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**Report Highlights:**

The area under citrus cultivation in South Africa has grown steadily over the past decade, driven by ongoing investments on relatively high earnings from export markets. As a result, South Africa is set for record citrus exports of 2.7 million tons in marketing year 2021/22. However, the expansion in citrus orchards is expected to ease in marketing year 2022/23. Accelerating farming input costs, higher shipping rates, new phytosanitary regulations imposed by the European Union, inflationary pressures on consumers in key markets, and infrastructure inefficiencies are challenging South Africa's citrus exports. These factors are reducing the profitability of the sector, resulting in restrained investment in the industry.

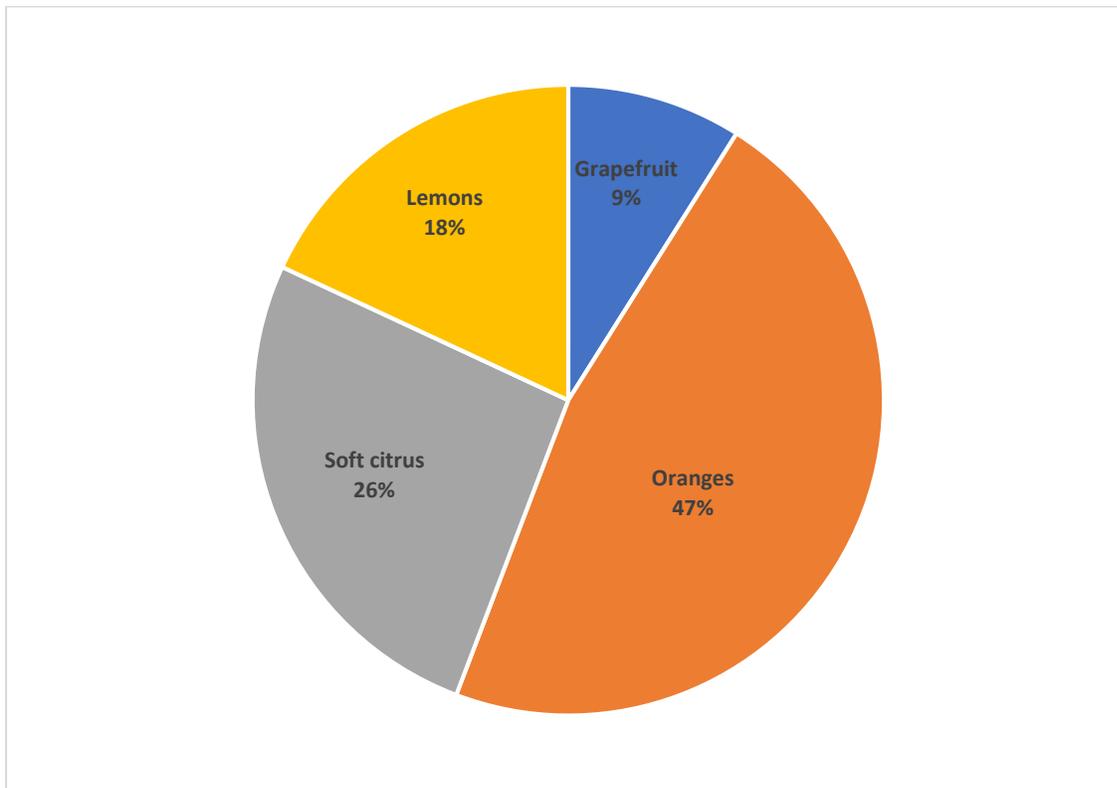
## Oranges, Fresh

### Area Planted

Citrus orchards in South Africa account to more than 100,000 hectares (ha) of which oranges orchards represent approximately 47 percent (see Figure 1). The area planted to oranges grew by almost 14 percent over the past seven years or by an average two percent per annum. Growth in orange area was limited by an aggressive shift to soft citrus in the growing regions of the Western Cape and Limpopo provinces. Post anticipates growth will be only marginal in Marketing Year (MY) 2022/23 at 48,130 ha. Accelerating farming input costs, higher shipping rates, infrastructure inefficiencies, including electricity supply disruptions (see [Load shedding the Achilles heel to the South African agricultural sector](#)), ineffective ports operations (also see [Labor Strikes Could Cripple South African Agricultural Trade](#)), deteriorating road networks and new phytosanitary regulations oppose by the European Union (EU), are diminishing the profitability of orange producers and limiting continued investment in the industry. In MY 2021/22 orange area grew by an estimated two percent to 47,750 ha, from 46,809 ha in MY 2020/21. Figure 2 illustrates the growing trend for area planted to oranges over the past seven years.

**Figure 1**

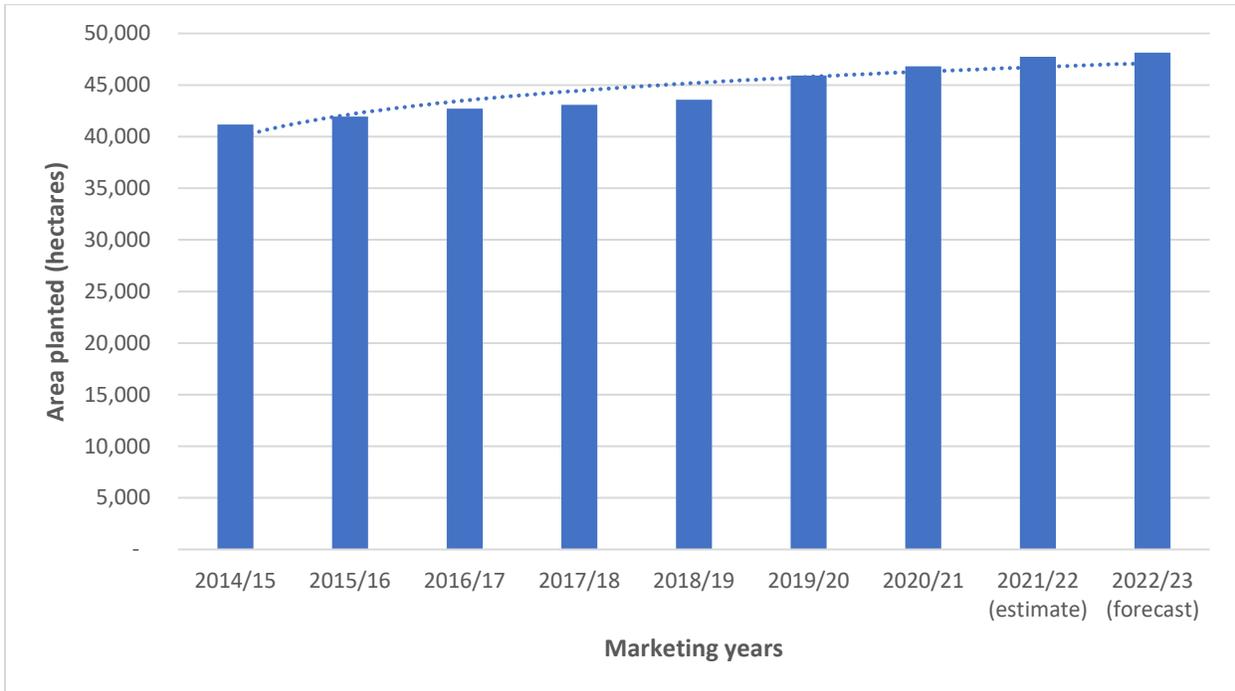
*The Percentage Distribution of South Africa's Total Citrus Area*



