

To: Dr. Boitshoko Ntshabele
Chief Executive Officer
Citrus Growers Association of Southern Africa
Hillcrest 3650
KwaZulu Natal, South Africa

From: Nicholas Gutierrez
USA Consultant – CGA
Elkridge, Maryland USA

Subject: March - 2026 USA Report

Ms. Jana Rense van Renburg Visit to Washington, D.C. - March 13 Meetings with South Africa Embassy, U.S. Department of Agriculture-Animal & Plant Health Inspection Service (APHIS), Corporate Council on Africa (CCA), & U.S. Trade Representative:

South Africa Embassy to the U.S.: Mr. Ismail Esau, Deputy Chief of Mission (DCM)

DCM Esau provided an impassioned and comprehensive briefing on his perceptions concerning the complicated U.S.-South Africa relationship which is undergoing a number of challenges. The DCM covered the bilateral challenges faced on the trade, economic, and political front, including the U.S. Administration's more personal sentiments or views negatively affecting the relationship.

USDA-Animal & Plant Health Inspection Service (USDA-APHIS): Matthew Rhoads, Acting Deputy Administrator-Plant Protection, Matt Messenger, Phytosanitary Trade Director for Asia, & John Sagle, Assistant Deputy Administrator for Pest Exclusion & Import Programs (Preclearance)

Mr. Rhoads acknowledged an upcoming plant health bilateral with DoA in April with both sides commenting on a long-standing technical relationship with close cooperation. He also stated that USDA political leadership prioritized agricultural exports had not fully understood the phytosanitary regulatory aspect of APHIS' role in approving agricultural imports, so APHIS was playing an instructive role in their export/import trade role dynamic.

CBS rule: PPQ noted that this issue has been "a work in progress" for 10 years and hinted that it was linked to other U.S. trade priorities. Mr. Rhoades then stated that the APHIS pest risk assessment (PRA)/risk mitigation document (RMD) would have to be reviewed/updated prior to a decision to publish a final rule in the Federal Register. However, it was noted that SA has been successfully exporting citrus to the U.S. for 27 years with no major pest finds including targeted inspection of 2,000 SA citrus shipments from 2018-2020 with zero finds of false codling moth, fruit fly, or CBS.

U.S. blueberries & apples: Ms. van Rensburg and SA Embassy Counselor Jaftha noted that the DoA had approved the importation of U.S. blueberries in 2025, but no exports had yet taken place. SA also stated that the DoA remained ready to conduct an U.S. apple site visit to Washington State or Oregon as part of an access request to import apples.

Future Partnership: Ms. Rensburg and Mr. Jaftha raised, and APHIS concurred that national trade estimates be identified and prioritized to ensure "win-win" outcomes with Ms. van Rensburg issuing an invitation to visit SA citrus production areas including the preclearance program.

Corporate Council on Africa (CCA): Mr. Laird Treiber, Senior Advisor

AGOA: Mr. Laird spent much time and effort working to renew AGOA through his congressional contacts but expressed disappointment that AGOA was only renewed for 1 year until December 2026 vs. a 3-year plan through 2028. He stated that the U.S. Congress had initially supported the 3-year plan. As a result, Mr. Laird said there was little hope of further renewal negotiation or agreement after 2026; given other Administration priorities such as the upcoming and intensive mid-term congressional election cycle, the Iran war, the President's personality-temperament, and growing inflation-affordability issues. He added that any future AGOA negotiations must focus on reciprocal trade opportunities.

AGOA Review Status: Mr. Laird stated that the review was initiated in 2025 and was to be completed by January 2026. However, no final report has been issued to date which adversely affects critical SA export industries such as SINTUS/traditional clothing manufacturer.

