



**Citrus
Growers'
Association**
OF SOUTHERN AFRICA



CRW

2025

ANNUAL REPORT





OUR MISSION

SUPPORTING CITRUS GROWERS
TO BE GLOBALLY COMPETITIVE AND
MAXIMISING THE LONG-TERM
SUSTAINABILITY OF ITS MEMBERS

STRATEGIC OBJECTIVES

- ✓ Administer, fund, and resource the CGA Group
- ✓ Gain, retain, and optimise market access
- ✓ Fund, control, and implement research and development
- ✓ Develop industry intelligence
- ✓ Provide product and quality assurance
- ✓ Engage with government and other stakeholders
- ✓ Assist growers' long term sustainability
- ✓ Drive industry transformation
- ✓ Facilitate efficient logistics

Citrus Growers' Association of Southern Africa

Reg. No. 2000/010147/08

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CHAIRMAN'S REVIEW

Gerrit van der Merwe

The year 2024 presented its own unique set of challenges and opportunities, but a comforting truth in these turbulent times was that, as we all know, a "normal citrus year" simply does not exist.

Perhaps the best way to characterize 2024 is as "The Year of the Juice". A significant shortage of orange juice in Brazil drove concentrate prices to record highs, offering many growers short-term benefits. However, as with most extremes, there is a price to pay. These elevated prices curbed demand, and as Brazil's production returns to normal, restoring that demand has become a challenge for the sector in 2025.

Part of what made 2024 unique is that South Africa actually exported slightly fewer cartons than the year before - around 160 million. Considering Vision 260, this was not a step in the right direction, but taking into account extreme weather damage, especially in the Western Cape province last year, and knowing that the juice market has stabilized, we can continue striving for the goals of Vision 260: increasing exports and creating 100 000 jobs in the years to come. Importantly, the reduced export volume also created an opportunity - growers were able to price more responsibly, resulting in better returns over much of the year.

However, some of our challenges have not gone away. Port logistics is still a major concern, with the Durban Pier 2 concession delay at the time of writing this

not resolved. Progress has been slower than needed. With Minister Barbara Creecy in her new role as Minister of Transport, we have seen positivity on the Transnet side. With investment in the ports and future private participation on rails, it is a step in the right direction, but a step on a very long road.

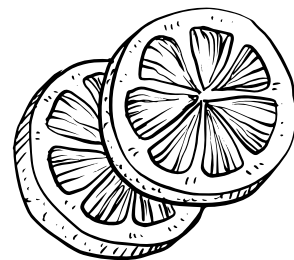
Our challenges concerning market access and tariff barriers are still high priorities, but progress on this front always moves at a slow pace.

Turning to 2025, "Liberation Day" was forced on us from the Rose Garden in Washington D.C. and turned the world on its head. While the CGA has been trying to stabilise the US tariff situation, it has given us a unique opportunity to forefront tariff barriers, not just with the US, but with our other trading partners as well. With the Government of National Unity (GNU) still relatively new, the CGA is optimistic that we will see some movement on this front.

In conclusion, I want to thank the CGA staff for this past year, and especially one of the pillars the CGA was built on - Justin Chadwick. Leading this organisation for 25 years and building it into the world-class organisation we have today is a massive achievement. 2024 was also the year of "the great CEO hunt" - after a long search, we are proud to present Dr Boitshoko Ntshabele, who took the reins from Mr Chadwick, and we are sure Dr B will "trap diep spore" in the CGA.

On a personal note, I want to thank the CGA board for its support this past year, especially the executive and, more specifically, my two vice chairs, Hannes de Waal and Jan-Louis Pretorius. Having two extraordinary gentlemen next to you makes heading up this organisation easier.

With everyone's continued dedication, perhaps one day soon we will witness the arrival of that mythical, long-awaited phenomenon - a "normal citrus year."



CEO'S REPORT

Outgoing CEO – Justin Chadwick

The 2024 Southern African citrus season will be remembered as "the year of orange juice". In March, healthy growth in exports was forecast, with volumes predicted to increase beyond those contained in our Vision 260 plan.

However, a crop failure in Brazil meant that oranges available for juicing were severely reduced. This, together with already depleted global orange juice stocks, resulted in a worldwide search for the elusive juice – and a six-fold increase in the price of oranges for processing purposes in Southern Africa.

As a result, considerable volumes of oranges that would have been destined for the export market ended up in processing plants. This was extremely good news for citrus growers in Southern Africa as the elevated returns from juicing did not carry the risks and costs associated with exporting fruit. In addition, the lack of marginal fruit in the market lifted export market returns. As a result, the final 2024 volumes were slightly below those of the previous season. While orange volumes declined, mandarin exports continued to rise, with extensive plantings over the past few years beginning to yield results.

The lower export volumes allowed some breathing space for the logistics system, and for most of the year fruit moved relatively smoothly through the ports. Unfortunately, this stability was disrupted towards the end of the season, when several events led to delays and market losses. It was also a bitter disappointment for cargo owners when the much-publicised joint venture between the private and public sectors at Pier 2 in Durban did not happen due to legal

challenges from one of the losing bidders. This delay has cost cargo owners and the South African economy dearly.

The addition of further liner services to transport Southern African citrus, and the reduction in shipping costs, were a welcome relief for citrus growers. Shipping rates brought growers to their knees in 2021 and 2022. The improvement in rates meant that some growers could replenish depleted reserves.

2024 was also the last year of the over twenty-five years I spent as CEO of the CGA.

I would like to pay tribute to the growers, the CGA board, and the CGA group staff for their support and friendship over this tenure. Citrus growers are the most resilient, hospitable, and likable people that I have had the pleasure of meeting – I will forever cherish memories of our meetings and deliberations. The CGA board has shown remarkable leadership over a period that has

thrown up many and varied challenges.

The board's attitude of taking these



challenges head-on and always making a plan is an example for other sectors of the economy.

When I was bedridden in 2017 and missed the CGA Citrus Summit, I was told that "the conductor was missing but the orchestra played on". The CGA group staff have always played incredible music for the benefit of CGA members – the growers. Every now and again I had to wave my baton, but mostly, the initiative, passion, and enthusiasm of the entire CGA made sure that the association delivered impressive results.

I am more than thrilled to welcome Dr Boitshoko Ntshabele as the new CEO. I have every confidence that he will lead both the organisation and the industry to even greater heights.

Incoming CEO – Dr Boitshoko Ntshabele

I began my tenure as CEO of the Citrus Growers' Association (CGA) in February 2025, working closely alongside my predecessor, Justin Chadwick, to ensure a smooth and seamless leadership transition.

It started with an immediate visit to Fruit Logistica in Berlin, where we met with CGA's international stakeholders and partners. This was followed by the successful CGA Summit in the Eastern Cape, which was a world-class event, cementing the CGA's role as a key player in the citrus world – globally and locally. April would see us travel across the length and breadth of the country to meet with growers in respective growing regions.

The CGA's Vision 260 is focused on the export of 260 million cartons by 2032, and 2024 saw the export of 164,5 million cartons. The February report by the Bureau for Food and Agricultural Policy (BFAP) on logistical inefficiencies in the citrus value chain once again highlighted the need to ensure that the CGA work closely with Transnet and the Department of Transport to resolve logistics problems. These problems translate into costs (estimated at R5,27 billion for 2024) for citrus growers across the different production

areas. In the CGA's view, the conclusion of Transnet's Private Public Partnership process at Durban's Pier 2 remains essential in resolving port and logistics challenges on a long-term basis.



The expected growth in citrus exports requires expanded and sustainable markets. At the end of March, a team from the CGA travelled with FruitSA colleagues to India to address market access issues. The Middle East and Southeast Asia offer lucrative market opportunities for South African citrus. The Japanese and Chinese markets have experienced a slight decline in exports.

Tariff and phytosanitary challenges in these and other key markets must be addressed, especially as competing nations benefit from more favourable trade agreements. India has expressed interest in working with South Africa, through the Southern African Customs Union (SACU), to conclude a trade agreement that should reduce tariffs and streamline market access.

We must also resolve the long-standing phytosanitary disputes with the European Union regarding Citrus Black Spot and False Codling Moth. This issue, now before the World Trade Organization (WTO) as part of a formal dispute settlement process, must be concluded swiftly to provide certainty for growers. Furthermore, expanding market access to the United States beyond the Northern and Western Cape remains an objective.

The CGA appreciates and acknowledges the support of the Department of Agriculture, and the Department of Trade, Industry and Competition, as well as the Department of International Relations and Cooperation, in taking all this work forward. Market access offers the opportunity to ensure inclusive growth for the citrus industry as we take transformation forward.



Vision 260

ARE WE ON TRACK TO HIT 2027'S TARGETS?

Vision 260 sets a bold target:

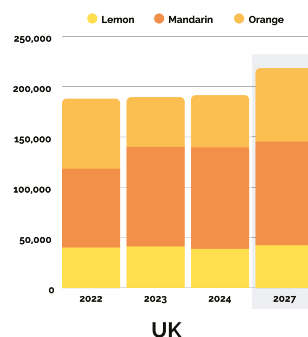
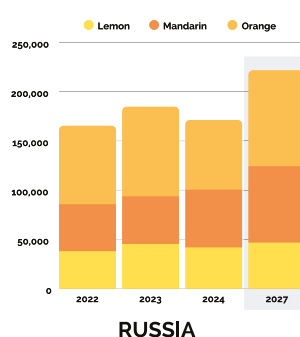
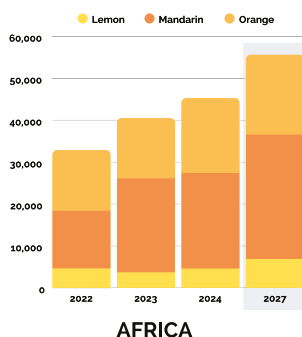
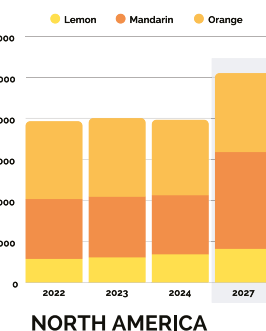
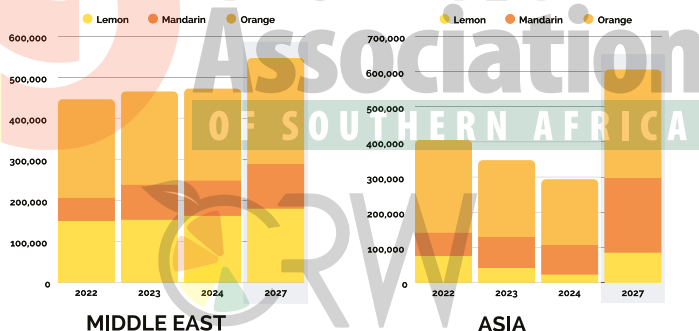
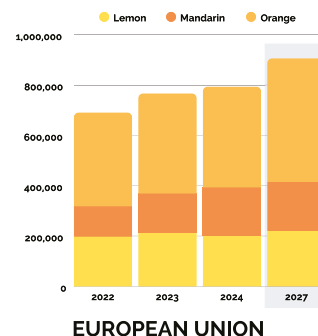
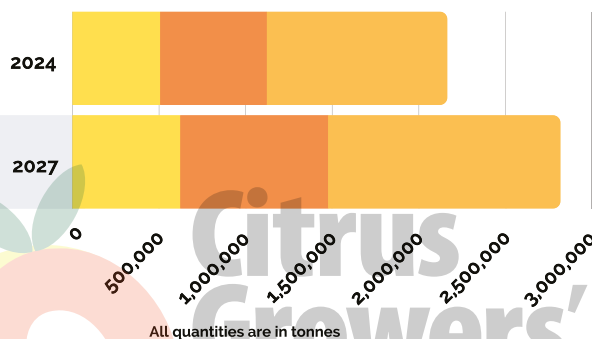
boosting exports to 260 million cartons (around 3.9 million tonnes) by 2032.

As a milestone along the way, the mid-2027 goal aims for 2,82 million tonnes, which translates to approximately 187.9 million cartons, based on a 15kg carton weight.

The initial Vision 260 model projected a decline in grapefruit volumes; as a result, targets were initially set only for oranges, lemons, and mandarins. These targets will be reviewed and revised in 2025 to align with evolving market trends.

EXPORTS OVERALL

● Lemon ● Mandarin ● Orange



These figures reflect only exports through seaports

Source: Agrihub Historical Data & CGA Crop Projection Model

COO'S REPORT

Paul Hardman

CGA statutory levy approval

The Chief Operating Officer (COO) is now the primary liaison with the National Agricultural Marketing Council (NAMC) for all matters related to applying, implementing, and reporting the CGA statutory levy. The application process for the next levy cycle (2025–2028) commenced in late 2023, beginning with the preparation of draft activity reports and budgets. These were presented to growers during the CGA roadshows held in February and March 2024. Taking growers' inputs into consideration, a refined application was submitted to the NAMC in April 2024. After internal NAMC reviews, the application was submitted to the Department of Agriculture, Land Reform and Rural Development (DALRRD) in August 2024, and approved by the Minister in December 2024. The CGA levy will be R1.65 per carton in 2025 – a reduction of approximately 8% compared to 2023.

Work hours pilot

From January to March 2025, the CGA piloted a flexible work hours initiative, allowing staff to opt for an earlier start and end to their workday. This pilot was well-received and taken up by several team members. Based on its success, this flexible work option will be retained going forward.

CGA remuneration policy

In 2024, management and the Remuneration Committee (REMCO) developed a draft remuneration policy and a REMCO Charter to provide a clearer policy framework for dealing with remuneration matters. These policies were adopted at the February 2025 CGA board meeting and will be implemented during the next financial year. This is a significant step towards strengthening transparency, consistency, and alignment in how remuneration is managed across the organisation.

CGA Citrus Summit

The CGA Citrus Summit is one of the most important events on the national agriculture calendar. It requires months of detailed planning and preparation, all undertaken by CGA staff members in parallel with their ongoing daily responsibilities. The 2025 Summit, held in March in Gqeberha, was a major success and a fitting tribute to both the industry and the leadership transition that was underway at the CGA. Sincere thanks go to all the CGA staff, as well as colleagues from the CGA group of companies, for their tireless efforts and professionalism in delivering a truly world-class event.

CGA Transformation Strategy

A Transformation Indaba was held on 19 June 2024 in Johannesburg to have a focused discussion on the current state of the citrus industry's many transformation activities. Attended by growers and representatives from across the CGA group of companies, the Indaba fostered a common understanding of transformation issues and opportunities. Presentations were made by the CGA, the GDC, and the Citrus Academy, highlighting the progress already made. It was agreed that a more integrated approach is needed to have a greater impact with the limited resources available. A drafting committee was formed to formulate a new CGA Transformation Strategy. This group met on several occasions, and a final draft strategy was adopted at the February 2025 CGA board meeting. In essence, the strategy aims to create more economic opportunities for previously disadvantaged individuals. By year-end, the main indicators of transformation success had been discussed. An overarching CGA Transformation Strategy will translate into clearer roles and responsibilities, and will also enable improved data collection, enhancing the CGA's ability to make informed decisions and engage more effectively with external partners.



Information and communication

Progress has been made in modernising the CGA's communication and information-sharing platforms. Under the leadership of Albert Coetzee, a new CGA website was launched, along with a supporting backend system to manage user access and member data. Together, these changes allow for greater information sharing with target groups and the ability to track responses from growers. In parallel, the information team, led by Precious Kunota, made notable strides in improving data accessibility. Enhanced interactive dashboards have been added to the website, giving growers access to more actionable insights. Training sessions were held to support users in navigating the new system. As part of these changes, the existing CGA App will be phased out and replaced by a mobile-friendly version of the CGA website, ensuring easier access to information across devices.

CGA group cooperation

Several initiatives have been driven to improve coordination and to take advantage of synergies across the group of companies. A regular meeting of general managers and CEO's was launched. The aim is to identify areas where companies can support each other better through finding efficiencies or sharing experiences. Additionally, a monthly Town Hall session has been introduced, with invitations to participate extended to all people working in the CGA group. These are useful in many respects, offering space for discussion on topics such as citrus tree census trends or an opportunity for leadership introductions, all while fostering group-wide communication. Key focus areas for improved coordination include transformation efforts, crop protection, active substance alignment, and event planning.

In 2024, the CGA continued to make meaningful progress across its operational, strategic, and organisational priorities. From modernising internal systems and enhancing communication, to deepening group cooperation and advancing transformation, our focus remains on keeping the citrus industry robust and relevant.

CGA staff developments

Jana Janse Van Rensburg and Amy Grundling joined the CGA as Market Access Liaisons in July and August 2024, respectively, working with Justin Chadwick and Deon Joubert as understudies on various market access matters. Jana is based in Cape Town, while Amy works from Pretoria.

In February 2025, Dr Boitshoko Ntshabele joined the CGA as the incoming Chief Executive Officer. He is currently based in Pretoria, sharing office space with the CGA Grower Development Company (GDC). These additions mark a further geographical spread of CGA personnel.

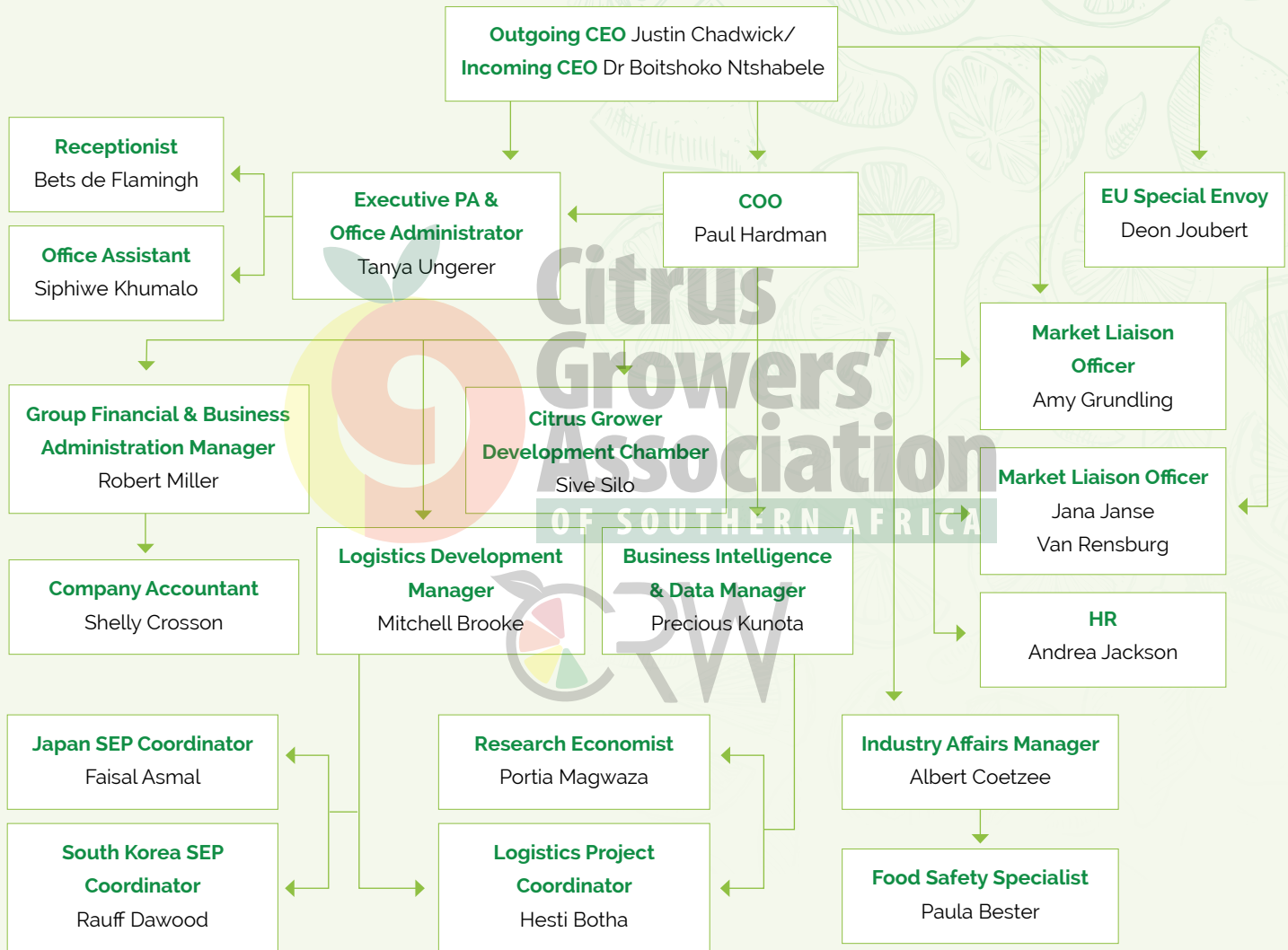
The leadership team, including the COO and Human Resources consultant, has focused on ensuring a cohesive team culture across locations, including regular online and in-person get-togethers. These initiatives proved especially valuable during the leadership transition, with CEO Justin Chadwick retiring at the end of March 2025, which also marked his 25th year with the CGA.

Earlier in the year, I took a sabbatical during April and May 2024, in recognition of 20 years of service to the organisation.



CGA MANAGEMENT STRUCTURE

as at 31 March 2025



ADMINISTRATION

Tanya Ungerer

Governance

The Citrus Growers' Association (CGA) represents citrus growers from all citrus-producing regions across Southern Africa. Each of the 14 South African regions has at least one elected director serving on the CGA board, regardless of the region's size. Eswatini and Zimbabwe have one board representative each.

Every two years, regional board positions are open for re-election, with growers nominating and electing their preferred representatives. Additionally, two directors specifically represent black growers, ensuring inclusive representation at the board level.

Board representatives maintain close communication with growers in their respective regions, providing regular updates on key industry matters such as export market trends, regulatory developments, and technological advancements. These elected leaders play a vital role in advocating for members' interests and ensuring they have access to competitive pricing and efficient production practices.

In the year under review, the CGA board consisted of 23 directors: 19 regional representatives, one independent chair of the Finance and Risk Review Committee, a government relations specialist, and two representatives for emerging growers – one each from the northern and southern regions. This diverse board structure helps ensure that all members' interests are adequately considered in strategic decision-making.

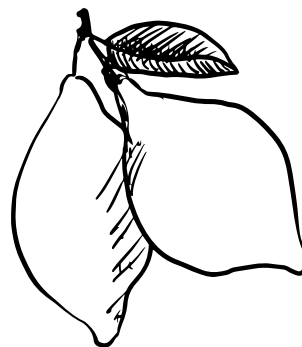
Leadership changes during the reporting period included the start of Gerrit van der Merwe's term as chairman in April 2024. Hannes de Waal served as outgoing vice-chairman, while Jan-Louis Pretorius stepped into the role of incoming vice-chairman.

All CGA directors volunteer their time without remuneration, and the citrus industry deeply values their commitment and leadership.

The CGA's activities are funded by grower levies, which are managed under the oversight of the National Agricultural Marketing Council (NAMC)—the government body responsible for the statutory levy process.

As part of this process, the NAMC is invited to participate as an observer at CGA board meetings and the annual general meeting. This collaboration ensures compliance and provides a platform for updates, guidance, and input on potential changes to levy regulations.

The continuation of the statutory levy, which is renewed every four years, depends on the approval of the Minister of Agriculture.



Executive Committee for 2024-2025

Gerrit van der Merwe – chairman
Hannes de Waal – outgoing vice-chairman
Jan-Louis Pretorius – incoming vice-chairman
Andries van Wyngaardt
Cornel van der Merwe
George Hall
Piet Engelbrecht



Board meetings

27 August 2024

Held virtually via Zoom

Apologies were received from Guy Whitaker, Khaya Katoo, George Hall, Jock Danckwerts, and Per Nøddeboe.

31 October and 1 November 2024 – Strategic planning session

The Beach Hotel, Gqeberha

Apologies were received from Charles Rossouw and Smit le Roux.

19-20 February 2025

CRI Boardroom, Nelspruit

Apologies were received from Jock Danckwerts, Tommie Landman, Piet Engelbrecht, and Phillip Dempsey.

Annual General Meeting

The annual general meeting of the CGA Group of companies (Citrus Growers' Association, Citrus Research International, Citrus Academy, CGA Grower Development Company, CGA Cultivar Company, and River Bioscience/XSIT) was held virtually on **27 August 2024**.

Leadership transition

After 25 years of service, Justin Chadwick retired as CEO of the CGA at the end of March 2025. His leadership played a pivotal role in shaping the CGA and the broader citrus industry. Dr Boitshoko Ntshabele was appointed as the new CEO and took office on 1 February 2025, ensuring a smooth handover. Reflecting on his retirement, Justin said: "Although I look forward to spending more time on the things I love, I will miss doing what I was called to do." The CGA thanks Justin for his outstanding contribution and wishes him all the best in this next chapter.

BOARD OF DIRECTORS

Hannes de Waal	.....	Sundays River Valley
Hennie Ehlers	.....	Sundays River Valley
Jan-Louis Pretorius	.....	Letsitele
Andries van Wyngaardt	.....	Letsitele
Piet Engelbrecht	.....	Senwes
Charles Rossouw	.....	Senwes
Cornel van der Merwe	.....	Onderberg
George Hall	.....	Boland
Gerrit van der Merwe	.....	Western Cape
Andrew Muller	.....	Nelspruit
Guy Whitaker	.....	Limpopo River
Jock Danckwerts	.....	Eastern Cape Midlands
Marius Bester	.....	Oranje River / Northern Cape
Mike Woodburn	.....	KZN / Pongola
Paul Bristow	.....	Zimbabwe
Per Nøddeboe	.....	Eswatini
Phillip Dempsey	.....	Patensie
Smit le Roux	.....	Burgersfort / Ohrigstad
Tommie Landman	.....	Hoedspruit
Khaya Katoo	.....	Emergent growers – southern regions
Bennet Malungane	.....	Emergent growers – northern regions
Vangile Titi	.....	Government Relations Specialist
Rajen Govender	.....	Chairman – Finance and Risk Review Committee



ORANGE HEART

Sive Silo

Orange Heart is the social responsibility initiative of the Citrus Growers' Association of Southern Africa (CGA).

It was established to uplift and support communities in citrus-growing regions by providing a structured platform through which citrus growers and industry stakeholders can contribute to sustainable rural development. The initiative aligns with the CGA's broader commitment to social impact and community upliftment.

Orange Heart focuses on two core initiatives: The Orange Heart Fruit Drive and the Summit Outreach. The Orange Heart Fruit Drive, launched in 2020 in response to the COVID-19 pandemic, aims to reduce food insecurity in vulnerable communities. Through the generosity of citrus growers and packhouses, fresh fruit and other food items are donated to organisations that distribute aid to food-insecure households across South Africa.

In the year under review, Orange Heart supported the Citrus Academy's Citrus Secondary Programme, a two-year citrus production qualification aimed at Grade 10 and 11 learners. The programme enables learners to earn a formal certification in citrus production while still attending school and is currently offered at 19 schools across citrus-producing regions in South Africa.

To facilitate access to the programme's e-learning platform, Orange Heart distributed 42 tablets to participating learners from Winterberg Agricultural High School in Fort Beaufort, Eastern Cape, and Clydesdale Senior Secondary School in Mzimkhulu, KwaZulu-Natal. These devices provide students with access to course content, enhancing their learning experience and equipping them with practical skills for future employment in the citrus sector.