**Source:** Citrus Growers Association (CGA)

**Figure 2**

*Area Planted to Oranges in South Africa*

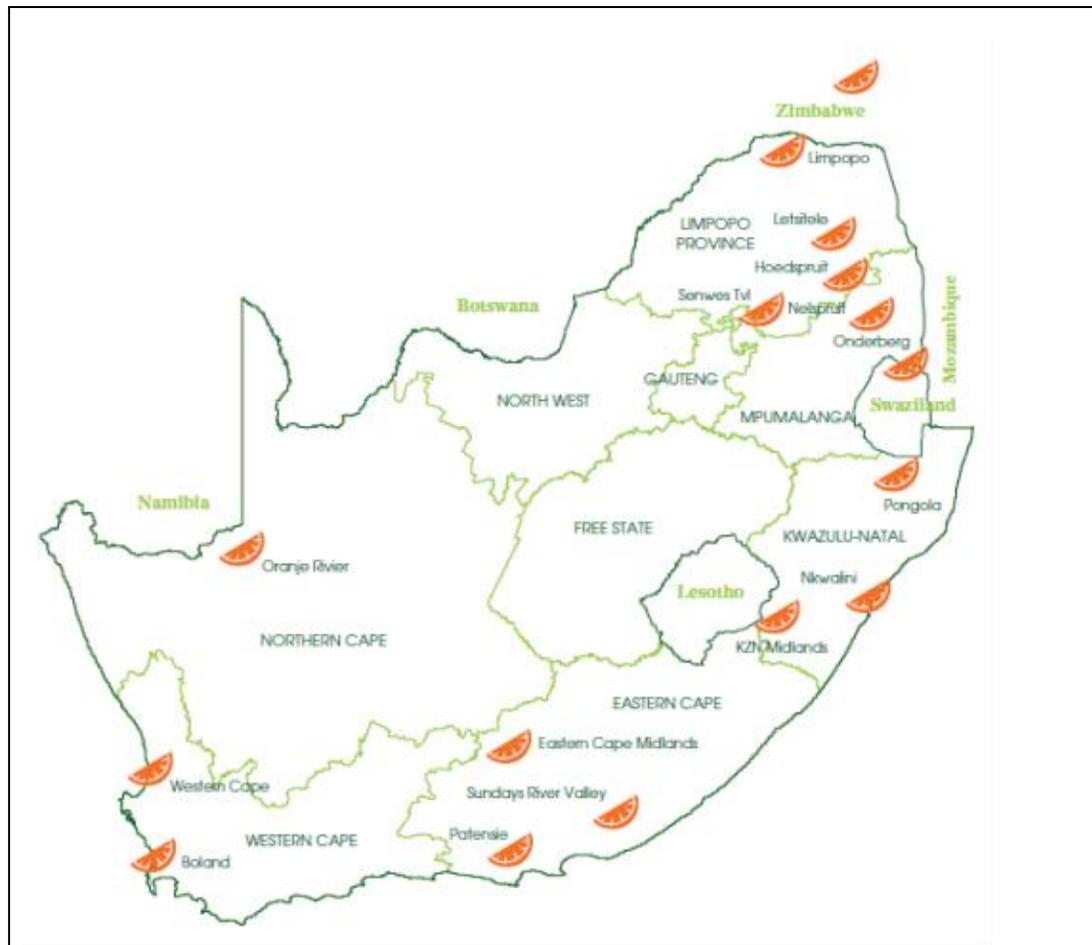


**Source:** CGA & Post Estimates

The Limpopo province is the leading growing region for oranges in South Africa, accounting for 48 percent of total area, followed by the Eastern Cape (23 percent) and Western Cape (14 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 25 percent of total area, followed by the Valencia Late (10 percent), Delta (9 percent), and Turkey (7 percent) cultivars. Other cultivars planted in South Africa include Bennie, Palmer, Cambria, Bahianinha, and Washington.

**Figure 3**

*Citrus Growing Areas in South Africa*



**Source:** CGA

**Production**

Post forecasts that orange production in South Africa will grow by three percent in MY 2022/23 to almost 1.7 million metric tons (MMT). Citrus, a water-intensive crop, will be able to benefit from the decent winter rainfall in the Western Cape and Eastern Cape provinces. Dam levels are currently averaging 70 percent full. In the Limpopo province, dam levels are on average 80 percent full and are expected to increase as another decent summer rainfall season is expected due to a *La Niña* weather system. Overall, there is sufficient water for irrigation available in all producing areas for MY 2022/23.

The production of oranges is estimated to grow by six percent to 1.6 MMT in MY 2021/22. This surge is based on the constant growth in planted area and above-average rainfall received throughout the season in the main growing regions, ensuring sufficient irrigation water and providing conducive growing conditions that positively impacted production. In MY 2020/21, South Africa produced 1.5 million MT of oranges.

**Figure 4**

*Orange Production in South Africa*



**Source:** CGA & Post Estimates

### Consumption

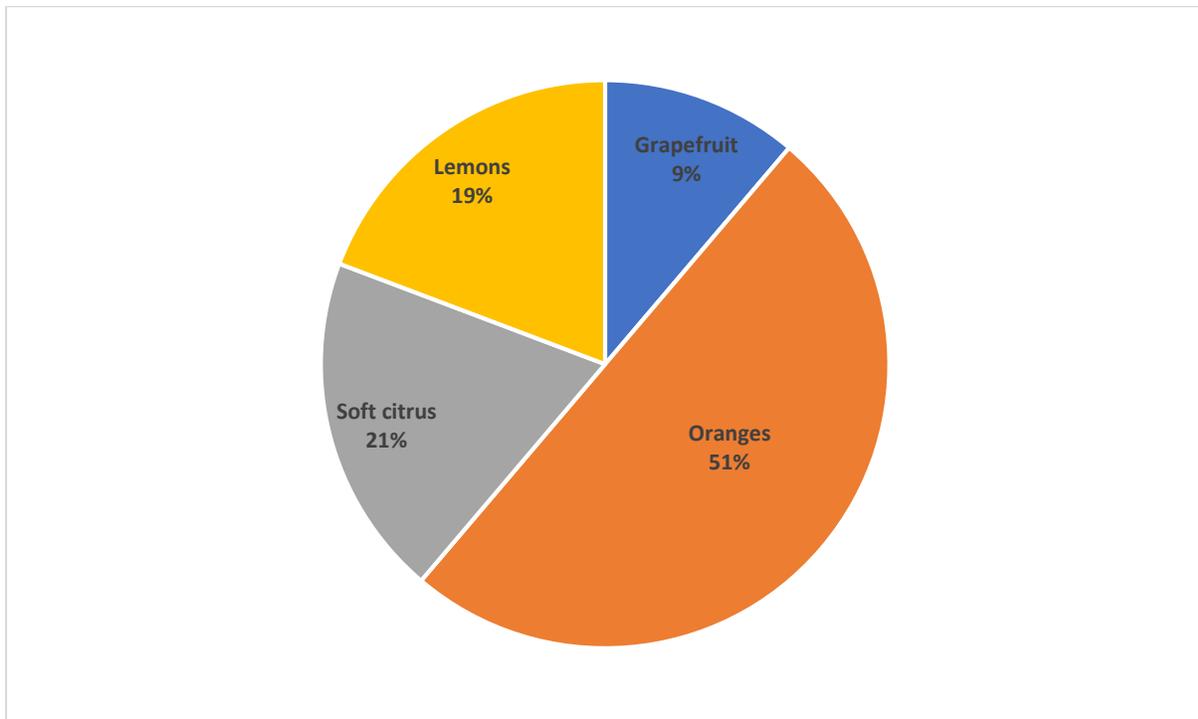
Post forecasts that the local consumption of oranges will grow marginally to 90,000 MT in MY 2022/23 on higher production. South Africa prioritizes supplying export markets, and surplus oranges, those that do not meet export standards, are supplied to the fresh domestic and processed markets. Fresh oranges are the most popular citrus consumed in South Africa, with a per capita consumption of about 1.5 kg per annum. However, slow economic growth and accelerating food price inflation (see [South Africa: Food and Fuel Feed Rising Inflation](#)) are forcing many South Africans to allocate more of their food budget to comparatively lower-cost staple foods. As a result, local consumption of oranges in MY 2021/22 is estimated at 85,000 MT, 10 percent lower than the 95,000 MT consumed in MY 2020/21.

### Exports

Post forecasts that South Africa's exports of oranges will grow by three percent in MY 2022/23 to reach a record level of 1.4 MMT on higher production. More than half of South Africa's total citrus exports consists of oranges (see Figure 5). In MY 2021/22, South Africa is heading for an estimated 1.35 MMT of oranges exports, up four percent from the 1.3 MMT exported in MY 2020/21 (see Table 1).