U.S. Trade Representative (USTR): Mr. David Jankowski, USTR Director for Agricultural Affairs

Mr. Jankowski provided an overview-timeline USTR provided from the past year regarding the evolution/progression of Administration tariff policies/rates including:

- U.S. Supreme Court ruled International Emergency Economic Powers Act (IEEPA) or Liberation Day (April 2, 2025) unlawful in February 2026
- Administration now combining current tariff law authorities under existing tariff legislation via Sections 122, 232 & 301 with goal of replacing IEEPA revenue loss
- Executive Order 14257/November 2025 granted exemption for SA orange fruit but no other citrus varieties – National Economic Council established the list
- Section 122/Annex II now denotes a global 10% flat rate following the Supreme Court ruling against IEEPA, but again a Trump tweet announced several days later upped the rate to 15%. However, the Administration has not yet officially authorized
- USTR advised that on March 12, Section 301(b) investigations were initiated for 60 countries including SA, based on suspected forced labor violations—USTR will initiate hearings on April 28

USTR-DTIC Bilaterals: Mr. Jankowski then offered an update regarding current USTR-DTIC bilateral trade talks where he expressed some pessimism regarding progress. The last meeting took place in February 2026, but DTIC has been non-responsive since the bilateral. Mr. Jankowski said that DTIC may be under a false sense of complacency due to the IEEPA illegal ruling, but DTIC continues to miss more agreed upon "due dates" that USTR considers critical.

USTR intimated that progress is linked to improved market access for US poultry, pork, and a few remaining beef barriers, although Mr. Jankowski conceded that the poultry TRQ and the DoA permitting issues have been resolved. He ended by saying that USTR frowns upon DTIC negotiation strategies where new "last minute" barriers are added unexpectedly before a bilateral. Ms. van Rensburg issued an invitation to visit citrus production areas while he will be in SA attending a wine conference in November.

Botswana Citrus Market Access: Jessica Mahalingappa, APHIS Assistant Deputy Administrator for SPS Plant Trade Staff and Prakash Hebber, APHIS Trade Director for Africa

On March 04, I met with APHIS-Plant Protection to get an update concerning the ongoing bilateral discussions with both sides attempting to agree via the APHIS Pest Risk Assessment (PRA) & Risk Management Document (RMD). The two sides disagree on the inclusion of 2 fruit flies, *Dacus ciliatus* (Lesser pumpkin fly) and *Ceratitis cosyra* (Mango fruit fly). During the meeting, APHIS stated that an

official letter had been forwarded to the Botswana plant protection service on March 03, with the key points of the letter being:

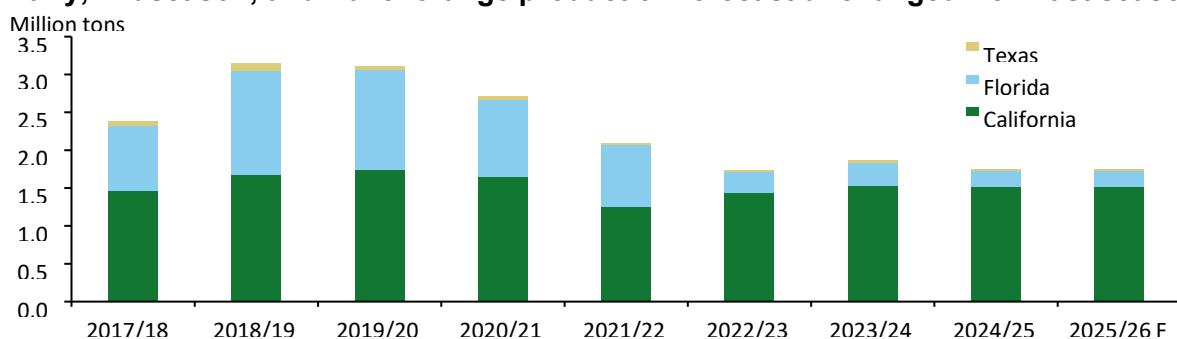
- APHIS agreed to drop *D. ciliatus* as a quarantine pest from the PRA and RMD however,
- APHIS will maintain *C. cosyra* as a quarantine pest in the PRA, but the RMD would require irradiation as the only treatment option for mandarin-tangerine varieties. The 22-day cold treatment would be allowed for grapefruit, lemon, and lime fruit.

I informed CRI so that scientists could continue work with the Botswana plant protection service to challenge the inclusion of *C. cosyra* to the APHIS PRA/RMD.

USDA-Economic Research Service (ERS) Fruit & Tree Nuts Report w/National Agricultural Statistics Service (NASS) Support– Published March 26, 2026:

U.S. early, midseason, and Navel orange production is 1.746 million tons, unchanged from last season. USDA, NASS groups oranges into two primary categories: 1) early, midseason, and Navel, and 2) Valencia. The early/midseason and Navel category includes varieties that are typically harvested between October and March, while Valencia harvest is later (March–July). In the previous 3 marketing years, about 70 percent of U.S. orange production was in the early/midseason and Navel category. California produces more than 80 percent of oranges in this category, mostly for the fresh market. Florida is the second-largest producer of early/midseason and Navel oranges, with most output used for processing. USDA, NASS will release updated production forecasts for early/midseason and Navel oranges and Valencia oranges in the April 2026 *Crop Production* report.

