

Boitshoko Ntshabele, 02 May 2025

"When we strive to become better than we are, everything around us becomes better too." —Paulo Coelho

IT'S ALL SYSTEMS GO AS THE SEASON STARTS

The Southern African citrus industry is expected to export a total of 171,1 million cartons of 15kg citrus in the 2025 season. The final figure of last year was 164,5 million cartons. There seems to be a favourable start to the 2025 season so far. The early season is mostly dominated by exports of lemons and grapefruit. Lemons are in demand and the lemon price also looks good. Also, we've exported 55% more grapefruit than last year at this point – although it is still very early in the season.

The solid growth trajectory that the industry has been on, has held so far, however, we anticipate that some serious threats will remain. Of significance for this season is the tariff turmoil that could disrupt the US market for a portion of our growers. It is imperative that a trade deal or exemption for seasonal fresh produce be agreed on by the governments of SA and the US before the paused 30% tariff comes into effect in two and a half months' time. Although the US represents only 4% - 6% of SA's citrus exports, the US market is the lifeblood of Northern Cape and Western Cape rural towns, such as Citrusdal.

The figure for the expected 2025 citrus exports from SA has been calculated after the estimates for late mandarins were finalised recently. The late mandarin variety estimates show impressive growth and break down as follows:

- Leanri - 2.1 million 15kg cartons, slightly down from 2.2 million cartons in 2024
- Orri - 2.1 million 15kg cartons, stable from 2024's 2.1 million cartons
- Nadorcott/Tango - 25.7 million 15kg cartons, up significantly from 23.3 million cartons last year, due to young trees coming into production
- Other late mandarins - 3.2 million 15kg cartons, up from 2024's 2.7 million cartons

These estimates come after the CGA released season estimates in March for lemons, oranges, grapefruit and early mandarins. Those figures represented stable growth overall, with:

- Lemons at 32.9 million 15kg cartons, a 5% decrease from 2024
- Navel oranges at 26.1 million 15kg cartons, a 5% increase from 2024
- Valencia orange at 52 million 15kg cartons, a 6% increase from 2024
- Grapefruit at 13.5 million 17kg cartons, also a 6% increase from 2024
- Satsuma (early mandarin) at 1.8 million 15kg cartons, no change from the previous year
- Nova (early mandarin) at 4.5 million, a 2% increase from 2024
- Clementines (early mandarin) at 5.4 million 15kg cartons, a 10% increase from 2024

The main challenges our growers face are logistical inefficiencies at our ports, the US tariff uncertainty, existing tariffs in other markets, and difficult access to markets like the European Union due to unnecessary phytosanitary (plant health) measures. We are cautiously optimistic that we will have a successful season and make progress in addressing the challenges our growers face. It is also great to start tracking the season in the weekly newsletter with the customary table.

PACKED AND SHIPPED

End of Week 17 Million 15 Kg Cartons	Packed	Packed	Packed	Shipped	Shipped	Original Estimate	Latest Prediction	Final Packed	Vision 260
SOURCE: PPECB/ AGRIHUB	2023	2024	2025	2024	2025	2025	2025	2024	2025
Grapefruit	4.5 m	4.3 m	4.2 m	1.8 m	2.8 m	15.3 m	15.3 m	14.4 m	16.8 m
Lemons	9.4 m	7.3 m	7.9 m	5.4 m	7.0 m	32.9 m	32.9 m	34.7 m	41.5 m
Mandarins	2.8 m	3.2 m	2.2 m	1.3 m	1.7 m	44.9 m	44.9 m	41.6 m	43.9 m
Navels	0.2 m	0.2 m	-	-	-	26.1 m	26.1 m	25.1 m	21.7 m
Valencia	-	-	-	-	-	52.0 m	52.0 m	48.8 m	58.0 m
Total	16.9 m	15.0 m	14.3 m	8.5 m	11.5 m	171.1m	171.1m	164.6 m	172.5 m