Through initiatives like the Citrus Secondary Programme and the provision of digital learning tools, Orange Heart reflects CGA's long-term investment in education, empowerment, and rural development. By nurturing the potential of young individuals in citrus-growing communities, Orange Heart is helping shape the next generation of agricultural leaders and skilled contributors to the industry.

Tablet handover
- Winterberg Agricultural High School
in Fort Beaufort, Eastern Cape



COMMUNICATION

Tanya Ungerer

CGA Citrus Summit

The CGA Citrus Summit, held every two years in alternation with regional grower roadshows, returned in March 2025 for its fifth edition at the Boardwalk Hotel in Gqeberha. The event drew over 650 delegates, including approximately 350 growers and 290 industry stakeholders. The summit was widely regarded as a success, with overwhelmingly positive feedback from attendees. Delegates highlighted the high quality and relevance of presentations, which were both informative and impactful. A detailed report on the summit appears later in this publication.

From the Desk of the CEO

The CEO's weekly newsletter remains one of the CGA's most valued communication tools. Compiled by outgoing CEO Justin Chadwick every Friday – except during a short Christmas break – the newsletter will continue under the leadership of incoming CEO, Dr Boitshoko Ntshabele. This one-page update offers timely insights on market developments, industry news, and upcoming events. It is available in English and Afrikaans, and is distributed to over 4,000 recipients, including both growers and broader industry stakeholders. To subscribe, email info@cga.co.za.

CGA members register

The CGA is actively compiling a comprehensive member register to enhance communication with citrus growers across southern Africa. All growers in South Africa, Zimbabwe, Eswatini, and Botswana are encouraged to submit their details to the CGA to ensure they receive timely and relevant updates.

Social media

The CGA maintains an active presence on LinkedIn, Facebook, X (formerly Twitter), and Instagram, providing regular updates on key developments in the citrus industry. Follow us to stay informed and connected with the latest news, insights, and events.

FOLLOW US ON SOCIAL MEDIA!



-  Citrus Growers Association of Southern Africa
-  Citrus Growers Association of Southern Africa
-  [citrusgrowerssa](#)
-  [citrusgrowerssa](#)

CGA website and CRM tool

At the start of 2025, the CGA launched a new and improved website at www.cga.co.za, built on enhanced software to ensure greater security and functionality. The updated site features interactive dashboards that allow for the easy sharing of industry insights and serve as a central source for citrus growers and stakeholders. Alongside the website, a new Customer Relationship Management (CRM) tool was introduced. This system improves communication, integrates internal platforms, and provides a



single point of information management. To ensure accurate and relevant communication, we ask all growers and stakeholders to keep their contact details up to date or notify us if they wish to be removed from our mailing lists. We appreciate your ongoing support and collaboration. For assistance or updates, please contact us at info@cga.co.za.

CGA App

Although the CGA App saw growth in user numbers, its overall usage remained too limited to justify the ongoing costs associated with its maintenance and limited functionality. This was a contributing factor in the decision to invest in the new CGA website, which offers improved functionality across all devices. As a result, the CGA App will soon be phased out.

CGA briefings

During the year under review, the CGA conducted a series of briefings with key stakeholders in the citrus value chain. These included major commercial banks – ABSA, FNB, Standard Bank, Nedbank, and Land Bank – as well as industry partners such as MSC, Hapag-Lloyd, Maersk, Sentraal-Suid Koöperasie (SSK), Mpact Ltd, the Industrial Development Corporation (IDC), and the Perishable Products Export Control Board (PPECB). These engagements were aimed at strengthening collaboration and sharing industry insights.

Communication Committee

The CGA Communication Committee, comprising Dr Boitshoko Ntshabele, Paul Hardman, Gerrit van der Merwe, Hannes de Waal, Jan-Louis Pretorius, Deon Joubert, Justin Chadwick, and Resolve Communications members (Paul Boughey, Loftus Marais, and Gerhard Mulder), met every second Friday to discuss communications and media-related issues. Resolve Communications provided assistance with interviews (written, television, and radio) and content such as articles and media statements, while also assisting with an annual strategic plan, monthly social media plans, and correspondence.



South African Fruit Journal (SAFJ)

The South African Fruit Journal (SAFJ) is published every second month, and all registered CGA members receive a complimentary copy. The publication's shareholders comprise the CGA, Hortgro, South African Table Grape Industry (SATI), and Fresh Produce Exporters' Forum

(FPEF). It features a wide range of content relevant to the fruit industry, including research updates, technical insights, market information, skills development, and other industry-focused articles. To access the digital edition, visit www.safj.co.za. For editorial queries, email editor@safj.co.za, and for advertising opportunities, contact sales@safj.co.za.



REPRESENTATION

Tanya Ungerer

The CGA is represented on several industry boards and committees, ensuring the interests of citrus growers are well represented across key platforms. These representatives report back to the CGA board of directors, keeping the organisation informed and aligned with broader industry developments. The office bearers for the period under review were as follows:

Agbiz

Justin Chadwick, Cornel van der Merwe, Charles Rossouw

Agbiz Fruit Desk

Paul Hardman

Agrihub

Precious Kunota

BI Steering Committee

Dr Vaughan Hattingh

CGA Combined Disaster Management Committee

Ben Vorster, Charles Rossouw, Tommie Landman, Francois Dillman, Hannes de Waal, Jock Danckwerts, Per Nøddeboe, Peter Nicholson, Piet Smit (Komati Group), Cornel van der Merwe, Gerrit van der Merwe, Pieter Nortjé, Deon Joubert, Justin Chadwick, Dr Vaughan Hattingh, Dr Elma Carstens, Rocco Renaldi, Boet Mouton, Fredri Kok, George Hall, Paul Bristow

CGA Communication Committee

Jan-Louis Pretorius, Deon Joubert, Justin Chadwick, Gerrit van der Merwe, Hannes de Waal, Paul Hardman, Dr Boitshoko Ntshabele

CGA Cultivar Company Board

Barend Vorster, Francois Joubert, George Hall, Guy Whitaker, Siseko Maqoma, Hendrik Warnich

CGA Grower Development Company Board

Andrew Muller, Ronald Ramabulana, Rajen Govender, Lawrence Mgadle (CGDC), Ntamiseni Mankhili (CGDC)

CGA Grower Development Chamber

Khaya Katoo, Bennet Malungane

Citrus Academy Board

Phillip Dempsey, Marius Bester, Bennet Malungane, Frikkie Olivier

Citrus Improvement Scheme

Paul Hardman, Smit le Roux

Citrus Industry Trust

Phillip Dempsey

Citrus Marketing Forum

Cornel van der Merwe, Jan-Louis Pretorius

Citrus Research International Board

Piet Smit, Fanie Meyer, Deon Joubert, Eddie Vorster, Mike Woodburn, Piet Engelbrecht, Louisa Mogotsi (CGDC)

Citrus Sustainability Forum

Albert Coetzee, Paula Bester

Confronting Climate Change Steering Committee

Albert Coetzee

Finance and Risk Review Committee

Rajen Govender, Mike Woodburn, Andrew Muller, Andries van Wyngaardt, Jan-Louis Pretorius, Phillip Dempsey

FMS Working Group and CBS Working Group

Hennie Ehlers

GLOBALG.A.P. National Technical Work Group

Paula Bester

Fruit Industry Value Chain Round Table Committee

Justin Chadwick

Fruit Industry Value Chain Round Table Trade Sub-Committee

Justin Chadwick, Amy Grundling

Fruit Industry Value Chain Round Table Resources Sub-Committee

Albert Coetzee

FruitSA IT Steering Committee / SHAFPE Sustainability Task Force

Paul Hardman

Fruit South Africa / SA Fruit Journal / SHAFPE / ATF

Justin Chadwick

HLB Steering Committee

Justin Chadwick, Jock Danckwerts, Cornel van der Merwe

Market Access Working Group for Fresh Produce

Dr Elma Carstens

National Logistics Crisis Committee

Mitchell Brooke

Perishable Produce Export Control Board

Ian Beukes, Pheladi Tlomatsane

River Bioscience / XSIT Board

Jan-Louis Pretorius, Marius Jurgens, C P Mouton, Eric Nohamba, Rajen Govender

(Eric Nohamba sadly passed away and will be missed: 1963/05/05 – 2024/08/13)

SIZA Board

Alana Snyman

SIZA Working Groups

Albert Coetzee

FINANCE

Robert Miller

The Citrus Growers' Association (CGA) administers the statutory levy payable on citrus exports. This levy is used to support key industry functions, including:

- Research and technical support provided by Citrus Research International (CRI)
- Market access and development
- Consumer assurance and food safety
- Industry data and statistics
- Logistics coordination
- Transformation initiatives, including:
 - Human capital development through the Citrus Academy
 - Enterprise development via the CGA Grower Development Company

In terms of the Marketing of Agricultural Products Act, the statutory levy is gazetted for four years, after which a new application must be lodged. The current levy period expired in December 2024, and at growers' request, a new four-year levy application was lodged and approved for the period January 2025 to December 2028.

This new levy was published in the Government Gazette number 11779 on 20 December 2024.

The statutory CGA levies for the newly approved collection period are as follows:

2025 – R1.65 per 15kg carton
2026 – R1.67 per 15kg carton
2027 – R1.70 per 15kg carton
2028 – R1.76 per 15kg carton

CGA BEE status

In early 2024, the CGA group renewed its B-BBEE certification, achieving a Level 5 rating on the Agricultural Sector scorecard. This rating applies across all CGA group entities, including River Bioscience, XSIT, CGA Cultivar Company, Citrus Research International (CRI), and the Citrus Research Trust (CRT). The certificate is available on the CGA website: www.cga.co.za. The CGA remains committed to driving transformation and fostering inclusion across the citrus industry.



CGA GROUP FINANCE AND RISK REVIEW COMMITTEE (FRRC)

Robert Miller

The FRRC provides oversight and strategic guidance to the boards of the CGA group companies in areas including risk management, financial governance, and internal controls. It also ensures that all entities operate in line with corporate governance standards and regulatory requirements, while promoting operational efficiency and risk mitigation.

The members of the FRRC for the year under review were Rajen Govender (chairman and independent director), Mike Woodburn (CGA director KZN), Andries Van Wyngaardt (CGA director Letsitele), Andrew Muller (CGA director Nelspruit), Phillip Dempsey (CGA director Patensie), and Jan-Louis Pretorius (CGA director Letsitele).

The FRRC held one meeting during the year under review, in August 2024.

All CGA group companies undergo an annual audit conducted by PricewaterhouseCoopers (PwC) South Africa. For the levy period 2021 – 2024, these audits raised no matters of concern.

The annual financial statements of each CGA group company are reviewed by the FRRC and submitted to the respective boards with a recommendation for approval.



RISK MANAGEMENT

Robert Miller

Below are the main risks identified by the CGA during the year under review, along with the mitigation measures currently in place:

Effect of phytosanitary constraints on export volumes and associated levy income

Citrus Black Spot (CBS)

- A Disaster Management Committee is in place.
- Special envoy is actively engaging with key stakeholders.
- Ongoing engagement with relevant government departments.
- Development of new export markets is underway.
- Additional funding has been allocated to CRI for research on CBS.
- A WTO dispute is in progress.
- A risk management system has been developed and implemented.

False Codling Moth (FCM)

- An FCM Management Committee has been established to assess, monitor, and manage this risk.
- Special envoy is actively engaging with key stakeholders.
- Discussions are ongoing with government representatives.
- An FCM Management System has been developed and implemented.

Bactrocera Dorsalis (BD)

- Movement of fruit from regions where BD is known to be established is being controlled.
- A joint CGA and CRI steering committee action plan is in place and managed.
- Other fruit industry groups contribute to managing this risk.

Biosecurity – Huanglongbing (HLB)

- A biosecurity manager at CRI is responsible for managing this risk.
- An HLB Steering Group is in place.
- An HLB Action Plan has been developed.

Geo-politics and trade dynamics

• AGOA and the US market

Agbiz has been engaged to assist and advise the CGA on matters related to the African Growth and Opportunity Act (AGOA). They are currently working with government departments to assess the implications of AGOA for the citrus industry, particularly regarding employment, foreign income, and broader trade dynamics. A short, medium, and long-term strategy is being formulated to ensure continued access to the US market, which may include the pursuit of a dedicated trade agreement with the United States.

• BRICS+ countries

The CGA is engaging with the government to explore how South Africa's membership in BRICS+ can support improved market access and trade opportunities within BRICS+ nations.

• Development of new markets

To support market expansion, the CGA has appointed two Market Access Liaisons to engage with the Department of Agriculture, Land Reform and Rural Development (DALRRD), the Department of Trade, Industry and Competition (DTIC), and foreign counterparts to open new export destinations for citrus.

• WTO dispute

The WTO legal case is progressing. A consultation panel has been appointed, and an agreement between the CGA, DALRRD, and DTIC has been signed. Hilton Lambert (trade lawyers) and the Advisory Centre for WTO Law (ACWL) have been contracted to represent the CGA and provide legal and strategic support throughout the process.

Financial risks

• CGA levies – reduction in export cartons

CGA levies are based on exported cartons, and the recent increase in juice processing prices has led to a decrease in the number of cartons exported, impacting levies collected during the 2024 season. However, this financial impact has been mitigated through careful budget planning and the use of accumulated surpluses from the current levy period.

• CGA reserves

The reduced levy income in 2024, along with the financial costs associated with the ongoing WTO dispute, has required the CGA to draw on its reserves to cover these expenses and meet its financial obligations across various operations. Despite this, the CGA has sufficient liquid reserves to manage these costs and ensure continued financial stability.

Logistical constraints on export volumes and levy income

- A Logistics Development Manager is employed to address this risk.
- A Logistics Risk Committee is in place to assist the logistics development manager.
- Key focus areas include:
 - Reducing supply chain costs;
 - Monitoring and advising on congestion reduction and port efficiency improvements;
 - Expanding export routes through alternative ports;
 - Addressing shipping and container cost escalations;
 - Addressing national road legislation; and
 - Developing rail transport options.
- A new shipping line has been established to offer additional shipping options.
- The finalisation of the Durban Pier 2 operator appointment is awaited.

Socio-political constraints on export volumes and associated levy income

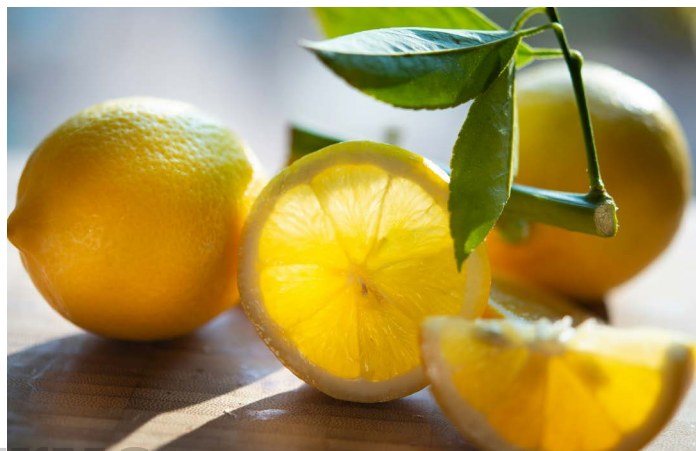
- Industry transformation is a key priority, with 20% of levy income allocated annually to transformation efforts.
- The CGA Grower Development Company and Citrus Academy have been established to address enterprise development and human resource needs, driving industry transformation.
- Collaborative opportunities are pursued with stakeholders to secure funding for enterprise development aimed at emergent growers and further promoting transformation, such as through the ETBCG programme (see related report later in this publication).
- Changes in the land expropriation laws, with the passage of a new Land Reform Bill, are actively being monitored. The CGA is working closely with industry body Agbiz on this matter, and submissions have been made to the Parliamentary Review Committee.

Effect of B-BBEE rating on future levy approvals

- Since 2022, the CGA Group received a combined B-BBEE rating, enabling all companies in the group to benefit from the transformation investment and improve their individual ratings.
- The CGA group undergoes an annual B-BBEE audit and has consistently achieved a Level 5 rating and certificate.
- A strategy has been developed to further improve the CGA Group's B-BBEE rating.

Constraints that buy-in from producers may have on future levy approval and income

- Grower representation is ensured through the composition of the CGA board, ensuring that growers' concerns are heard and addressed.



- An effective communication strategy is in place, which includes weekly newsletters, the CGA Citrus Summit (alternating with roadshows), and other publications. Additionally, other group companies are encouraged to keep growers informed of their activities.
- Growers have approved a new four-year levy collection period, covering the 2025 to 2028 seasons.

IT systems failure puts industry data at risk and results in the company being unable to operate

- The CGA employs an information technology consultant to manage IT risks.
- Data is backed up regularly, with off-site backups and storage of company data continuously monitored.
- Finance and accounting data are backed up off-site daily.

Cyber-risks and POPI Act compliance

- Regular cyber risk reviews are conducted, and improvements are implemented based on findings.
- POPIA compliance reviews are also carried out, and the CGA Privacy Policy is enforced to safeguard the data it collects.

LOGISTICS

Mitchell Brooke

A comprehensive guide to the 2024 citrus export season has been well outlined in the "Report on the State of Southern African Citrus Export Logistics and Shipping 2024", a first-of-its-kind report.

This document categorically outlines the many aspects that influenced the logistics and shipping conditions during the 2024 season. The South African import and export logistics environment was constrained by the limited use of rail transportation in conjunction with road transport, along with the underperformance of Transnet's state-run container terminals. Equipment failures at these terminals were widespread and are likely to persist in the near future. This issue posed a major constraint for citrus exports, as 95% of volumes are moved via containerisation. Although significant investments have been made in cold storage capacity across the Eastern, Central, and Western Corridors, aimed at providing much-needed support, the greatest challenge in the logistics chain remains the timely delivery and shipping of containers from terminals, which is essential to keeping the export ecosystem fluid. Transnet Port Terminals (TPT) has made substantial investments in the deployment of new equipment, though the full benefits are expected to be realised only by the 2026 citrus export season. As TPT represents Southern Africa's primary gateway to international trade, the citrus export industry remains at risk until there is a marked improvement in terminal productivity.

2024 Corridor production volume overview

The 2024 season brought about some unusual dynamics across the primary citrus production corridors. Extreme weather conditions, coupled with challenges related to fruit quality, sizing, and colour, significantly impacted overall production. Most

notably, the abnormally high international price of orange juice played a key role in reducing the volume of fruit available for export. This was particularly evident in the Northern Corridor. In March 2024, the region was projected to deliver 92 million 15kg cartons for export, however, the final volume amounted to just 76.5 million cartons. The March forecast also anticipated a substantial overlap of Mandarin and Valencia production between weeks 24 and 34, an event that was termed the "super peak". Considerable preparation was undertaken in anticipation of this overlap, although it ultimately did not materialise. In retrospect, the industry is now adopting a more cautious approach to March production estimates. The Northern Corridor's 2024 production was the lowest recorded in recent years. However, the longer-term outlook remains positive: under Vision 260, production from this region is forecast to reach 108 million cartons, excluding volumes from Botswana and Mozambique, which were not included in the 2023 tree census data.

Summary of noteworthy logistics and shipping developments in 2024

Hapag-Lloyd 'Citrus Connect' shipping service

Following extensive consultation, a core group of citrus producers and exporters contracted a dedicated shipping service with Hapag-Lloyd, known as 'Citrus Connect'. The service operated a rotation from Durban and Gqeberha to Europe, deploying 14 vessels between June and September 2024. The volume of containers shipped through 'Citrus Connect' ultimately exceeded the contracted target. To ensure alignment with volume projections, the Citrus Growers' Association (CGA) and Fresh Produce Exporters Forum (FPEF) held fortnightly meetings with Hapag-Lloyd. These sessions focused on reviewing volume assumptions and adjusting logistics accordingly to meet the contractual goals. The 'Citrus Connect' initiative was a significant success and



has laid a strong foundation for future innovations in the citrus export shipping space.

Maersk and MSC shipping services via Coega and Gqeberha ports to Europe

Maersk introduced the 'Reefer Plus' service to the Port of Gqeberha several years ago, providing a critical shipping link for Eastern Cape citrus producers to the European market. This initiative was prompted by a rotation change in the SAECS service, making it essential to establish an alternative service to maintain market access.

In 2024, Maersk continued to support this strategy through its WAF1 service, which called at either the Port of Coega or Gqeberha, with transshipment via Algeciras en route to Europe. Complementing this, MSC introduced a new European service calling at both Coega and Gqeberha ports. As a result, three independent shipping services to Europe were available to producers in the Eastern Cape during the 2024 season, significantly enhancing the region's shipping capacity and access to European markets.

Distress vessels calling into South African ports

As a result of the restricted use of the Red Sea route, more than 6,000 vessels are transiting Southern African waters at any given time. This elevated maritime traffic significantly increases the likelihood of distressed vessels diverting to South African ports for assistance or recovery.

During the 2024 citrus export season, four such incidents were recorded. One notable case involved the *CMA CGM Belem*, which called at the Port of Coega to discharge, load, or re-stow dislodged containers. The vessel occupied a berth at the Ngqura Container Terminal (NCT) for several weeks, severely disrupting the terminal's ability to accommodate scheduled container vessels. This berth occupation, combined with weather-related disruptions to port and terminal operations, had a severe impact on citrus export throughout. In response, an appeal has been



submitted to the Minister of Transport, urging consideration of the implications that distressed vessels have on critical export logistics.

ICTSI PSP at DCT Pier 2 terminal

International Container Terminal Services Incorporated (ICTSI) was scheduled to assume operational control of Durban Container Terminal (DCT) Pier 2 by April 2024. However, a successful court interdict was filed against Transnet's awarding of the contract to ICTSI, citing technical irregularities in the Request for Qualification (RFQ) process. As a result, a further court hearing has been scheduled to determine the validity of the contract awarded to ICTSI. In the interim, operational control of DCT Pier 2 remains with Transnet Port Terminals (TPT).

While the legal process continues, the delay in implementing a public-private partnership (PPP) at Pier 2 is a matter of serious concern. PPPs remain the only viable long-term mechanism through which the terminal efficiency required to achieve the Vision 260 objectives can be realised.

Exports from Maputo port

In the 2024 season, a total of 730 reefer containers were exported from the port of Maputo to Eastern and Asia markets, significantly below the initial projection of 2,500 containers. Substantial groundwork has been undertaken to better understand how Maputo can be positioned to expand its role in citrus exports going forward. Sustainable shipping options to the Middle East are currently available and being utilised from Maputo. However, the future growth of citrus exports through this port will depend heavily on unlocking access to key markets in Asia, Southeast Asia, and the Far East. These regions are particularly important for grapefruit exports, which are increasingly sourced from the expanding Maputo hinterland.

Several critical enablers are required to facilitate this growth, particularly to high-value markets such as China, Japan, and South Korea. These include:

- Approved preclearance inspections by the Department of Agriculture, Land Reform, and Rural Development (DALRRD);
- Cold storage infrastructure along the Maputo N4 corridor, specifically on the South African side;
- Rail connectivity to service the cold storage facility, enabling delivery and collection of reefer containers for export; and
- Direct shipping access from Maputo to key Asian and Far Eastern markets.

Plans to advance these developments are underway, with a collaborative effort being led in partnership with the Fresh Produce Exporters Forum (FPEF).

Private sector rail transport services

The year 2024 laid the foundation for private rail operators to access and operate trains on South Africa's national rail network. A significant milestone was the publication of the updated '*Rail Network Statement*', which outlines the framework for private operators to access the network. This includes the allocation of rail slots, which private companies can tender for. It is important to note that, at this stage, slot allocations will not be available across the entire network, but only on select routes. Of particular interest to the citrus industry are two key corridors:

- The Container Corridor between Durban and Gauteng; and
- The Coal Corridor between Maputo and Nelspruit.

Both are currently under consideration for private slot allocation and are seen as critical to enhancing citrus export logistics.

As we enter 2025, the role of private sector involvement in rail operations is expected to become clearer. This marks the beginning of what could be an evolutionary and potentially revolutionary shift in rail transport within South Africa. Realising this vision will require significant long-term investment and collaboration between industry stakeholders and rail service

partners. It is also important to understand that Transnet Freight Rail has undergone a structural transformation. The former entity has been dissolved into three separate divisions:

1. **Transnet Freight Rail Operating Company (TFROC)** – one of multiple future operating companies;
2. **Transnet Rail Infrastructure Manager (TRIM)** – responsible for the management and maintenance of the rail network; and
3. **Transnet Rail Leasing Company (TRLIC)** – which will manage rolling stock leasing.

Under this new structure, TFROC will become just one of several potential rail operators. The '*Rail Network Statement*' also details the cost structures and parameters under which TRIM will charge each train for the use of the national rail infrastructure.

Conclusion

The 2024 citrus export season was unusual on many fronts, and the logistics and shipping environment was no exception. It was also a year marked by meaningful dialogue and the initiation of several thought-provoking and forward-looking developments. In many ways, 2024 set the stage for what lies ahead in the logistics space, not just for the citrus industry, but on a national scale. Logistics has increasingly taken centre stage within the broader agricultural export sector. While this report highlights several significant challenges, I remain personally optimistic about the road ahead. We are fortunate to have a Minister of Transport who is actively engaging to understand the pain points, constraints, and, most importantly, the opportunities that exist. Within the citrus export logistics space, we are supported by a network of progressive, forward-thinking professionals. Transnet's leadership, including a highly committed and enthusiastic COO, is demonstrating a strong willingness to collaborate across its operating divisions. An extensive procurement drive is currently underway to address critical equipment shortages across South



African container terminals, an initiative that is expected to yield positive outcomes in the near term.

The recently published '*Rail Network Statement*' marks a pivotal moment: it opens the door for the first private rail operators to run trains on the national rail network. I consider this a landmark development in South Africa's logistics history, one worth celebrating. While delays in establishing a public-private partnership at DCT Pier 2 are unfortunate, the need for such partnerships remains undeniable. Encouragingly, we are seeing unprecedented levels of collaboration within the fruit export industry. This has created a competitive and dynamic shipping environment, rivalled only by the long-standing Summer Citrus collaboration. Maintaining an industry-wide perspective will be essential in advancing efficient and effective shipping services. As we look ahead to the 2025 citrus season, we can expect another eventful year in the logistics and shipping space. To that end, we have presented Transnet with a '*Reefer Export Optimisation*' Project, an initiative designed to centrally coordinate reefer export planning and operations in partnership with Transnet and the broader citrus logistics ecosystem. In the short term, the most pressing challenge remains ensuring that containers reach terminal stacks within a reasonable timeframe.

INFORMATION

Precious Kunota

The Citrus Growers' Association (CGA) and the Fresh Produce Exporters' Forum (FPEF) jointly fund the procurement of citrus data from two key sources. The Perishable Products Export Control Board (PPECB) provides weekly updates on citrus volumes packed and approved for export. Agrihub, an independent legal entity established by the South African fruit export industry in collaboration with four competing software providers, supplies real-time shipping data and reports. This information is shared with all growers and members of the Citrus Marketing Forum (CMF).

Tree census

The annual tree census is based on data collated through the Department of Agriculture, Land Reform and Rural Development's (DALRRD) orchard registration process for exports in November 2024. Growers in Zimbabwe, Botswana, and Eswatini provided additional information. The 2024 tree census accounted for a total of 101,624 hectares. Valencia and Midseason oranges constitute a 31% share of the total that are planted, soft citrus accounted for 27%, lemons for 18%, navels for 15%, and grapefruit remained at 9%. The data procured through the tree census serves various purposes, including the CGA's industry statistics booklet, and the annual updates and refinements to the long-term citrus production model.

