2026

Citrus Growers' Association
OF SOUTHERN AFRICA

ANNUAL REPORT

Citrus Growers' Association OF SOUTHERN AFRICA

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

There is an old saying in the citrus industry that there is no such thing as a "normal citrus year." If 2025 has taught us anything, it is that this remains gloriously, stubbornly true. However, what 2025 has given us is something we have been working towards for many years — and something worth pausing to appreciate before we charge headlong into the next challenge.

A milestone worth celebrating

In 2025, the Citrus Growers' Association of Southern Africa crossed a threshold that once felt more like a dream than a target — 200 million cartons exported. Let that number sink in for a moment.

This is not simply a statistic for a boardroom presentation. It is a testament to the growers, packhouse workers, logistics teams, and industry bodies who have collectively refused to accept mediocrity as the standard. It is the result of years of deliberate investment, disciplined growth, and the kind of long-term thinking that does not always get the recognition it deserves.

To every single person who played a role in reaching this milestone — this achievement belongs to you as much as anyone else. Well done. Now back to work.

Looking ahead — the road to 210 million

With 200 million cartons behind us, our sights are firmly set on approximately 210 million cartons in 2026. But beyond the cartons themselves, I want to tell the story that is not always told loudly enough — the human story behind these numbers.

For every additional million cartons we export, we can create roughly 1,000 jobs. Each one of those jobs represents an income earner in a rural community, supporting, on average, six dependents. That means every million cartons translate into approximately 7,000 lives being directly and meaningfully impacted — in the small towns, farming communities, and rural households where economic opportunity does not arrive easily or often.

The step from 200 million to 210 million cartons is not just a 5% increase in volume. It represents the potential for 10,000 new jobs and 70,000 people in rural South Africa gaining greater food security, better access to education, and a more dignified quality of life. If that does not motivate you to get out of bed in the morning, I am not sure what will.

Vision 260 remains our aspiration, and we are walking towards it — one carton, one job, and one family at a time.

Navigating a challenging global landscape

It would not be a chairman's report without a healthy dose of reality, and 2026 obliges us generously in that department.

The ongoing Middle East crisis continues to create significant uncertainty. We export 19% of our citrus to that market, and it remains under varying degrees of pressure. This is not a number we can wish away or simply absorb without strategic response. Add to this the volatility of global oil prices — which finds its way into every refrigerated container, every vessel, and every kilometer of the cold chain — as well as an exchange rate that has been testing our patience and our calculators in equal measure, and the picture demands our sharpest focus.

But I want our growers, our partners, and our industry to remember that we have been here before. Not in identical circumstances, but in the fundamental truth that this industry has never operated in calm waters. We did not build 200 million cartons in fair weather alone.

Our business model is our competitive advantage

When the external environment turns hostile, we return to what we know. And what we know is formidable. Our business model rests on three pillars that, together, make the Citrus Growers' Association of Southern Africa not merely a participant in global citrus markets, but a preferred and indispensable partner.

First, our economies of scale. The sheer volume and infrastructure we have built allow us to absorb pressures that would cripple smaller operations, and to compete on cost and efficiency in ways that are difficult to replicate.

Second, our superior quality. South African citrus does not simply fill a gap on a supermarket shelf — it earns its place there. Our fruit travels far, and it arrives in excellent condition. That reputation has been built over decades, and it remains one of our most valuable assets.

Third — and this is perhaps our most underappreciated strategic strength — is our role in supporting Northern Hemisphere producers to deliver a year-round supply of citrus to global retailers and consumers. We do not compete with the Northern Hemisphere; we complement it. By supplying markets seamlessly during their off-season, we have made ourselves not just useful, but essential to the supply chains of the world's major retail groups. That is a relationship worth protecting, nurturing, and growing.

In responding to currency and oil price challenges, our approach must remain what it has always been — medium- to long-term thinking, sound risk management, and the discipline to avoid making permanent decisions based on what may prove to be temporary turbulence. The growers who have thrived in this industry are not those who reacted to every storm, but those who built structures strong enough to weather them.

Gratitude

None of what we have achieved is possible without the remarkable people who make up this industry. To the CGA staff: your dedication, expertise, and passion for this sector are the driving force behind everything we do. To my fellow board members, the executive team, and my vice-chairs: your counsel and commitment make the privilege of leading this organisation one I do not take lightly. To our growers: you are the reason 200 million cartons is a reality and not a dream. And you are the reason 210 million is not a question of if, but when.