Early, midseason, and Navel orange production forecast unchanged from last season



F = Forecast.

Note: Utilized production in ton equivalent for early, midseason, and Navel oranges. Excludes Valencia orange production.

Source: USDA, Economic Research Service based on data from USDA, National Agricultural Statistics Service, *Crop Production* (released on January 12, 2026).

All orange production is up 2 percent: All orange production for the United States in the 2025/26 season (November–October) is forecast to increase 2 percent from 2024/25. This increase is due to a larger Valencia orange crop in California (up 16 percent). The January 2026 forecast for U.S. early, midseason, and Navel oranges remains unchanged from the previous season at 1.746 million tons. USDA, NASS distinguishes between two primary categories of oranges in its quarterly (formerly monthly) citrus forecast: 1) early/midseason and Navel, and 2) Valencia. The former category includes varieties that are harvested between the months of October and March and which are preferred for fresh consumption. The latter category includes Valencia oranges, which typically have a later harvest season (March–July) and are preferred for the processing market. As a matter of convenience, we hereafter refer to the early/midseason and Navel category as non-Valencia oranges. In Florida, both

Valencia and non-Valencia oranges are used for processing with smaller shares of each going to the fresh market (6 and 8 percent, respectively).

The January 2026 USDA, NASS forecast estimates non-Valencia orange production at 4.50 million boxes in Florida, a reduction of 2 percent from the previous season. Florida Valencia orange production is forecast at 7.50 million boxes, down 1 percent from the previous season. These reductions reflect higher-than-average fruit drop, lingering effects of Hurricane Milton (2024), and continued industry losses from Huanglongbing (citrus greening disease). Although both Valencia and non-Valencia trees are bearing more fruit per tree than last season, smaller sized fruit and increased dropage offset these gains.

The *California Valencia Orange Objective Measurement Report* released by the California Department of Food and Agriculture and USDA, NASS (March 10, 2026) indicates average Valencia orange size was 7 percent higher than the previous season and 5 percent above the 5-year average. California is forecast to have a larger Valencia crop this season with 8.50 million boxes, 11 percent above the 5-year average. The Golden State's non-Valencia crop is also expected to increase over last season to 38 million boxes, up 3 percent from the 5-year average. This increase in California orange production can be attributed to favorable weather conditions for orange production in addition to a favorable bearing-cycle year.

Texas generally accounts for less than 2 percent of U.S. commercial orange production. As of the January 2026 forecast, orange production (Valencia and non-Valencia) was up 6 percent compared to last year at 900,000 boxes. Despite the projected increase, production is still expected to remain 19 percent below the preceding 6-year average (excluding the exceptionally poor 2022 harvest due to Winter Storm Uri). This increase in Texas production likely reflects more favorable weather and a rise in bearing acreage compared with the 2024/25 season.

The United States is a net exporter of fresh oranges with the bulk of U.S. fresh orange exports occurring in the spring. Export volumes of fresh oranges are down 10 percent so far this season to date (November 2025–January 2026) compared to the same period last season. U.S. Bureau of the Census data show declines season to date in exports to Canada by 15 percent (a decrease of 10.1 million pounds), South Korea by 35 percent (a decrease of 9.9 million pounds) and Hong Kong by 11 percent (a decrease of 2 million pounds). In contrast, exports of oranges to Mexico increased 26 percent (an increase of 6.6 million pounds) over the same period last year. USDA, ERS forecasts total U.S. fresh orange exports to reach 730 million pounds (365,000 tons) in 2025/26, up 1 percent from last season. Higher export levels from the United States are expected this season given increased production in California.

