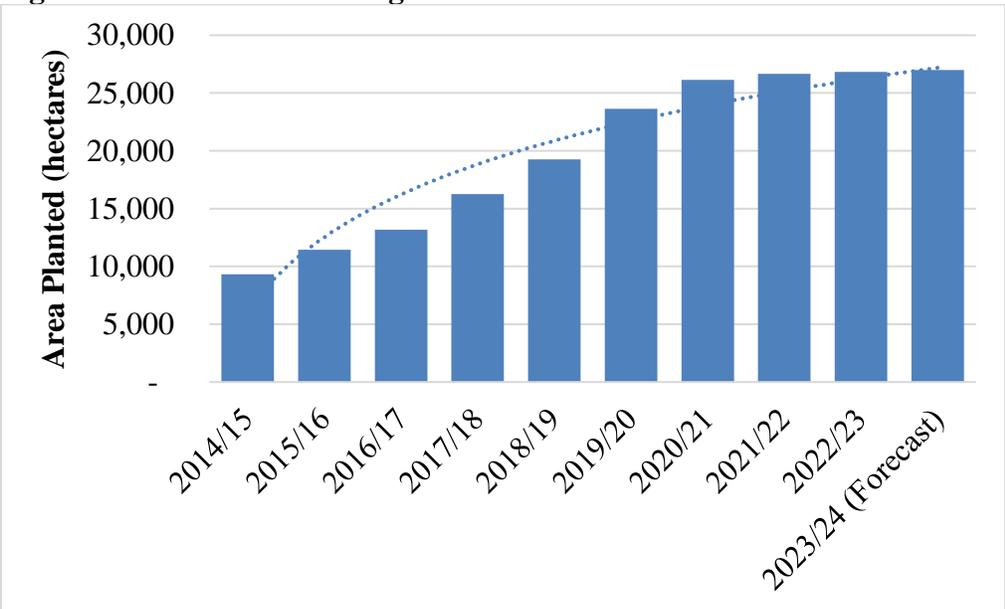
# Tangerines/Mandarins, Fresh

## Crop Area

South Africa’s expansion of tangerines/mandarins (soft citrus) area has slowed. Farmer interest driven by higher global demand for seedless soft citrus and relatively higher profit margins compared to other citrus types led to substantial new plantings in recent years and have left many growers wondering if the market is oversaturated (see **Figure 8**). Accelerating farming input costs, infrastructure inefficiencies, ineffective port operations, an underperforming rail system, and deteriorating road networks are diminishing the profitability of soft citrus producers and limiting continued investments in the sector. Growers are expanding the number of hectares under netting to better control pests, enable better water-management practices, and protect the fruit from adverse weather conditions such as strong winds, hail, or sun damage. Further investment is going towards alternative sources of energy supply to manage the risk of erratic electricity supply. Post expects that the area planted to tangerines/mandarins will increase slightly by 1 percent to 27,000 ha in MY 2023/24. 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.

In MY 2022/23, area planted to tangerines/mandarins increased by only 1 percent based on a decline in the rate of budwood sales. Slight area expansion was observed in the Western Cape, Limpopo and KwaZulu-Natal growing regions. In MY 2021/22, the area planted with tangerines/mandarins increased by 2 percent year-on-year. Post contacts confirm that a small portion of MY 2021/22 tangerine/mandarin crop went unutilized due to limited commercial opportunities. Without any viable market for a percentage of the production, producers are hesitant to expand further.

**Figure 8: South African Tangerine/Mandarin Area**



Source: CGA & Post Estimates/Forecast

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 (9 percent), Leanri (7 percent), and Orri (7 percent). The Western Cape province is the predominate producer of soft citrus, accounting for 38 percent of South Africa's total production, increasing by 1 percent from MY 2021/22, followed by Limpopo (28 percent) and Eastern Cape (24 percent) provinces. Almost 18 percent of the soft citrus area in South Africa consists of orchards four years and younger, meaning that a growing volume of soft citrus will reach the market in coming years.