In closing

The citrus industry of Southern Africa stands at a remarkable intersection — celebrating genuine achievement while facing genuine challenges. That, perhaps, is exactly where an industry of our character belongs.

We have the scale. We have the quality. We have the partnerships. And we have the people.

Somewhere out there, that mythical "normal citrus year" is still waiting to make its appearance. In the meantime, we have 210 million cartons to chase — and 70,000 more reasons than ever before to make sure we get there.

CEO'S REPORT

Dr Boitshoko Ntshabele

The 2025 season saw citrus exports grow by a significant 22% compared to the previous year. A total of 203,9 million 15kg cartons were exported to over 120 destinations. This came on the back of fruit that was diverted to juicing in 2024 returning to the export market, new plantings coming into production, and overall good growing conditions.

What was more significant was that, despite the remarkable rise in export volumes, logistics and ports held up well — a sound indication that a turnaround is taking place at South African ports.

The export season also began with the U.S. administration imposing what was referred to as "Liberation Day" tariffs on several of its trading partners, ostensibly to recalibrate and balance trade relationships. South Africa faced a 30% reciprocal tariff, which was immediately reduced to 10%, with implementation of the full 30% delayed to August 2025. Exports from the Northern and Western Cape were affected; however, shipments were brought forward, with most leaving before the August deadline. An exemption for oranges was introduced in November 2025, and the U.S. Supreme Court ruled in early 2026 that these tariffs were illegal, resulting in the introduction of a new 10% tariff as of February 2026.

Market access and market development thus became the focus as these pressures reverberated across all other territories, with third countries adopting a more restrictive approach to trade. A market initiative in India has shown some potential, and increased focus in this area could yield positive returns in the future. The growth trajectory that we are on as the CGA also highlights the need to expand in all markets, and thus the importance of taking lessons from India and applying them in other markets as we deepen citrus demand and consumption.

A refresh of Vision 260 led to the development of the following strategic initiatives to sharpen focus and continue supporting our growth trajectory:

- Deepen market and consumer intelligence;
- Elevate industry standards and policy influence;
- Optimise market access and supply chain performance;
- Strengthen ecosystem connectivity and collaboration; and
- Drive growth and transformation through insight and innovation.

2025 also saw the resolution of the Transnet PSP impasse, with ICTSI appointed at Durban Pier 2, and their takeover during January 2026. We look forward to working with them to improve port performance to world-class standards, as most of our fruit from the north is exported through this port.

The year was also my first as CEO of the CGA, and I wish to express my thanks to my predecessor, Justin Chadwick, and the CGA Group staff for what, by all accounts, was a smooth transition. I also thank the CGA board for their leadership throughout the year. Our quest for new markets and our responses to changes in global trade conditions are undertaken in collaboration with government and other industry stakeholders. We are grateful for your support, and we look forward to working with all of you as we deepen existing markets and open new ones for our citrus exports.

The year also had a sad note, as we had to bid farewell to CGA's Market Access Envoy, Deon Joubert. May he rest in peace. Deon served the citrus industry with distinction and will be sorely missed.

Vision 260

ARE WE ON TRACK TO HIT 2027'S TARGETS?

Vision 260 sets a target to boost exports to 260 million 15kg cartons (about 3,9 million tonnes) by 2036. Tracking is shown against a midway target of 2,8 million tonnes by 2027.

The Vision 260 model excludes grapefruit, and the set targets are for oranges, lemons, and mandarins.

Source:
Agrihub Historical Data & CGA Crop Projection Model

These figures reflect only exports through seaports

COO'S REPORT

Paul Hardman

CGA strategic objectives and team alignment

The strategic planning session held by the board in October 2025 not only confirmed the strategic focus areas for the CGA but also served as the catalyst for introducing an integrated internal approach to how the CGA operates. Using the Strategic Session Playbook as a foundation, the CGA team developed an action plan detailing the activities staff will focus on through to the end of 2026. The action plan aligns directly with the strategic focus areas, namely: Deep Market and Consumer Intelligence; Elevate Industry Standards and Policy Influence; Optimise Market Access and Supply Chain Performance; Strengthen Ecosystem Connectivity and Collaboration; and Drive Growth and Transformation through Insights and Innovation. It is further used to define Key Performance Areas (KPAs) for each portfolio. Improved alignment between day-to-day activities and the strategic goals is already evident. Since May 2025, a Management Committee (Manco) has been in place, with the primary objective of providing oversight of the implementation of the action plan. Members of the Manco include the CGA CEO, Dr Boitshoko Ntshabele; COO, Paul Hardman; Group Finance and Administration Manager, Robert Miller; and HR consultant, Andrea Jackson.