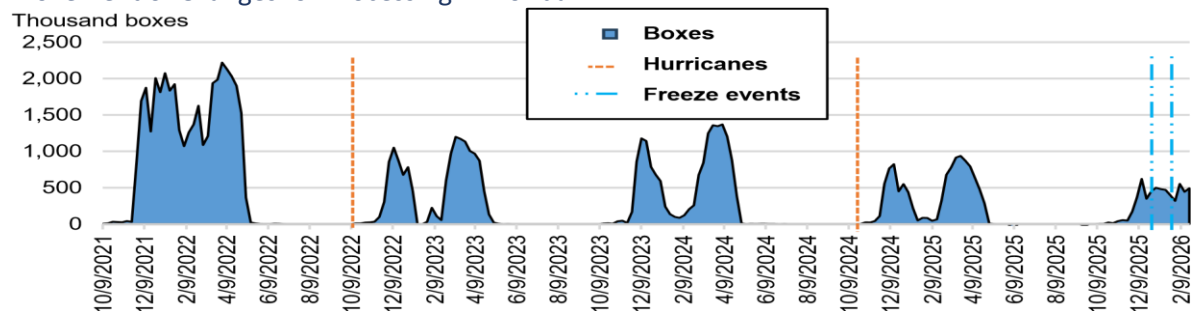
U.S. fresh orange imports begin increasing in May and peak in August and September, as they run counter seasonal to the domestic harvest (January–March). Historical import data suggests that only 10 percent of total annual import volume is reached by January of the given marketing year. Imports of fresh oranges for the 2025/26 season to date (November 2025–January 2026) are up 13 percent compared to the same time last year. The majority of winter and early spring (December–April) fresh orange imports come from Mexico, which are currently up 17 percent year to date. Morocco is a top supplier during the late spring and early summer, accounting for about 7 percent of all fresh orange imports last season (2024/25). South Africa and Chile are major suppliers of fresh oranges to the United States during the summer months, and early fall when imports peak, respectively accounting for 42 and 24 percent of fresh orange imports in the 2024/25 season.

The average on-tree equivalent grower price for a box of fresh oranges for the 5-month period covering September 2025–January 2026 is \$26.97, up 15 percent from the same period last year. Higher production levels coupled with strong imports are expected to temper these prices in the coming months.

Florida orange juice production is forecast to new low: Based on current estimates, 39 percent of U.S. grown oranges will go to processing in the 2025/26 season. Most oranges for the processing market are grown in Florida. The combined orange harvest peaks twice in the State of Florida, with peak harvest of non-Valencia oranges occurring in December and early

January and the peak of the Valencia orange crop occurring in March or early April (figure 3). Processing movement data from the Florida Department of Citrus suggest that Winter storms Ezra and Gianna occurred during a period of the year when less than half of Florida’s processing orange crop had been harvested.

Movement of Oranges for Processing in Florida



Note: One box of Florida oranges weighs approximately 90 pounds. Box counts are approximate and calculated from reported pound solids and yield per box for both frozen concentrated orange juice and single-strength orange juice. Source: USDA, Economic Research Service based on data from Florida Department of Citrus, *Weekly Processor Reports*.

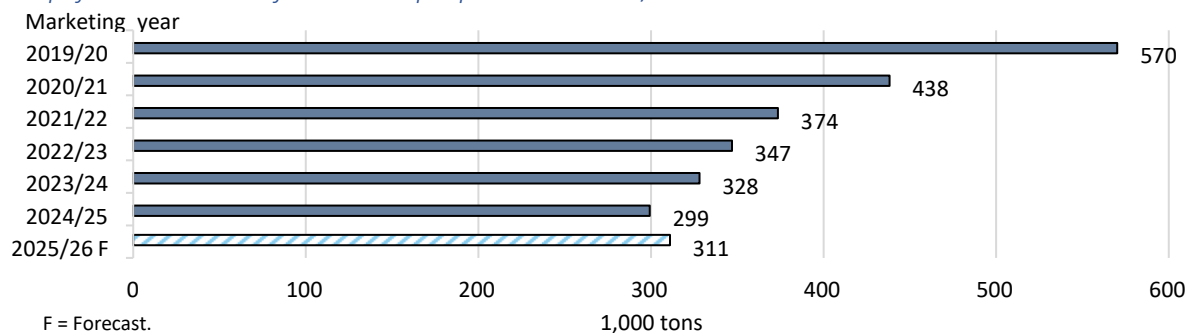
As of March 2026, the harvest of Valencia oranges in the State is still in the early stages. The average on-tree equivalent grower price for a box of oranges for the processing market reported by USDA, NASS over the months of December 2025–January 2026 was \$9.07 per box, down 21 percent from the same period last year. These prices from the initial months of the 2025/26 season may be reflective of higher beginning stocks this season for frozen concentrated orange juice at 126 million single-strength equivalent (SSE) gallons, up 60 percent from the 2024/25 beginning stocks, as calculated from Florida Department of Citrus *Weekly Processor Reports* and USDA, NASS *Cold Storage* reports.