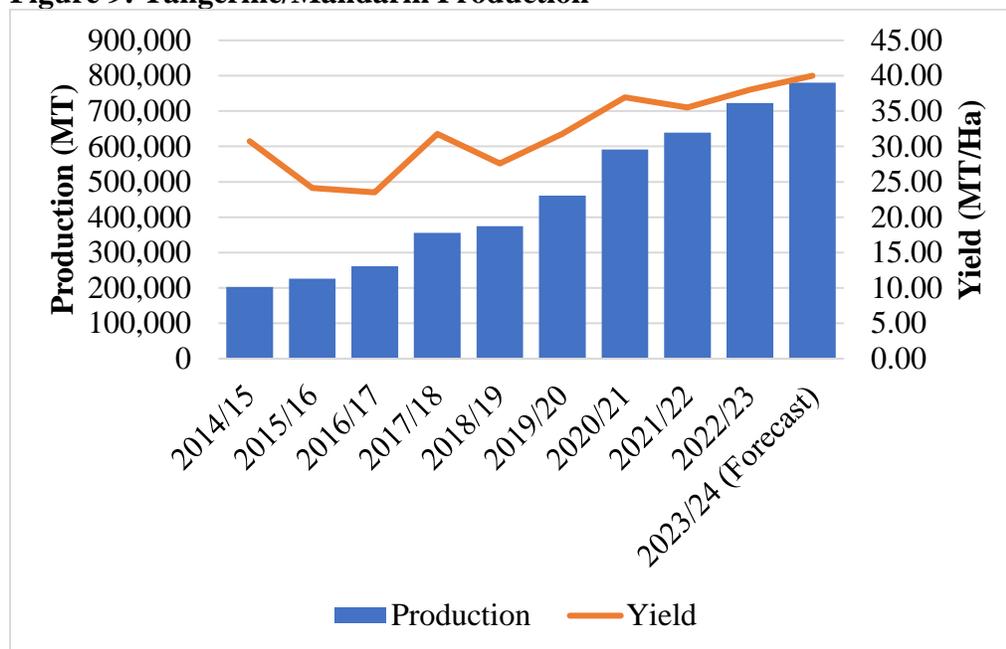
## **Production**

Post increases its MY 2023/24 production forecast to 780,000 MT, up 8 percent from the previous season, as young trees come into production and harvested area is expected to expand. Additionally, tangerine/mandarin growing regions are reported to have sufficient water for irrigation this MY. More tangerines/mandarins are being grown under hail nets, which Post expects will improve in both quality and yield.

In MY 2022/23, tangerine/mandarin production surged 13 percent to 723,000 MT based on newly bearing trees and decent rains that led to sufficient water resources for irrigation in major production areas. Although, the Western Cape region experienced heavy rains and flooding, leading to a reduction in the production of late citrus such as clementines, the floods occurred after the vast majority of the crop had been harvested.

The production of tangerines/mandarins expanded in MY 2021/22, climbing 8 percent year-over-year (see **Figure 9**) on the expansion of planted area, conducive weather conditions, and the use of netting.

**Figure 9: Tangerine/Mandarin Production**



Source: DALRRD & Post Estimates/Forecast

### Consumption

Post forecasts MY 2023/24 domestic consumption of tangerines/mandarins will increase by 19 percent year-on-year to 43,000 MT based on greater availability of supply and a great shift by consumers to tangerines/mandarins from oranges, as the fruit is easier to peel and considered juicier and sweeter than other citrus types. In MY 2022/23, local consumption of tangerines/mandarins is estimated to have dropped by 20 percent to 36,000 MT, corresponding to the greater export volumes. In MY 2021/22, South Africa consumed 45,000 MT of tangerines/mandarins, with a small portion of the crop also used for livestock feed.

The South African industry prioritizes export markets for soft citrus and 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.

