Citrus Growers' Association OF SOUTHERN AFRICA
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MIDDLE EAST CRISIS WEEKLY NOTIFICATION (#04) – 2 APRIL 2026

OVERVIEW AND OUTLOOK

The ongoing Middle East crisis remains largely unchanged from the previous week, although rising instability in the Bab el-Mandeb Strait is evident. The Middle East Crisis Committee will continue to monitor developments against the key risks outlined in Table 1, with the overall status remaining unchanged. Stakeholders are referred to the latest Crane Worldwide Logistics report for an updated overview of logistical conditions, payment delays, and customs clearance challenges.

Table 1: Middle East Crisis & Ripple Effect Risk Matrix

Focus Area	Risk Level	Key Risk	Monitoring Focus
Logistics & Shipping	High	Route disruptions, delays, limited reefer plugs, rising freight costs	Route availability, transit times, freight rates
Market Access & Compliance	Medium	Some fruit may not meet SPS and labelling requirements for certain markets.	Ensure fruit complies with destination market requirements.
Middle East Market Risk	High	Price caps, delayed or non-payments	Payment timelines, buyer feedback, price controls
Market Diversion & Absorption	High	Inability of alternative markets to absorb volumes	Volume shifts, prices, buyer demand
Supply & Volume Coordination	High	Oversupply across export and local markets	Packing vs demand, stock levels
System Capacity (Logistics & Excess Fruit Processing)	High	Cold storage congestion and limited juicing capacity	Cold store utilisation, juice intake volumes
Quality & Claims Risk	Medium–High	Deterioration due to longer transit times	Arrival quality, claims
Grower Financial Pressure	High	Lower prices, delayed payments, margin squeeze	Export/local prices, payment cycles
Input & Cost Pressures	Medium–High	Rising fuel, logistics, and input costs	Fuel prices, surcharges, input costs

SHIPPING ENVIROMENT

Shipments from Week 8 that were previously delayed have now started reaching Middle East destinations, with transit times extended by approximately one month. This raises increasing concern regarding fruit quality. While early shipments consisted largely of lemons - which are more resilient - future routing decisions will need to account more carefully for fruit sensitivity.

The shipping environment remains critically constrained. Rising instability in the Bab el-Mandeb Strait continues to pose risks to key access routes into Jeddah, resulting in a shift toward Mediterranean routing due to improved reliability and security, albeit with significantly longer transit times. Table 2 reflects updated shipping options and indicative transit times. With volume bunching expected post-Easter, system capacity across logistics, markets, and cold chain infrastructure will be further tested.

Table 2: Current Shipping Opportunities to the Middle East as of Thursday, 1 April 2026

Line Name	Service Name	Port Of Call	Tranship 1	Tranship 2	Port Of Destination	Indicative Transit Time
CMA CGM	MIDAS 2	Durban	Mundra		Fujairah	21 Days
CMA CGM	MIDAS 1	Port Elizabeth	Mundra		Fujairah	25 Days
CMA CGM	MIDAS 1	Cape Town	Mundra		Fujairah	25 Days
MAERSK / ONE LINE / HAPAG LLOYD	SAECS	Durban / Coega / Cape Town	Algeciras		Jeddah	46 Days
MSC	MSCEM	Durban / Coega / Cape Town	Las Palmas	Gioia Tauro	Jeddah	52 Days
UNIFEEDER / ONE LINE / HAPAG LLOYD	MJI	Maputo	Mundra		Jeddah	22 Days

Note: Routes are indicative and may change without notice. Exporters of fresh fruit are strongly encouraged to actively monitor container temperature and location throughout transit.

At the same time, vessel capacity is tightening, trucking constraints at destination ports - particularly Jeddah - are emerging, and competition for limited shipping space is intensifying. Fuel shortages in certain markets are also affecting onward distribution. CGA and FPEF continue to engage with value chain stakeholders to monitor developments and identify mitigation opportunities.

MARKET IMPACT

Although full market dynamics will only become clear once all regions are packing, early indications show that certain markets outside the Middle East have already received above historical average volumes, particularly for lemons (Weeks 1–14). Production remains uneven, with continued packing delays in northern regions due to rainfall, while Europe, Russia, and the UK are already absorbing higher volumes. Packing is likely to begin in earnest after the Easter Weekend.

As noted in previous notifications, maintaining the integrity of export markets is critical. Growers and exporters should ensure alignment between fruit quality and market specifications to avoid destabilising key markets. Stakeholders are encouraged to refer to the CGA dashboard for more detailed shipping and packing data.

Table 3: Citrus Shipping Volumes by Export Region (15kg Cartons), Weeks 1-14

Region/Country	2026	2025	2024	2023	2022	2021
Africa & Islands	92,833	94,172	98,033	32,794	50,435	24,468
Asia	99,381	15,462	5,139	171,892	222,764	1,643
Europe	1,013,829	396,244	111,214	425,140	104,493	122,286
Middle East	1,392,620	2,906,710	2,159,177	2,751,839	2,178,993	1,725,692
Bahrain	11,614	27,535	63,249	61,118	63,887	48,257
Iran			10,588		6,926	
Iraq	186,048	692,701	169,241	282,114	224,916	249,306
Jordan				20,732		3,263
Kuwait	35,980	170,805	91,823	147,949	170,830	125,819
Oman	30,917	80,807	53,817	66,023	44,183	21,837
Qatar	22,859	129,228	53,904	117,505	118,718	87,864
Saudi Arabia	499,541	366,620	639,164	630,913	587,625	423,452
Turkey	198,236					
UAE	399,622	1,434,847	1,077,391	1,425,485	961,908	765,483
Unknown	7,803	4,167				411
North America	150,159	281,961	323,614	236,044	124,228	107,735
Other		388	28,955	1,707		
Russian Federation	874,843	641,401	393,031	471,444	142,047	595,953
Southeast Asia	595,252	608,272	550,103	1,056,584	1,116,666	414,597
United Kingdom	576,968	176,347	151,613	285,531	90,779	120,947
Total	4,795,885	5,120,957	3,820,879	5,432,975	4,030,405	3,113,321

GOVERNMENT SUPPORT

As uncertainty persists, efforts continue to explore support mechanisms to mitigate both the direct and indirect impacts of the crisis. Fuel price adjustments came into effect on 1 April 2026, with diesel increases partially offset by a temporary fuel levy reduction of R3 per litre. A joint statement by National Treasury and the Department of Mineral Resources and Energy on 31 March 2026 indicated that further relief measures are under consideration.

While such support is welcomed, options remain constrained under World Trade Organization "Green Box" provisions, which do not allow export subsidies. Engagement with government and industry stakeholders will continue to explore compliant support measures.

CONCLUSION

While the overall risk status remains largely unchanged, underlying pressures across logistics, market absorption, and system capacity continue to build. As shipments normalise and volumes increase post-Easter, these constraints are expected to intensify.

The coming weeks will be critical in determining whether the system can absorb volumes without significant disruption. Careful route planning, disciplined volume allocation, and strict adherence to market specifications will be essential to maintain market stability and protect value through the 2026 season.

APPENDIX

- *Crane Worldwide Logistics. (1 April 2026). Middle East Daily Triage Report. Dubai, United Arab Emirates.*
- *National Treasury & DMRE (31 March 2026). Joint media statement announcement by Minister Enoch Godongwana and Minister Gwede Mantashe on short-term relief measures to address fuel price increases. Pretoria, South Africa.*