Citrus statistics booklet

The annual citrus statistics booklet provides an overview of exports, crop distribution, and

growth trends of the different citrus commodities. Export-related data is supplied by Agrihub and PPECB. The tree census data, as well as data on export and local market sales, processing volumes, and revenue, are obtained from DALRRD. Budwood sales data supplied by Citrus Research International (CRI) are also published in the booklet. The 2024 citrus statistics booklet has been printed and posted to all registered citrus growers. The electronic version can also be found on the CGA website or downloaded by scanning the QR code below.



SCAN ME

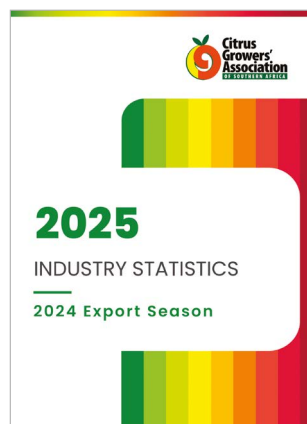
Download the
2025 Key Industry
Statistics Book

Packed figures

Information on volumes packed is supplied by the PPECB on a weekly basis. The packed figures reflect the actual volumes packed to date, previous years' packed figures, and the estimated packed figures for the current season and are presented on a weekly and cumulative basis. These figures are available in the member section of the CGA website (www.cga.co.za).

Shipped figures

In 2024, Agrihub continued to provide data on volumes shipped, compiled into weekly reports available on its website. These reports include shipment volumes by variety, week, and market, along with year-on-year comparisons.



Users can access the full set of reports directly from the Agrihub website, while selected summaries are updated daily on the CGA website through interactive dashboards.

During the year under review, the four fruit associations that fund Agrihub allocated additional resources to support a technology upgrade. This upgrade, expected to be completed by September 2025, will enhance the Agrihub platform's capabilities for automated data cleaning, improved error detection, and integration with additional data sources. It will also enable the publication of more comprehensive and refined reports.

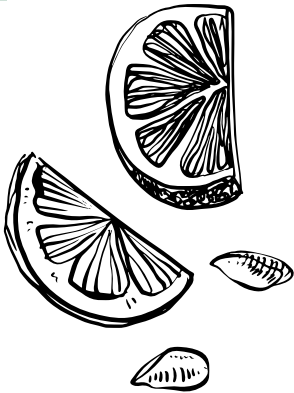
Variety Focus Groups

The 2024 Southern African citrus export crop estimate was assembled by the regional Variety Focus Group representatives in March 2024. Regular online meetings were held during the season to update the crop projection and discuss the markets. The Variety Focus Groups' updated crop projections were communicated to the industry in the CEO's weekly newsletter and minutes published on the CGA website. The table below shows the original 2024 estimates, the actual volumes achieved, and the estimates for the 2025 season. All figures are in 15kg equivalent cartons. The Variety Focus Groups aim to estimate within 10% of the final volumes inspected and passed for export by PPECB inspectors.

2024 Estimates and actual, 2025 estimates

The 2024 season presented unique challenges that led to a significant gap between estimated and final export volumes, particularly for oranges. A major factor was the high price offered for processing-grade orange fruit, which drew a substantial portion of the crop away from both export and local markets. Adverse weather conditions, including heat, drought, and extreme wet weather events, further reduced the availability of high-quality, exportable fruit. These challenges were compounded by disease pressures and fruit quality issues. Additionally, a shift in fruit sizing contributed to lower export volumes. It is important to note that the impact of these issues varied by region and citrus variety. For example, the decline in orange exports was more pronounced for Valencias, which saw a 16% drop in volumes, compared to a more modest 2% decline for navels relative to the original estimates. While some regions reported increased overall production, much of this fruit was diverted to juice processing. The fruit was there, it just did not end up in an export carton.

Commodity	2024 Estimate (CGA)	2024 Actual	% Actual vs. Estimate	2025 Estimate
Navels	25,687,243	25,111,329	-2%	26,087,304
Grapefruit	16,773,516	14,400,355	14%	15,292,580
Lemons	37,937,869	34,676,577	-9%	32,876,436
Mandarins	43,025,053	41,646,481	-3%	44,881,248
Total	181,733,442	164,593,818	-9%	171,113,872



Citrus Marketing Forum (CMF)

The CMF is a joint forum between the Citrus Growers' Association (CGA) and the Fresh Produce Exporters Forum (FPEF). It provides a platform for sharing information, initiating research and investigations, and making recommendations on a wide range of industry issues. The forum supports the development of a unified vision and strategy for the long-term success of the citrus industry. All growers and registered export agents are welcome to attend CMF meetings, while other stakeholders, such as suppliers and shipping companies, may apply for annual membership via the CGA. During the year under review, the CMF met on the last Thursday of every month. In October 2024, the forum focused on reviewing the closing season's events and lessons learned. In March 2025, planning for the forthcoming season was the primary focus. The CGA also coordinated inputs from the Variety Focus Groups, including estimates, projections, and grower feedback. For membership queries or to be added to the CMF distribution list, please contact info@cga.co.za.

International information exchange

Southern Hemisphere Association of Fresh Fruit Exporters (SHAFFE)

The major Southern Hemisphere fresh citrus exporting countries participate in a joint initiative whereby members supply information on shipped by volume and destination to the SHAFFE secretariat, which collates and supplies this information to the participating SHAFFE members.

Lemon tracking in the EU and UK markets

In 2024, the CGA Lemon Focus Group, chaired by Leroux Venter, deepened its understanding of the European lemon market through a collaboration with Anya Jaworski of SAFRESCO Global. SAFRESCO provided an Artificial Intelligence (AI) model to help growers assess the likely impact of various supply patterns throughout the year. By leveraging this tool, growers were able

to monitor historical supply trends and optimize their individual export strategies.

The initiative proved highly successful, culminating in Anya's presentation of the model's insights and outcomes at the CGA Summit in March 2025. This achievement sets a promising precedent for applying similar AI-driven approaches to other citrus commodities.

World Citrus Organization (WCO)

As a founding member of the WCO, the CGA continues to strongly support this initiative, which aims to build a global community of citrus producers working collaboratively to promote citrus consumption. In many markets around the world, per capita citrus consumption lags behind that of other fruit sectors, and the WCO serves as a platform for sharing ideas to address this concern. On the supply side, the WCO facilitates the exchange of export volume estimates from both Northern and Southern Hemisphere countries ahead of their respective seasons. These exchanges provide valuable insights and contribute to a shared understanding of the opportunities and challenges facing the global citrus industry.



VARIETY FOCUS GROUPS

Portia Magwaza

The Variety Focus Groups set the initial export estimate for each season, track packing and shipping data from service providers, review market conditions, and revise export forecasts as the season progresses.

Meeting summaries are shared with growers and included in the CEO's weekly newsletter. From time to time, the Variety Focus Groups also provide input on dispensation requests referred to them by DALRRD when called upon to do so. The Variety Focus

Groups met regularly during the 2024 season via Zoom, with the Citrus Growers' Association (CGA) convening the meetings and serving as secretariat.

The CGA extends its appreciation to the regional representatives on the Variety Focus Groups for their time and commitment to supporting their fellow growers. Special thanks go to Dr Jock Danckwerts who stepped down at the beginning of 2024. Dr Danckwerts has served on the Mandarin Focus Group since its inception in 2006. The CGA also expresses gratitude to the Fresh Produce Exporters' Forum (FPEF) representatives for their contributions to the Variety Focus Groups.

The regional representatives on the Variety Focus Groups for the 2024 season were as follows:

Regions	Grapefruit	Lemon	Mandarin	Valencia/Navel
Boland		E. van Greunen	S. Bruwer	
Burgersfort/Ohrigstad		D. Fourie	T. Snyman	
E.C. Midlands		L. Danckwerts	L. Danckwerts	L. Danckwerts
Hoedspruit	G. Kruger	J. Meintjes	E. van der Westhuizen	T. Landman
Letsitele	B. Landman*	B. Landman	D. Fourie	B. Landman
Limpopo River	F. Dilman	F. Dilman	J. Joubert	J. Joubert
Nelspruit		A. Muller	T. Snyman	A. Muller
Nkwalini		B. Snyman		
Onderberg	M. Neethling	G. van Staden		C. van der Merwe
Oranje Rivier	D. Steyn	F. Reyneke	M. Bester	R. Van Zyl
Patensie		Z. van der Merwe	M. Odendaal	W. Kleyen
Pongola	A. Rouillard	A. Barnard		
S.R. Valley		L. Venter*	A. Janse van Rensburg	D. Joubert/ H. De Waal
Senwes		H. Schoeman	R. Els	P. Nortje
S-KZN		P. Button		P. Button
W. Cape		B Mouton	H. Warnich*	S. Engelbrecht* / P. Hough
Eswatini	J. Boyd			G. Brown
Zimbabwe	P. Bristow			P. Bristow

* Chairperson

The following Variety Focus Groups meetings were held:

Month	Grapefruit	Oranges	Lemons	Mandarin	Total
January	1				1
February	-	-	-	-	-
March	-	1	1	1	3
April	1	-	1	1	3
May	2	1	1	1	5
June	2	2	1	1	6
July	1	2	2	1	6
August	1	1	1	1	4
September	1	1	1	1	4
October	-	1		1	2
Total	9	9	8	8	34



CONSUMER ASSURANCE

Albert Coetzee & Paula Bester

The rapid pace at which compliance requirements from our key markets and their governments are changing necessitates, and reaffirms, the mandate of the Consumer Assurance (CA) portfolio: to anticipate and keep growers informed of changes in requirements, to influence processes and regulations so they remain practically relevant and material, and to provide solutions to these challenges.

In 2024, the CA portfolio revised its Strategic Plan for 2025-2028. A key aspect of this revised approach was the implementation of a more assertive and coordinated strategy to ensure that the needs of our trading partners are practical, material, and sustainable in the long term, while providing the assurance that our produce is safe to consume, ethically produced, and grown in an environmentally responsible way.

The EU Green Deal initially set ambitious targets, however, many of these goals were not achieved within the specified timeframes. Following the withdrawal of the EU Green Deal in 2024, the focus shifted to enhancing the competitiveness of EU farmers through the New Vision for Food and Agriculture Policy. This new approach adopts a protectionist stance toward EU farmers to improve their competitive edge. One of the key aims of the policy is to reduce the administrative burden related to reporting for EU farmers. Additionally, the EU Parliament stated that it would no longer support positive Maximum Residue Levels (MRLs) for active substances that are no longer approved for use in Europe. This change is intended to create a "level playing field" for EU producers.

A notable example of the disconnect between scientific recommendations and political decisions is the case of carbendazim (benomyl). The European Food Safety Authority (EFSA) proposed a positive MRL for lemons based on scientific

risk assessments. However, a significant majority in the EU Parliament rejected this proposal at the end of 2024, sending the EU Commission back to the drawing board to propose a new draft regulation with an MRL that deviates from the science. As of now, no draft regulation proposing a carbendazim MRL for lemons has been published. Several key active ingredients are no longer approved for use in Europe, although a positive MRL for citrus remains in place. The Consumer Assurance portfolio continues to monitor the regulatory status along with the MRLs of key active substances.

Mancozeb import tolerance

For one of these key actives, Mancozeb, the CGA continuously engaged with the primary registration holder to support a favourable MRL for Mancozeb on citrus in the EU. The need for a favourable Mancozeb MRL was emphasized during direct engagements with the European Commission.

Carnauba wax

The CGA remains hopeful that the application for the approval of carnauba wax on citrus, submitted by the CGA and wax suppliers in 2022, will be successful for the next export season. The CGA sincerely thanks the carnauba wax registration holders for their support in this matter.

Product carbon footprint

The carbon footprint landscape is rapidly evolving, both in the private sector and at international and domestic levels. The Carbon Border Adjustment Mechanisms being developed



by the EU, and potentially by the UK, Canada, and Japan, remain a significant concern for the CGA, as they could have considerable financial implications for our growers. The CGA team has actively participated in the South African Sectoral Emission Targets process to ensure that the targets set for the citrus industry do not hinder future growth. In this context, the CGA has been engaging with various financial institutions to develop sustainable financing models aimed at reducing the carbon footprint of our products, while also supporting the financial sustainability of our growers. Furthermore, the CGA team has explored the carbon credit market, working to clarify the topic and provide growers with information about this potential additional income stream, which can encourage sustainable farming practices.

GLOBALG.A.P

The CGA chaired the GLOBALG.A.P. National Technical Working Group meetings, primarily focussed on establishing the National Interpretation Guidelines (NIGs) for GLOBALG.A.P. standards. Valuable grower input was gathered through this channel and led to material changes in the NIG for the Integrated Farm Assurance standard. GLOBALG.A.P has also been developing the new Environmental Sustainability Solution (ESS), which aims to incorporate the SPRING and Biodiversity add-ons. The Consumer Assurance team has been involved in the ESS consultation process and working groups. During this process, the influence of the Southern Hemisphere Association of Fresh Fruit Exporters (SHAFTE) and the World Citrus Organization (WCO) was leveraged to ensure strong representation of southern hemisphere and producer perspectives. Notably, the SHAFTE secretariat served as vice-chair of the ESS Committee. Through this role, the CGA helped guide stakeholders to ensure that the new environmental standard would be relevant to local circumstances and not create gaps or uncertainties that could lead to the need for an additional add-on. Once finalised, this standard will also be benchmarked against our locally developed and internationally recognised SIZA programme.

SIZA

The Consumer Assurance team facilitates a reference group that prepares the citrus representative on the SIZA board to ensure a balanced narrative is presented. In 2024, this group was expanded to include meaningful contributions from growers across various regions.

The Fertilizers, Farm Feeds, Agricultural Remedies and Stock Remedies Act (No. 36 of 1947): The Registrar under Act 36 has indicated an intention to phase out all Highly Hazardous Pesticides (HHPs) in South Africa by 2035, a goalpost that appears to be shifting. HHPs include active substances classified as Category 1A or 1B carcinogens, mutagens, or reproductive toxins, as well as final product formulations classified as restricted agricultural remedies. The CGA has maintained ongoing engagement with affected product registration holders and the Registrar in efforts to retain essential uses on citrus, supporting reclassification and derogation processes under Act 36. Efforts have also been directed at highlighting the impracticalities of PCO Regulations to the Registrar's Office. In collaboration with the Citrus Academy and multiple grower associations across South Africa, the CGA has worked to establish more feasible and relevant approaches to regulatory compliance.



Retailer engagements

The Consumer Assurance team regularly engages with retailers both in South Africa and at trade shows to outline the realities of private standards and requirements. Position papers were developed on retailer requirements, highlighting the impact of problematic private standards on good agricultural practices. These papers are supported by our partners at the World Citrus Organization, SHAFPE, and the Spanish lemon and grapefruit grower association, Ailimpo. Several importers, facing constrained supply and increased administrative burdens due to additional requirements, expressed their support for these positions. Building and maintaining these relationships remains valuable for influencing retailer strategies and perspectives.

The SHAFPE Sustainability Committee

After a few dormant years, this committee regained momentum and hosted several significant webinars related to sustainability initiatives. It also served as a strong coordination platform for Southern Hemisphere partners to influence and challenge unjust requirements.

Communication

The Citrus Sustainability Forum (CSF) remains a critical communication platform for sharing the latest information with our constituents and stakeholders. The CSF is now held every two months, focusing on targeted topics. "Consumer Assurance Cutting Edges" were published throughout the year to communicate urgent regulatory updates affecting the use of key active ingredients or waxes. The PCO regulations and restricted agricultural remedies were also unpacked, with explanations of their potential impact on citrus growers, based on crop protection risk assessments. The CRI/CGA Recommended Usage Restrictions for Plant Protection Products on Southern African Export Citrus was updated to reflect current and anticipated MRL changes in export markets. In early 2025, Albert Coetzee and Paula Bester travelled with CRI to present sustainability and food safety updates at post-harvest workshops across the country.

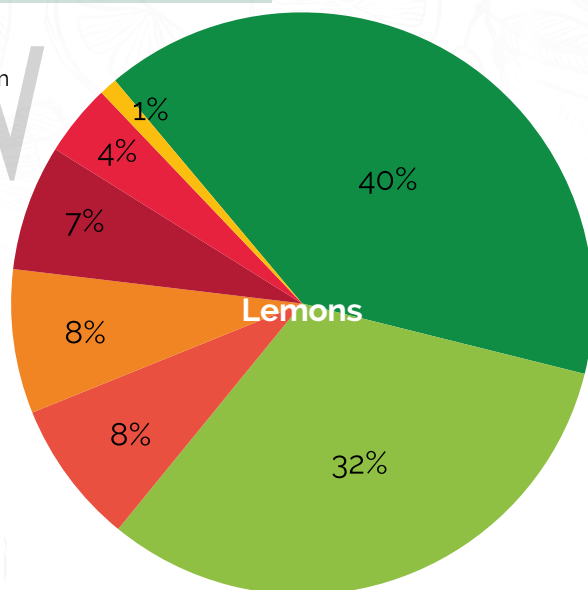
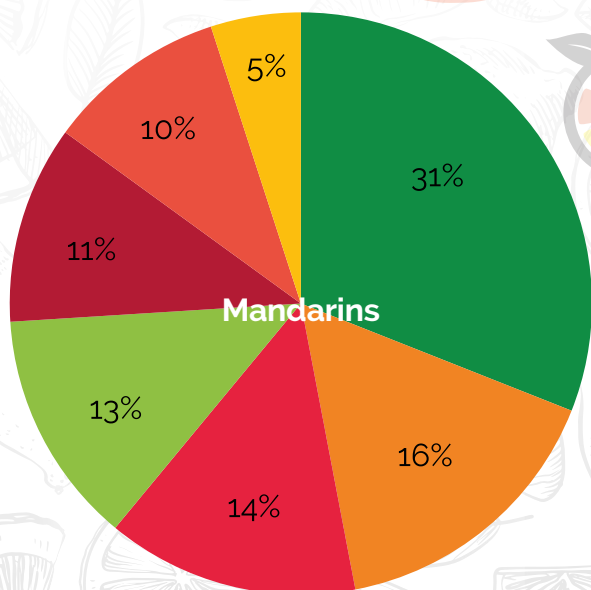
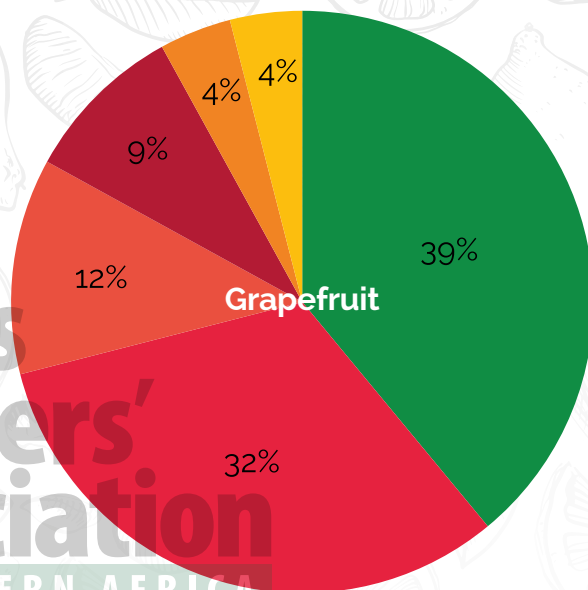
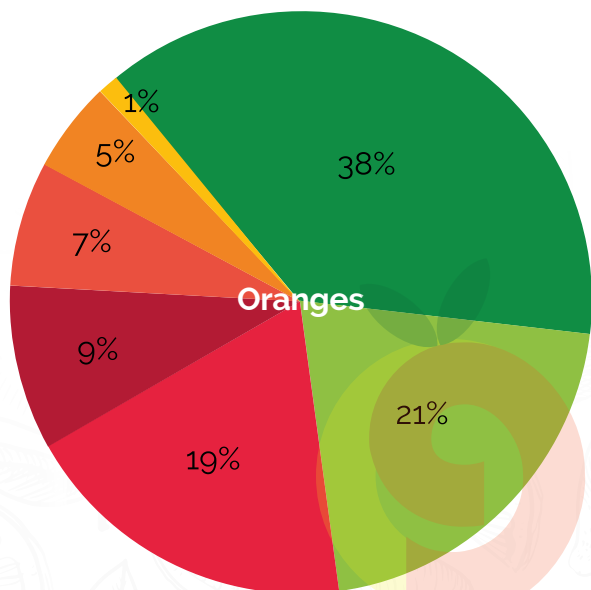
WE ARE CITRUSCENTRIC



Citrus
Growers'
Association
OF SOUTHERN AFRICA



EXPORTS 2024



Citrus Growers' Association of Southern Africa

- Europe
- Middle East
- Southeast Asia
- North America
- Russia
- United Kingdom
- Other

MARKET ACCESS

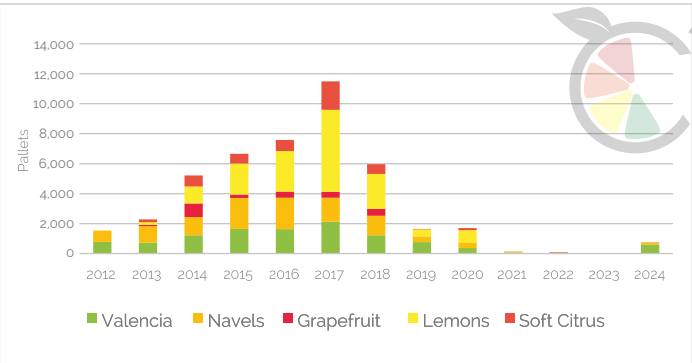
Justin Chadwick, Paul Hardman, Dr Vaughan Hattingh,
Dr Elma Carstens, Amy Grundling, Deon Joubert,
Jana Janse van Rensburg, Nick Gutierrez

 PHILIPPINES

Agrilink Manila: Paul Hardman and Dr Elma Carstens visited Manila and participated in the Agrilink show as part of a broader visit to key Asian markets in October 2024. While Agrilink is a relatively low-key event, it provides valuable opportunities for engagement with South African representatives in the capital, as well as with officials from the Philippines' Bureau of Plant Industry (BPI).

These meetings served to assess whether any issues had arisen with citrus imports from South Africa.

Volumes: There was no increase in citrus shipments to the Philippines in 2024.



Meeting with Ambassador Ms Radebe-Netshitenzhe, Philippines

Vision 260: A protocol improvement under consideration for discussion with the Philippines in 2025 is the formal recognition that lemons are not hosts for False Codling Moth (FCM) and fruit flies. If the protocol is revised to acknowledge the non-host pest status of lemons, Vision 260 projects potential lemon exports of up to 5,000 tonnes to this market by 2027. Exports of oranges and soft citrus have already exceeded the 2027 targets, 780 tonnes for soft citrus and 300 tonnes for oranges, though they remain below the historic volumes exported between 2012 and 2014.



Agrilink 2024, Philippines



 VIETNAM

South Africa initially applied for market access for oranges in 2013. In March 2024, South Africa's Department of Agriculture, Land Reform and Rural Development (DALRRD) received the final draft import conditions from Vietnam's Plant Protection Department (PPD). Following acceptance of some editorial changes, both Citrus Research International (CRI) and DALRRD confirmed their agreement with the import conditions. On 19 April 2024, PPD issued the final import conditions, officially opening the Vietnamese market to South African oranges, with import permits available from 1 May 2024. Subsequent meetings with industry stakeholders finalised the operational procedures, including the specifics of the required cold chain handling. A "Vietnam one-pager" and relevant compliance information for the export of fresh oranges were circulated to role players. Negotiations for market access began in 2008, and the Pest Information Package (PIP) for oranges was submitted in 2013, culminating in the official market opening in 2024. Several containers of oranges were successfully exported during the year.

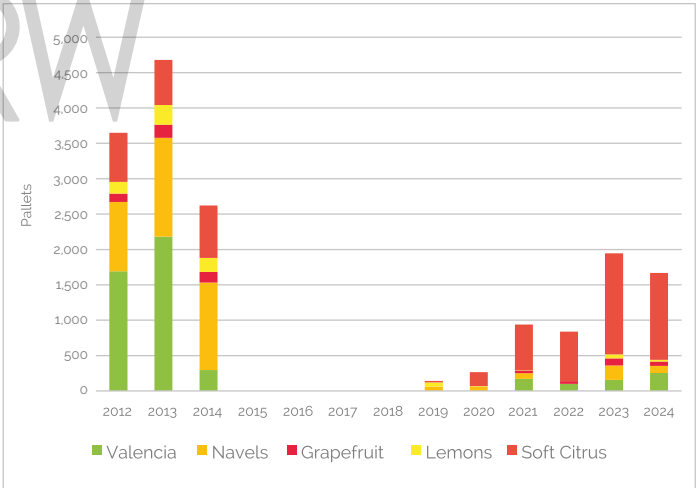
Other citrus types: The CGA intervened when FruitSA erroneously listed avocados as the next market access priority for Vietnam and insisted that FruitSA retain other citrus types (first mandarins) as the next Vietnam market access priority. FruitSA informed DALRRD accordingly. In August 2024, DALRRD formally notified the PPD that mandarins were South Africa's next market access priority. Despite multiple follow-ups made by DALRRD, a response from PPD was still pending at the end of this reporting period. However, during a FruitSA meeting in November 2024, the PPD confirmed receipt of the priority list and indicated that their technical team had begun processing the remaining citrus commodities. A draft protocol, along with the associated requirements, is expected to be shared with DALRRD. Once received, the timeline for the required verification visit can be confirmed.

FruitSA advocacy visit: In November 2024, Amy Grundling joined a FruitSA delegation to Vietnam to engage with National Plant

Protection Organization (NPPO) officials, key importers, and the South African Embassy in Hanoi. Insights from this visit revealed that Vietnamese consumers prefer sweet, firm, colourful, and larger-sized fruit, qualities where South African citrus is currently less competitive compared to fruit from Australia, China, Egypt, and the US. Australia, notably, benefits from tariff-free access through the ASEAN-Australia-New Zealand Free Trade Area (AANZFTA) and the Comprehensive and Progressive Agreement for Trans-Pacific Partnership (CPTPP). Despite these challenges, the CGA remains optimistic about increasing South Africa's market share in Vietnam and continues to work closely with DALRRD and the Department of Trade, Industry and Competition (DTIC) to strengthen access and positioning in the market.

Volumes: With the market now open to oranges, initial shipments to Vietnam have commenced.

Vision 260: The expanded market access in Vietnam is expected to enable exports of up to 10,000 tonnes of oranges and 15,000 tonnes of soft citrus by 2027.



CHINA AND HONG KONG

Engagements in China: In September 2024, the CGA was invited to participate in the Forum on China-Africa Cooperation (FOCAC) held in Beijing. The atmosphere during the event appeared positive and collaborative, particularly with the presence of the Government of National Unity's President and Ministers at the business meeting, signalling a unified effort in advancing South Africa's interests. In the agricultural sector, several agreements were signed by the Minister that are expected to benefit trade with China, particularly in the dairy, wool, and meat sectors. South African avocados have recently gained access to the Chinese market, and negotiations for stone fruit access are at an advanced stage.

This increase in agricultural trade is vital for South Africa, as the trade balance remains heavily skewed in favour of China. Expanding exports, especially of value-added agricultural products, is essential to address this imbalance. In addition, most of South Africa's exports are of primary products, while imports are of manufactured goods. While debate continues over whether fresh fruit qualifies as a processed product, there is a strong argument that fruit exported after undergoing packing, cold chain treatment, and phytosanitary preparation should be considered part of the agro-processing sector.