### Processing

South Africa prioritizes supplying export markets, while fruit that does not meet export standards is usually used for processing. Post forecasts tangerine/mandarin deliveries for processing in MY 2023/24 will increase slightly by 1 percent to 70,000 based on expanded production. In MY 2022/23, Post estimated tangerine/mandarin deliveries for processing decreased by 9 percent to 69,000 MT based on exports and growing domestic demand. Processing volumes in MY 2021/22 increased by 73 percent over the previous season, representing greater production supplies, especially for domestic use due to high shipping costs that limited export opportunities. South African tangerines/mandarins are mostly processed into juice and concentrate.

## Exports

Post forecasts South Africa’s tangerine/mandarin exports will increase by 8 percent to 670,000 MT in MY 2023/24 based on increasing production and investments in quality improvements. About 48 percent of tangerines/mandarins are exported through the Port of Cape Town and 34 percent through the Durban Port. Port operations currently pose a risk for MY 2023/24 exports, as there are growing concerns with operational constraints, which will impact the movement of produce to the export market. Industry and government stakeholders continue to engage with port authorities to ensure readiness and increased productivity especially during peak season, which began in May.

In MY 2022/23, tangerine/mandarin exports are estimated to have increased by 19 percent on the back of high production volume and more reasonable shipping rates. In MY 2021/22, South Africa exported 520,615 MT of tangerines/mandarins, which was an increase of 3 percent over the previous MY (see **Table 9**).

**Table 9: South African Fresh Tangerine/Mandarin Exports**

Partner Country	MY	MY	% Change	Feb - Apr		
	2021/22 (MT)	2022/23 (MT)		MY 22/23 (MT)	MY 23/24 (MT)	% Change
Netherlands	102,01	134,16	32%	5,477	5,415	-1%
United Kingdom	87,821	97,448	11%	7,143	5,831	-18%
United States	53,489	49,634	-7%	67	159	137%
Russia	51,336	51,958	1%	5,142	5,455	6%
United Arab Emirates	39,962	57,446	44%	275	726	164%
China	23,117	30,851	33%	23	0	-100%
Canada	22,906	29,250	28%	747	2,245	201%
Bangladesh	21,762	22,239	2%	110	84	-24%
Portugal	10,853	17,269	59%	71	0	-100%
Malaysia	10,744	8,118	-24%	45	27	-40%
Hong Kong	9,475	11,438	21%	0	0	-
Saudi Arabia	9,437	10,321	9%	24	71	196%
Ireland	8,288	8,997	9%	1,010	1,275	26%
Iraq	6,137	6,140	0%	0	23	-
Taiwan	6,020	1,681	-72%	0	0	-
India	5,161	9,014	75%	0	0	-
Senegal	4,997	6,646	33%	0	0	-
France	4,461	6,055	36%	0	9	-
<i>Others</i>	<i>42,635</i>	<i>63,337</i>	<i>49%</i>	<i>754</i>	<i>1,553</i>	<i>106%</i>
<b>Total</b>	<b>520,615</b>	<b>622,002</b>	<b>19%</b>	<b>20,888</b>	<b>22,873</b>	<b>10%</b>

Source: Trade Data Monitor, LLC.

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 exponentially over the past six years, from 13,695 MT in MY 2017/18, to 49,634 MT in MY 2022/23. Even though exports to the United States decreased in MY 2022/23, 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 2023/24 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. In MY 2022/23 average prices for fresh and processed fruit increased to R7,383/MT (\$394.81/MT) and R390/MT (\$20.86/MT), respectively, due to a surge in export supply.