**Figure 5**

*Percentage Contribution to South Africa's Total Citrus Exports*



**Source:** Trade Data Monitor

South Africa exports oranges to more than 100 countries around the world, but the EU remains South Africa's largest export market, accounting for almost 40 percent of total orange exports. However, 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 EU market due to the prevalence of citrus black spot (CBS) and false codling moth (FCM). The citrus industry estimates that it spends almost R4 billion (US\$232 million) to comply with the CBS and FCM requirements in the EU market. The measures that have allowed South Africa to maintain and grow the EU market include pre-export inspections, strict spraying protocols, field surveillance programs, adherence to shipping protocols, and comprehensive CBS risk management systems.

As of 14 July 2022, the EU requires that imports of citrus fruit undergo specified cold treatment processes and precooling steps for specific periods before importation to ensure protection against FCM. These changes were introduced in the middle of South Africa's export season, which made implementation difficult and time sensitive. An estimated 1,350 containers of citrus fruit were detained at EU ports for several weeks, which resulted in an estimated R200 million (US\$12 million) in losses on reduced quality and transaction costs. South Africa launched a consultation process with the EU at the World Trade Organization in July 2022 regarding the cold treatment prescribed within the new regulations.

**Table 1***South African Fresh Orange Exports*

Export destinations	MY2020/21	MY2020/21	MY2021/22	%
	(MT)	(MT)	(MT)	Change
	Calendar year	January - September		
Netherlands	283,466	263,214	240,684	-8.6%
China	72,744	68,669	95,456	39.0%
United Arab Emirates	105,057	76,420	86,670	13.4%
Russia	86,289	63,404	67,135	5.9%
United Kingdom	68,670	59,744	62,293	4.3%
Portugal	71,154	69,407	57,970	-16.5%
Saudi Arabia	74,370	59,411	55,993	-5.8%
Bangladesh	61,624	40,127	53,495	33.3%
United States	47,501	42,478	53,284	25.4%
Hong Kong	46,506	43,035	44,405	3.2%
Malaysia	41,380	31,562	43,336	37.3%
Canada	40,404	32,372	36,647	13.2%
Iraq	41,810	35,385	35,054	-0.9%
Italy	42,747	41,449	34,286	-17.3%
India	21,093	18,044	27,311	51.4%
Others	190,922	158,026	147,058	-6.9%
<b>Total</b>	<b>1,295,734</b>	<b>1,102,746</b>	<b>1,141,076</b>	<b>3.5%</b>

**Source:** Trade Data Monitor

China is now South Africa's second largest market for oranges after growth of almost 40 percent in MY 2021/22. The export of citrus from the Maputo port in Mozambique, which started this year, is a breakthrough that lowers shipping time and costs. Significant volumes of South Africa's oranges are produced in the north-eastern parts of the country, which is substantially closer to the Maputo port than the Durban port. The Maputo port is an enhanced gateway for South African citrus to markets in Asia and the Middle East.

The Russia-Ukraine conflict has had a limited effect on South Africa's exports of oranges to Russia. In MY 2020/21, South Africa exported 86,289 MT of oranges to Russia, representing seven percent of total orange exports. In MY 2021/22, exports to this market grew by six percent.

South Africa's export of oranges to the United States are expected to continue to grow, benefitting from duty-free access under African Growth Opportunity Act (AGOA). Exports of oranges to the United States increased to a record of 53,121 MT in the MY 2019/20 but fell back slightly to 47,500 MT in MY 2020/21, due to global logistical challenges. However, in MY 2021/22 orange exports to the United States reached another record level of 53,284 MT, recording a growth rate of more than 25 percent.

## Imports

The import of oranges is estimated to remain flat at about 4,000 MT in MY 2022/23, based on available local 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.

## Prices

Table 2 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 against the major currencies and strong demand. However, from MY 2015/16, average export prices for South Africa oranges traded largely sideways. The exception is MY 2019/20 when global orange prices spiked due to firm demand worldwide for Vitamin C-rich products, which was underpinned by the pandemic.

**Table 2**

*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

**Source:** CGA

**Note:** 1 US\$ = R17.20 (11/15/2022)

**Table 3***Orange Production, Supply, and Distribution*

<b>Oranges, Fresh</b>	<b>2020/2021</b>		<b>2021/2022</b>		<b>2022/2023</b>	
	<b>Jan 2021</b>		<b>Jan 2022</b>		<b>Jan 2023</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>Market Year Begins</b>						
<b>South Africa</b>						
<b>Area Planted</b> (HECTARES)	46810	46810	47750	47750	0	48130
<b>Area Harvested</b> (HECTARES)	42360	42360	43210	43210	0	43320
<b>Bearing Trees</b> (1000 TREES)	41300	41300	42130	42130	0	42240
<b>Non-Bearing Trees</b> (1000 TREES)	4575	4575	4665	4665	0	4930
<b>Total No. Of Trees</b> (1000 TREES)	45875	45875	46795	46795	0	47170
<b>Production</b> (1000 MT)	1511	1511	1600	1600	0	1650
<b>Imports</b> (1000 MT)	3	3	3	4	0	4
<b>Total Supply</b> (1000 MT)	1514	1514	1603	1604	0	1654
<b>Exports</b> (1000 MT)	1296	1296	1360	1345	0	1380
<b>Fresh Dom. Consumption</b> (1000 MT)	82	95	85	85	0	90
<b>For Processing</b> (1000 MT)	136	123	158	174	0	184
<b>Total Distribution</b> (1000 MT)	1514	1514	1603	1604	0	1654
(HECTARES) ,(1000 TREES) ,(1000 MT)						

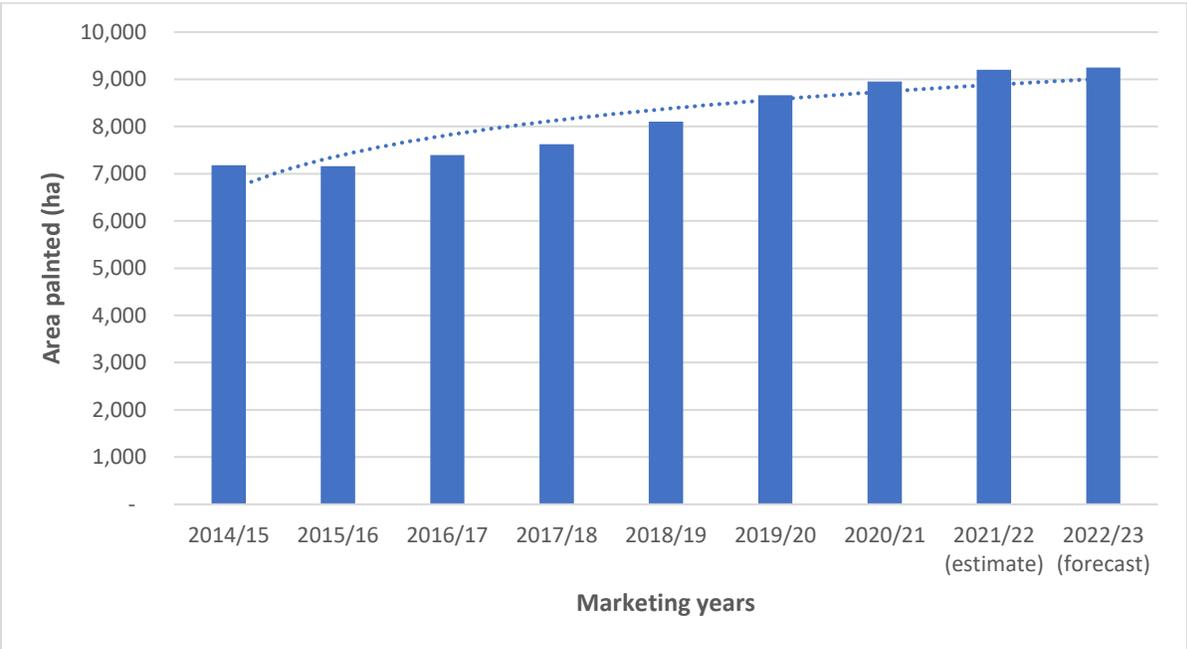
# Grapefruit, Fresh

## Area Planted

The area planted to grapefruit in South Africa grew by almost 25 percent over the past seven years (see Figure 6), mainly driven by a surge in global demand, especially in Europe, Asia, and the Middle East. However, grapefruit area is expected to flatten in the coming years due to a softening in global demand. In addition, accelerating farming input costs and higher shipping rates are diminishing the profitability of grapefruit producers which limit continuing investments in the industry. As a result, post forecasts marginal growth in grapefruit area in MY 2022/23 to 9,250 ha. In MY 2021/22 grapefruit area grew by an estimated three percent to 9,200 ha, from 8,952 ha in MY 2020/21.