At the Business Forum, Justin Chadwick served as a panellist in a session focused on agriculture and manufacturing. Each panellist had two minutes for introductions. Given that many delegates were unfamiliar with citrus and the Southern African region, the CGA's introduction included the following key messages:

- The Citrus Growers' Association of Southern Africa represents growers of oranges, mandarins, lemons, and grapefruit across South Africa, Zimbabwe, Eswatini, Namibia, Botswana, and Mozambique.
- South Africa is the world's second-largest exporter of citrus and the largest in the Southern Hemisphere, exporting 2.5 million tonnes of fruit annually to over 120 countries.

- China currently receives 8 to 10% of South Africa's citrus exports.
- The citrus industry employs 140,000 people on farms and in packhouses, with additional jobs secured in upstream and downstream activities.
- The industry invests R180 million annually in advanced research to ensure fruit safety and compliance with international phytosanitary standards.

Key challenges in the Chinese market were highlighted:

- South Africa gained access to the Chinese citrus market in 2004, marking 20 years of trade in 2024.
- The export protocol has been revised several times, each revision improving access. The Chinese government's emphasis on sound scientific justification for import requirements is welcomed.
- Ongoing engagement is necessary to develop scientifically backed risk mitigation measures that are less trade restrictive.
- Citrus volumes from Southern Africa are expected to continue growing over the next decade, and China is viewed as a key market with potential to exceed the current annual volume of 100,000 tonnes.
- Import duties continue to disadvantage South African citrus exports when compared to competitors benefiting from free or preferential trade agreements.
- The BRICS+ partnership must evolve beyond political cooperation to support practical trade facilitation that benefits the citizens of member countries.

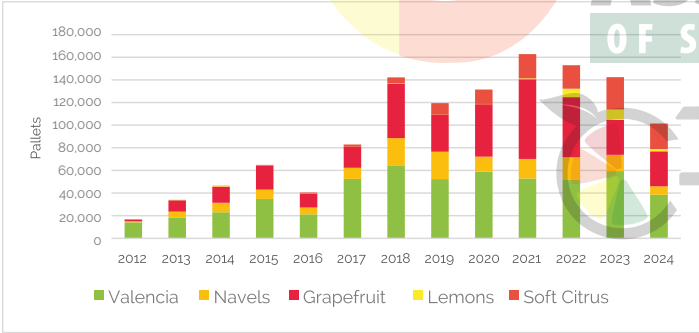
Engagement with the Chinese Ambassador in South Africa:

In November 2024, the CGA and FruitSA met with Chinese Ambassador Wu Peng. He reiterated China's support for increasing citrus imports and encouraged the use of Hainan as a tariff-free entry point for products with at least 30% local value addition. He also referenced a proposed non-reciprocal Economic Partnership Agreement from China, though South

Africa's Department of Trade, Industry and Competition (DTIC) has not yet responded. The CGA remains committed to collaborating with DALRRD and DTIC to enhance trade relations and bolster the competitiveness of South African citrus.

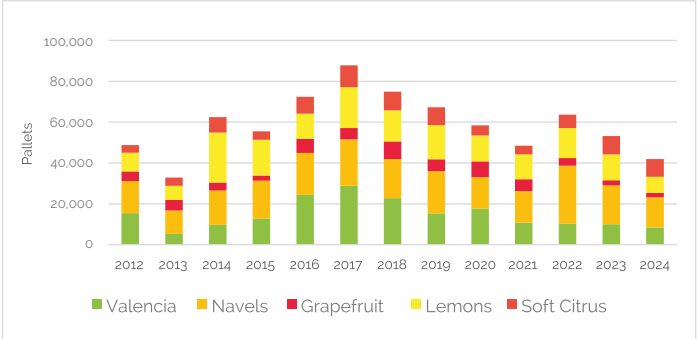
China volumes: Citrus export volumes to China were disappointing in 2024, falling back to levels last seen in 2017/2018.

Vision 260: Soft citrus volumes have reached 63% of the 2027 target, with expected exports of 43,000 tonnes. Lemon volumes are currently at 11% of the target, but growth is expected as the new protocol gains traction, with projected volumes of 24,000 tonnes. Orange volumes have reached 62% of the 2027 target, with approximately 89,650 tonnes projected by 2027. Notably, the target was already met in the previous season, and there is strong confidence it will be achieved again.

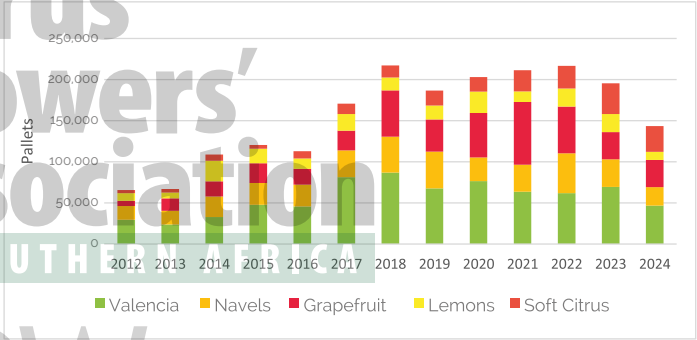


Hong Kong volumes: Export volumes to Hong Kong declined in 2024.

Vision 260: Although current exports have decreased, projections indicate a recovery by 2027, with expected volumes reaching 10,800 tonnes for soft citrus, 18,400 tonnes for lemons, and 43,750 tonnes for oranges.



The combined volumes into Hong Kong and China showed a marked decline when compared to previous years.



Asia Fruit Logistica 2024, Hong Kong
Tanya Ungerer, Amy Grundling, Precious Kunota



During 2024, Zimbabwe commenced with small volumes of citrus exported to China.



STATUS: Optimising access conditions for all citrus types (improved fruit fly cold treatment conditions); Access for all mandarins, excluding Satsumas; Access for all navel oranges – feedback is pending from Japan.

There has been no progress on the three outstanding matters. For the 2024 citrus export season, the Japanese inspector arrived in June/July to oversee both the citrus and avocado export programmes. However, citrus exports had already commenced prior to the inspector's arrival. In May 2024, the CRI, via DALRRD, received a response from Japan's Ministry of Agriculture, Forestry and Fisheries (MAFF) regarding the long-standing matters. In this response, MAFF indicated that they do not view the three issues interconnected and should not be handled concurrently.

Specifically, MAFF stated that they do not consider all three components of South Africa's request as amendments to the current protocol. They regard the revised cold treatment conditions and the inclusion of all sweet oranges as protocol amendments, while the inclusion of all mandarins is considered a new market access request requiring a Pest Risk Analysis (PRA). South Africa was asked to prioritise which components to advance first. Following internal discussions between CRI and the CGA, CRI responded to DALRRD in August 2024, indicating that South Africa's priority is to amend the current protocol to include all mandarins. In October 2024, DALRRD submitted detailed arguments asserting that all three components should qualify as amendments to the existing protocol and requested that MAFF consider them collectively as part of a single market access amendment. During a FruitSA visit to Japan in October 2024 (with CGA and CRI part of the delegation), MAFF acknowledged

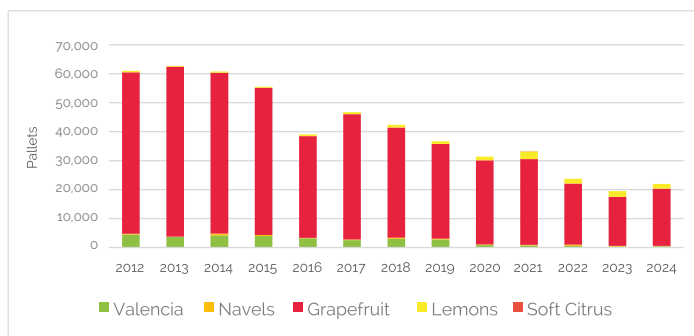
receipt of South Africa's submission. While they maintained that the inclusion of all mandarins constitutes a new market access request, they committed to reviewing the information provided and responding in due course.

On 11 February 2025, DALRRD informed CRI that MAFF had officially acknowledged receipt of the October 2024 submission and MAFF indicated that the evaluation was underway, with a response to follow. During a high-level bilateral meeting between South Africa and Japan in March 2025, the outstanding issues were further discussed, and it was proposed that a technical bilateral meeting be convened to address the long outstanding issues.

FruitSA advocacy visit: To reinforce the urgency of resolving these long-standing market access matters, Paul Hardman and Dr Elma Carstens visited Tokyo in October 2024 and met with MAFF. Although no immediate progress was achieved, the presence of the CGA and CRI helped to emphasise the importance of this market and ensured continued dialogue on the key issues.

Volumes: Citrus export volumes to Japan saw a welcome increase in 2024.

Vision 260: Export volumes of soft citrus and lemons are expected to increase following protocol revisions. By 2027, projections estimate 20,000 tonnes of soft citrus, 12,800 tonnes of lemons, and 11,150 tonnes of oranges will be exported to Japan.





UNITED STATES OF AMERICA (US)

STATUS: Access for citrus from the rest of South Africa (CBS areas); Recognition of CBS pest-free places of production in an area of low pest prevalence; The inclusion of other Western Cape magisterial districts in the current export program; Revised pest list, and mixing of fruit types, and packaging with feedback pending.

There has been no progress on any of the outstanding matters due to US demands for unrelated trade concessions from South Africa, particularly around animal health concerns. A bilateral meeting scheduled for the last week of February 2025 was cancelled at short notice.

South Africa market access beyond the Northern and Western Cape Provinces – CBS rule: DALRRD continues to urge the United States Department of Agriculture (USDA) – Animal and Plant Health Inspection Service (APHIS) to publish a long-awaited final regulation. This regulation would allow for a flexible systems approach certification in place of the current Citrus Black Spot (CBS) disease-free requirement. Publication of this rule would effectively open citrus exports from the rest of the country to the US market. In 2010, APHIS completed a PRA, which concluded that commercial fruit intended for consumption does not pose a viable pathway for the spread of the disease. This assessment has already facilitated market access for countries such as China, Australia, Uruguay, and Argentina.

The CBS rule is closely linked to wider access for US pork and poultry to the South Africa market, which are also hampered by phytosanitary barriers. An APHIS-DALRRD bilateral on animal health took place in Pretoria, South Africa in September 2024 but failed to resolve the outstanding disease-related issues. Despite this, technical data and information have continued to be shared between the two regulatory agencies over the past seven months.

African Growth and Opportunity Act (AGOA): With the expiration of AGOA approaching in September 2025, uncertainty persists

around the renewal of this preferential trade framework. Should AGOA not be extended, South African citrus exports to the United States would become subject to duties under the Harmonised Tariff Schedule. This would make South African citrus less competitive relative to other Southern Hemisphere suppliers that benefit from US free trade agreements. Although US importers typically absorb these tariff costs, the added duties ultimately lead to higher consumer prices. The already significant in-transit distance between South Africa and the US further increases shipping costs, placing South African citrus exports at an additional disadvantage compared to countries located closer to the US market.

This situation echoes a similar scenario in 2015, when South Africa faced the potential suspension of AGOA benefits. At that time, US President Barack Obama formally notified Congress and the South African government of his intent to revoke AGOA preferences for South African agricultural products.

The decision was based on findings that South Africa was not fully meeting AGOA eligibility requirements, particularly in failing to consistently address barriers to US trade and investment. The proposed suspension specifically targeted agricultural imports and was set to take effect within 60 days unless South Africa complied with conditions to lift restrictions on US poultry, pork, and beef imports. That determination was the result of a 15-year "out-of-cycle" review (2000–2015), which ultimately led to South Africa's continued participation in AGOA and a 10-year extension of the programme, now set to expire in 2025.

Engagements: In July 2024, US Trade Representative Katherine Tai hosted the AGOA Forum in Washington, DC. During the event, South Africa's Minister of DTIC, Ebrahim Patel, held an informal discussion with USTR Chief Agricultural Negotiator Doug McKalip. They agreed to support the launch of an expanded agricultural trade dialogue between the two countries. The following month, US Secretary of Agriculture Tom Vilsack held a video conference with South Africa's Minister of Agriculture, John Steenhuisen,

highlighting the need to address existing agricultural trade challenges and explore opportunities for increased trade. Meanwhile, newly appointed DTIC Minister Parks Tau held several discussions with USTR Katherine Tai to deepen dialogue and build a stronger bilateral trade relationship. Additionally, US Assistant Secretary of State for African Affairs, Joy Basu, met with USDA Under Secretary Jennifer Lester Moffitt to diplomatically encourage APHIS to expedite the citrus access public comment phase for Eswatini.

On 12 September 2024, the US Embassy in Pretoria hosted its Independence Day celebration. As the Ambassador noted, the pleasant spring weather was a welcome improvement over July's chill. The event was a grand occasion, befitting the celebration of 248 years of American independence.

On 14 November 2024, the CGA hosted South Africa's Deputy Minister of Trade and Industry, Andrew Whitfield, for a site visit in Citrusdal. The visit provided an in-depth look at the citrus industry, both at production level and within the broader global context. The programme began at XSIT, where the delegation was introduced to the innovative process that mitigates the threat of FCM through effective and environmentally friendly control measures. This was followed by a guided tour of the facility. The visit continued at Mouton Citrus, the farm of Boet Mouton, a participant in the Summer Citrus programme. Boet personally led the delegation through his farming operations, showcasing production activities, on-site educational facilities for workers' children, and healthcare services provided to workers and their families. Minister Whitfield and his team expressed deep appreciation for the engagement and committed to addressing the key challenges and opportunities facing the citrus sector.

On 2 December 2024, the CGA held a virtual meeting with Ebrahim Rasool, South Africa's Ambassador to the US at the time. The CGA presented an overview of citrus exports to the US and outlined the potential consequences of AGOA's non-renewal, particularly its impact on growers and farmworkers in the Northern and Western

Cape. Ambassador Rasool acknowledged the importance of AGOA and committed to considering the information provided in his engagements in the US.

CGA leadership's market access communication efforts included regular meetings with US Ambassador Reuben Brigety at embassy events following a citrus field visit. CGA representatives also participated in several major US horticultural conferences and held discussions with the Philadelphia Maritime Port Authority.

Further engagements included video conferences with the US-Africa Trade Desk and Prosper Africa, as well as facilitating virtual meetings between representatives of the US and African pork industries.



Deon Joubert with Sergio Del Castillo from Peru at the Produce Marketing Association.

CGA representative in the US: Nick Gutierrez continues to play an active role in representing the CGA in the US. He remains engaged with key US government agencies, including the United States Trade Representative (USTR) and other regulatory authorities. He has also cultivated strong relationships with the South African and Eswatini embassies in Washington, D.C. Each month, Nick provides a comprehensive report outlining key developments, engagements, and progress, which is shared with the CGA board and other relevant stakeholders.

His ongoing discussions span a wide network, including the embassies of South Africa, Botswana, and Eswatini, as well as USDA-APHIS, USDA's Foreign Agricultural Service, the USTR, and the US Department of State. He also engages with representatives from the US pork and poultry sectors and maintains close contact with US citrus importers.

Volumes: Citrus exports to the US declined again in 2024, primarily due to reduced mandarin volumes. While there was also a slight decline in 2023, it is notable that total export volumes to the US have doubled over the past six years.



 BOTSWANA AND ESWATINI

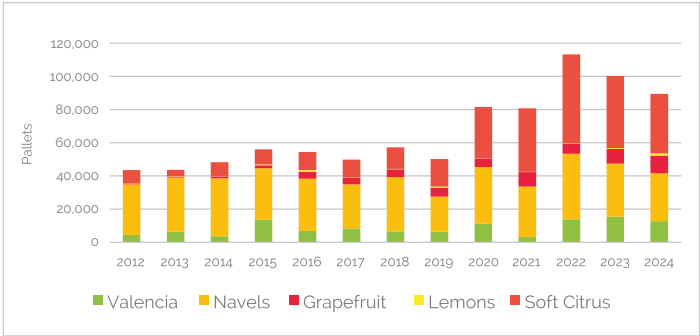
The CGA and CRI continued to assist Botswana and Eswatini growers and authorities with the access process.

Botswana – New market access: In October 2024, APHIS published a draft PRA for public comment, with the consultation period running from October 2024 to January 2025. APHIS is currently reviewing and consolidating 17 submissions received during the comment phase, including input from CRI, which challenged the inclusion of several fruit fly pests.

The next step involves finalising the PRA in consultation with Botswana's National Plant Protection Organisation (NPPO). The final pest list and associated mitigation measures are expected to closely mirror those of the South African export programme, with one key exception: CBS. Unlike South Africa, Botswana will be allowed to manage CBS through a more flexible systems approach rather than the more stringent disease-free area certification requirement.

Eswatini – Market access: APHIS has not yet initiated a preliminary risk assessment for Eswatini, citing other USDA trade priorities. Despite efforts to encourage the Ministries of Agriculture and Trade in Eswatini to engage with USDA and USTR, including meetings with embassy staff, there has been no forward movement to date.

Vision 260: No measurable progress was made in 2024 toward achieving the 2027 export targets: 72,515 tonnes for soft citrus, 56,135 tonnes for oranges, and 5,210 tonnes for lemons.





STATUS: Optimising access conditions (cold treatment protocol for citrus shipments) for all citrus types: Several repeated trial shipments have been dispatched, and feedback is pending from the Indian authorities.

Since 2017, DALRRD has engaged with India's NPPO to reinstate in-transit cold treatment for citrus exports. Despite multiple trial consignments, no positive outcomes had been achieved until recent developments.

In March 2024, a FruitSA delegation, comprising representatives from CRI, CGA, and DALRRD, met with NPPO India in New Delhi. During the meeting, both parties agreed to proceed with two additional trial shipments. A preparatory meeting involving the two exporters, DALRRD, and the Perishable Products Export Control Board (PPECB) was held the same month.

On 22 July 2024, two consignments of soft citrus were inspected for compliance with Indian import conditions. Both shipments passed phytosanitary inspection and were loaded for shipment on 25 July 2024. DALRRD communicated full consignment details and expected arrival dates to the Indian NPPO. Upon arrival in India, both containers were successfully cleared by Customs and the Indian NPPO.

Representative in India: The CGA formalised a contractual arrangement with a representative in India starting April 2024. This agreement focusses on advancing the resolution of outstanding phytosanitary matters.

Market development in India: In March 2025, the CGA board approved a trial promotional campaign aimed at expanding market presence in India.

FruitSA advocacy visit: In April 2024, the CGA joined a FruitSA delegation in visits to New Delhi and Mumbai. The delegation engaged with key government departments and importers in New

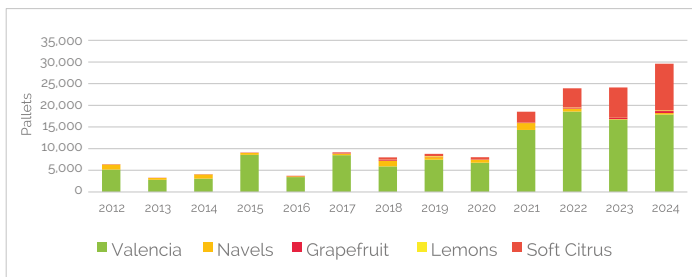
Delhi, and attended the Fresh Produce India Trade Show, as well as a municipal market visit in Mumbai.

In December 2024, the CGA also participated in meetings hosted by South Africa's High Commissioner to India, Anil Sooklal, in both New Delhi and Mumbai. These "Conclave" events were part of celebrations marking thirty years of diplomatic relations between South Africa and India. CGA's CEO, Justin Chadwick, served on a panel discussion focused on agriculture and manufacturing trade between the two countries.

Tariffs: India's high import tariffs on South African citrus remain the most significant barrier to trade. Competing exporters benefit from lower tariffs through preferential trade agreements, placing South Africa at a competitive disadvantage. As both countries are members of BRICS+, there is an expectation that preferential trade terms should be considered.

Volumes: Citrus export volumes to India continued to increase in 2024. Since 2021, volumes have more than tripled.

Vision 260: This continued growth is encouraging. To date, 81% of the 2027 orange export target of 27,000 tonnes has been achieved, along with 38% of the 34,000-tonne target for soft citrus. With anticipated approval of in-transit cold treatment and increased market development, South Africa is on track to meet its 2027 targets.





SOUTH KOREA

Phytosanitary inspections and review of bilateral protocol:

During the 2024 export season, citrus consignment rejections at the Port of Durban again raised concerns around compliance with South Korea's phytosanitary requirements.

However, during a FruitSA delegation visit to South Korea's Animal and Plant Quarantine Agency (APQA), which included CGA and CRI, APQA expressed satisfaction with the outcomes of pre-shipment inspections conducted in South Africa. APQA indicated that the time was right to review the current bilateral protocol, especially the requirement for joint phytosanitary inspections of every consignment by APQA and DALRRD prior to export. South African citrus has been exported to South Korea for more than 25 years, and APQA suggested a transition toward an audit-based inspection model. They confirmed their intention to submit a formal proposal to DALRRD to phase out the consignment-by-consignment inspection requirement.

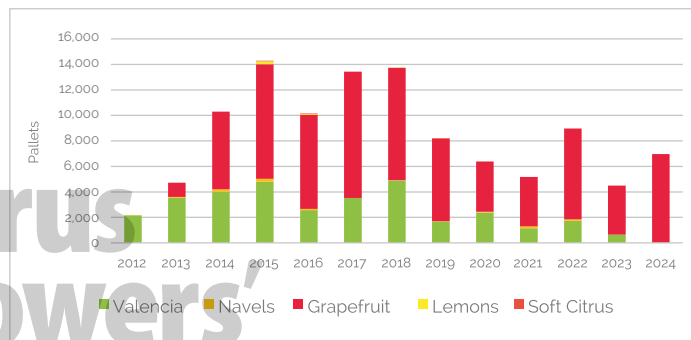
In February 2025, an APQA delegation visited South Africa to audit the national citrus export system. The objective was to assess whether the joint inspection protocol could be replaced by a systems-based audit approach. The audit produced a positive result. It was agreed that, for the next three years, APQA inspectors would no longer be required to perform pre-shipment inspections for each consignment. Instead, APQA inspectors will conduct periodic system audits. However, they also noted that phytosanitary inspections on arrival in South Korea will be intensified.

To address compliance and maintain South Africa's standing under the revised protocol, a joint DALRRD-industry meeting was held on 18 March 2025. The meeting reaffirmed the importance of effective risk mitigation and strict adherence to phytosanitary requirements. Any failure to comply could jeopardise the arrangements and lead to the reinstatement of mandatory joint inspections.

FruitSA Advocacy Visit: On 8 October 2024, Paul Hardman and Dr Elma Carstens visited APQA headquarters in Southern South

Korea as part of a FruitSA advocacy mission. During the meeting, APQA reiterated its intention to shift to an audit-based system for citrus imports. The same APQA officials later travelled to South Africa in February 2025 for the aforementioned audit.

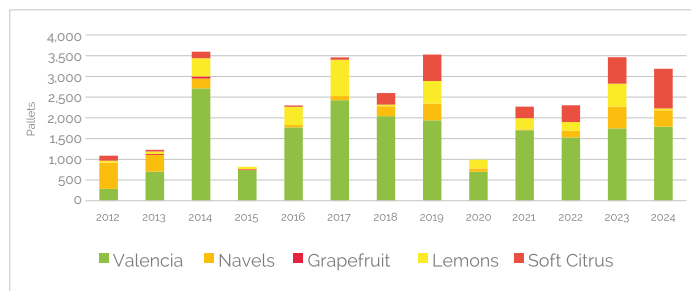
Volumes: Exports of grapefruit to South Korea increased during the 2024 season.



INDONESIA

Volumes: Export volumes were static in 2024. However, there was a noticeable shift in the product mix, with a decline in lemon exports offset by an increase in mandarin shipments.

Vision 260: The decline in lemon exports has slowed progress toward the 2027 target of 5,340 tonnes. As of 2024, only 1% of this target has been achieved.



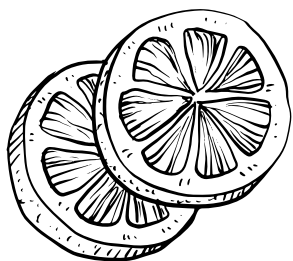
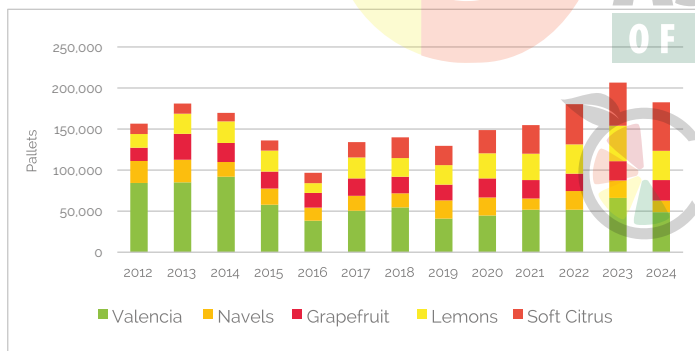
RUSSIA

CGA representative in Russia: Mikhail Fateev continued in his role representing Southern African citrus interests in Russia. He remained actively engaged on industry issues and worked to strengthen ties between South Africa and Russia.

Mikhail also produced a weekly newsletter distributed to the Russian interest group, providing regular updates on market developments and trade matters.

Volumes: After several consecutive years of growth, citrus export volumes to Russia experienced a slight contraction in 2024.

Vision 260: Despite the dip in 2024, exports to Russia remain on track to meet 2027 targets. By 2027, projections indicate export volumes will reach 77,500 tonnes of soft citrus, 46,900 tonnes of lemons, and 97,300 tonnes of oranges.



THAILAND

STATUS: Interpretation of current FCM Cold Treatment Protocol – the amended protocol was published in June 2024; Exclusion of lemons from the mandatory cold treatment and inclusion of the new improved FCM cold treatment options with feedback pending from Thailand.

Throughout 2023 and early 2024, numerous communications were exchanged between DALRRD and Thailand's NPPO to reach consensus on the correct interpretation of the FCM cold treatment provisions in the bilateral protocol for fresh citrus and table grape exports. Industry stakeholders also held meetings and submitted supporting documentation to DALRRD.

On 26 June 2024, DALRRD informed CRI that Thailand's NPPO had published the amended import conditions in its Government Gazette. These new protocols came into effect on 29 June 2024. Key improvements included: 1) A reduced cold treatment duration; 2) Export eligibility for all citrus cultivars across all citrus types; and 3) Improvements to the cold treatment description.

A one-page summary outlining these amendments was circulated on 15 July 2024. Despite the progress, two outstanding issues remain: 1) The exclusion of lemons from FCM cold treatment requirements; and 2) The inclusion of improved FCM cold treatment options.

On 5 August 2024, DALRRD requested an update from the Thai NPPO. During an October 2024 FruitSA visit (which included CGA and CRI), Thailand's NPPO acknowledged receipt of the request but indicated that the two outstanding matters would need to be processed as separate new market access applications.