**Table 10: Tangerine/Mandarin Prices**

<b>Marketing Years</b>	<b>Local Market Average Price (rand/MT)</b>	<b>Export Market Average Price (rand/MT)</b>	<b>Processed Average Price (rand/MT)</b>
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**

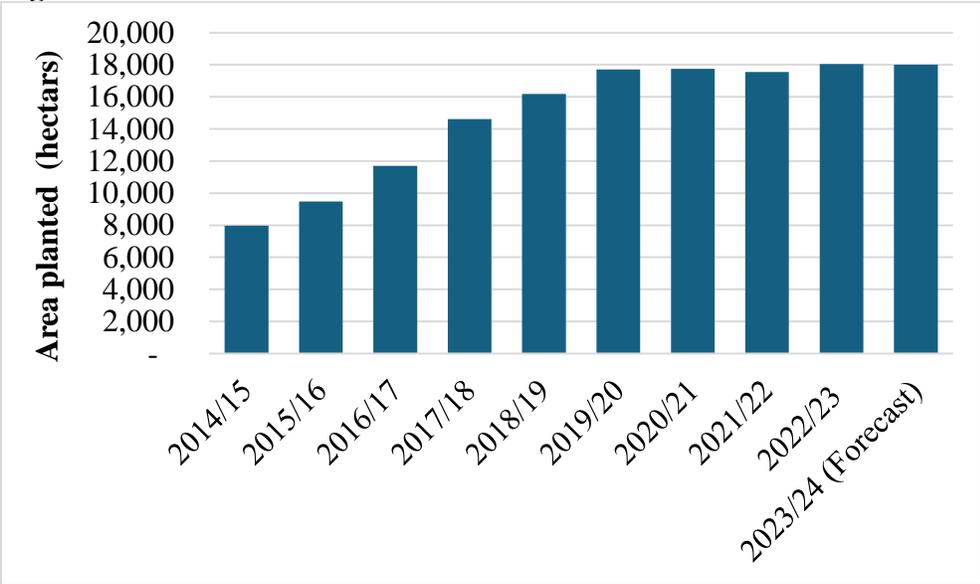
Market Year Begins	2021/2022		2022/2023		2023/2024	
	Feb 2022		Feb 2023		Feb 2024	
	USDA Official	New Post	USDA Official	New Post	USDA Official	New Post
<b>South Africa</b>						
<b>Area Planted (HECTARES)</b>	26677	26677	26977	26833	27500	27000
<b>Area Harvested (HECTARES)</b>	18000	18000	18500	19000	19000	19500
<b>Bearing Trees (1000 TREES)</b>	10500	10340	12000	10405	12200	10470
<b>Non-Bearing Trees (1000 TREES)</b>	5000	3825	4950	3850	5100	3870
<b>Total No. Of Trees (1000 TREES)</b>	15500	14165	16950	14255	17300	14340
<b>Production (1000 MT)</b>	639	639	710	723	740	780
<b>Imports (1000 MT)</b>	3	3	3	4	3	3
<b>Total Supply (1000 MT)</b>	642	642	713	727	743	783
<b>Exports (1000 MT)</b>	521	521	600	622	630	670
<b>Fresh Dom. Consumption (1000 MT)</b>	45	45	47	36	49	43
<b>For Processing (1000 MT)</b>	76	76	66	69	64	70
<b>Total Distribution (1000 MT)</b>	642	642	713	727	743	783
(HECTARES) ,(1000 TREES) ,(1000 MT)						
OFFICIAL DATA CAN BE ACCESSED AT: <a href="#">PSD Online Advanced Query</a>						

# Lemons/Limes, Fresh

## Crop Area

The area planted with lemons in South Africa has more than doubled over the past eight years, driven by global demand and rising global prices (see **Figure 10**). However, the positive trend in area planted with lemons has flattened in recent years due to the bearish movement of export prices. Post forecasts that South African lemon area will decrease slightly to 18,000 ha in MY 2023/24 on a downward trend in budwood sales. Furthermore, producers are discouraged from planting any more lemons due to an oversupply and limited intake for processing. In MY2022/23, area expanded by 3 percent to 18,054 ha with growth coming from growing regions in 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 citrus types and uprooted old orchards. The pace of expansion for lemon area has slowed as orchards five years and younger only make up 8 percent of total area, compared to the 66 percent that are six to ten years old. There is limited commercial production of limes in South Africa.