**Figure 6**

*Area Planted to Grapefruit in South Africa*



**Source:** Citrus Growers Association (CGA) & Post Estimates

The Limpopo province is the leading growing region for grapefruit in South Africa, accounting for 56 percent of the total area planted, followed by Mpumalanga (20 percent), KwaZulu-Natal (10 percent), and Northern Cape (6 percent) provinces. Star Ruby, due to its high global demand, 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.

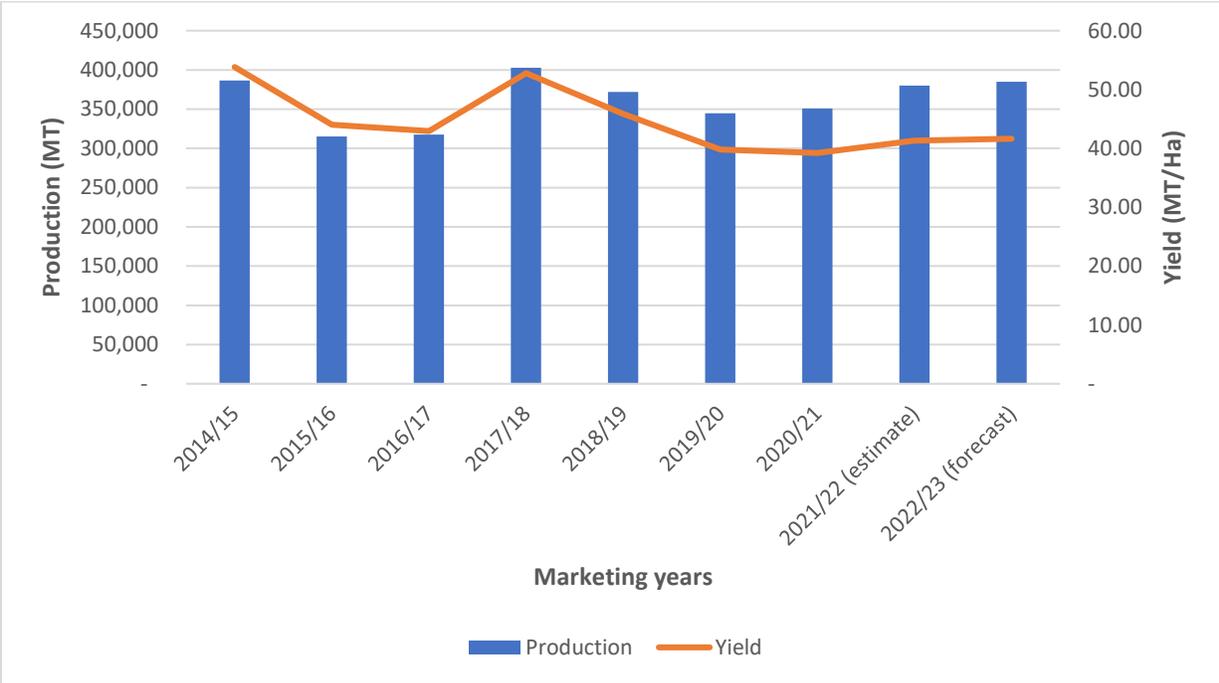
## Production

Post forecasts a marginal growth in grapefruit production to 385,000 MT in MY 2022/23. As already mentioned, favorable weather conditions are expected in most of the citrus (including

grapefruit) production areas due to a *La Niña* weather system that usually translate to above-average rainfall. In MY 2021/22, South Africa’s grapefruit production is expected to grow by eight percent to 380,000 MT, from 351,043 MT in MY 2020/21. 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 impacted positively on production. In addition, an increasing number of young trees started to bear fruit. Figure 7 illustrates grapefruit production and yields in South Africa over the past seven years.

**Figure 7**

*Grapefruit Production in South Africa*



**Source:** CGA & Post estimates

**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. Local grapefruit consumption in MY 2022/23 is forecast to stay at the same level as MY 2021/22, around 3,000 MT.

**Processing**

Local processing of grapefruit offers a fair alternative to exports. However, Post estimates that the grapefruit delivered for processing will decline by four percent to 132,000 MT in MY 2022/23, due to marginal growth in South Africa’s grapefruit exports. In MY 2021/22, the

volume of grapefruit for processing surged by more than 150 percent to reach 137,000 MT due to a decline in exports.

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. Grapefruit peel oil is used in scented fragrances.

## **Exports**

Post forecasts marginal growth in grapefruit exports by South Africa in MY 2022/23 to 245,000 MT on a slight growth in production. On the other hand, Post estimates a 19 percent drop in grapefruit exports in MY 2021/22 to 235,000 MT despite an eight percent upsurge in local production. Accelerating farming input costs and higher shipping rates meant that certain grades of grapefruit could not be exported profitably. In addition, flooding across the KwaZulu-Natal and Limpopo provinces near harvest time created shipping challenges. Particularly hard-hit areas included the city of Durban, resulting in devastated roads and an impact on operations at the port. Grapefruit is normally harvested between March and September, and due to the flooding, some exports were impacted. The Russia-Ukraine conflict has also affected the normal trading patterns of South Africa's grapefruit. Immediately after the conflict started, South Africa's citrus shipments to Russia ceased. However, grapefruit exports to Russia have now resumed at a reduced pace, as exporters, concerned about payments and shipping delays, explored other markets.

China is the leading market for South African grapefruit exports in MY 2021/22, accounting for 27 percent of total exports (see Table 4), followed by the Netherlands (26 percent), Japan (10 percent) and Russia (8 percent). Together these four countries represent more than 70 percent of South Africa's total exports of grapefruit. 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 8,827 MT in MY 2020/21. Although grapefruit exports to the United States dropped by 30 percent in MY 2021/22, mirroring lower exports across the board, growth is expected to return in MY 2022/23.

In MY 2020/21, South Africa exported a record amount of 290,607 MT of grapefruit, an increase of 19 percent from the 244,334 MT exported in MY 2019/20.

**Table 4***South African Fresh Grapefruit Exports*

<b>Export destinations</b>	<b>MY2020/21 (MT)</b>	<b>MY2020/21 (MT)</b>	<b>MY2021/22 (MT)</b>	<b>% Change</b>
	<b>Calendar year</b>	<b>January to September</b>		
China	77,707	77,039	63,315	-17.8%
Netherlands	73,231	73,056	62,515	-14.4%
Japan	30,029	30,029	22,865	-23.9%
Russia	22,127	21,962	18,428	-16.1%
United Kingdom	10,347	10,306	8,773	-14.9%
South Korea	4,547	4,464	7,175	60.7%
Canada	8,351	8,019	6,880	-14.2%
Hong Kong	13,130	12,746	6,810	-46.6%
United States	8,827	8,827	6,161	-30.2%
Italy	11,118	11,118	4,705	-57.7%
Portugal	5,475	5,475	4,472	-18.3%
Eswatini	2,135	2,109	3,318	57.3%
United Arab Emirates	4,795	4,609	3,275	-28.9%
Taiwan	3,557	3,536	2,970	-16.0%
Germany	719	719	1,703	136.9%
Others	14,512	13,943	10,095	-27.6%
<b>Total</b>	<b>290,607</b>	<b>287,957</b>	<b>233,458</b>	<b>-18.9%</b>

**Source:** Trade Data Monitor

### Imports

South Africa is not a major importer of grapefruit as the industry is mainly export-orientated. Imports mainly originate from Eswatini, Spain, Turkey, and Israel to fill the small demand gap towards the end of the season. Grapefruit imports are expected to stay flat in MY 2022/23 at around 1,000 MT. Grapefruit imports in MY 2021/22 are estimated at 1,400 MT.