Subsequently, on 7 November 2024, CGA and CRI met to align their position. Following this, a formal request was submitted to DALRRD seeking the following protocol amendments, which are being pursued on the basis of equivalence and do not require new PRAs:

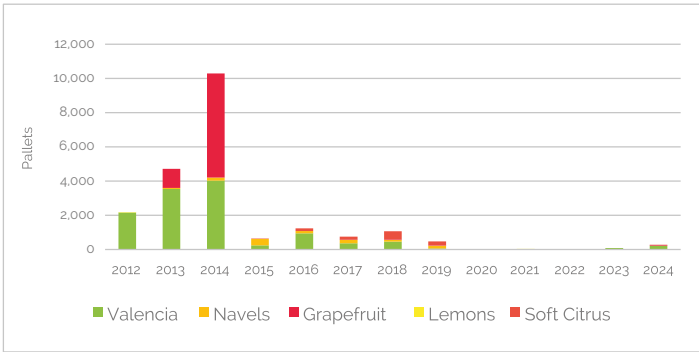
For oranges: Incorporate improved time-temperature FCM and fruit fly cold treatment options, based on their inclusion in international standards and the bilateral protocol with Vietnam.

For lemons: Exclude lemons from FCM cold treatment requirements, citing their non-host status and referencing both the EU's Implementing Regulation (EU) 2019/2072 and the protocol with China.

For fruit flies (lemons): Include a treatment option of $\leq 3^{\circ}\text{C}$ for 18 days, aligned with the citrus protocol between South Africa and China. DALRRD formally submitted this request to Thailand's NPPO on 18 December 2024.

FruitSA advocacy visit: From 30 September to 1 October 2024, a FruitSA delegation visited Thailand. The visit was led by South Africa's Ambassador to Thailand, His Excellency Mr Darkie Africa, and included CGA representatives Paul Hardman and Dr Elma Carstens. Meetings were held with both the NPPO and the Import and Export Inspection Division of the Ministry of Public Health. The delegation used the opportunity to advance the outstanding phytosanitary matters and gain clarity on Thailand's food safety import procedures. It was confirmed during the engagements that the lack of formal response to the pending issues was due to them being treated as new market access applications.

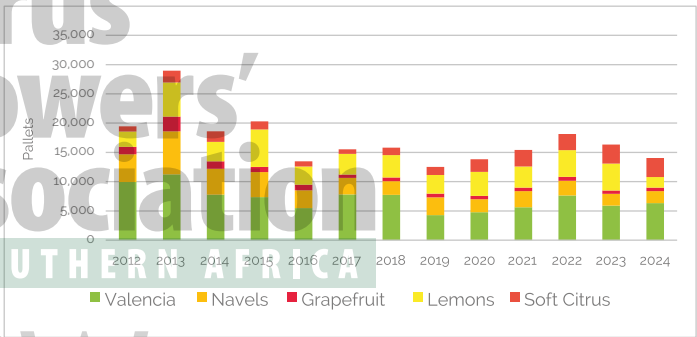
Volumes: Citrus export volumes to Thailand showed a notable increase in 2024.



SINGAPORE

Volumes: Singapore remains an important market for South African citrus exports, with annual volumes consistently ranging around the 15,000 pallet mark.

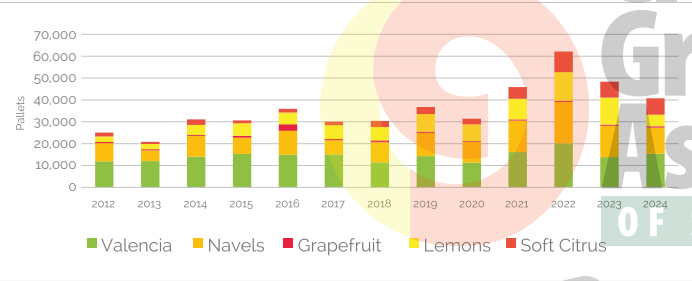
Vision 260: Lemons have been identified as a key growth opportunity in this market, with a 2027 export target of 6,260 tonnes. Although this target was achieved in earlier years, volumes declined significantly in 2024, reaching only 34% of the target.





Volumes: Malaysia remains a significant importer of South African citrus, although there was another slight decline in volumes in 2024, bringing total exports down to approximately 40,000 pallets.

Vision 260: Targets for 2027 have been set at: 19,000 tonnes for soft citrus; 17,440 tonnes for lemons; and 44,900 tonnes for oranges. While the lemon and orange targets have been achieved in previous seasons, soft citrus continues to underperform. In 2024, mandarins reached only 47% of the target, lemons 36%, and oranges 73%.



General

FCM Cold treatment changes and recognition that lemons are not a host for FCM (and Fruit Flies) in multiple markets

STATUS: Optimising access for all citrus types to identified markets, with improved conditions for access are being sought through selected bilateral engagements.

A joint request by CRI, HORTGRO, and SATI was submitted to DALRRD, seeking engagement with key trading partners to amend existing export protocols. The objective is twofold: 1) To exclude lemons from mandatory cold treatment requirements for FCM and fruit flies; and 2) To incorporate improved cold treatment options for FCM across citrus types. To date, citrus-related discussions have been held with Thailand, where this request formed part of broader phytosanitary negotiations.

BRICS+: During the BRICS Summit held in Kazan, Russia, in October 2024, the original member countries comprising Brazil, Russia, India, China, and South Africa, welcomed six new full members: Saudi Arabia, Egypt, the United Arab Emirates, Ethiopia, Indonesia, and Iran. Additionally, several nations joined as BRICS+ partner countries, including Belarus, Bolivia, Cuba, Kazakhstan, Malaysia, Nigeria, Thailand, Uganda, and Uzbekistan.

For South Africa, the expanded BRICS+ framework offers significant opportunities to grow agricultural exports. Importantly, eight of the world's top 15 citrus-producing countries are now members or partners within BRICS+, including China, Brazil, India, Egypt, Nigeria, Iran, South Africa, and Indonesia. As the leading citrus exporter in the Southern Hemisphere within this bloc, South Africa is well-positioned to supply Northern Hemisphere members during their off-season, potentially expanding its market share.

However, the expansion of BRICS+ has drawn some criticism, particularly from those concerned about a shift in the global

trade balance away from its traditionally Western orientation. For South Africa, this raises important strategic considerations – how to deepen ties within BRICS+ while maintaining strong relationships with Europe, the Americas, the Middle East, and other African partners.

While BRICS+ is primarily a political and economic alliance rather than a formal trade agreement, the growing number of bilateral trade arrangements within the group is a promising development. Both China and India have extended trade agreement proposals to South Africa, which are currently under consideration. Furthermore, Russia has taken over the global chairmanship of the BRICS+ Agribusiness Working Group from South Africa, with a continued emphasis on “deepening agricultural trade” as a top priority.

As it navigates this evolving landscape, the CGA's goal is to expand exports within the BRICS+ framework while maintaining strong ties with its traditional partners, ensuring long-term market stability and sustained growth.

G20 & Business 20 Task Forces: The G20, established in 1999, is an intergovernmental forum that brings together the world's major economies. Its members include Argentina, Australia, Brazil, Canada, China, France, Germany, India, Indonesia, Italy, Japan, the Republic of Korea, Mexico, Russia, Saudi Arabia, South Africa, Türkiye, the United Kingdom, the US, the European Union, and, as of 2023, the African Union. Collectively, these members represent approximately 85% of global Gross Domestic Product (GDP), 75% of international trade, and two-thirds of the world's population.

South Africa, which will hold the G20 Presidency in 2025, has committed to advancing the themes of Solidarity, Equality, and Sustainability, with a particular emphasis on promoting Africa's development and addressing global economic and environmental challenges.

The G20's policy dialogue is facilitated through the Business 20 (B20) Task Forces, which focus on strategic global priorities,

including:

- Trade and investment;
- Employment and education;
- Energy mix and just transition;
- Digital transformation;
- Integrity and compliance;
- Sustainable food systems and agriculture;
- Finance and infrastructure; and
- Industrial transformation and innovation.

The CGA's Market Access Liaison Officers, Amy Grundling and Jana Janse van Rensburg, represent the citrus growers of Southern Africa on the B20 Trade and Investment Task Force. Notably, only 6% of task force members represent the agriculture, forestry, and fisheries sectors, highlighting the significance of their participation in ensuring the voice of agriculture is heard in global trade dialogues. The task force is currently focused on developing three high-impact recommendations, each supported by actionable policy proposals. These include:

- Promoting stability in global trade and improved market access through pragmatic reform and sustained multilateralism;
- Creating a new Trade and Investment Deal for Africa; and
- Fostering the development of a climate-responsive trade system.

African Continental Free Trade Area (AfCFTA): Established on 21 March 2018, the African Continental Free Trade Area (AfCFTA) seeks to significantly increase intra-African trade by creating a single, continent-wide market for goods and services. To date, 54 of Africa's 55 countries (excluding Eritrea) have signed the agreement, with 48 having ratified it and 49 submitting tariff offers under Category A, which covers 90% of tariff lines. All member states are expected to submit their comprehensive tariff offers by October 2025, laying the foundation for full-scale trade implementation.



While key foundational instruments for trade have been finalised, several critical negotiations remain underway. These include finalizing sensitive and excluded tariff lines, resolving outstanding Rules of Origin, and concluding the Competition and Digital Services Protocols.

South Africa is actively participating in the Guided Trade Initiative, a pilot programme designed to test the effectiveness of AfCFTA systems and institutions. In 2024, South Africa commenced its first shipments under the initiative to Ghana and Kenya. However, large-scale commercial trade within this framework has yet to build significant momentum.

Saudi Arabia: The CGA CEO has been appointed by the Minister of Trade, Industry and Competition to serve on the Saudi Arabia Business Council. Saudi Arabia is a key market for South African citrus exports, and this appointment ensures that the citrus industry's interests are represented in bilateral trade engagements and policy discussions at the highest level.

New market access requests: CRI, on behalf of the citrus industry, requested that DALRRD initiate market access applications for the following countries: Morocco, Costa Rica, Guatemala, El Salvador, Honduras, Mexico, and Brazil. DALRRD has formally submitted these requests to the respective authorities. At the time of reporting, official responses from all targeted countries are still pending.

EU MARKET ACCESS

Deon Joubert, Jana Janse van Rensburg,
Dr Elma Carstens, Rocco Renaldi

General

The EU remains South Africa's largest export market, accounting for 36% of the country's citrus exports in 2024. As the leading supplier of citrus fruits to the EU from the Southern Hemisphere, South Africa primarily exports through key channels, with the Netherlands receiving 68%, Portugal 13%, and Italy 10% of the total shipments to the EU. Citrus exports to Europe totalled 45%, including exports to the United Kingdom (UK) within this percentage. With a population of approximately 450 million in the EU and 70 million in the UK, South Africa can leverage seasonal differences to efficiently supply citrus fruits to these markets.

Volumes: The 2024 season concluded with a collective total of 907,867 pallets exported to the EU and UK, reflecting a notable 18% decline compared to 2023 volumes.

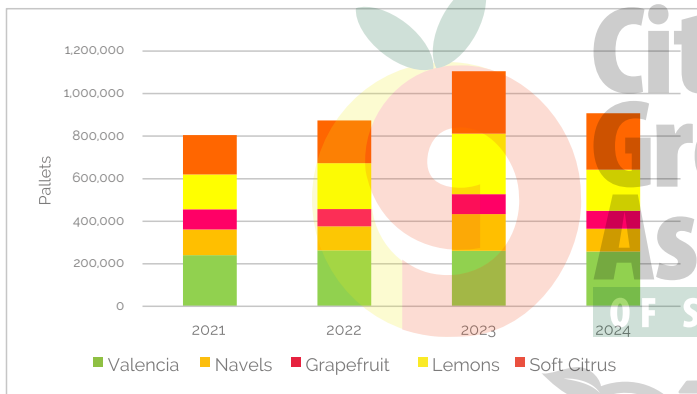
Valencia volumes remained relatively stable, decreasing 1% from 263,548 to 257,856 pallets, indicating consistent demand. Navels saw the steepest drop, decreasing 38% from 172,528 to 107,066 pallets, likely due to the diversion of fruit to juicing, where higher prices offered better returns. Grapefruit and lemons also declined, by 11% and 32% respectively. Soft citrus decreased by 9%, from 293,171 to 265,510 pallets, possibly reflecting shifting consumer preferences.



Vision 260: By 2027, the EU is expected to reach 195,203 tonnes of soft citrus, 220,185 tonnes of lemons, and 490,103 tonnes of oranges, while the UK's targets stand at 103,043 tonnes of soft citrus, 42,537 tonnes of lemons, and 72,763 tonnes of oranges. Although most of these targets were exceeded in 2023, orange volumes for both the EU and UK lagged behind. In 2024, only the soft citrus targets for the EU and UK were achieved, but the overall 2027 targets remain attainable.



Fruit Attraction - Deon Joubert and Rocco Renaldi in discussion with key stakeholders from the Netherlands.



Jana Janse van Rensburg, Randolph Aaldijk, and Inge Ribbens at Origin Fruit Group-Europe in Rotterdam.

One distinctive feature of the 2024 season was a spike in demand for juicing, especially early in the season. Favourable juice prices made local processing facilities an attractive option for many growers, leading them to divert their produce. An estimated 10 million, 15kg equivalent cartons were redirected to juicing plants – about 7% of South Africa's total citrus exports. This shift was largely influenced by the unusually high prices for juice, prompting growers to prioritise processing over fresh exports. This benefited South African producers' margins, though the high cost of compliance with EU plant health regulations continues to pose a significant challenge despite strong volume performance.



Fruit Logistica - Deon Joubert and Jana Janse van Rensburg in discussion with key stakeholders from France.

The EU maintains strict import regulations for South African citrus to prevent the spread of pests and diseases like CBS and FCM.

In response, South Africa is challenging these trade restrictions through two World Trade Organization (WTO) panels, focusing on the regulations related to CBS and FCM. After initial consultations failed to resolve the dispute, the WTO Dispute Settlement Body (DSB) approved the establishment of these panels, but panellists have not yet been chosen (update WTO 26 July 2024). South Africa argues that the EU's measures are unscientific, discriminatory, and inconsistent with the Agreement on the Application of Sanitary and Phytosanitary Measures.

WTO case timeline

- South Africa initiated its first WTO trade dispute against the EU on 27 July 2022, concerning EU phytosanitary measures related to FCM.
- On 15 April 2024, South Africa launched a second WTO dispute challenging the EU's regulations on CBS.
- On 26 July 2024, South Africa requested the establishment of two panels at a meeting of the WTO DSB to examine what, in South Africa's view, are unscientific and discriminatory measures placed on citrus imported from South Africa by the EU, following over 20 years of engagement with the EU to find an amicable solution.
- The initial requests for establishment of the panels were made on 24 June 2024 and were not accepted by the EU. In line with the WTO Dispute Settlement Understanding, the second panel requests were automatically approved by the Chair of the WTO DSB.

Currently, South African citrus growers are spending approximately R3.7 billion per year to comply with CBS and FCM measures. The measures are unscientific and unnecessarily restrictive, as South Africa already has an effective world-class risk management system that ensures safe citrus exports. Emerging citrus growers are especially impacted, with significant implications for livelihoods and jobs. The measures at issue affect

not only South Africa but also other Southern African developing and least-developed countries that depend on South Africa's infrastructure for their citrus fruit exports.

Retaining and optimising access conditions for all citrus types

False Codling Moth (FCM) regulations

The citrus FCM Risk Management System (FMS) remained unchanged for the 2024 export season. However, DALLRD renamed it the Citrus False Codling Moth Systems Approach (Citrus FCMSA). The official document along with a Cutting Edge update was communicated to relevant stakeholders on 2 April 2024.

During the 2024 export season, South Africa received a notification of one FCM interception in the EU (down from three the previous year), prompting an investigation by the FCM response team. The findings confirmed that there was no possibility of live FCM surviving in the consignment. As a result, it was recommended that NPPO South Africa request supporting evidence from the reporting country and formally challenge the notification.

On 25 September 2024, CRI and DALRRD convened to review the 2024 export season and strategise for 2025. The meeting addressed industry concerns related to EU exports, but no modifications were made to the FCMSA. The official document, along with a Cutting Edge update, was shared with relevant stakeholders on 17 March 2025.

Citrus Black Spot (CBS) Risk Management System (RMS)

During the 2024 export season, South Africa received 31 notifications of CBS interceptions, with the majority involving lemons from the Eastern Cape. To address these concerns and determine the next steps, a workshop was held in the Sundays River Valley (SRV). Following the discussions, a report detailing the situation in the SRV was submitted to DALRRD.

On 25 September 2024, CRI and DALRRD met to review the 2024 export season and plan for 2025. The discussion focused

on industry concerns regarding EU exports, with several issues related to existing CBS procedures raised and successfully resolved. The official document, *'Procedure to Ensure Compliance for Export of Fresh Citrus Fruit to The European Union from Areas Where Citrus Black Spot (CBS) is Present in South Africa,'* along with a Cutting Edge update outlining the changes, was shared with relevant stakeholders on 17 March 2025. For the 2025 season, only one modification was made to the CBS measures. A new provision was added to the 2024 version, requiring NPPO South Africa to issue phytosanitary certificates for floating consignments, including those containing fruit from an orchard where a CBS rejection or interception occurred after loading into a container or vessel. Additionally, adjustments were made to Annexure C – Procedure for the 1% Fruit Inspection Along the Line in the Packhouse, to facilitate the process.

The request for inspection must now be submitted to PPECB at least 15 hours before line inspection, and bookings must be made via email using the designated PPECB form.

The 31 notifications of CBS interceptions represent a significant decrease from the 2023 season, when 48 CBS notifications were reported. In spite of these improvements, in February 2025, the EU Standing Committee on Plant Health agreed to extend the emergency measures concerning CBS in relation to citrus fruit from South Africa and Zimbabwe by three years. The *'Commission Implementing Regulation (EU) 2025/505 amending Implementing Regulation (EU) 2022/632 as regards the prolongation of the temporary measures concerning specified fruits originating in Argentina, Brazil, South Africa, Uruguay and Zimbabwe to prevent the introduction into and the spread within the Union territory of the pest Phyllosticta citricarpa (McAlpine) Van der Aa'*, was published on 19 March 2025 and will remain effective until 31 March 2028.

Fruit fly regulations

During the 2024 export season, South Africa received a notification of one fruit fly interception in the EU.

On 25 September 2024, CRI and DALRRD convened to review the 2024 export season and strategise for 2025. The discussion addressed industry concerns related to EU exports, but no modifications were made to the South Africa Fruit Fly Management System (FFMS). The official document, along with a Cutting Edge update, was shared with relevant stakeholders on 17 March 2025.

Citrus scab

South Africa received three notifications of citrus scab interceptions in the EU during the 2024 season. To ensure awareness among stakeholders, a Cutting Edge update was circulated, highlighting that *Elsinoë fawcettii*, the causal organism of citrus scab, has been designated as a regulated pest by the EU.

Citrus canker

Following an erroneous EU interception of citrus canker in 2023, no further such notifications of non-compliance have been received. Following further in-orchard investigations, South Africa's canker-free status was confirmed.

Ports

Each year, all major import hubs in Europe are visited, along with local importers, harbour authorities, and EU inspection services covering phytosanitary, residue, customs, and quality checks. Due to past incidents of significant opportunity losses caused by varying interpretations of EU regulations, the CGA market access team has established strong relationships with individual officials at these access points. These connections have proven invaluable in resolving blockages and delays related to inspection procedures, documentation, and findings.

Over the past five years, regular meetings and harmonisation of interpretations have further strengthened these relationships, enabling swift and direct resolution of issues. Key access points include, among others, Rotterdam, Cartagena, Algeciras, Vigo, Lisbon, Sines, Hamburg, Antwerp, Civitavecchia, Genoa, and Marseille Fos.

2025 CGA CITRUS SUMMIT

Tanya Ungerer

The CGA Citrus Summit, held every two years in alternation with regional grower roadshows, returned in March 2025 for its fifth edition at the Boardwalk Hotel in Gqeberha. The event drew over 650 delegates, including approximately 350 growers and 290 industry stakeholders. "Tough times don't last, tough people do" was the theme of the 2025 CGA Citrus Summit, held from 11 to 13 March 2025.

Pre-Summit tour

The pre-Summit tour to the Sundays River Valley, was initially planned for 62 delegates, with a strong response and efficient management of the waiting list. While final attendance settled at 50 due to a few last-minute cancellations and no-shows, the delegates who attended were actively engaged throughout the programme. Thorough preparation by the CGA and RBX teams enabled a smooth registration process, with welcome packs and name tags well received. Comfortable 22-seater transport ensured seamless access to all tour stops, and despite roadworks in the Sundays River Valley, the itinerary remained on track. Pre-packed lunches supported the tight schedule, while the evening function in a private venue provided a valuable opportunity for informal networking. Although some delegates missed pre-tour instructions, this highlighted an opportunity to improve communication, particularly when bookings are made through administrative contacts. Luggage handling on Monday morning was busy but effectively managed with delivery to B&Bs. Sponsorship of drinks and water added real value, helping to keep

costs down, an approach worth continuing in future events.

Summit

The Summit kicked off with the welcome function on the evening of the 11th, sponsored by Villa, where the novelty bar, sponsored by CCH, kept delegates hydrated throughout the evening. The welcome function always provides a great opportunity for delegates to meet and reconnect. On the 12th, the CGA's chairman, Gerrit van der Merwe, welcomed all delegates at the start of the presentations, followed by a few words from Brendan Jacobs of Standard Bank, the event partner. The keynote address was delivered by the Minister of Agriculture, John Steenhuisen, who highlighted South Africa's citrus industry as one of the country's success stories, creating countless jobs in rural communities where they are most needed. Wandile Sihlobo of Agbiz served as programme director, ensuring the smooth flow of events.

The first day's programme began with Frans Cronje, a leading political commentator, who unpacked the first 300 days of the Government of National Unity (GNU) and prospects for future governance. This was followed by economic commentary from Dawie Roodt, who addressed both local and global economic conditions; this session was sponsored by Prophet Systems.

The programme then explored factors affecting the Southern African citrus region, with Marcos Neves from Brazil providing insights into the juice market and future trends in the Brazilian citrus industry. Climate expert Guy Midgley discussed the impact of severe weather on production; this session was sponsored by Sunworld.

Market dynamics were next, with over 70% of Southern African





was made to outgoing CEO Justin Chadwick. The evening offered meaningful conversations and catch-ups, accompanied by wine sponsored by the RSA Group.

Day two began with rugby legend CJ Stander sharing his experiences as one of the world's toughest number eights. This was followed by presentations on global citrus trends by Eric Imbert (CIRAD) and the local industry outlook by Tracy Davids (BFAP). Anya Jaworski (SAFRESCO) presented the Lemon Tracking Model developed in collaboration with the CGA. Ian Hatton then offered insights on how to survive, revive, and thrive through difficult times; this session was sponsored by Mpact.

The focus then shifted to logistics, with Michelle Phillips (Group CEO of Transnet) updating delegates on the recovery plan for rail and ports. Thomas Eskesen covered the shipping environment, and Mitchell Brooke (CGA) spoke about the future of road and rail transport; this session was sponsored by Maersk.

The Summit closed with remarks from outgoing CEO Justin Chadwick and a warm welcome to incoming CEO Dr Boitshoko Ntshabele.

The Summit was widely regarded as a success, receiving overwhelmingly positive feedback from delegates. Attendees praised the high quality and relevance of presentations, noting that they were both informative and impactful.

citrus exported and 95% of revenue coming from exports, making global market understanding critical. Tony Lee examined the Chinese market, while CGA representatives Nick Gutierrez (US), Mikhail Fateev (Russia), Rocco Renaldi (EU), and Sachin Khurana (India) offered further insights. The CGA's Deon Joubert and Jana Janse van Rensburg also contributed to the discussion. Nicci Stewart presented research from grapefruit growers on raising awareness and stimulating interest in Southern African citrus; this session was sponsored by Freshworld.

Inclusivity and support for new entrants remain a key industry focus. A panel featuring Nhlanhla Mathaba, Kuhle Nohamba, and Lavhengwa Nemaorani shared their transformation success stories, experiences, challenges, and opportunities. The day ended with Brett Archibald's gripping account of surviving over 28 hours drifting in the Mentawai Straits in the Indian Ocean.

Delegates then attended the gala dinner, sponsored by Wonderful Citrus, where Citrus Legends were honoured and a special tribute



A TRIBUTE TO JUSTIN CHADWICK

At the end of March 2025, Justin Chadwick officially retired as CEO of the CGA, closing a remarkable 25-year chapter of leadership. Although his retirement became effective at the end of March, Justin agreed to continue to support the organisation through a two-month handover period, which will conclude at the end of May 2025.

Justin's leadership began in 1999, at a time when the industry was still adjusting to post-deregulation realities. The sector faced uncertainty around research continuity, technical support, and market access. Communication among growers was limited,



and funding for essential services was precarious. From the outset, Justin worked closely with industry stakeholders to address these immediate challenges. His efforts led to the implementation of the statutory levy system, which secured sustainable funding for vital industry functions.

Throughout

six levy cycles, Justin helped guide the CGA from a fledgling organisation into a regional powerhouse. Under his stewardship, the CGA family grew to include initiatives such as CRI, CA, GDC, RB, XSIT, and CGACC, all with the primary aim of advancing grower interests. He was instrumental in uniting the industry by helping to establish pivotal structures such as the Citrus Marketing Forum, Variety Focus Groups, and Fruit South Africa.

Internationally, Justin played a key role in the creation of the World Citrus Organization (WCO) and the Southern Hemisphere Association of Fresh Fruit Exporters (SHAFFE), elevating the global profile of the CGA and the Southern African citrus sector. He also founded the widely read "From the Desk of the CEO" newsletter, a vital communication channel that kept thousands of stakeholders informed and connected.

Throughout his tenure, Justin never lost sight of the importance of market access. His persistent efforts contributed to the expansion of export opportunities for Southern African growers and cemented his legacy as a tireless advocate for the industry.

In early 2025, many of Justin's friends and colleagues recorded heartfelt video tributes, which were played during the CGA Citrus Summit gala dinner, celebrating Justin's resilience, strategic insight, and unwavering work ethic. In recognition of his extraordinary contribution to the citrus industry, CGA Chairman Gerrit van der Merwe presented Justin with a certificate launching the Justin Chadwick Bursary in Agricultural Economics. This annual award will support final-year undergraduate or postgraduate PDI students studying agricultural economics at any accredited South African university, with preference given to applicants from Justin's alma mater, the University of KwaZulu-Natal.

Justin's vision, leadership, and dedication have left an enduring legacy. His contribution will continue to shape the industry for years to come.





2025 CGA Citrus Summit

11-13 March 2025,
Boardwalk Hotel, Gqeberha,
South Africa

TOUGH TIMES DON'T LAST, TOUGH PEOPLE DO

As always, the CGA extends its sincere thanks to all sponsors for their generous support in making the Summit both insightful and enjoyable. The success of the event would not have been possible without their contributions:

- **Event partner:** Standard Bank
- **Platinum sponsor:** Wonderful Citrus
- **Gold sponsors:** Villa, SAFRESCO, and River Bioscience
- **Silver sponsors:** Bayer, Khula, Freshworld, and processors Magalies, Letaba African Realty Turst, Granor Passi, Venco, Onderberg Verwerkingskoöperasie Beperk, and BronPro
- **Bronze sponsors:** Capespan, Mpact, Maersk, Prophet Systems, Villa, Freshworld, Sunworld, and Janssen PMP
- **Hospitality sponsors:** RSA Group and CCH Logistics
- **Official workwear partner:** Jonsson Workwear
- **Youth leaders and Emerging growers sponsors:** Control Union, AgrigateOne, Safpro, PPECB, DuRoi Nursery, Clemengold, Agrimark, and SSK
- **Additional support:** Advertisers in the Summit handbook and contributors of inserts for the Summit bags.