**Figure 10: South African Lemon Area**



Source: CGA & Post Estimates/Forecast

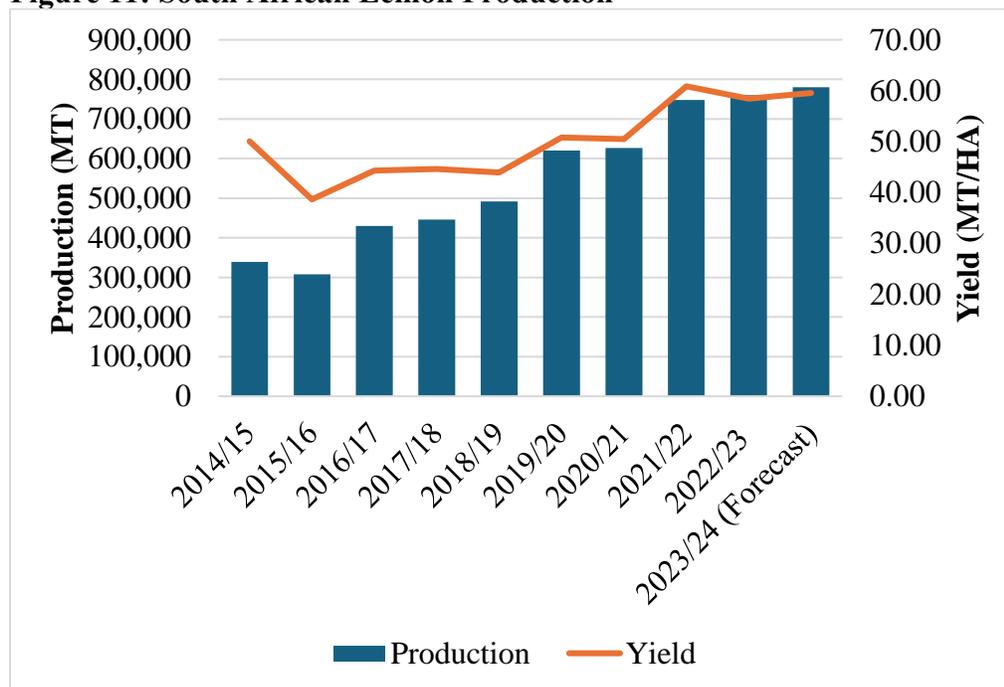
The largest growing region for lemons/limes in South Africa is the Eastern Cape province, accounting for 41 percent of total area planted, followed by Limpopo (34 percent) and Western Cape (14 percent) provinces. By far, the most popular cultivar of lemons planted in South Africa is Eureka, representing 75 percent of total area. Eureka is followed by the Lisbon (7 percent) and 2Ph Seedless (6 percent) cultivars.

## Production

Post revises MY 2023/24 lemon production upwards to 780,000 MT, representing an expected increase of 3 percent from MY 2022/23, based on improved yields due to increased availability of irrigation water and expanded use of netting in lemon orchards. Additionally, Post's contacts reported the Kouga dam in the Eastern Cape province, which serves more than 40 percent of South Africa's lemon production area, was 100 percent full due to ample rainfall, particularly in September 2023. This is the first time in eight years that the dam has been completely filled. South Africa experienced hot and dry conditions in February 2024, which will lead to smaller sized fruit; however, overall yields are expected to improve.

Post increases the MY 2022/23 production estimate to 760,000 MT, up by 2 percent year-on-year. Expanded production last season was due to young trees coming into production and expansion of harvested area. MY 2021/22 production increased by 19 percent over the previous season due to favorable weather conditions.

**Figure 11: South African Lemon Production**



Source: DALRRD & Post Estimates/Forecast

## Consumption

Post forecasts South Africa's domestic lemon consumption will increase slightly by 3 percent to 40,000 MT in MY 2023/24 on expanded supply. Consumption is estimated at 39,000 MT in MY 2022/23 based on increased demand driven by health-conscious consumers and a decrease in lemons deliveries 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 cocktail garnishing, there is negligible demand in the remainder of the year.