### Prices

Table 5 illustrates the average local, export, and processed market prices for grapefruit over the past 10 years. Grapefruit prices in the export market have increased steadily over the period to reach record levels in MY 2019/20 on the weakening of the South African currency (rand) and growing demand. However, with a softening in the demand for grapefruit, export prices are currently under pressure. Processed and local market prices tend to fluctuate based on supply availability.

**Table 5***Grapefruit 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	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

**Source:** CGA**Note:** 1 US\$ = R17.20 (11/15/2022)**Table 6***Grapefruit Production, Supply, and Distribution*

<b>Grapefruit, Fresh</b>	<b>2020/2021</b>		<b>2021/2022</b>		<b>2022/2023</b>	
	<b>Jan 2021</b>		<b>Jan 2022</b>		<b>Jan 2022</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>Market Year Begins</b>						
<b>South Africa</b>						
<b>Area Planted</b> (HECTARES)	8952	8952	9200	9200	0	9250
<b>Area Harvested</b> (HECTARES)	8325	8325	8550	8550	0	8600
<b>Bearing Trees</b> (1000 TREES)	8240	8240	8500	8500	0	8595
<b>Non-Bearing Trees</b> (1000 TREES)	980	980	1000	1000	0	955
<b>Total No. Of Trees</b> (1000 TREES)	9220	9220	9500	9500	0	9550
<b>Production</b> (1000 MT)	351	351	380	380	0	385
<b>Imports</b> (1000 MT)	1	1	1	1	0	1
<b>Total Supply</b> (1000 MT)	352	352	381	381	0	386
<b>Exports</b> (1000 MT)	290	290	275	235	0	245
<b>Fresh Dom. Consumption</b> (1000 MT)	9	3	9	3	0	3
<b>For Processing</b> (1000 MT)	53	59	97	143	0	138
<b>Total Distribution</b> (1000 MT)	352	352	381	381	0	386

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

**Tangerines/Mandarins, Fresh**

**Area Planted**

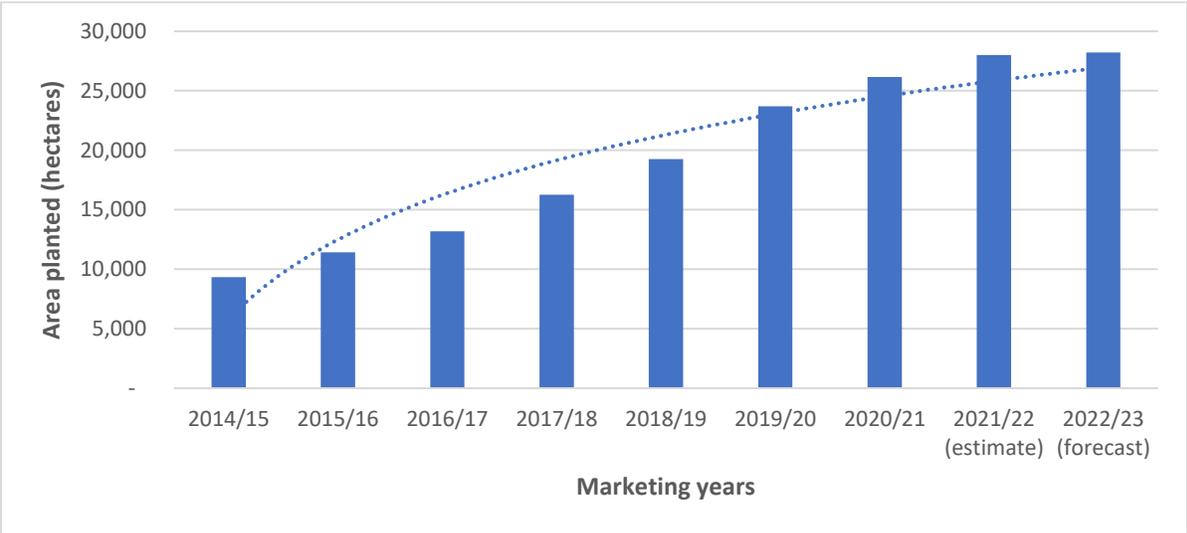
The area planted to tangerines/mandarins (soft citrus) increased exponentially over the past seven years, driven by higher global demand for seedless soft citrus and relatively higher profit margins compared to other citrus types (see Figure 8). However, Post forecasts this aggressive growth in soft citrus area will slow-down in MY 2022/23. The industry is concerned that demand for soft citrus is softening in key markets such as the EU and United Kingdom due to inflationary pressures on consumers and an expected weakening in economic growth. In addition, accelerating farming input costs, higher shipping rates, infrastructure inefficiencies, ineffective ports operations and deteriorating road networks are diminishing the profitability of soft citrus producers, limiting continued investment in the industry.

In MY 2021/22, the area planted with tangerines/mandarins grew by an estimated seven percent to 28,000 ha from 26,151 ha in MY 2020/21. An expanded number of hectares of tangerine/mandarin production are under netting to protect the fruit from adverse conditions such as hail or sun damage and as part of water-management techniques.

The predominant cultivar planted is the Nardocott, accounting for almost 20 percent of total area. Nardocott is followed by Arccit 9 (12 percent), Nules, (12 percent), Tango (11 percent), Nova (10 percent), Leanri (9 percent), and Orri (8 percent). The Western Cape province is the predominate producer of soft citrus, with 37 percent of total production, followed by the Limpopo (28 percent) and Eastern Cape (25 percent) provinces. More than 50 percent of the soft citrus area in South Africa consist of orchards younger than five years, meaning that a growing volume of soft citrus will reach the market in coming years.

**Figure 8**

*Area Planted to Tangerines/Mandarins*



**Source:** CGA & Post Estimates

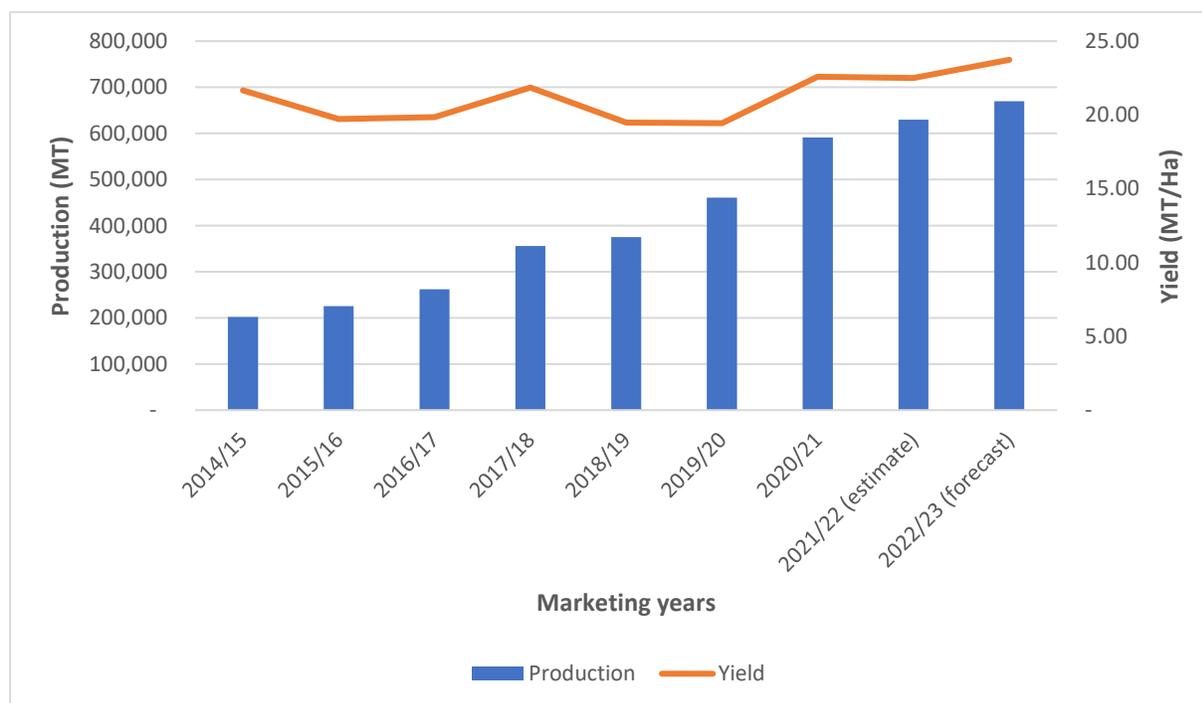
## Production

Post forecasts that tangerines/mandarin production will grow by six percent in MY 2022/23 to 670,000 MT. As already mentioned, decent rains have led to sufficient water resources for irrigation in major production areas. In addition, an increasing number of new plantings are reaching full production.