The CGA greatly appreciates the continued commitment and partnership of all sponsors in supporting the growth and unity of the citrus industry.







2025 CGA

Citrus Legends

Tanya Ungerer

South Africa's citrus industry thrives thanks to the dedication and vision of individuals whose efforts have shaped its growth and global reputation. The Citrus Growers' Association of Southern Africa (CGA) established the Citrus Legends to recognise those who have gone above and beyond in building a sustainable and successful sector.

Since the first announcement at the 2015 CGA Citrus Summit, the Legends have become an industry tradition. That year, Hoppie Nel, Jock Danckwerts, and Peter Nicholson were honoured as the inaugural Legends. They were followed in 2017 by Hennie Le Roux, Freek Dreyer, and Edward Vorster; in 2019 by Milaan Thalwitzer, David Lotter, and the late Gerrit van der Merwe Sr; and in 2023 by John Purchase, the late Arend Venter, and Kallie Schoeman.

For 2025, nominations were made by previous Legends and key industry leaders, with final selections made through a confidential voting process. The announcement of the new Legends remains a closely guarded secret until the CGA Citrus Summit gala dinner, where this year we proudly welcomed Mikhail Fateev, Fanie Meyer, and Louis von Broembsen to this esteemed group.

Celebrating these Legends is not only a tribute to their legacy but also a way to inspire future generations committed to the growth and prosperity of the citrus industry.



Mikhail Fateev

Mikhail Fateev has been a passionate advocate for South African citrus for over three decades.

As a pioneer of citrus imports into Russia in the 1980s and 1990s, he helped establish a thriving market that today receives around 10% of Southern African citrus exports.

Since 2010, Mikhail has served as the CGA's official representative in Russia, sharing weekly insights on market conditions and building strong relationships across the value chain, from importers and government officials, to the media. His diplomatic flair and infectious charm have made him a beloved figure, both in boardrooms and on the ground.

His dedication extends beyond logistics, whether meeting vessels at port, involving the media in citrus arrivals, or seizing creative publicity moments. One such memorable occasion was in 2022 when the "8 billionth child in the world" was born. Many countries claimed this – as did Russia. Mikhail decided it would be a good idea to get some South African citrus to the mother and child, and of course, the media was all over this occasion. As a result, there were photos of this poor woman with her new born baby in the hospital, surrounded by cartons of South African citrus. Mikhail's commitment to promoting South African citrus has never wavered.

A gifted communicator, Mikhail writes with poetic flair in English and has even penned Afrikaans songs recorded in Stellenbosch, evidence of his deep affection for South Africa.

On receiving the Legend honour, he responded with humility and humour, saying:

"How can I retire now after receiving such honour? It seems you've opened a new chapter of the book of my destiny."

Mikhail Fateev's recognition as the first international CGA Citrus Legend marks not just a tribute to his tireless efforts, but a celebration of the global spirit that continues to drive our industry forward.

2019

Milaan Thalwitzer
David Lotter
Gerrit van der
Merwe Sr.

2017

Hennie Le Roux
Freek Dreyer
Edward Vorster

2015

Hoppie Nel
Jock Danckwerts
Peter Nicholson



Fanie Meyer

Fanie Meyer's enduring contribution to the citrus industry spans leadership, innovation, and unflinching commitment. Over the years, he has served on the boards of the CGA, CRI, and RBX, a rare trifecta, and chaired the Citrus Improvement Scheme Advisory Committee, skillfully navigating complex negotiations toward a compulsory statutory scheme now on the verge of finalisation.

A University of Pretoria graduate, Fanie managed citrus operations across the country, including Crocodile Valley Estates, Tambuti, TSB, and Blyde River Estates. His influence extended through both the pre- and post-deregulation eras, serving on the Outspan board and later the CGA board for a decade, six years of which were on the Executive Committee. Known for his sharp wit and challenging insights, he was a vital voice in steering policy and direction.

On the CRI board for 13 years, Fanie also chaired the Integrated Pest Management Committee, contributing significantly to the research confirming that lemons are not hosts for FCM and fruit fly, a breakthrough for market access. He has played key roles in numerous other industry bodies, from disaster management to variety focus groups, often pushing for greater accountability and relevance.

A memorable character, Fanie championed the first Citrus Summit in Phalaborwa, where the golf may have been the highlight, but his advocacy and dedication left a lasting impact.

With over 25 years of documented service and influence, Fanie Meyer's recognition as a Citrus Legend

honours a legacy of leadership, critical thinking, and passion for the industry.



Louis von Broembsen

Few individuals have had as profound and lasting an impact on the foundation of South Africa's citrus industry as Louis von Broembsen.

Honoured at the 2025 Citrus Summit, Louis is celebrated for his pioneering role in establishing the research and technical frameworks that underpin the sector today.

A key architect of the Citrus Improvement Scheme (CIS), Louis helped introduce shoot tip grafting as a standard, ensuring that growers receive disease-free, true-to-type trees, a cornerstone of modern orchard success. His global research travels, particularly in the United States, brought world-class standards to local practices, shaping CIS into the institution it is today.

Louis's academic journey began with a Master of Science in Horticulture from the University of Natal. His professional career reads like a roadmap of the industry's evolution: from early roles at the South African Cooperative Citrus Exchange (SACCE) in the 1970s to executive leadership in Outspan International and Capespan, and later as a respected consultant. He played a vital role in positioning Citrus Research International (CRI) post-deregulation, serving on its board for 15 years and guiding numerous strategic sessions with characteristic thoroughness, and legendary card-on-the-wall techniques.

His diplomatic leadership in managing research and extension services earned wide respect, as did his mentorship of emerging scientists. Louis helped launch the careers of many who would become leaders in citrus research, significantly boosting productivity by tackling soil-borne pathogens and enhancing nursery practices.

Louis von Broembsen's legacy lies not only in the systems he built, but in the people he inspired and the scientific foundation he helped lay for future generations. His recognition as a Citrus Legend is richly deserved.

2023

John Purchase
Arend Venter
Kallie Schoeman

2025

Mikhail Fateev
Fanie Meyer
Louis von Broembsen

CRI - RESEARCH & TECHNICAL

Dr Vaughan Hattingh



Governance and funding

The 2024/25 year was the fourth year of the CRI four-year plan (4Y plan), supported by the 2020-2024 levy. CRI has successfully implemented the planned upscaling of research and technical support services as provided for in the 4Y plan. CRI was able to upscale research from 75 projects in 2020/21 to 131 projects in 2024/25, with a further increase to 151 projects in 2025-26. This brings research operations to the level envisaged in the 4Y plan and is the level that will be consolidated and sustained through the next levy term (2025-2029), as provided for in CRI's 4Y2 plan. The 4Y2 plan was presented to growers in 2024 as part of the new levy proposals. The levy proposal was supported by growers, and the new levy was approved by the Minister of Agriculture for implementation as of 2025.

The CRI board of directors changed due to the resignations of Prof Nigel Barker (University of Pretoria) and Dr Nthabiseng Motete (Agricultural Research Council), with Prof Dave Berger joining the board. The CRI executive committee, consisting of Piet Smit (chairman), Deon Joubert (vice-chairman), Mike Woodburn, Eddie Vorster, and Piet Engelbrecht, remained unchanged. The CRI advisory committees were chaired by the following directors: IPM – Fanie Meyer; Disease Management – Eddie Vorster; Citriculture – Piet Smit; Cultivar and Rootstock Evaluation – Deon Joubert; and Citrus Improvement Scheme Advisory Committee (CISAC) – Fanie Meyer. The balance of the board consisted of: Steve Turner (Citrus Exporters Forum), Chris Kellerman (Citrus Consultants),

Dave Berger (University of Pretoria), Danie Brink (Stellenbosch University), Martin Hill (co-opted, Rhodes University), and Louisa Moloka-Mogotsi (Citrus Growers Development Chamber, co-opted as an observer).

Market access technical

Gaining, Retaining and Optimising (GRO) market access is central to CRI's mission. The CRI-supported research portfolios are strategically planned to produce scientific outputs that are relevant to the phytosanitary regulation of citrus exports from Southern Africa. Likewise, the research outputs need to enable growers to competitively and sustainably produce fruit that meets market expectations, and the research aims to enable compliance with international phytosanitary trade regulations. The expertise inherent in CRI and its affiliated scientists is vital in supporting Southern African government bodies in fulfilling their official government-to-government engagements, which are key to GROing market access.

Research

2024/25 was the final year of CRI's first four-year plan under the significantly increased research levy. Looking back, it is clear that this increase has enabled tremendous growth in CRI's research initiatives and those of its collaboration partners. Over this time, the number of research projects has doubled, as has the number of external research entities collaborating with CRI. More importantly, CRI has been able to access technologies and expertise that were previously unaffordable, and which are now proving very promising for the competitiveness of the Southern African citrus industry.

In the 2024/25 research year, the Integrated Pest Management (IPM) research portfolio comprised 63 continuing and new projects, distributed across three programmes: *False Codling Moth (FCM) and Other Lepidoptera* (37%), *Fruit Fly* (22%), and *Other Pests* (41%).

Within the *Other Pests* programme, seven projects focused on biosecurity-related research, particularly on psyllids, in preparation for the potential future arrival of *Diaphorina citri* (Asian Citrus Psyllid) and Huanglongbing (HLB).

A notable proportion of the projects directly addressed market access priorities, with a focus on risk assessment and risk reduction techniques for pests of phytosanitary concern. FCM was the primary pest targeted amongst these projects, followed by fruit fly. A significant portion of the portfolio is also concentrated on the development of new or improved tools for managing arthropod pests on citrus. Several projects further aimed to advance understanding of arthropod pests and their management strategies.

In the *FCM* programme, the high field efficacy of mating disruption was confirmed, both when alone and in combination with the sterile insect technique (SIT). This supports the broader applicability of FCM SIT across citrus regions in South Africa, based on pheromone profile similarities and mate attraction across FCM populations. Repellents and virus-neem oil combinations have shown promise as new tools for FCM control. Unique compounds associated with FCM-infested citrus fruit were discovered in one of the projects, with potential for future use in postharvest detection. Ongoing research into chemical cues influencing FCM oviposition has also shed light on citrus type and cultivar preferences for the pest.

In the *Fruit Fly* programme, the restricted distribution of Natal fruit fly in the north and northeast of South Africa was confirmed. The non-host status of commercial export-grade Valencia oranges for marula fly was also confirmed, and the efficacy of current Mediterranean fruit fly (Medfly) cold treatments for other fruit fly species was demonstrated. The potential use of X-ray tomography for post-harvest detection of fruit fly in citrus was demonstrated. Research into the response patterns of fruit fly pests to protein baits has provided a strong foundation for the effective use of this control technique and will support its appropriate application for field-level suppression.

Development of new management tools for mealybug and psyllids were the key highlights in the *Other Pests Programme*. For mealybug, new multiplex PCR assays were developed for the identification of mealybug pest species – tools which are already in use at the Diagnostic Centre of CRI. Promising post-

harvest fumigation treatments for mealybug were identified. The efficacy of pre-harvest preventative treatments for mealybugs was evaluated, affirming the need to preserve biological control agents for effective mealybug management. For psyllids, an automated detection system for these pests on traps was developed. Ongoing research on mites has improved our understanding of the identity and distribution of flat mites in citrus-growing areas in South Africa. Thrips remain a key cosmetic pest in citrus. To support improved management of thrips, two new projects were launched: one focusing on the development of repellents, and another investigating an integrated, multifaceted approach incorporating fertilisation, pruning, and ground cover management.

Production of high quality citrus is reliant on successful management of various pre- and postharvest pathogens in a sustainable manner. These include fungal, viral, viroid, and bacterial pathogens. Due to the diverse nature of these pathogens, the *Disease Management Portfolio* is divided into different research programmes. These include Preharvest Diseases (fruit and foliar, including citrus black spot and soilborne diseases), Graft Transmissible Diseases (GTD), HLB and Greening Disease, and Postharvest Diseases (PHD).

Research in the *Preharvest Diseases Programme* places strong focus on better understanding the different pathogen species that cause fruit, foliar, and soilborne diseases of citrus. Citrus Black Spot (CBS) remains a research focus because of its phytosanitary importance for access to the EU. Projects are aimed at improving management and detection protocols for *Phyllosticta citricarpa*, the causal pathogen. Other projects evaluate promising new chemical management options, including the assessment of the potential for fungicide resistance development. CRI PhytRisk was developed as a CBS prediction platform and is continuously being improved as a management tool. Other research covers the tempo of CBS infection in new orchards and the development of a CBS risk matrix that can be used to predict the CBS risk associated with orchards.

Alternaria diseases of citrus, and specifically *Alternaria* Brown Spot (ABS), have increased dramatically in recent years due to the

planting of more sensitive cultivars and the increased installation of protective netting over orchards. This has led to several projects being initiated that focus on the development of disease prediction models, improved chemical and biological control options, and also the characterisation of the causal pathogen, as well as resistant or tolerant citrus cultivars. Apart from the well-known diseases CBS and ABS, *Botrytis cinerea* and other pathogens that cause flower blight and fruit rind distortions are also studied in the Preharvest programme. Focus is placed on the fungal species involved, their epidemiology, the development of disease prediction models, and chemical and non-chemical control options.

Soilborne diseases and nematodes remain serious constraints to citrus production. Research on soilborne pathogens and nematodes focuses on management, specifically the evaluation of new fungicides, fungicide sensitivity, and the correct application of biological control agents and cover crops.

The research in the *Graft Transmissible Diseases* (GTD) programme plays an integral role in ensuring that pathogen-free plant material is supplied to the industry through the Citrus Improvement Scheme (CIS). An important part of the research in this programme is therefore aimed at developing accurate and reliable diagnostic tools for these various pathogens. Another important focus area is the improvement of CTV cross-protection. Viruses and viroids remain a persistent problem in the industry. In terms of viroids, the focus is on the role of rootstocks in viroid disease severity and their spread in the tree.

The HLB programme coordinates and facilitates the interdisciplinary research needed to prepare the industry for the arrival of this disease. Research is therefore focused on constructing a comprehensive *Liberibacter* genome reference database in support of the development of accurate detection and identification assays, which are critical for the success of the HLB Action Plan. Further research aims to establish a test orchard under protection where potential African Greening and HLB management options can be evaluated.

Postharvest disease management is facing challenges in terms of increasing pressure to reduce the number and level of detectable residues present on export fruit. The focus in this programme is therefore to optimise the application of chemical postharvest treatments and to investigate and optimise alternative non-chemical control options. One of the key active ingredients is imazalil. To mitigate the risk of any potential additional restrictions on the use of this active ingredient, alternative actives are continuously being evaluated. Increased shipping times, shipping delays, and reduced shipping temperatures are contributing to problematic saprophytic fungal growth on the stem-end of exported fruit. The exact causes and possible remedial actions are being studied. Currently, GRAS chemicals, biocontrol options, and organic management options are being tested as either preharvest sprays or postharvest applications.

Within the *Citriculture Portfolio*, the cultivar and rootstock evaluation programme supports market retention and growth by providing the industry with commercially relevant information. The new grapefruit cultivar 'Aliza' performed well in the Western Cape, yielding good-quality fruit. Regarding Valencia oranges, 'Alpha' yielded better in cooler production areas than in hotter regions. At the same time, 'Bennie' outperformed other Valencia options at all the trial sites in Eswatini, including the locally cooler climatic zones. In the second season of evaluations on the Argentinian lemon rootstocks grafted with 'Eureka', '2 PH Eureka SL' and 'Lisbon' in Hoedspruit, showed marked differences in yield, influenced by the combination of scion and rootstock. To ensure sustainable production, water use efficiency and nutrient use efficiency in citrus orchards continue to receive attention.

Ongoing research comparing micro-irrigation and drip irrigation, with each system applying water stress at different phenological stages to reduce total seasonal water use, has shown that in an "on-year", micro-irrigation sustains a larger crop better than a drip irrigation system, achieving a 31% higher yield and a 7% increase in fruit size. However, micro-irrigation resulted in lower sugar and acid percentages. During periods of normal rainfall, no differences in yield or fruit quality were recorded between the systems.

Water stress during Stage 1 of fruit development significantly impacted mandarin fruit size, while well-managed water stress during Stage 3 did not affect fruit size. Increased water stress during Stage 3 did not significantly improve internal quality but did offer a reduction in irrigation. In a comparative project of fertilisation-irrigation management combinations in full-bearing Valencia and Nadorcott orchards, the results indicate that low-flow drip-irrigated systems demonstrate significantly poorer nutrient use efficiencies (NUE) of N, P, and K compared to other systems. Furthermore, since the project indicated that poor NUE is mainly due to excessive fertilisation rates, benchmark NUE of 1.7 to 2.2 kg N/ton, 0.18 to 0.28 kg P/ton, and 1.6 to 1.9 kg K/ton are proposed for the industry. Projects on colour development and rind conditions confirm the importance of adequate preharvest colour development before applying ethylene: high chlorophyll content leads to weak colour and contributes to higher susceptibility to chilling injury.

The cold-chain-related component of the research portfolio encompassed container airflow, packaging, pallet engineering, and forced-air precooling to support market access, enhance airflow, and optimise loading strategies. Analyses have pinpointed chilling-injury hotspots and provided solutions through airflow modification kits and innovative vent-hole designs. Furthermore, in refining the setup parameters (drain-plug positions, vent settings, and void plugs) for container loading of standard and twenty-one-pallet configurations, increased cooling uniformity and reduction of hot spots by 0.5–1.0 °C were obtained. This significantly reduces the risk of chilling injury and enhances phytosanitary treatments. New cold-room wind tunnels demonstrate that a step-down precooling regime lowers chilling injury by approximately 15% compared with single-set-point cooling; further work is underway to fine-tune recommendations. In addition, commercially focused studies aimed at optimising cold-store design and operations are already providing valuable insights that streamline cold-chain logistics and reduce costs. Packaging research continues to exploit the pallet lateral-acceleration tester, which quantifies pallet stability with individual components, enabling the industry

to reduce packaging costs without sacrificing mechanical performance. Pallet base design work has benchmarked ten commercial bases and produced new prototypes, culminating in the "Opti-base", which delivers 37% greater mechanical stiffness at a lower cost. The project has also established, and continues to refine, an industry quality-control framework intended to eliminate poorly constructed pallet bases. For carton-strength evaluation, a low-cost multi-stack creep rig now predicts carton service life, permitting lighter board grades and larger ventilation cut-outs without compromising arrival quality.

Extension

Over the past few years, there has been a renewed focus on taking extension to a higher level such that research outputs will more effectively be taken to implementation. This has entailed ensuring that the type of information presented to growers is appropriate, that the communication channels are effective, that the packaging of the information supports effective uptake, and that the presentation of information is professional.

A highlight of 2024 was the hosting of a very successful 12th Citrus Research Symposium at Champagne Sports Resort near Winterton, held from 18 to 21 August 2024, attended by 850 people. The quality of the research outputs presented was generally outstanding, and the attendees expressed a high level of appreciation for the dedicated and professional manner in which the research was executed and outputs communicated.

The annual regional CRI workshops in six production regions continued to be one of the most powerful means of effective technology transfer. These workshops were very well attended in 2024, and feedback reflected success in achieving a focus on professional presentation of relevant and useful information. For both the CRI Postharvest workshops and the CRI Production, IPM & Disease Management workshops, the respective organising committees ensure that the most topical issues are covered during the two-day workshops. Apart from the information presented, the interaction between the different role players greatly adds to the success of these workshops.

The study groups and packhouse forums were mostly very active during the 2024 season, where specific area needs were addressed by Extension staff and CRI researchers. Several training and information courses were presented at the study group level to improve production practices. One of the most challenging needs remains advancing on-farm integrated pest management (IPM). It continues to be an extension goal that will receive focused attention.

The adoption of more effective communication channels has been an extension focus in recent times. Several podcasts, including training material, were recorded and distributed to relevant role players, and a professional communication service provider was engaged to assist in modernising CRI's communications. CRI guidelines on effective PowerPoint presentations were compiled, and extension staff attended a presentation skills training course.

In line with the revision of CRI's role in relation to packaging material and the carton accreditation process, a packaging specialist was appointed. The focus of the packaging specialist is to support growers, packhouses, and packaging material manufacturers. The carton manufacturers have remained committed to the Packaging Working Group, which remains a platform for sharing information of mutual interest and getting feedback from the Packaging Specialist on industry matters. CGA food safety and carbon footprint support activities have also been linked to packaging.

The Exporters Technical Panel (ETP) meeting was well attended by various stakeholders, with good interactions amongst the exporters and other role players. The role of exporters in communicating market feedback and market requirements is vitally important for follow-up and solving postharvest issues.

Biosecurity

Biosecurity is at the core of Citrus Research International's (CRI) mission to maximise the long-term global competitiveness of the Southern African citrus growers and is operated as a division within CRI. The strategic objectives aimed at ensuring

CRI-Biosecurity's mission are summarised under four pillars: Preparedness, Operations, Awareness, and the CIS.

The terms of reference for CRI's Biosecurity Advisory Committee (BAC) were updated to align with the strategic objectives of the division. BAC's 17 members are scientific and/or technical experts and meet twice a year to review and advise on the biosecurity preparedness, operations, and awareness activities. Additionally, work groups of BAC members were tasked with specific objectives.

A BAC work group conducted another round of scenario planning to test the practical feasibility of the HLB/ACP Action Plan. It is evident from experiences in Brazil and the US, including experience gained from eradication and containment efforts of African Greening outbreaks in urban settings in South Africa, that eradication of an ACP incursion, or HLB incursion in an area with vector activity, is unlikely. Containment is a more realistic and achievable objective. The work group concluded that the HLB/ACP Action Plan must be updated to ensure the practical feasibility of the proposed actions and optimal deployment of resources. In short, many of the resource-intensive and/or practically infeasible measures aimed at eradication should be reconsidered to only attempt eradication in situations where it may be assessed as practically feasible. Measures should be focused on the more realistically feasible containment objectives, and these measures will differ in urban and rural settings. For commercial citrus growers, area-wide management of the insect vectors of HLB was highlighted as a critical control measure.

CRI is accumulating a biosecurity contingency fund in the Citrus Research Trust to support emergency response in the event of any major biosecurity incursion. Additional national or international funding options are being investigated.

Biosecurity operations mostly involve surveillance aimed at early detection of exotic pests and diseases in South Africa and neighbouring Southern African countries. CRI reviewed the locations and trap densities of the ACP trap networks to better align with high-risk corridors and to reduce the trap reading workload on the four Biosecurity Field Officers (BFOs). Additionally,

CRI supported training of two ARC teams, who now assist in ACP trap reading. BFO capacity was freed and is being allocated towards the roll-out of additional ACP surveillance networks, as well as increased physical surveillance along trapping networks, on farms, nurseries, and urban settings.

African Greening was detected in Knysna, East London, and Gqeberha. It was proposed that the affected areas be declared "buffer zones" to allow specific control measures. These measures are being implemented by DALRRD, with the support of CRI. The required regulations under the Agricultural Pest Act were drafted and are in the process of being promulgated.

CRI conducted two surveillance trips to Kenya, specifically to the regions where HLB was previously detected. Notably, CRI was accompanied by the author of the scientific paper that originally reported the HLB find. On both trips, samples were collected and tested in the CRI and Kenyan laboratories. The HLB findings could not yet be confirmed, and clear signs of HLB and HLB spread were not evident.

CRI subsequently surveyed the citrus-growing regions in Tanzania, 60km south of the Kenyan border, as well as other areas in Tanzania. HLB was not observed or detected in samples taken, nor was it detected in ACP specimens collected throughout Tanzania by a collaborator. The collaborator has submitted a PhD proposal to CRI for funding, which will focus on ACP and HLB surveillance throughout Tanzania, as well as the study of HLB vectors, look-alike psyllid species, and their natural enemies. CRI researchers will participate in this study.

HLB and ACP diagnosis in the Southern African context is markedly more complex than elsewhere, given the endemic variation in greening-causing *Liberibacters* and their subspecies, as well as in the insect vector genera *Diaphorina* and *Trioza*. Excellent progress has been made in the two research projects that were initiated to resolve these diagnostic complexities. As part of the post-entry quarantine diagnostics, the CRI and ARC laboratories are continuously developing the development and optimising diagnostic protocols for other identified biosecurity threats.

The citrus leprosis virus outbreak in the Eastern Cape province was successfully contained, with good prospects of eradication.

Awareness is an important aspect of biosecurity. A broad biosecurity awareness strategy is being developed, with specific communication plans for stakeholders in Southern Africa (growers, national and provincial governments, the agchem industry, other fruit industries, and the public in urban and rural settings). Appropriate awareness materials will support early detection, response preparedness, and action plans, but should be tailor-made for each audience. Fact sheets for the top 10 threats were developed, published as a series of articles in the *SA Fruit Journal*, and are available on the CRI website. Biosecurity talks were also presented at the CRI Research Symposium, as well as the regional IPM and Disease Management workshops.

CRI has actively engaged NPPOs and stakeholders in Zimbabwe, Mozambique, Zambia, Botswana, and Eswatini to establish active surveillance networks in these countries. CRI also promotes the use of certified, disease-free citrus propagation material instead of high-risk material from other countries for all citrus development in Southern Africa. Engagement of stakeholders in Southern and Eastern African countries was supported by the incorporation of Namibia, Botswana, and Mozambique as CGA members. A strategic objective is engagement with NPPOs in these countries, as well as Eswatini and Zimbabwe, to create awareness of the citrus biosecurity risks, measures to prevent incursion, surveillance and rapid response plans, and control measures following any incursion.

CRI continues to collaborate with other citrus industries and their scientific and technical support structures, particularly those in the US and Brazil, which have proven invaluable in the development of South Africa's preparedness and response plans. In this reporting cycle, CRI BAC members attended meetings and visited growing regions in Spain, Florida, US, Texas, and California, with valuable practical experience gained and contacts made.

The *Citrus Improvement Scheme* (CIS) has been incorporated as a sub-division of Biosecurity. The CIS is essentially a citrus health scheme and a logical fit in CRI's Biosecurity division. The status

and integrity of the CIS must be maintained so that the scheme continues to support the biosecurity interests of the Southern African citrus industry. While a sub-division within CRI Biosecurity, the CIS will effectively be administered and operated as a financially self-sustained unit.

Citrus Improvement Scheme (CIS)

The 2022/23 and 2023/24 seasons saw a significant drop in seed and budwood orders: seed orders down by 70% to 74% from the prior 5-year average of 5,986 litres per season, and budwood demand declined by 58% and 67% compared to the prior 5-year average of 6.6 million buds per season. Seed and budwood demand in the 2024/25 season improved notably. Seed demand increased by 80% from the prior season, reaching 2,872 litres supplied (excluding seed produced in nurseries). Demand for Swingle Citrumelo seed exceeded supply. Budwood supply increased by 25% to 3.16 million buds, 77% of which was supplied directly from the Citrus Foundation Block (CFB), with the remainder authorised for cutting in nurseries.

Of the 8.37 million buds supplied over the last three seasons, the top cultivar types were Valencia (35.4%), mandarin hybrids (26.2%), navels (13.8%), lemons (10.0%), Clementines (3.9%), and grapefruit (4.0%). The respective proportions in the 2024/25 season alone were 46.0%, 28.7%, 11.3%, 5.8%, 2.4%, and 1.8%. CFB cultivar stock currently includes 571 cultivar lines, but the top 30 varieties comprised 90.9% of all buds supplied in the past season. The top 10 cultivars last season were: Jasi Valencia, Nadorcott mandarin, Turkey Valencia, Midnight Valencia, Bennie Valencia, ARC Nadorcott LS mandarin, Tango mandarin, Eureka lemon, Nova mandarin, and Witkrans navel.