## Processing

Lemon prices for processing in South Africa have weakened due to a drop in exports of lemon juice. Processors are reported to have high stocks of lemon juice and appear to be restricting lemon intake from member growers. Post revises lemons for processing upwards to 157,000 MT in MY 2023/24, relatively unchanged from processing volumes for MY 2021/22 and MY 2022/23, based on increased production volumes, particularly of smaller sized lemons, and a lack of alternative markets. Post raises its estimate for MY 2022/23 processing to 158,000 MT, based on larger production volumes. Industry contacts confirmed that in MY2021/22 and MY 2022/23, processors were restricting lemon intake due to large lemon juice stocks caused by a surge in class 2 and class 3 fruit in the local market. About 159,000 MT of lemons were delivered for processing in MY 2021/22, on the back of record production and an increase in fruit being sold for processing due to unfavorable export market conditions.

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

Post decreases its export forecast for MY 2023/24 to 585,000 MT, up marginally from the previous two marketing years. The pace of exports between January-April 2024 slowed in comparison to the same period in MY 2022/23. Post contacts report that due to Spain having a long season with improved production particularly of Verna lemons, a late switch towards South African lemons is expected, which would improve the pace of exports later in the MY. Lemon exports in MY 2023/24 are forecast to improve by 4 percent year-on-year on increased production of exportable supply. Exports are expected to continue rising for destinations in the Middle East, Europe, and Asia based on sustained growth in demand. Lemons from the Eastern Cape province to the EU will benefit from added direct shipping service from Port Elizabeth and ports of Ngqura.

MY 2022/23 exports improved slightly by 1 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.

The EU and UK remained the main markets for South African lemons in MY 2022/23, accounting for almost 47 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 reduced chilling injury and subsequent decay.

**Table 12: South African Fresh Lemon Exports**

Partner Country	MY	MY	% Change	Jan - Apr		
	21/22 (MT)	22/23 (MT)		MY 22/23 (MT)	MY 23/24 (MT)	% Change
Netherlands	116,09	123,07	6%	7,832	2,779	-65%
United Arab Emirates	68,358	65,037	-5%	22,209	19,875	-11%
United Kingdom	43,635	43,190	-1%	5,894	3,610	-39%
Portugal	42,179	25,911	-39%	574	0	-100%
Russia	41,126	48,104	17%	9,916	8,564	-14%
Saudi Arabia	34,228	30,607	-11%	10,721	11,312	6%
Canada	30,793	30,147	-2%	6,090	7,387	21%
Iraq	30,132	39,391	31%	5,701	5,835	2%
Italy	29,802	32,646	10%	1,577	409	-74%
Hong Kong	18,349	14,348	-22%	4,683	4,276	-9%
Malaysia	16,138	14,959	-7%	4,038	2,470	-39%
China	9,325	10,532	13%	134	0	-100%
Kuwait	9,007	7,418	-18%	2,163	1,909	-12%
Spain	8,484	18,704	120%	417	0	-100%
<i>Others</i>	59,832	61,227	2%	9,166	8,196	-11%
<b>Total</b>	<b>557,479</b>	<b>565,298</b>	<b>1%</b>	<b>91,115</b>	<b>76,622</b>	<b>-16%</b>

Source: Trade Data Monitor LLC

## Imports

Post forecasts MY 2023/24 imports of lemons will shrink to around 2,000 MT, as domestic production will sufficiently meet local demand for most of the year. Imports are minimal, mainly coming from Eswatini. In MY 2022/23, South Africa imported 2,358 MT of lemons, continuing a downward trend based on high domestic production.