USDA, ERS forecasts orange juice production in 2025/26 to be down from last year, with total production at 99 million SSE gallons. If realized, this volume will likely be the lowest in U.S. history. To compensate for lower production, U.S. orange juice imports are expected to increase over last year reaching more than 580 million SSE gallons. Mexico and Brazil are the main suppliers of orange juice imports into the United States, accounting for a combined 94 percent in the 2024/25 season. Higher production volumes of orange juice are projected for Brazil in the 2025/26 season, which may also contribute to higher U.S. import volumes. U.S. exports of orange juice are expected to reach a new low of 30 million SSE gallons this season. Canada will remain the primary foreign destination for U.S. produced orange juice, accounting for more than two-thirds of all U.S. orange juice exports.

Grapefruit production is expected to be up in 2025/26: Total U.S. grapefruit production is projected up 4 percent to 311,000 tons in 2025/26 from 299 thousand tons in 2024/25 (figure 4). While the

2025/26 grapefruit production forecast is higher than last season, it is still 24 percent below the preceding 5-year average (2019/20–2023/24), reflecting a downward trend in grapefruit bearing acreage in Florida and Texas. California 2025/26 grapefruit production forecast is 172 thousand tons, a 5-percent increase over the 2024/25 season. Texas grapefruit production forecast is 88,000 tons in 2025/26, a 10-percent increase over last season. The USDA, NASS Florida grapefruit production forecast released in January 2026 was down 7 percent from the previous season.

Grapefruit: Production forecast is up 3 percent in 2025/26 but still below historic levels



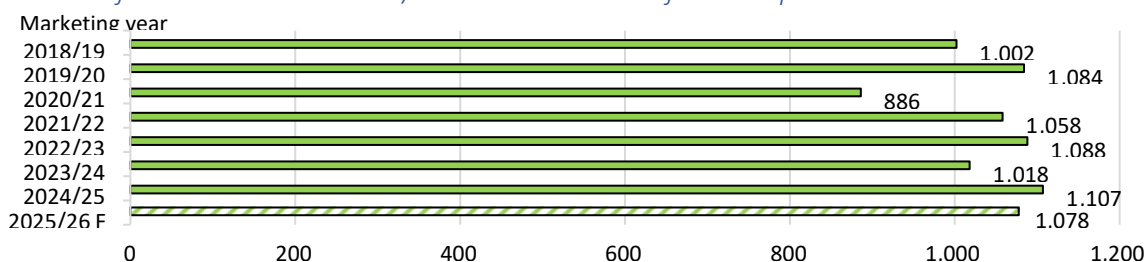
Note: The marketing year for fresh grapefruit begins in September and lasts through August of the following year.

Source: USDA, Economic Research Service based on data from USDA, National Agricultural Statistics Service, *Crop Production* (January 2026) and *Citrus Fruit Summary*, various issues.

The U.S. grapefruit harvest typically peaks during the winter and early spring. Approximately 65 percent of U.S. grown grapefruit goes to the fresh market on average (2020/21–2024/25). In February 2026, the grapefruit Producer Price Index (PPI) and U.S. average grapefruit retail price was lower than the same month last year (down 7 and 6 percent, respectively), according to the U.S. Department of Labor, Bureau of Labor Statistics. Lower grapefruit prices are to be expected over last season given increased production. Season-to-date fresh grapefruit exports were up 2 percent, driven by increased shipments to Mexico (up 1.7 million pounds) and South Korea (up 1.3 million pounds). Amid higher domestic production, U.S. fresh grapefruit import volumes for the current season (September 2025–January 2026), have been down by 27 percent compared with the same period in 2024/25.

Lemon production forecast is down in 2025/26: The U.S. lemon crop for the 2025/26 marketing season (August 2025–July 2026) is anticipated to be 1.08 million tons, down 3 percent from the 2024/25 final utilized production (figure 5). California, which accounts for 94 percent of U.S. commercial lemon output, is projected to produce 32,000 fewer tons in 2025/26 than last season (down 3 percent). The lemon production forecast in both Arizona and Florida is higher year over year (up 2 and 7 percent, respectively).