Thirty-one nurseries were certified in the last audit in November 2024, with eight achieving a 5-star rating, fifteen a 4-star rating, six a 3-star rating, and one a 2-star rating. A CRI Cutting Edge with the certified nursery list, including the star-grading, was shared with growers. CRI's Extension Officers participate in some nursery audits, which supports technology transfer to nurseries.

Development of the CIS Seed Farm is a strategic objective to protect the industry's budwood supply from the biosecurity risk of an incursion by an exotic pest, most notably HLB and its insect vector, ACP. The CRI Citrus Rootstock Seed Farm in the Thornhill/Loerie area was successfully developed, with almost 9 hectares of more than 30 citrus rootstock cultivars planted in August and September 2023. The trees are growing very well, and it is expected that they will contribute meaningfully to the harvest in 2026/27. Redundant seed orchards at the CFB will be removed once yield from the Seed Farm orchards meets rootstock seed demand.

The notice for public comment of the intended promulgation of the CIS as a compulsory statutory scheme was published in the Government Gazette in September 2023, after which information sessions were arranged in the different provinces. Feedback was positive throughout and the notice was finalised for ministerial approval and promulgation. However, senior officials in DALRRD advised that promulgation of the Scheme should be delayed to follow the promulgation of regulations under the new Plant Improvement Act. These regulations were finalised in 2024 and are expected to be promulgated in 2025.

The bulk of CIS funding is from income from supply of budwood and seed and the dramatic decline in demand compromises the affordability of the CIS and its strategic initiatives. The downturn in demand was expected to last for about 4 years, and CIS income would not cover expenses in these years. The CRI board of directors agreed to use past CIS profits in the reserve fund to offset the CIS shortfall to breakeven. To adjust the CIS income relative to the 3 to 4 million tree industry expected in the longer term, a price adjustment was required for seed and budwood in 2024/25. The price adjustment constitutes approximately a 1% increase in tree price. Given the price increase, as well as the increased demand and supply of seed and budwood, the 2024/25 season has returned to a financial break-even situation. The total deficit that had to be recovered from reserve funds in previous years was R9.27 million. The forecast for the upcoming seasons looks promising, with the predicted CIS income expected to cover expenses, including capital expenditure.

CGA CULTIVAR COMPANY

Jon Roberts



The past year has seen a tale of two industries for the CGACC, characterised by contrasting dynamics between the juice and fresh citrus markets.

Strong performance in the juice market

The Valencia industry experienced a strong year due to the high juice prices, largely driven by orange juice supply shortages caused mainly by the extreme drought in Brazil. Juice prices were comparable to export prices and brought price stability along with a series of positive knock-on effects:

- Provided growers with a good alternative market amid higher phytosanitary fruit risk.
- Diverted cheap Egyptian oranges to juice markets, easing competition in South Africa's early fresh orange market in the EU/UK.
- Established an unexpected 'floor price' for fresh oranges, helping stabilise overall pricing.
- Boosted juice demand for Navels and Mandarins unexpectedly, reducing the supply of lower-grade fruit and offering an alternative solution, particularly for creased fruit in a poor navel creasing year.

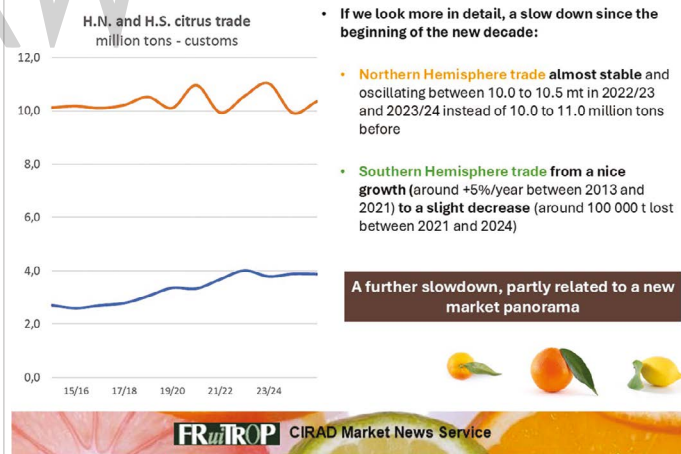
While these knock-on effects primarily benefited Valencia varieties, Navels and Easy Peelers also saw some positive impact, albeit to a lesser degree.

Looking ahead, it remains uncertain whether the global juice shortage will persist. At the recent Citrus Summit held in March in Gqeberha, Brazilian industry expert Prof Marcos Neves noted that Brazil's orange production was expected to improve post-drought. However, increasing rates of HLB infections threaten long-term recovery. Without a cure for HLB, Brazil's dominant juice supply cannot be reliably replaced, as South Africa and other disease-free countries will struggle to reach more than 10% of global orange juice production combined, with South Africa currently at only a 1% share. There is also concern that prolonged high prices could prompt manufacturers to use cheaper substitutes or blends, potentially eroding long-term orange juice demand. Despite these risks, demand for Valencias is likely to remain firm over the next few years as processors struggle to source sufficient volumes of quality fruit.

Ongoing challenges in fresh citrus consumption

In contrast, fresh market consumption remains under pressure. According to data presented by Eric Imbert of CIRAD at the Citrus Summit, global consumption of fresh citrus across most citrus types has slowed since pre-COVID times.

Even less dynamism these last seasons...



CGACC cultivar budwood released

What did this mean for the CGACC this year? The sharp contrast in dynamics between the juice and fresh citrus markets is reflected in the CGACC's budwood releases:

- Valencia budwood demand surged dramatically, likely driven by high juice prices. This renewed interest led to a record-breaking year for the CGACC in terms of total bud sales since its inception.
- Demand for other cultivars continued downward, in line with trends observed since the 2022 downturn.

The CGACC was well-positioned to meet the renewed demand for Valentias. The top two highest-selling protected Valencia cultivars (managed by the CGACC) over the past five years maintained



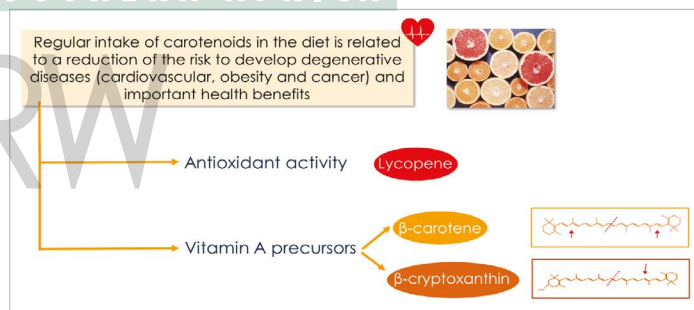
their leading positions again this year. Additionally, the CGACC recently secured management rights for the third-highest-selling protected Valencia, Gusocora. New cultivars released in the previous season, such as Kas Early and Wonder Why Valentias, also saw increased uptake as budwood availability improved.

Research, collaboration, and market development

While the CGACC did not undertake international travel this year, our focus shifted to consolidating recent cultivar releases and strengthening collaboration with partners offshore as they begin releasing some of our cultivars in Spain, Turkey, and the US.

We hosted several overseas agents throughout the year. In July, with the help of Carlos Tornero, our Citrus Rosso agent for Red Lina and Muller red lycopene oranges, and Dr Paul Cronjé, we hosted a presentation by visiting researcher Dr Jaime Zacarias of the Biotechnology Department of IATA-CSIC, Valencia, Spain. Dr Zacarias is involved in groundbreaking research on the bioactive and nutraceutical properties of our lycopene oranges. The research highlights the potential of lycopene citrus to reduce the risks of degenerative diseases, cardiovascular issues, and obesity. This work is crucial in reversing the decline in citrus consumption by emphasising health benefits to European consumers, South Africa's primary export market.

Health Related properties of Carotenoids



Carlos also shared insights in a presentation of successful US and EU marketing campaigns, where lycopene oranges are branded "Pink" to distinguish them from blood oranges, aiding consumer recognition and price premiums.

Growing international demand for lycopene cultivars

International interest in the CGACC's lycopene cultivars is growing



steadily, especially in Spain, where there has been strong grower demand over the past three years. Premium prices for “pink” navels, similar to those in the US, are now being observed in several European markets. Trials are also underway in the US and Turkey, with commercial releases expected soon.

Budwood supply constraints

The spike in Valencia budwood demand was unexpected and placed significant strain on the Citrus Foundation Block (CFB), which supplies buds to nurseries nationwide. The system is designed around multi-year demand averages, and the sudden surge outstripped the current bud “increase trees” capacity. Due to the one-to-two-year lead time needed to establish new, increase trees, we were forced to allocate limited quantities throughout the season. Although this was a better year in terms of demand, there were stressful times for the CFB, nurseries, and cultivar companies managing the process as best as possible. Unfortunately, we were unable to fully leverage the high-demand opportunity.

2024 Citrus Budwood Sales

Variety	2019	2020	2021	2022	2023	2024
Grapefruit & Pummelos	409,089	470,028	401,680	319,127	174,531	77,074
Lemons & Limes	729,987	771,888	886,766	533,927	412,344	192,673
Valencias & Midseasons	1,462,519	1,439,501	1,682,128	1,082,764	679,370	1,212,369
Navels	786,432	510,575	637,802	630,755	398,257	325,117
Mandarins	3,899,996	2,782,405	2,738,486	1,568,778	902,223	716,553
Clementines	650,557	432,605	456,051	271,985	141,838	53,228
Mandarin Hybrids	3,199,074	2,313,326	2,231,565	1,233,698	743,053	659,615
Satsumas	50,365	36,474	50,870	63,095	17,332	3,710
Other*	29,501	23,414	41,768	88,628	119,641	66,109
Total	7,317,524	5,997,811	6,388,630	4,223,979	2,686,366	2,589,895

Industry reset and future outlook

The last few years have marked a shift in grower behaviour, from speculative, higher-risk planting toward more deliberate decisions based on observation and evaluation data before planting. This return to a more conservative discipline, as noted in previous annual reports, is a welcome trend. It should have a trickle-down effect from growers to nurseries, cultivar managers, and plant breeders, encouraging more selectivity in screening new cultivars for their commercial potential. I am reminded of my predecessor, Andrew Lee, who often said: "Focus on probable value, not possible value."

The short- to medium-term outlook suggests that annual bud demand (excluding Valencia) will likely stabilise at around 2.5 to 3 million buds.

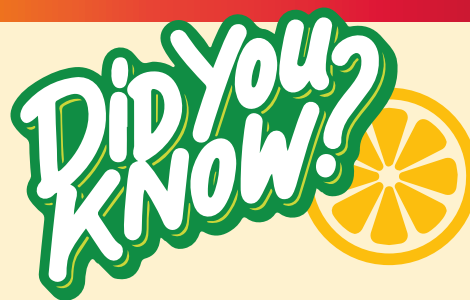
The CGACC has expanded significantly since the 2022 downturn, from six cultivars released commercially pre-2022 to over 20 released commercially and semi-commercially in the current year, with several promising candidates in confidential development stages.

Staffing and operational outlook

The growth, while positive, has not been without challenges. Increased commercial activity has stretched our small team, and we regret the loss of a senior technical manager this year. Nonetheless, we view this as a natural growing pain, and recruitment is underway both to replace this position and to add support for the increased commercial activity as we scale operations in the coming years.

In summary

Despite difficult global conditions for many citrus cultivars, the CGACC has been fortunate, with a strong Valencia inventory, to capitalise on juice market opportunities. The strategic decision to develop some of our cultivars offshore has also increased our sales during the 2024 season, allowing for a record sales year despite challenges.



QUICK FACTS

The South African citrus industry...

-  Employs an estimated 100,000 people on farms, and a further 40,000 in packhouses and downstream activities.
-  Generates approximately R33 billion in export earnings annually, the largest agricultural export earner in South Africa.
-  Is the second largest exporter of citrus fruit in the world.
-  Exports to 119 countries around the globe.
-  Is the largest citrus exporter in the Southern Hemisphere.
-  Is the world's largest grapefruit exporter, third-largest orange exporter, third-largest lemon exporter, and fifth-largest soft citrus exporter.
-  Is recognised as a world leader in citrus research.
-  Invests R180 million annually in citrus industry research.
-  Is a key rural economy driver in parts of Limpopo, the Eastern Cape, and Mpumalanga.
-  Invests R60 million annually in black grower development and human capital development.

CITRUS ACADEMY

Jacomien De Klerk



Citrus Academy board of directors

The board of directors for the year under review consisted of the following individuals:

Representation	Name	Date of Appointment	Date of Resignation
CGA	Phillip Dempsey (chairperson)	2012/11/20	
Donors (Citrus Industry Trust)	Dr Hildah Lefophane (vice-chairperson)	2021/11/04	
CGA	Marius Bester	2017/03/09	2025/03/31
CGA	Bennet Malungane	2018/03/22	
CGA	Frikkie Olivier	2020/09/08	
Service providers	Johann Engelbrecht	2023/03/29	
Additional seat	Vacant		

The company secretary, Robert Miller and the chairperson of the CGA Finance and Risk Review Committee (FRRC), Rajen Govender, attend board meetings ex officio, while the CGA's Chief Operating Officer, Paul Hardman, is invited to attend board meetings as an observer.

The following board meetings were held during the year under review:

Date	Meeting	Members Apologies
2024/11/20	Board Meeting	Rajen Govender
2025/03/31	Board Meeting	None

The seventeenth annual general meeting of the Citrus Academy was held via Zoom on Tuesday, 27 August 2024.

Financial results

While the development of learning material for the implementation of occupational qualifications continued, the focus during the year under review shifted towards programme implementation. During the year, the Citrus Extension CPD and Citrus SuperPower programmes were implemented. In addition, following a successful pilot project in the previous year, the Citrus Secondary programme was rolled out nationwide.

In the 2024/25 financial year, the Citrus Academy recorded a modest surplus of R26,889, increasing its accumulated retained surplus to R140,236. This contrasts with a deficit of R235,830 reported in the 2023/24 financial year.



Alignment with CGA Strategic Objectives and the Citrus Industry Transformation Strategy

The Citrus Academy is a non-profit company, established with the purpose of executing the transformation agenda of the CGA. All Citrus Academy activities are aligned with four of the strategic objectives of the CGA.

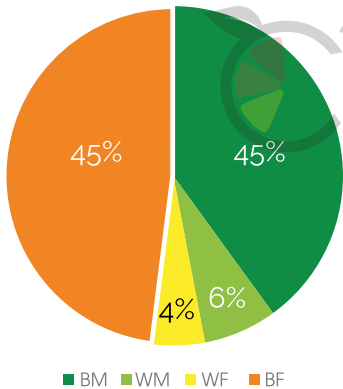
The primary objectives in question are driving industry transformation and assisting growers' long-term sustainability. Secondary objectives pursued by the Academy are engaging with government and other stakeholders, specifically regarding human resources, and supporting the implementation of research and development through bursaries for students involved in research and assisting with technology transfer.

In February 2025, the CGA board approved the new Citrus Industry Transformation Strategy, which identifies the Citrus Academy as one of its two primary implementation agents. In the upcoming financial year, the Citrus Academy will realign its objectives and activities to support the new transformation strategy.

Beneficiary demographics

Because the Citrus Academy is an essential component of the CGA's transformation agenda, the demographics of its beneficiaries are constantly monitored. Beneficiaries are calculated as all programme participants, excluding user-pay programmes (short courses and e-learning programmes).

Of the 4,144 beneficiaries to date, 90% have been non-white, while 49% are female. In the year under review, beneficiaries were 89% Black and 47% female.



Citrus Academy Bursary Fund

Citrus Academy Bursary Fund allocations are separated into three categories, namely postgraduate, undergraduate, and BEE bursary support. The BEE bursary support section of the Bursary Fund supports black-owned citrus enterprises to build their internal capacity and empower self-management. In the 2024 academic year, just over R2.2 million was paid as bursaries to 44 beneficiaries. There is a worrying downward trend in the number of bursaries allocated each year, mostly due to a lack of funding and the rising cost of higher education.

Graduate retention remains satisfactory, with two-thirds of graduates employed in the fruit industry, academia, and government departments or agencies. More than half of those graduates are employed in the citrus industry. We constantly strive to meet the demands of the industry for graduates.

The Citrus Industry Trust and the AgriSETA remain the major sources of bursary funding, while the contribution by companies from within the citrus industry continues to grow. We appreciate their continued support.



AgriSETA Excellence Awards

Experiential learning programmes

The Citrus Academy creates opportunities for Bursary Fund students to gain exposure and experience while they are studying, and after they have graduated. Vacation work is arranged for all B-degree and diploma students at workplaces where they can gain experience relevant to their field of study. The internship and graduate placement programmes assist Bursary Fund students to find placements at citrus enterprises where they can gain work experience. Through the industry exposure programme, current and former students are assisted in attending conferences, symposia, and other events relevant to their field of study.

In the year under review, four interns and one graduate completed their experiential learning in December 2024. Five students participated in the vacation work programme, while twenty-two benefited from the industry exposure programme.

Career fairs

The Citrus Academy takes part in regular career fairs, to create awareness about the citrus industry and encourage young people to study agriculture. During the year under review, the Citrus Academy participated in several events, both virtual and in person, in collaboration with AgriCAREERConnect.

Pick me!

The Pick me! platform on the Citrus Academy website has proved to be a powerful tool to put work seekers in touch with potential employers. Work seekers are able to register their details on the platform, and recruiters can view the available candidates. A bulletin with the details of available candidates by province is circulated to employers every second week. An option to allow businesses to advertise available positions on the platform is currently under investigation.

Citrus short courses

Citrus Academy short courses are aimed at developing insight and

understanding of specific aspects of the citrus value chain. In the year under review, development began on a new short course, which will bring the total number of available short courses to six. These cover citrus nurseries, citrus production, citrus packing, citrus packhouse quality control, the citrus export supply chain, and citrus economics. Short courses are also available on the Citrus Academy e-learning platform, with Citrus Economics and Citrus Packhouse Quality Control still to be added.

Face-to-face short courses are not currently implemented, but they are being made available on demand.



Agri's Got Talent

Citrus Secondary Programme

The Citrus Secondary Programme is aimed at providing an opportunity for learners at schools in citrus production regions to achieve an NQF2 Plant Production qualification while still at school. The programme runs over two years, targeting grade 10 and 11 learners. Programme content and assessments are delivered online via the Citrus Academy e-learning platform.

In 2024, the programme was implemented throughout the country, with 13 schools and 348 learners participating. In 2025, the programme was expanded further to 25 schools and 635 learners. It now covers most citrus-growing regions.



Vacation Work at CRI



CSP Farm Visits



Citrus SuperPower

Citrus SuperPower Programme

The Citrus SuperPower Programme has been developed in response to the need for quality supervisor training in citrus workplaces. The programme uses a train-the-trainer model, with the Citrus Academy implementing the trainer development programme, and trainers in turn delivering supervisor training in workplaces, including citrus farms, packhouses and nurseries.

In the year under review, four trainer development programmes were held, with sixteen SuperPower trainers participating.

Citrus Extension Officer CPD Programme

Building the internal capacity of government extension services has long been an objective of the Citrus Academy. New technology enabling accessible learning has made it possible to develop a programme that extension officers can participate in, even if stationed in remote areas. This programme was developed in the year under review and consists of an induction module and ongoing developmental programmes that earn CPD points. A community of citrus extensionists will also be built over time.

In the year under review, 38 extension officers enrolled for the programme.

Continuous improvement – citrus best practice handbooks

To support the long-term sustainability of growers and packhouses, the Citrus Academy has developed best practice handbooks as practical resources for growers, packhouse managers, and their teams. These handbooks aim to improve key business and operational practices that ultimately ensure competitive and sustainable commercial performance. In the year under review, the handbooks proved to be a valuable aid in the implementation of GLOBALG.A.P. IFA 6.

The two citrus best practice handbooks are available on the Citrus Resource Warehouse.

Learning media – audio-visual media

The Citrus Academy develops audio-visual learning modules on various aspects of citrus production. All Citrus Academy audio-visual material can be found on the Citrus Academy YouTube channel. Additionally, audio-visual modules are also available for download from the Citrus Resource Warehouse members' section.

No new series developments were undertaken during the year under review.

Citrus Resource Warehouse (CRW)

The Citrus Academy moderates and maintains an industry information-sharing platform where documents can be found that

cover all aspects of citrus production, including research reports, extension briefs, legislation and regulations, annual reports of CGA group companies, best practice handbooks, and more. All documents are in searchable PDF format, enabling easy keyword searches across multiple sources.

Economic Transformation of Black Citrus Growers Programme (ETBCG)

In 2020, the CGA implemented the ETBCG Programme, aimed at providing enterprise development support to black citrus growers. The programme, initially running from April 2020 to March 2023, was extended to March 2025 to allow for the finalisation of monitoring and evaluation.



Citrus Academy past and current students

CGA GROWER DEVELOPMENT COMPANY (CGA-GDC)

Lukhanyo Nkombisa



In 2016, the CGA board made a significant decision to establish the CGA Grower Development Company (CGA-GDC). This came after operating a Transformation Desk within the CGA since 2003. The creation of the CGA-GDC was a clear demonstration of the CGA's commitment to transformation and inclusive development, ensuring that all citrus producers in the country, including black citrus growers, are actively supported and included in the industry's growth.

That is why the CGA continues to lead transformation efforts within the citrus sector, making a meaningful contribution to the broader transformation of South African agriculture. Beyond simply creating the CGA-GDC, the CGA also allocated resources to ensure its effective operation. It continues to support the GDC's initiatives and provides strategic guidance through its advisory committee, the Citrus Grower Development Chamber (CGDC). This committee plays a critical role in ensuring that transformation is not just discussed in boardrooms but is implemented practically, with both financial backing and human capacity.

It gives me great pleasure to share with you the success stories, achievements, and lessons learned along our journey. Agriculture is a complex and essential system that depends on several key elements – land, water, capital, and skills. For this reason, achieving our goals requires collaboration and mutual support among all stakeholders. Ultimately, our goal is to establish

productive and sustainable farms that help ensure every South African has access to three meals a day.

During the year under review, several initiatives were implemented. These brought a mix of successes, challenges, and valuable lessons. Below is a highlight of some of these initiatives.

Enterprise Development Fund (EDF)

The EDF is a fully grant-funded internal instrument offered by the CGA-GDC to existing, majority black-owned citrus enterprises. This fund aligns with the company's mission: to facilitate and support the establishment, growth, and empowerment of profitable and sustainable black citrus growers, ultimately creating wealth at the farm level. The EDF is designed to assist these growers with immediate, catalytic needs that enable them to produce both quality and quantity in their citrus operations. It specifically targets existing citrus businesses and addresses their priority operational requirements.

Each year, the CGDC is consulted to help identify and prioritise the most pressing needs, which then inform the annual call for applications. Once the call is announced, growers are invited to submit applications. This is followed by a thorough process of vetting, allocation, disbursement, delivery of goods or services, and final verification. During the year under review, the CGA-GDC supported 69 farms and spent a total of R37.6 million across six

Expenditure Per Province		
Province	Enterprises	Expenditure
Eastern Cape	32	R20,526,600.00
Limpopo	16	R7,079,138.07
KwaZulu-Natal	4	R4,466,788.50
Mpumalanga	6	R2,853,733.89
Western Cape	5	R1,448,824.31
North West	6	R953,455.94
Total	69	R37,328,540.72

provinces on production inputs, establishment costs, citrus trees, equipment and vehicles, electricity, fuel, infrastructure, integrated pest management, transport, water systems, irrigation materials, and packing costs.

Collaboration with the Eastern Cape Development Corporation

The CGA-GDC entered into a partnership with the Eastern Cape Development Corporation (ECDC) to implement agro-processing and route-to-market support initiatives, with a focus on developing the citrus industry value chain among black citrus producers in the Eastern Cape province. Below are some of the major achievements of this collaboration:

Market access readiness

Support was provided to farms to assist with the costs of obtaining key accreditations:

- GLOBALG.A.P. – 11 entities
- SIZA Ethical Standard – 3 entities
- SIZA Environmental Standard – 9 entities
- TESCO – 1 entity

Additionally, three farms underwent readiness assessments for audit compliance but were found to be non-compliant. The primary reason cited was a lack of sufficient resources to meet audit requirements.

Feasibility studies

Two feasibility reports were completed, namely: (1) a juicing plant in the Amathole region; and (2) a new packing facility in the Gamtoos region.

Juicing plant needs analysis:

- Current volumes produced by the CGA-GDC growers in the Kat River Valley and Kieskamma are too low for the project to be viable
- According to the financial model, a minimum of 15 tonnes

per annum is required for viability, about 400% more than the current output

Grower feedback received:

Growers in the Kat River Valley and Kieskamma accepted the report and agreed that a juicing plant would only become viable if commercial farms were brought into the partnership.

Key findings on the packing facilities report:

- There is an urgent need for increased packing capacity in the Gamtoos Valley
- Kat River Valley has sufficient capacity, although some growers have expressed interest in a majority black-owned packhouse
- The Sundays River Valley has adequate existing capacity
- Kieskamma Valley has surplus capacity, but the current packhouse requires repairs to be completely functional

Grower feedback received:

Growers in the Gamtoos Valley accepted the report and expressed a willingness to explore collective participation in the new packhouse. The business plan will rely on full participation from all involved growers.

Production and Technical Support

Extension services

The CGA-GDC extension services play a critical role in bringing information on new technologies to black citrus growers, which they can adopt to increase productivity, income, and standards of living.

Information days

These annual events are held in the major citrus-producing provinces. During the year under review, information days were hosted in the Eastern Cape, Limpopo, KwaZulu-Natal, Mpumalanga, and the North West. The Information Days serve as a platform for all key stakeholders involved in the development of black citrus growers to share opportunities, insights, and support.

Attendees typically include government departments, financial institutions, suppliers, and extension officers who play a critical role in the industry. These information days were also well attended, with notable participation across all regions, including the North West event, which was addressed by the MEC for Agriculture.

One-on-one farmers support

One-on-one farmer support offers personalised assistance to individual growers, primarily through mentorship, targeted training, and practical guidance. This direct engagement enables a better understanding of each farmer's unique challenges and helps to improve their agricultural practices toward achieving sustainable commercial production.

Key components of the one-on-one support approach include:

- Extension officers providing tailored guidance and **mentorship**, sharing technical knowledge and best practices.
- Assessing each farmer's specific **challenges**, such as limited access to finance, markets, or technology.
- Developing a customised **action plan** in collaboration with the farmer to address these challenges and enhance operations.
- Conducting regular follow-ups to **monitor** progress, offer continued support, and adapt plans as needed.
- Facilitating **access to** relevant **resources**, including information, training, and tools necessary for success.
- Building strong, trust-based **relationships** between

farmers and extension officers to encourage open communication and effective problem-solving.

Citrus study groups

The purpose of the citrus study groups is to gain knowledge and share best practices among group members. By hosting the group at a different venue each month, growers can learn from the different orchards and techniques that their fellow growers are using.

During the year under review, 11 citrus study groups were active across all citrus-growing regions (3 in the Eastern Cape, 4 in Limpopo, 2 in KwaZulu-Natal, 1 in the North West, and 1 in Mpumalanga). Each group held four sessions, resulting in a total of 44 citrus study groups during the year. These study groups were well attended.