## 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 market and processed prices.

**Table 13: Lemon/Lime Prices**

<b>Marketing years</b>	<b>Local Market Average Price (rand/MT)</b>	<b>Export Market Average Price (rand/MT)</b>	<b>Processed Average Price (rand/MT)</b>
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**

<b>Lemons/Limes, Fresh</b> Market Year Begins South Africa	<b>2021/2022</b>		<b>2022/2023</b>		<b>2023/2024</b>	
	<b>Jan 2022</b>		<b>Jan 2023</b>		<b>Jan 2024</b>	
	<b>USDA Official</b>	<b>New Post</b>	<b>USDA Official</b>	<b>New Post</b>	<b>USDA Official</b>	<b>New Post</b>
<b>Area Planted</b> (HECTARES)	17555	17555	17550	18054	16900	18000
<b>Area Harvested</b> (HECTARES)	12289	12289	13000	13000	13000	13100
<b>Bearing Trees</b> (1000 TREES)	8410	7720	8700	7940	8500	7915
<b>Non-Bearing Trees</b> (1000 TREES)	2140	2438	1910	2507	1600	2500
<b>Total No. Of Trees</b> (1000 TREES)	10550	10158	10610	10447	10100	10415
<b>Production</b> (1000 MT)	748	748	653	760	720	780
<b>Imports</b> (1000 MT)	3	3	3	2	2	2
<b>Total Supply</b> (1000 MT)	751	751	656	762	722	782
<b>Exports</b> (1000 MT)	557	557	573	565	640	585
<b>Fresh Dom. Consumption</b> (1000 MT)	35	35	40	39	40	40
<b>For Processing</b> (1000 MT)	159	159	43	158	42	157
<b>Total Distribution</b> (1000 MT)	751	751	656	762	722	782
(HECTARES) ,(1000 TREES) ,(1000 MT)						
OFFICIAL DATA CAN BE ACCESSED AT: <a href="#">PSD Online Advanced Query</a>						

## **Orange Juice**

### **Production**

South African growers 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 largely, and in some instances even solely, to supply processing facilities.

Domestic juicers are reported to be paying such high prices for juice in MY 2023/2024 that producers are considering sending export quality fruit directly for processing. This hike in orange juice prices is due to a drop in Florida's orange production and concerns about Brazil's crop being reduced by drought. Orange juice production is revised upwards and is expected to hike by 59 percent to 58,800 MT in MY 2023/24. Further, orange sizes are reported to be smaller, and a portion of smaller sized oranges are likely to be sold for processing leading to a 59 percent hike in oranges delivered for processing. Post contacts reported that early orange varieties which are 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 vs 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 is revised upwards and estimated to have increased by 4 percent based on an improvement in deliveries for processing and improved prices for producers. MY 2021/22, South Africa's orange juice production surged by 48 percent based on increased supply of oranges delivered for processing.

Post contacts indicated processing costs have increased significantly due to increased demand of fuel to operate generators during rolling blackouts, locally known as load shedding. Fruit juice must be kept at a specific temperature to maintain quality, so an uninterrupted supply of electricity is important for the processing sector. However, investments in mitigation measures over the past few years appear to be allowing local processors to scale up operations to seize opportunities offered by higher global prices.

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 is forecast to remain unchanged in MY 2023/24 despite increased production as prices are expected to remain elevated. Further, there is easily available

substitutable juices in local juice blends. In MY 2022/23 domestic juice consumption is estimated to have decreased by 9 percent on a downward change in juice production.

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 pear juice based on market conditions. Processors primarily source apple and pear concentrate from China, which is used as a base for blended juice. Post contacts confirm that the price of apple and pear concentrates increased significantly in MY 2022/23 which further increased the cost of the final product and limited growth in the consumption of orange 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](#)) and is expected to increase again in 2025. 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 in MY 2023/24 orange juice exports will improve by 14 percent based on improved production, high global demand and a weak exchange rate. 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**). However, Europe also remains an important market for South African orange juice. Even though exports to the United States dropped by 18 percent in MY 2022/23, South Africa increased orange juice exports to the United States by over 900 percent from 186 MT in 2020/21 to 1,871 MT in 2021/22. Exports of orange juice from South Africa to the United States are expected to grow in MY 2023/24, on improved production.