The production of tangerines/mandarins continued to grow in MY 2021/22, surging by an estimated seven percent to 630,000 MT, from 591,021 MT in MY 2020/21 (see Figure 9). This is based on the rise in area planted, conducive weather conditions and a growing trend to establish new orchards under netting, which has improved water efficiency, yields, and the overall quality of soft citrus production in South Africa.

**Figure 9**

### *Tangerine/Mandarin Production*



**Source:** CGA & Post Estimates

## Consumption

The local consumption of tangerines/mandarins is estimated to grow marginally to 48,000 MT in MY 2022/23, on increased production. Local consumption of tangerines/mandarins is much smaller than oranges, as the 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 and has reduced the percentage of soft citrus that is considered surplus. However, some high-end retail chains such as Woolworths sell export-grade citrus to domestic consumers. In MY

2021/22, South Africa consumed an estimated 45,000 MT of tangerines/mandarins and about 43,000 MT in MY 2020/21.

## Exports

Post forecasts that South Africa's exports of tangerines/mandarins will grow by almost eight percent in MY 2022/23 to reach a record level of 560,000 MT on higher production. In MY 2021/22, South Africa will export an estimated 520,000 MT of tangerines/mandarins, up three percent from the 506,769 MT exported in MY 2020/21 (see Table 7).

**Table 7**

*South African Fresh Tangerine/Mandarin Exports*

Export destinations	MY2020/21	MY2020/21	MY2021/22	% Change
	(MT)	(MT)	(MT)	
	Calendar year	January to September		
Netherlands	107,572	103,756	97,659	-5.9%
United Kingdom	87,359	82,864	83,036	0.2%
Russia	39,600	37,305	49,547	32.8%
United States	43,665	40,345	48,820	21.0%
United Arab Emirates	39,997	37,949	36,877	-2.8%
China	24,098	24,098	22,719	-5.7%
Bangladesh	33,598	32,009	21,643	-32.4%
Canada	20,497	18,885	21,176	12.1%
Portugal	9,651	9,637	10,652	10.5%
Malaysia	6,748	5,727	10,086	76.1%
Hong Kong	6,866	6,610	9,313	40.9%
Saudi Arabia	9,357	9,063	9,101	0.4%
Ireland	7,797	7,797	8,047	3.2%
Iraq	10,112	10,064	6,137	-39.0%
Taiwan	4,486	4,350	6,020	38.4%
Others	55,365	50,616	52,845	4.4%
<b>World</b>	<b>506,769</b>	<b>481,080</b>	<b>493,677</b>	<b>2.6%</b>

**Source:** Trade Data Monitor

The EU and the United Kingdom account for 45 percent of total South African exports of soft citrus, followed by Russia (10 percent), the United States (10 percent), and United Arab Emirates (7 percent). Tangerine/mandarin exports are not impacted by South Africa's CBS challenges in the EU market. However, as with all citrus exports, South Africa's exports of soft citrus are under pressure due to higher shipping costs, local port challenges, and deteriorating road networks. In addition, demand for soft citrus is softening in key markets such as the EU and

United Kingdom, due to inflationary pressures on consumers and an expected weakening in economic growth.

South Africa's exports of soft citrus to the United States under AGOA have grown exponentially over the past five years, from 11,180 MT in MY 2016/17, to 48,820 MT in MY 2021/22. This growth trend is expected to continue based on the expanding preference for easy peelers in the United States market and continued duty-free market access under AGOA. In MY 2021/22, the United States was South Africa's fourth largest export market for tangerines/mandarins (see Table 7).

## Imports

Post estimates that South Africa's imports of tangerines/mandarins will remain flat at 3,000 MT in MY 2022/23. South Africa only imports minimal volumes of citrus to satisfy off-season demand.

## Prices

Table 8 indicates the local, export, and processed market prices for tangerines/mandarins over the past seven years. Export market prices received for tangerines/mandarins remain the highest of all citrus categories for South Africa, supporting the surge in local production. However, from MY 2015/16, average export prices for South Africa soft citrus traded largely sideways. The exception was MY 2019/20 when the pandemic amplified global demand for Vitamin C rich products causing a surge in soft citrus prices.

**Table 8**

### *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

**Source:** CGA

**Note:** 1 US\$ = R17.20 (11/15/2022)

**Table 9***Tangerine/Mandarin Production, Supply, and Distribution*

Tangerines/Mandarins, Fresh Market Year Begins	2020/2021		2021/2022		2022/2023	
	Jan 2021		Jan 2022		Jan 2022	
South Africa	USDA Official	New Post	USDA Official	New Post	USDA Official	New Post
<b>Area Planted</b> (HECTARES)	2650	26150	2800	28000	0	28225
<b>Area Harvested</b> (HECTARES)	16000	16000	1800	18000	0	20000
<b>Bearing Trees</b> (1000 TREES)	9000	9000	10500	10500	0	12000
<b>Non-Bearing Trees</b> (1000 TREES)	3500	3500	5000	5000	0	4950
<b>Total No. Of Trees</b> (1000 TREES)	12500	12500	15500	15500	0	16950
<b>Production</b> (1000 MT)	591	591	660	630	0	670
<b>Imports</b> (1000 MT)	3	3	3	3	0	3
<b>Total Supply</b> (1000 MT)	594	594	663	633	0	673
<b>Exports</b> (1000 MT)	507	507	570	520	0	560
<b>Fresh Dom. Consumption</b> (1000 MT)	29	43	33	45	0	48
<b>For Processing</b> (1000 MT)	58	44	60	68	0	65
<b>Total Distribution</b> (1000 MT)	594	594	663	633	0	673
(HECTARES) ,(1000 TREES) ,(1000 MT)						