Citrus Improvement Scheme (CIS) workshops

CRI and DALRRD, with the assistance of the CGA-GDC, invited all nursery premises representatives, relevant producers of citrus propagating material, and citrus producers to participate in workshops to submit any objections or representations concerning the establishment of the CIS compulsory scheme. Black citrus growers responded positively and attended most of the workshops held in their regions. These workshops also raised awareness among growers interested in starting their own nurseries.

CIS public consultation workshops were held across the citrus-growing regions. The final workshop was a national session

Citrus study group attendance

Quarter	Sekhukhune	Vhembe	Mopani	Waterberg	SRV	KAT River	Patensie	Nkweleni	Weenen	Mpumalanga	Brits
1	0	27	21	0	23	21	7	0	0	42	14
2	49	0	32	0	0	0	0	0	0	24	17
3	25	26	42	10	23	0	5	15	6	36	17
4	26	26	17	6	21	24	5	15	0	24	17

conducted online during the first quarter, on 24 April 2024.

AgrigateOne

The goal of AgrigateOne is to provide CGA-GDC growers with traceability and supply chain insights. This initial phase is focused on testing and preparing for future expansion. At present, AgrigateOne is in the onboarding phase, which primarily involves finalising packhouse and cold store integrations, as well as securing permission letters from participating growers. Once the first batch of farmers has been successfully onboarded, a CGA-GDC profile will be created, granting these growers access to the AgrigateOne platform.

The AgrigateOne traceability platform offers several benefits for both CGA-GDC and the growers.

Through the *OneFlow (Trace & Plan)* service, the system allows for the monitoring and tracking of pallets from the packhouse through the entire supply chain, up to the point where containers are unloaded at their destination. For CGA-GDC, this service provides a scalable, multi-tenant cloud solution that aggregates data across four key services for GDC growers. It enables the tracking of production and market performance both individually and collectively and supports measuring progress towards Vision 260 goals (e.g., the percentage of black farmers entering export, local, and juicing markets, with an initial target of 50 growers in 2025). For growers, the platform integrates data across different systems, enabling effective track-and-trace functionality. It also supports automated data access and workflow processes to improve decision-making, as well as pre- and in-season planning, allocation, and order management.

To support this, two data permission processes are in place. The first is integration permission, where growers are asked to sign letters granting AgrigateOne access to data from their packhouses and cold stores. The second is data sharing permission, which allows the platform to share data with CGA-GDC, including both static reports and real-time platform access. All data is protected

by controlled user access permissions, and AgrigateOne complies fully with data protection regulations such as Protection of Personal Information Act (POPI Act) and General Data Protection Regulation (GDPR).

Another service, *OneFlow (Transact)*, automatically pulls pallet data into the system, facilitating automatic allocation to tax invoices and credit notes based on the grower's preferences. This enables the generation of standard business intelligence reporting and supports a financing workflow covering invoicing, account sales processing, payments, and reporting.

AgrigateOne also includes *OneSight (ESG Reporting)*, which integrates data such as production inputs, energy usage, and labour conditions to support sustainability reporting. This feature is increasingly important for meeting the demands of export markets. It empowers businesses with customised market analytics and sustainability compliance tools, enabling them to meet environmental targets, track performance, and gain essential business insights.

Lastly, the *OneSight (Data-Driven Market Insights)* service offers access to both local and export market data from South Africa, Peru, and Chile. This equips growers with the information they need to make informed, in-season marketing decisions, helping to maximise profitability.

Viability assessment of a selected group of GDC-supported black citrus businesses

The CGA-GDC partnered with the Bureau for Food and Agricultural Policy (BFAP) to conduct a viability assessment of majority black-owned enterprises. In the first phase, a sample of 38 entities, referred to below as the Due Diligence Study Group (DDSG), was selected for evaluation. The following high-level key findings emerged from the assessment:

- The DDSG has a lower percentage of Full Bearing Equivalent hectares (FBE ha) compared to the Regionally Representative Industry Norm (RRIN). This is largely due to a higher

proportion of new plantings within the DDSG. In the model, yields are also assumed to decline slightly for trees older than 30 years, which applies to both the RRIN and the DDSG.

- A comparison of FBE yields revealed that DDSG performance is significantly lower than the RRIN, with the exception of lemons. For lemons, DDSG yields (tonnes per hectare) exceeded those of the RRIN. This variance in yield is the primary driver behind the lower profitability observed in the financial analysis.
- Operational Profitability (measured as EBITDA) is low across the DDSG, driven more by low revenue (volume x price) than by high costs. Over 75% of DDSG entities rely on grants or other forms of supplementary income (constituting approximately 12% of total revenue) to support operational viability. Where interest data was available, it indicated very high financing costs, further undermining long-term sustainability.
- Total operating costs per FBE hectare for the DDSG are generally comparable to the RRIN. In many cases, direct input costs (R/FBE ha) are actually lower, due to limited cash flow, which restricts optimal input application. However, even when inputs are applied, they often do not result in sufficient productivity to generate competitive or sustainable revenue. Labour costs (R/FBE ha), on average, are higher in the DDSG than in the industry norm. This suggests a less efficient use of labour to generate yield and revenue, partly due to limited on-farm pre-sorting for processing.
- The DDSG exports a lower percentage of harvested volume than the industry norm, reducing total revenue per harvest. While this is partially attributable to production practices, as well as quality and certification requirements for exports, in some cases, it is also influenced by contractual terms and partnership practices. Although insight into local versus processed volumes is limited, the available data indicates that the DDSG sends a higher

percentage to the local market than for processing. This could be favourable, but only if it results in improved farm gate returns (i.e., price after subtracting marketing cost).

Production performance

The table below shows the export volumes from majority black-owned enterprises across various growing regions over the past two seasons:

CGA Regions	2023	2024
S.R Valley	1,389,415	1,907,484
Orange River (Northern Cape)	1,172,798	1,056,123
E.Cape Midlands	1,078,224	991,158
Hoedspruit	950,636	671,745
W. Cape	630,086	568,999
Patensie	182,782	358,985
VaalHarts (North West)	156,234	208,340
Letsitele	133,300	100,246
Nelspruit	130,568	98,513
Limpopo River	99,277	68,483
Boland	68,686	46,274
Nkwalini (KZN)	31,148	40,047
Senwes	20,479	19,067
Total	6,043,633	6,135,464

Below is the performance according to the different varieties:

CGA Regions	2023	2024
Grapefruit	1,074,497	961,957
Lemons	1,683,191	2,048,403
Navels	771,936	810,661
Soft Citrus	1,243,426	1,341,992
Valencia	1,270,583	972,451
Total	6,043,633	6,135,464

ECONOMIC TRANSFORMATION OF BLACK CITRUS GROWERS (JOBS FUND)

Robert Miller

The Economic Transformation of Black Citrus Growers (ETBCG) Project completed its fifth year on 31 March 2025.

A total of 14 projects valued at R294 million were funded through this programme.

The funds were used for new plantings, working capital, packhouse generators, power grid and solar installations, orchard maintenance, and packhouse repairs.

The project has now completed the disbursement phase and entered the Monitoring and Evaluation (M&E) phase, which will last six years.

A full M&E audit and analysis of the project will be carried out by the Bureau for Food and Agricultural Policy (BFAP).

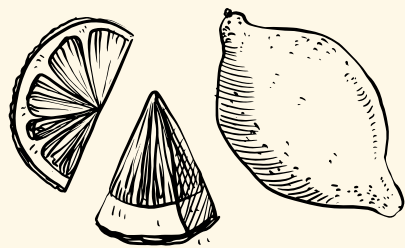
The M&E phase and audit will allow the Jobs Fund and other contributors to fully assess the impact the project has had on the participating entities and communities. It will also enable the project to meet the various targets set at project initiation and assess how the programme contributed to sustainable enterprises.

The following sets out what has been achieved up to 31 March 2025:

Indicator	Target	Achieved
New permanent jobs	316	112
New seasonal jobs	1,713	1,430
Short-term jobs created	7	22
Beneficiaries trained	1,005	979
Hectares planted	746	498

Learnings and developments from the project

- Blended financing models can work. Banks, government departments, and other funders are very open to this type of blended financing model.
- Blended financing models are appropriate when a business is mature. Many farms are not yet ready for this type of funding, so other ways of assisting them need to be found. The CGA-GDC Enterprise Development Funding (EDF) can play a significant role here.
- A general review of the ETBCG Project has been carried out. A document is being developed to approach banks and other organisations on how to further assist emerging citrus growers with access to finance.
- The project identified additional black/emerging farms that need assistance, as well as what they need to develop and progress.
- Joint venture and partnership projects were the most successful in achieving the main goal of the programme, namely job creation.
- Overall, the project was positively received. Additionally, there was a noted increase in the involvement of larger commercial farmers in transformation initiatives.
- Promotional videos on two of the project beneficiaries, one in the Eastern Cape and one in Limpopo, have been completed. These highlight the impact the project has had on the ground. The videos are available on the CGA website.



CITRUS GROWER DEVELOPMENT CHAMBER (CGDC)

Sive Silo

The CGA has been at the forefront of promoting inclusive growth and transformation within the citrus industry. Central to this mission is the Citrus Growers Development Chamber (CGDC), which was established as a platform to represent and support emerging black citrus growers.

The CGDC aims to ensure that black citrus growers have a unified voice within the citrus industry and are actively included in decision-making processes and development initiatives. It plays a pivotal role in advocating for the needs of emerging growers, facilitating access to industry resources, and promoting equitable participation in the citrus value chain. Through its efforts, the CGDC contributes to the broader transformation agenda by helping to build a more inclusive and sustainable citrus sector in South Africa.

Throughout the year, the CGDC has held regular meetings to deliberate on a range of critical issues. These discussions not only highlight region-specific challenges but also inform national-level strategies for grower development.

The following meetings were held during the year under review:

Meeting Date	Body	Format
2024/06/18	CGDC	In-person
2024/10/10	CGDC executive committee	In-person
2024/10/10	CGDC	In-person
2025/03/10	CGDC executive committee	In-person
2025/03/10	CGDC	In-person

The CGDC executive committee is elected by the CGDC members. During the year under review, the following CGDC members and

company representatives served on the executive committee:

- Mziwoxolo Makhanya (chairperson)
- Ntamiseni Mankhili (vice-chairperson)
- Bennet Malungane
- Lawrence Mgadle
- Pheladi Tlomatsane
- Lukhanyo Nkombisa (general manager, CGA-GDC, ex officio)
- Paul Hardman (COO, CGA, ex officio)
- Jacomien de Klerk (general manager, Citrus Academy, ex officio)

The Citrus Academy is contracted by the CGA to coordinate the activities of the CGDC and act as member liaison.

During the year under review, the following people served on the CGDC.

Name	Region
Clifford Dyonase	Eastern Cape Midlands
Lawrence Mgadle	Eastern Cape Midlands
Siseko Maqoma	Eastern Cape Midlands
Khaya Brian Katoo	Patensie
Simphiwe Yawa	Sundays River Valley
Steri Ndyenga	Sundays River Valley
Wayne Mansfield	Boland
Ntamiseni Thompson Mankhili	Limpopo River
Bennet Sdumo Malungane	Letsitele
Octavias Masalesa	Letsitele
Pheladi Tlomatsane	Letsitele
Olivia Dikeledi Selowe	Nelspruit
Hlulekile Joyce Phonela	Nelspruit
Simon Tiisang Selowe	Nelspruit
Petros Eric Shiba	Onderberg
Mziwoxolo Makhanya	KwaZulu-Natal
Louisa Maloka-Mogotsi	Senwes

RBX GROUP

Rob Elfick



**River
Bioscience**



The RBX Group has had another significant season of strong growth and delivery on commitments. A large part of this can be attributed to the continued investment we have made in our staff to technically support our products and programmes. This is not just having people on the ground in the sales areas to build and maintain relationships and trust with agents and growers, but also technical experts in the production facilities and administration departments. These dedicated professionals ensure our offerings are not only of the highest quality, but that this can also be easily tracked and displayed when needed while all along being supported by a world class administration and logistics team. This has seen us continue to move our mandate of offering wholistic, accurate and quality assured sustainable programmes for the management of key pests forward to growers.

Macrobial market impact

The RBX growth is not just about chasing revenue, it is about reinvesting in the future and expanding our impact for the long-term. A great example of our commitment to offering Integrated Pest Management (IPM) programmes to the agricultural industry is how we have expanded into the Trichogramma market in South Africa over the last few seasons.

We strategically positioned our offering of this beneficial insect in the market to allow for increased use and accessibility for growers. This has empowered more producers to implement robust integrated pest management approaches, aligning with our mission

to supply accurate, cost-effective, and sustainable IPM options.

A further differential in this offering of Trichogramma to the market is that the product is now registered with Act 36. River Bioscience's commitment to quality management and communication through the supply chain, via our ever-increasing technical customer service department, allows agents and growers to develop their understanding, trust and confidence in this type of technology.

ISO9001 accreditation

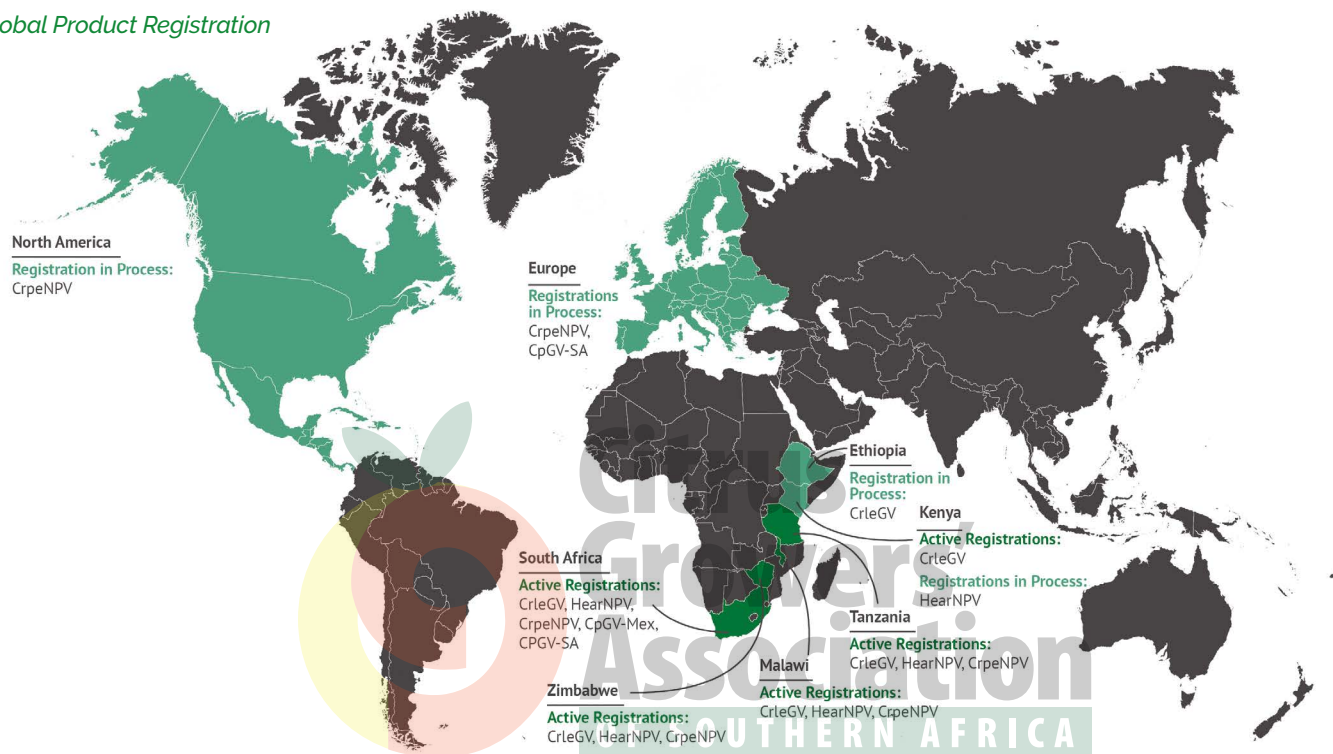
Obtaining ISO9001 accreditation for our Addo facility further demonstrates our commitment to continuous improvement, customer satisfaction, and reliable processes that enhance trust with clients and stakeholders. It also helps streamline workflows, reduce errors and improve overall performance, thereby positioning our facility as a leader in quality-driven innovation in the sector.

Sterile Insect Technique (SIT) Programme for False Codling Moth (FCM)

This past season, the Western Cape Department of Agriculture (WCDoA) made another generous contribution to making the SIT FCM programme more affordable to growers. Their full donation was once again used to directly reduce the cost of the programme for all producers who use SIT in the Western Cape no matter what crop they grow.

SIT, along with sanitation in the orchards, is seen as a significant base for an IPM approach to managing FCM. The big challenge

Global Product Registration



is to make the programme affordable enough to make it economically viable for all growers in an area to join the SIT programme. Partnerships like the one XSIT has with the WCDaA are critical to making this a reality and we look forward to working with this dynamic team into the future.

Expanding our African footprint

River Bioscience (RB), in partnership with Dudutech and Bioline Africa, is advancing sustainable crop protection solutions to support growers in Southern and East Africa. The collaboration focuses on developing and registering effective pest control products for various crops, meeting the region's need for eco-friendly agricultural practices. These efforts have thus far focused on Zimbabwe, Zambia, Malawi, Tanzania, Kenya, and Ethiopia.

Through strategic alliances in each country and regional efforts,

River Bioscience is committed to helping African growers adopt environmentally responsible pest management practices, ensuring healthier crops and reduced environmental impact into the future.

Aligning efforts with CGA group companies

The CGA-GDC and RB signed an agreement in 2022, with the aim to continually support and improve development grower sustainability. As a result, citrus growers in the Kat River Valley were given the opportunity to actively participate in an IPM programme geared towards FCM management via a holistic FCM management programme that included the use of Trichogrammatoidea cryptophlebiae (parasitoid wasps) and CryptoMax (virus).

Through sound technical support, the Eastern Cape RB and GDC extension team successfully serviced these FCM susceptible hectares over the last two seasons. Further value was added in the



form of in-field support, ensuring correct product storage and stewardship, while continuous assessment of an established monitoring network took place throughout the seasons.

The programme aims to continue in the upcoming seasons and is forecasted to grow, building on the success of the past seasons



by servicing these additional hectares and potentially addressing other phytosanitary pests.

In other CGA group initiatives the RBX Group has offices for the CGA-GDC and the CGA Cultivar Company in their head office where they can use all facilities and infrastructure without the need to establish these for themselves. Our accounting and administration team also supports the Cultivar Company in back-office activities while our sales and marketing team lend their support to events like the CRI Symposium and by hosting the Pre-Summit Study Tour for the 2025 Citrus Summit in the Eastern Cape.

Being part of our communities

In the RBX Group our corporate culture, and the values that support this, are key in our endeavour to be an employer of choice. Our team also agreed that where possible this needed to go further than just our employees. With this in mind, the community initiatives of the RBX group have been focused on early childhood development, poverty relief, and emergency support over the last few years.

During multiple floods in Citrusdal we have partnered with the ACT Foundation, which was actively providing food and shelter to those affected by the disasters. We also support various pre-schools by addressing essential needs such as upgrading and repairing ablution facilities and supplying schools with necessary materials and food in both the Eastern Cape (EC) and Western Cape (WC) regions where our companies are active.

We also partner with the Hand-Up Foundation in the Eastern Cape. Their unwavering commitment to alleviating poverty and equipping individuals with the tools they need to earn a living is truly unmatched.

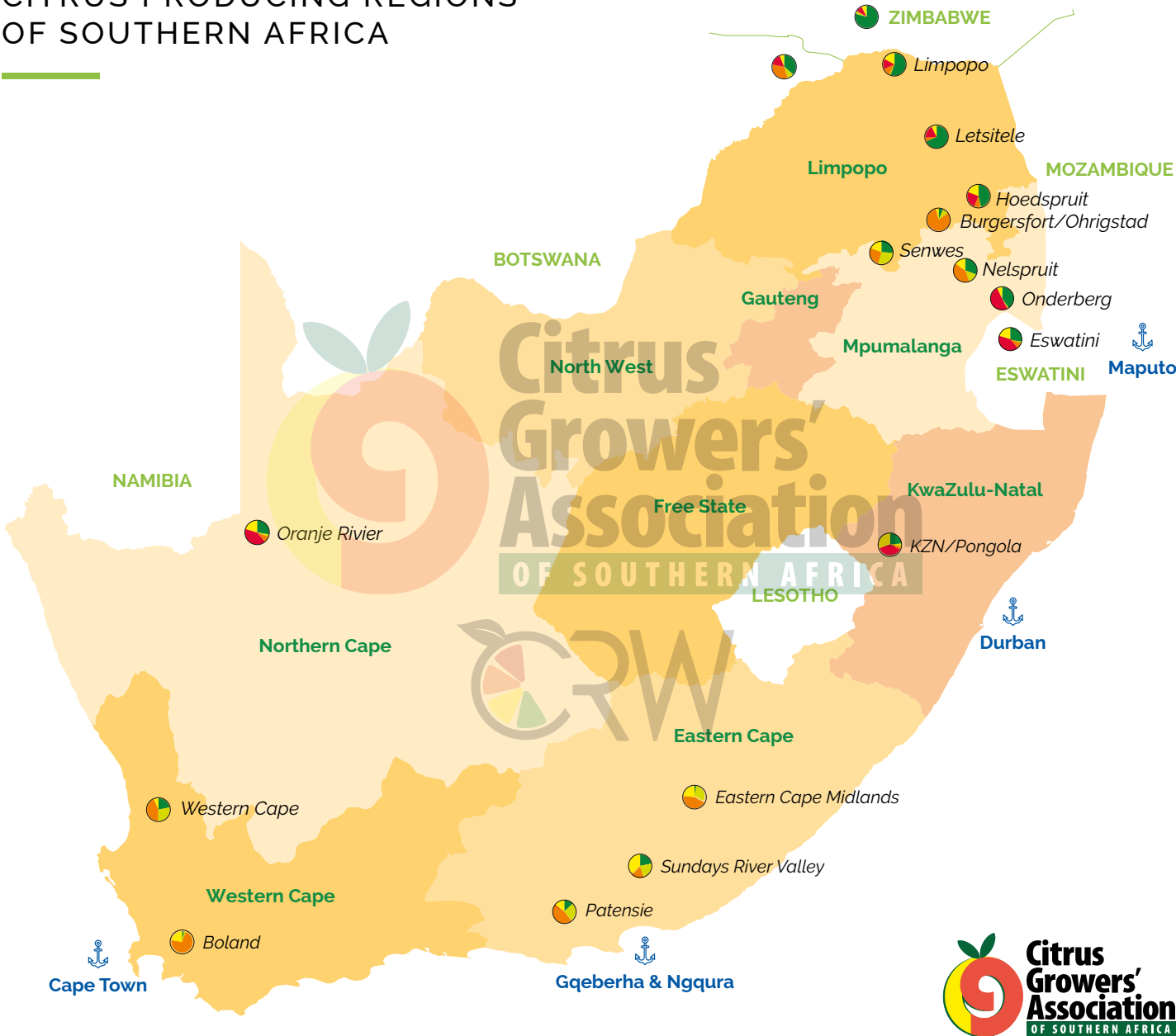
Future-proofing our team

As the RBX team looks ahead, our focus remains on sustainable growth and ensuring that every investment we make supports our long-term vision. With a strengthened team, an expanding portfolio, and a clear strategic direction, River Bioscience and X Sterile Insect Technique are well-positioned to continue making a lasting impact for southern African growers. Thank you to every team member who contributes to our success - your dedication and expertise are what drives us forward!

Condolences

During the year under review we lost two colleagues - our board member Eric Nohamba and the Citrusdal office administrator Kleintjie Swart. We will ever remember them for their contribution to the RBX team and extend our condolences to their family and friends during this difficult time.

CITRUS PRODUCING REGIONS OF SOUTHERN AFRICA



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ABRIDGED FINANCIAL STATEMENTS

	Actual 2023/24	Budget 2024/25	Actual 2024/25	Budget 2025/26
Income	279,003,718.00	297,488,000.00	282,934,424.00	328,492,000.00
RSA Levy	270,305,232.00	292,486,000.00	268,778,616.00	300,300,000.00
Eswatini / Zimbabwe / Botswana Levy	3,891,951.00	2,717,000.00	4,357,109.00	4,257,000.00
Draw From Reserves - CBS Provision				20,000,000.00
Property Income	267,105.00	285,000.00	271,413.00	285,000.00
Interest	4,373,778.00	2,000,000.00	5,136,911.00	3,500,000.00
Dividends Received - River Bioscience / XSIT		0.00		
Citrus Summit Income			4,237,766.00	
Other Income	165,652.00		152,609.00	150,000.00
Expenditure	255,521,148.12	287,418,330.00	294,690,287.00	319,928,742.00
Staff Costs	7,923,525.00	7,754,346.00	8,751,504.00	8,110,527.00
Travel & Accommodation	842,204.00	313,000.00	359,071.00	375,000.00
Office - Rent, Rates & Equipment	58,233.00	357,000.00	291,918.00	486,037.00
Office Expenses	896,793.00	621,000.00	798,822.00	765,000.00
Board Expenses	1,068,998.00	1,301,000.00	1,280,125.00	1,351,104.00
Services (Accounting, Legal & Insurance)	795,019.00	2,184,000.00	960,381.00	1,110,540.00
Subscriptions	713,300.00	836,000.00	628,349.00	1,255,659.00
Communication	1,364,721.00	1,120,000.00	1,491,379.00	1,396,000.00
Market Access	4,877,583.00	9,606,000.00	13,657,016.00	12,156,292.00
Market Access - CBS / FCM	4,630,463.00	8,280,000.00	7,912,936.00	24,368,800.00
Fruit South Africa	942,347.00	1,200,000.00	1,265,689.00	1,272,000.00
Research Programmes - Citrus Research International	164,994,934.00	176,630,984.00	176,630,984.00	188,228,843.00
Research: CRT Bond	3,200,000.00	3,200,000.00	3,200,000.00	
Transformation - CGA incl. ETBCG Programme	4,836,889.00	5,110,000.00	5,026,918.00	3,923,900.00
Transformation - CGA Grower Development Company	43,991,382.00	50,000,000.00	48,644,329.00	52,500,000.00
Transformation - Citrus Academy	9,635,346.00	10,000,000.00	10,000,000.00	10,500,000.00
Depreciation	77,845.00	120,000.00	105,613.00	120,000.00
Information	2,038,749.00	2,470,000.00	3,398,513.00	3,153,790.00
Provision for doubtful debts	-4,487,895.88		478,030.00	
Leave Pay Provision	235,242.00		-2,125.00	
Impairment of Loan - CGA Cultivar Company (Pty) Ltd	2,500,000.00		1,900,000.00	
Infrastructure & Logistics	2,325,792.00	3,970,000.00	2,715,589.00	5,251,000.00
Shipping	737,037.00	1,000,000.00		150,000.00
Market Development	1,322,642.00	1,195,000.00	957,480.00	3,404,250.00
Citrus Summit Expenses			4,237,766.00	
General		150,000.00		50,000.00
NET SURPLUS / (DEFICIT) FOR YEAR	23,482,569.88	10,069,670.00	-11,755,863.00	8,563,258.00



Citrus Growers' Association

OF SOUTHERN AFRICA



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