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

<b>Partner Country</b>	<b>MY 2021/22 (MT)</b>	<b>MY 2022/23 (MT)</b>	<b>% Change</b>
Netherlands	9,275	13,040	41%
Botswana	3,860	9,067	135%
Eswatini	2,924	2,899	-1%
Namibia	2,014	2,669	33%
Israel	1,959	1,722	-12%
United States	1,871	1,540	-18%
Spain	928	1,523	64%
Italy	930	1,230	32%
Lesotho	1,005	1,132	13%
Ethiopia	803	880	10%
Zimbabwe	896	828	-8%
Zambia	677	631	-7%
India	577	474	-18%
Greece	147	416	183%
China	102	303	197%
Mozambique	203	246	21%
<i>Others</i>	<i>3,004</i>	<i>2,463</i>	<i>-18%</i>
<b>Total</b>	<b>31,175</b>	<b>41,063</b>	<b>32%</b>

Source: Trade Data Monitor

## **Imports**

Post forecasts that imports of orange juice will drop to around 800 MT in MY 2023/24 based on volumes of juice produced in the domestic market. In MY 2022/23 South Africa imported 1,112 MT of orange juice imports, an increase by 13 percent year-on-year. Zimbabwe is the main supplier of orange juice to South Africa 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	2021/2022		2022/2023		2023/2024	
	Apr 2022		Apr 2023		Apr 2024	
	USDA Official	New Post	USDA Official	New Post	USDA Official	New Post
<b>Deliv. To Processors</b> (MT)	215000	355000	165000	369000	160000	588000
<b>Beginning Stocks</b> (MT)	12150	11438	11952	13240	9852	6989
<b>Production</b> (MT)	35000	35500	32000	36900	31000	58800
<b>Imports</b> (MT)	981	981	800	1112	800	800
<b>Total Supply</b> (MT)	48131	47919	44752	51252	41652	66589
<b>Exports</b> (MT)	31179	31179	30000	41063	28000	47000
<b>Domestic Consumption</b> (MT)	5000	3500	4900	3200	4850	3200
<b>Ending Stocks</b> (MT)	11952	13240	9852	6989	8802	16389
<b>Total Distribution</b> (MT)	48131	47919	44752	51252	41652	66589
(MT)						
OFFICIAL DATA CAN BE ACCESSED AT: <a href="#">PSD Online Advanced Query</a>						

## **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*

**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.

## 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 Polices 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
<b>08.05</b>	<b>Citrus fruit, fresh or dried:</b>							
<b>0805.10</b>	<b>Oranges</b>							
0805.10.10	Fresh	kg	4%	free	4%	free	4%	2.4%
0805.10.90	Other	kg	4%	free	4%	free	4%	2.4%
<b>0805.40</b>	<b>Grapefruit, including pomelos:</b>							
0805.40.10	Fresh	kg	4%	free	4%	free	4%	2.4%
0805.40.90	Other	kg	4%	free	4%	free	4%	2.4%
<b>0805.50</b>	<b>Lemons (Citrus Limon, Citrus Limonium) and limes (Citrus aurantifolia, Citrus latifolia):</b>							
0805.50.10	Fresh	kg	4%	free	4%	free	4%	2.4%
0805.50.90	Other	kg	4%	free	4%	free	4%	2.4%
<b>0805.90</b>	<b>Other:</b>							
0805.90.10	Fresh	kg	4%	free	4%	free	4%	2.4%
0805.90.90	Other	kg	4%	free	4%	free	4%	2.4%
<b>2009.1</b>	<b>Orange juice</b>							
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 June 10, 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](#).

**Notes:**

Exchange rate: U.S. dollar to rand = R18.70 (as of June 3, 2024)

Marketing Year (MY)

January – December for grapefruit and lemons

February – January for oranges and tangerines/mandarins

April – March for orange juice

MT = Metric Tons

**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