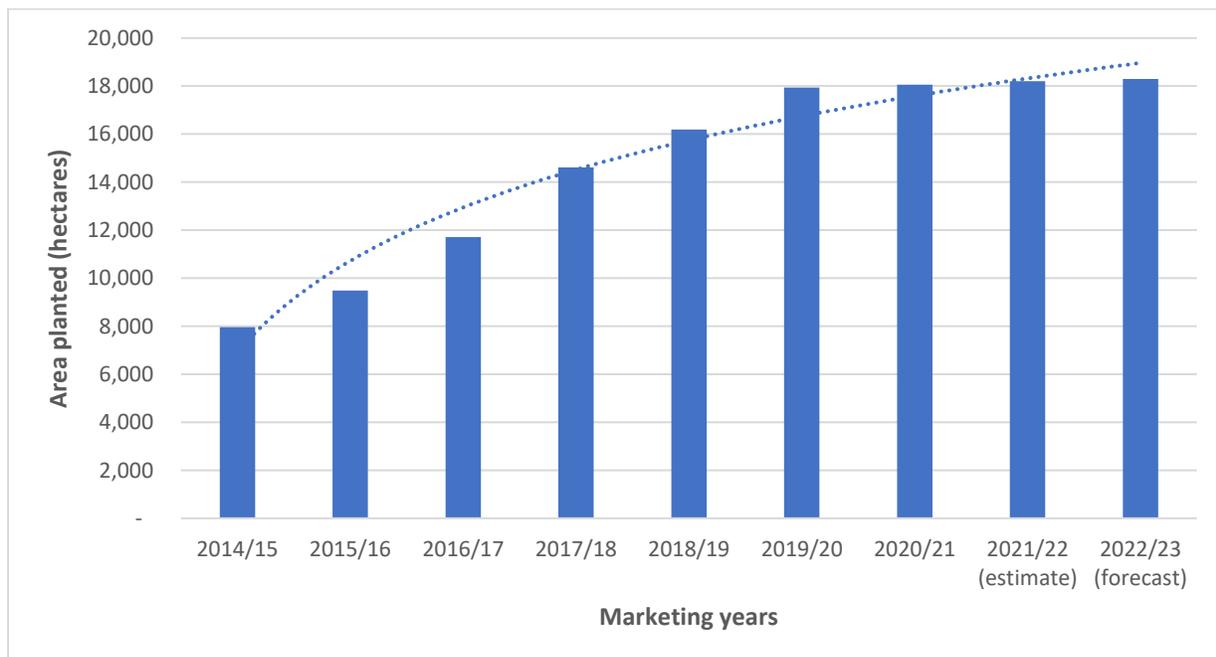
## Lemons/Limes, Fresh

### Area Planted

The area planted with lemons/limes in South Africa more than doubled over the past seven years, driven by improved global demand and rising global prices (see Figure 10). However, the positive trend in area planted with lemons/limes has flattened in recent years due to the bearish movement of export prices received by producers. Post expects this situation to continue in MY2022/23 with only marginal growth in area planted with lemons/limes, up to 18,300 ha, from 18,200 ha in MY2021/22. More than 40 percent of the total area planted with lemons consists of orchards that are five years or younger, indicating that growing volumes of lemons will be reaching the market in the next five years.

**Figure 10**

*Area Planted to Lemons/Limes*



**Source:** CGA & Post Estimates

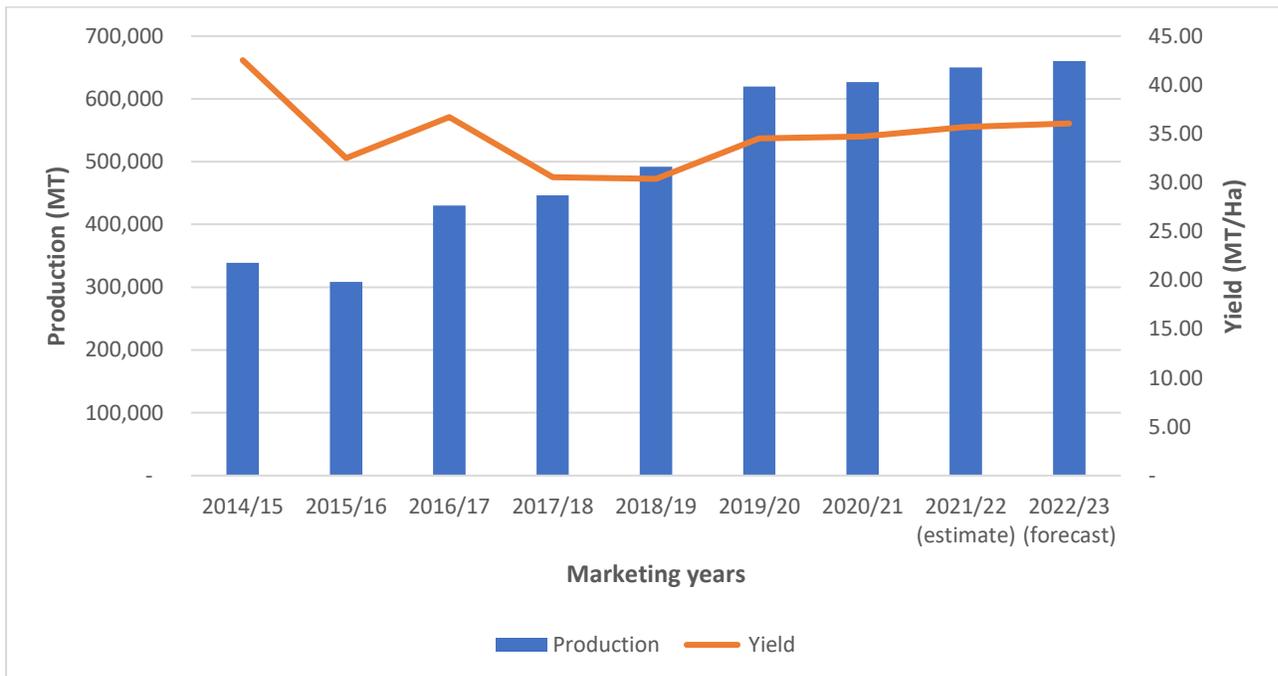
The Eastern Cape province is the leading growing region for lemons/limes in South Africa, accounting for 42 percent of total area planted, followed by the Limpopo (31 percent) and Western Cape (14 percent) provinces. By far, the most popular cultivar of lemons planted in South Africa is Eureka, representing 75 percent of total area. Eureka is followed by the Lisbon (8 percent) and 2Ph Seedless (6 percent) cultivars.

## Production

Post forecasts production of lemons/limes will grow by two percent in MY 2022/23 to a historic high of 660,000 MT. This forecast is based on conducive weather conditions and a growing number of young trees approaching full production. In MY 2021/22, South Africa produced an estimated 650,000 MT of lemons/limes, up four percent from the 626,791 MT produced in MY 2020/21.

**Figure 11**

### *Lemon/Lime Production in South Africa*



**Source:** CGA & Post Estimates

## Consumption

Post forecasts that the domestic consumption of lemons/limes will grow marginally to 30,000 MT in MY 2022/23, from an estimated 28,000 MT in MY 2021/22, on higher production. In MY2020/21, South Africa consumed approximately 27,000 MT of lemons.

## Processing

Post anticipates that lemons/limes delivered for processing will drop to around 60,000 MT in both MY 2022/23 and MY2021/22, due to an upsurge in exports to record levels. In MY 2020/21 an estimated 103,000 MT of lemons were delivered for processing. 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**

South Africa's exports of lemons/limes are forecast to rise by two percent to a record level of 570,000 MT in MY 2022/23. This estimate is based on higher production, sustained growth in the EU and United Kingdom markets and growth in demand from the Middle East and Asian markets (South Africa sent its first shipment of lemons/limes to China recently).

South Africa's exports of lemons/limes are estimated to rise by 12 percent to 560,000 MT in MY 2021/22 from 498,737 MT in MY 2020/21. The EU and United Kingdom remain the main export markets for South African lemons/limes, accounting for almost 50 percent of total exports (see Table 10). Lemon/lime exports to Russia, representing seven percent of total exports, stayed flat in MY 2021/22, indicating limited impact of the Russia-Ukraine conflict.

Lemons exports to China increased by more than 1000 percent to almost 9,000 MT in MY 2021/22, after the easing of cold treatment requirements in August 2021. Although South Africa is a major supplier of lemons globally, the country's lemons exports to China have, until last year, been limited by the cold treatment requirement, which made the fruit susceptible to chilling injury and subsequent decay. It is anticipated that this change in protocol will intensify South Africa's lemon exports to China in future.

**Table 10***South African Fresh Lemon/Lime Exports*

<b>Export destinations</b>	<b>MY2020/21</b>	<b>MY2020/21</b>	<b>MY2021/22</b>	<b>% Change</b>
	<b>(MT)</b>	<b>(MT)</b>	<b>(MT)</b>	
	<b>Calendar year</b>	<b>January to September</b>		
Netherlands	90,658	90,298	116,048	28.5%
United Arab Emirates	60,021	56,809	65,571	15.4%
United Kingdom	38,289	37,894	42,761	12.8%
Portugal	25,657	25,657	42,179	64.4%
Russia	40,746	40,114	39,590	-1.3%
Saudi Arabia	36,527	32,638	33,266	1.9%
Iraq	31,799	31,750	29,965	-5.6%
Italy	27,999	27,913	29,802	6.8%
Canada	27,833	24,499	27,863	13.7%
Hong Kong	17,043	15,780	17,513	11.0%
Malaysia	13,487	11,915	15,150	27.2%
China	716	649	8,913	1273.3%
Kuwait	11,436	11,207	8,687	-22.5%
Spain	10,718	10,718	8,484	-20.8%
Qatar	4,637	4,517	6,414	42.0%
Other	61,174	57,257	49,372	-13.8%
<b>Total</b>	<b>498,737</b>	<b>479,615</b>	<b>541,579</b>	<b>12.9%</b>

**Source:** Trade Data Monitor

### Imports

Post estimates that MY 2022/23 imports of lemons/limes will remain flat at around 3,000 MT, as the available domestic production sufficiently meets local demand. Imports are minimal, mainly from Eswatini.