Lemons: forecast is down in 2025/26 due to smaller California crop



F = Forecast.

1,000 tons

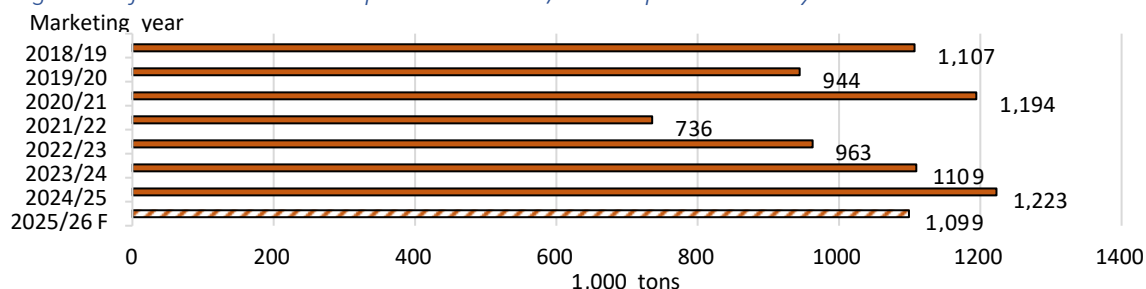
Note: The marketing year for fresh lemons begins in August and lasts through July of the following year. Source: USDA, Economic Research Service based on data from USDA, National Agricultural Statistics Service, *Crop Production* (January 2026) and *Citrus Fruit Summary*, various issues.

Despite lower forecast production for this current season (August 2025–January 2026), fresh lemon grower prices (on-tree equivalent) averaged \$29.77 per box, compared to \$30.43 per box over the same period in 2024/25. Fresh lemon exports from the United States are highest in the winter and spring months during the harvest and typically peak between December and March. These exports are up 15 percent year to date (August 2025–January 2026)—with significant quantities going to Canada (47 percent), Japan (26 percent), and South Korea (11 percent).

Fresh lemon imports run counter seasonal to peak U.S. production and are highest between June and October. These imports are down year to date (August 2025–January 2026) by 21 percent, compared to the same period from 2024/25.

Tangerine, mandarin, and tangelo crops are forecast down from last season: Total production of U.S. tangerines (a commodity group including tangerines, mandarins, and tangelos) is forecast at 1.10 million tons in the 2025/26 season (November 2025–October 2026). If realized, this quantity will be a 10-percent decrease from final production levels in the 2024/25 season (figure 6). California accounts for approximately 98 percent of domestic tangerine production. California’s 2025/26 tangerine forecast is 1.08 million tons (or 27 million boxes), a 124,000-ton reduction from last season’s bumper crop. Part of this reduction may be due to an uncharacteristically wet bloom season. The 2025/26 Florida tangerine production forecast is 19 thousand tons, accounting for 1.7 percent of this year’s crop.

Tangerines: forecast is down 10 percent in 2025/26 compared to last year



F = Forecast.

Note: The marketing year for fresh tangerines begins in November and lasts through October of the following year. Source: USDA, Economic Research Service based on data from USDA, National Agricultural Statistics Service, *Crop Production* (January 2026), and *Citrus Fruit Summary*.

U.S. tangerine exports are highest in the winter and spring months and typically peak between February and April. Despite lower forecast production, tangerine exports (including mandarins, clementines, and similar citrus hybrids) are up 25 percent season to date, with a 30-percent increase in exports to Canada and a 46-percent increase in exports to Mexico.

U.S. fresh tangerine domestic availability has more than doubled since the early 2000s, due to an upward trend in both U.S. tangerine production and U.S. fresh tangerine imports. During the last 3 marketing years, fresh tangerine imports accounted for 44 percent of domestic availability. So far this season (November 2025–January 2026), fresh tangerine imports are down by 63 percent—with smaller quantities coming from Morocco, Chile, and Peru. The 2025/26 tangerine production and export forecast for Morocco, Chile and Peru is higher year over year according to the USDA, Foreign Agricultural Service’s *Citrus: World Markets and Trade* report released in January 2026.