Staff changes

Considerable changes to the composition of the CGA team unfolded over the last twelve months. Dr Boitshoko Ntshabele completed his first full term of office as CEO. Precious Kunota resigned at the end of May 2025 when her family decided to emigrate, and Hesti Botha resigned in autumn to pursue other interests. Both assisted beyond their resignation dates to ensure that services to growers were not disrupted. Albert Coetzee stepped in to oversee the information portfolio, which has since been restructured as the Business Intelligence (BI) portfolio under his leadership. Sameera Ebrahim joined the BI team as a Data Analyst on 1 July 2025.

The sudden loss of Deon Joubert in November 2025, was a major blow to the CGA, especially to the Market Access team, which was finding its footing under a new configuration. Deon was due to retire within two years and was maximising that time to develop the Market Access Liaisons (MALs), Jana Janse van Rensburg and Amy Grundling. Following Deon's unexpected passing, consultants in key markets already contracted to the CGA were asked to play a supporting role to the MALs and to be active in their respective countries, while the development of the MALs will be accelerated under the guidance of the CEO. The MALs have performed well thus far.

The CGA team now works from across the country. The breakdown is as follows:

- **Durban:** Paul Hardman, Tanya Ungerer, Mitchell Brooke, Robert Miller, Portia Magwaza, Faisal Asmal, and Rauff Dawood.
- **Pretoria:** Dr Boitshoko Ntshabele and Amy Grundling.
- **Western Cape:** Albert Coetzee, Paula Bester, Shelly Crosson, Sameera Ebrahim, and Jana Janse van Rensburg.

Andrea Jackson is contracted to provide human resources capacity and expertise and works from Gqeberha. Dave Watts and Samantha Dunlop are contracted to support logistics operations in Durban and the Eastern Cape, respectively.

CGA team culture

Due to staff being located across different sites, deliberate steps have been taken to ensure CGA teams remain connected. From an operational perspective, this takes place through weekly catch-up sessions and regular get-togethers. At the May 2025 event, Andrea Jackson led an exercise to identify the key values important to the organisation. The following emerged from these interactions and were adopted as the core values: *Integrity, Respect, Excellence, Humility, and Courage.* These values are now visible throughout the CGA offices and on screensavers, among other platforms. All CGA policies have also been reviewed and updated to align with best practice and revised labour law requirements, while reflecting these core values. This process of updating policies and reinforcing values in the workplace remains active and ongoing, given the dynamic environment in which the CGA operates.

System and infrastructure support

The decision was taken in June 2025 to migrate to Microsoft 365 to further support collaboration across teams. In addition to reducing the number of software vendors used by the CGA, this move also facilitated improved and more secure handling of data within the organisation and between data providers and consumers (e.g. PPECB and Transnet), while also providing access to the latest Office 365 tools. This supports the strategic goal of *"Strengthening Ecosystem Connectivity and Collaboration"*. The CGA also continued to work on the Customer Relationship Manager (CRM) tool, which replaced the previous communication tools (i.e. CGA app and CGA Comms Tool). At the same time, additional ways of reaching growers are being investigated to ensure that all growers remain informed. This is regarded as a priority for the coming year.

CGA roadshows 2026

CGA roadshows, another invaluable platform for engaging with growers, were conducted across the country during February and March 2026. The theme for the roadshows was *"V260: Gearing for Growth in Uncertain Times"*. Thank you to the growers who attended and provided valuable inputs. Appreciation is also extended to all contributors to these events, as well as those responsible for coordinating the logistics and ensuring their successful execution.

CGA Group alignment

Efforts to encourage and ensure alignment across the CGA Group were concentrated on a few key projects over the past year, most notably:

1. The execution of the CGA Transformation Strategy across the CGA Group of Companies; and
2. Understanding and addressing the threats and opportunities posed by Artificial Intelligence (AI).