### Prices

Table 11 indicates the average local, export, and processed market prices for lemons/limes over the past seven years. Lemon/lime prices displayed strong upward trends until MY 2015/16 after which the trend reversed and flattened. However, the export markets provided the highest prices for South African lemons/limes over the period compared to local market and processed prices.

**Table 11***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

**Source:** CGA**Note:** 1 US\$ = R17.20 (11/15/2022)**Table 12***Lemon/Lime Production, Supply, and Distribution*

<b>Lemons/Limes, Fresh</b>	<b>2020/2021</b>		<b>2021/2022</b>		<b>2022/2023</b>	
	<b>Jan 2021</b>		<b>Jan 2022</b>		<b>Jan 2023</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>Market Year Begins</b>						
<b>South Africa</b>						
<b>Area Planted</b> (HECTARES)	18057	18057	18500	18200	0	18300
<b>Area Harvested</b> (HECTARES)	14000	14000	14500	14500	0	15000
<b>Bearing Trees</b> (1000 TREES)	7500	7500	7800	8410	0	8700
<b>Non-Bearing Trees</b> (1000 TREES)	2900	2900	3000	2140	0	1910
<b>Total No. Of Trees</b> (1000 TREES)	10400	10400	10800	10550	0	10610
<b>Production</b> (1000 MT)	627	627	670	650	0	660
<b>Imports</b> (1000 MT)	2	2	2	3	0	3
<b>Total Supply</b> (1000 MT)	629	629	672	653	0	663
<b>Exports</b> (1000 MT)	499	499	530	560	0	570
<b>Fresh Dom. Consumption</b> (1000 MT)	27	27	28	28	0	30
<b>For Processing</b> (1000 MT)	103	103	114	65	0	63
<b>Total Distribution</b> (1000 MT)	629	629	672	653	0	663
(HECTARES) ,(1000 TREES) ,(1000 MT)						

## **Orange Juice**

### **Production**

The production of orange juice is estimated to rise by six percent to 33,120 MT in MY 2022/23, from 31,320 MT in MY 2021/22, on improved domestic orange production. In MY 2020/21 South Africa produced an estimated 22,140 MT of orange juice, surging from the previous year when strict lockdown measures had limited processing.

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

Industry 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 data regarding fresh oranges delivered for processing.

### **Consumption**

Post estimates domestic consumption of orange juice will increase to 7,500 MT in MY 2022/23, from 7,000 MT in MY 2021/22, on improved production and supply availability.

### **Export**

Post forecasts that MY 2022/23 exports of orange juice will grow by 16 percent to 25,000 MT, from an estimated 21,550 MT in MY 2021/22, based on higher production. In MY 2020/21, South Africa exported 22,203 MT of orange juice (see Table 13).

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. 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, and Zimbabwe. Europe also remains an important market for South African orange juice.

**Table 13***South African Orange Juice Exports (HS200919, HS200911 and HS200912)*

Export destinations	MY2020/21	MY2020/21	MY2021/22	% Change
	(MT)	(MT)	(MT)	
	Calendar year	January to September		
Netherlands	5,850	4,682	3,225	-31.1%
Eswatini	3,071	2,035	2,244	10.3%
Namibia	2,052	1,390	1,200	-13.7%
Botswana	3,715	2,169	1,179	-45.6%
Zimbabwe	900	482	1,052	118.3%
Others	6,612	4,387	5,804	32.3%
<b>World</b>	<b>22,203</b>	<b>15,148</b>	<b>14,702</b>	<b>-2.9%</b>

Source: Trade Data Monitor

**Imports**

Post estimates imports of orange juice will remain flat at around 1,000 MT in MY 2022/23. Zimbabwe is the main supplier 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 14***Orange Juice Production, Supply, and Distribution*

Orange Juice	2020/2021		2021/2022		2022/2023	
	Jan 2021		Jan 2022		Jan 2023	
Market Year Begins	USDA Official	New Post	USDA Official	New Post	USDA Official	New Post
South Africa						
Deliv. To Processors (MT)	136000	123000	158000	174000	0	184000
Beginning Stocks (MT)	16890	16890	14490	12150	0	15920
Production (MT)	24480	22140	28440	31320	0	33120
Imports (MT)	1823	1823	2000	1000	0	1000
Total Supply (MT)	43193	40853	44930	44470	0	50040
Exports (MT)	22203	22203	25000	21550	0	25000
Domestic Consumption (MT)	6500	6500	7000	7000	0	7500
Ending Stocks (MT)	14490	12150	12930	15920	0	17540
Total Distribution (MT)	43193	40853	44930	44470	0	50040
(MT)						

## **Policies and Regulations:**

### **Policy**

#### **United States Authorizes Imports of Cold-Treated Citrus from South Africa into All Ports of Entry**

On November 4, 2020, the United States 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 United States ports of entry. APHIS determined that citrus fruit from South Africa, which is cold treated in transit, can safely enter all United States ports of entry without increasing the risk of introducing the false codling moth (FCM) or other pests of concern. Previously, APHIS restricted the entry of cold-treated citrus fruit from South Africa to four United States 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.

#### **United States 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 very beneficial to South Africa in terms of 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 Northwest 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 citrus black spot 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 is still in the process of being finalized.

#### **CBS Challenges in the European Market**

South Africa still faces challenges in the EU market because of 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 September 2022, 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.

## 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 can be obtained from the following website link: [Fpia](#).

### Custom Duties

United States citrus exports face a four percent customs duty in South Africa. Table 16 reflects the applicable custom duties when exporting citrus to South Africa.

**Table 15**

#### *Custom Duties Applicable to Citrus Exports to South Africa*

HS Code	Article description	Unit	Rate of Duty				
			General	EU	EFTA	SADC	MERCOSUR
<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%
0805.10.90	Other	kg	4%	free	4%	free	4%
<b>0805.2</b>	<b>Mandarins (including tangerines and satsumas); clementines, wilkings and similar citrus hybrids:</b>						
<b>0805.21</b>	<b>Mandarins (including tangerines and satsumas)</b>						
0805.21.10	Fresh	kg	4%	free	4%	free	4%
0805.21.90	Other	kg	4%	free	4%	free	4%
<b>0805.22</b>	<b>Clementines:</b>						
0805.22.10	Fresh	kg	4%	free	4%	free	4%
0805.22.90	Other	kg	4%	free	4%	free	4%
<b>0805.29</b>	<b>Other:</b>						
0805.29.10	Fresh	kg	4%	free	4%	free	4%
0805.29.90	Other	kg	4%	free	4%	free	4%
<b>0805.40</b>	<b>Grapefruit, including pomelos:</b>						
0805.40.10	Fresh	kg	4%	free	4%	free	4%
0805.40.90	Other	kg	4%	free	4%	free	4%
<b>0805.50</b>	<b>Lemons (CitrusLimon, Citrus Limonium) and limes (Citrus aurantifolia, Citrus latifolia):</b>						
0805.50.10	Fresh	kg	4%	free	4%	free	4%
0805.50.90	Other	kg	4%	free	4%	free	4%
<b>0805.90</b>	<b>Other:</b>						
0805.90.10	Fresh	kg	4%	free	4%	free	4%
0805.90.90	Other	kg	4%	free	4%	free	4%
<b>2009.1</b>	<b>Orange juice</b>						
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 Service (SARS)

## **South African Import 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](#)

## **Attachments:**

No Attachments