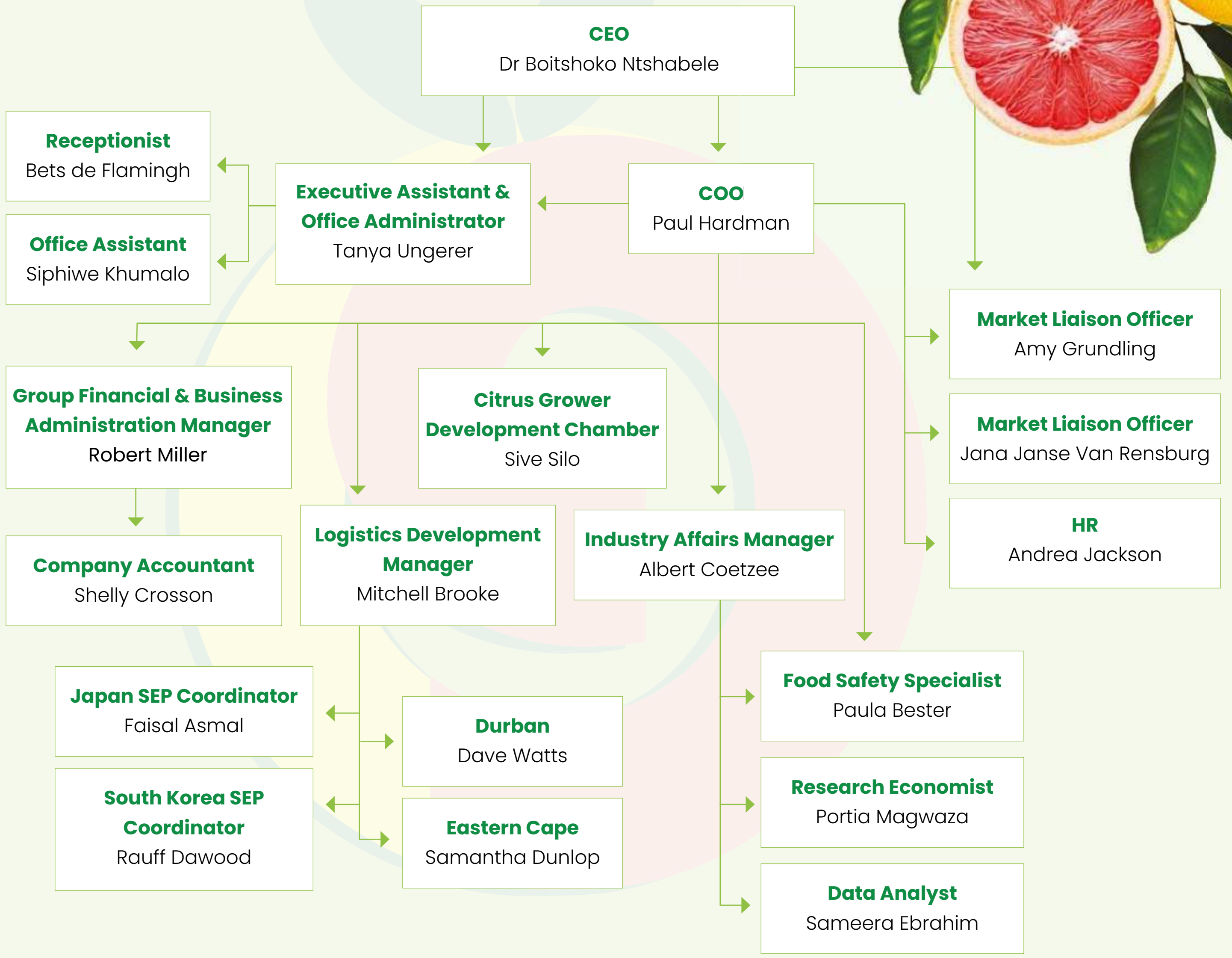
Regarding the latter, a guidance document titled Data Governance and Responsible AI-Use provides guardrails in an environment where AI tools are increasingly available and disruptive in the workplace. Representatives from each of the entities contribute to a focus group that helps to keep this document relevant in a rapidly evolving field.

CGA Transformation Strategy

The CGA provides oversight of the implementation of the CGA Transformation Strategy across the entire CGA Group of Companies. Since the adoption of the Strategy in February 2025, it has been encouraging to see how each entity has implemented internal changes and worked synergistically to support growers and stakeholders throughout the value chain. However, collaboration and implementation have been delayed due to the uncertainty created by the restructuring of the CGA Grower Development Company, initiated during the second half of 2025. This restructuring is itself a consequence of the rapidly evolving transformation landscape, which requires a new approach to supporting black growers. The CGA Grower Development Chamber also saw new leadership elected in September 2025. Across all these developments, the common objective has been to build on the strong foundations already laid by the dedicated teams, while acknowledging new realities. The efforts of board members and staff handling and managing these changes are greatly appreciated.

CGA ORGANISATIONAL STRUCTURE

as at 31 March 2026



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 each have one board representative. Every two years, regional board positions are opened for re-election, with growers nominating and electing their preferred representatives. In addition, two directors specifically represent black growers, ensuring inclusive representation at 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 access to competitive pricing and efficient production practices.

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

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, is subject to 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

26 August 2025
Held virtually via Zoom
Apologies were received from Andrew Muller.

15-16 October 2025 – Strategic planning session
Lemoenkloof Boutique Hotel, Paarl
Apologies were received from Piet Engelbrecht, Guy Whitaker, Jock Danckwerts, Andrew Muller, and Per Nøddeboe.

31 March – 1 April 2026
River Meadow Manor, Irene
Apologies were received from Diederik Fourie, Bennet Malungane, George Hall, Guy Whitaker, and Riaan van Zyl.

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 **26 August 2025**.

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
Riaan van Zyl	Orange River / Northern Cape
Mike Woodburn	KZN / Pongola
Paul Bristow	Zimbabwe
Per Nøddeboe	Eswatini
Phillip Dempsey	Patensie
Diederik Fourie	Burgersfort / Ohrigstad
Tommie Landman	Hoedspruit
Khaya Katoo	Emergent growers – southern regions
Bennet Malungane	Emergent growers – northern regions
Vacant	Government Relations Specialist
Rajen Govender	Chairman – Finance and Risk Review Committee

COMMUNICATION

Tanya Ungerer

From the Desk of the CEO

The CEO's weekly newsletter remains one of the CGA's most widely read and valued communication platforms. Published in both English and Afrikaans, the newsletter is compiled by the CGA CEO, Dr Boitshoko Ntshabele, and distributed every Friday. It reaches more than 6,000 recipients each week, including growers and a broad range of industry stakeholders. This concise one-page publication provides readers with timely updates on market trends, industry developments, and upcoming events. To subscribe, visit the CGA website at *www.cga.co.za*

Social Media

The CGA maintains an active presence across LinkedIn, Facebook, X (formerly Twitter), and Instagram, where regular updates on important developments within the citrus industry are shared. These platforms provide stakeholders with timely news, industry insights, and information on upcoming events, helping audiences stay informed and connected.

FOLLOW US ON SOCIAL MEDIA

- Citrus Growers Association of Southern Africa
- Citrus Growers Association of Southern Africa
- citrusgrowerssa
- citrusgrowerssa

CGA Members Register

The CGA is actively developing a comprehensive member register aimed at strengthening communication with citrus growers throughout Southern Africa. Citrus growers in South Africa, Zimbabwe, Eswatini, Mozambique, and Botswana are encouraged to submit their details to the CGA to ensure they receive relevant and timely industry updates. Registration can be completed through the Membership Application section on the CGA website.

CGA Website and CRM Tool

Scan to visit our website

At the beginning of 2025, the CGA launched an enhanced website with improved security, functionality, and user experience. The platform includes interactive dashboards that provide industry insights and serve as a central information resource for growers and stakeholders.

A new Customer Relationship Management (CRM) system was also introduced to strengthen communication, integrate internal platforms, and centralise information management.

Growers and stakeholders are encouraged to keep their contact details up to date. For assistance or to update your information, please contact *info@cga.co.za*.

CGA Briefings

During the year under review, the CGA hosted a series of briefings with key stakeholders across the citrus value chain. These engagements included meetings with major commercial banks – ABSA, FNB, Standard Bank, and Nedbank – as well as a range of industry partners. The briefings served to strengthen collaboration, foster stakeholder engagement, and facilitate the sharing of relevant industry insights.

Communication Committee

The CGA Communication Committee, consisting of Dr Boitshoko Ntshabele, Paul Hardman, Gerrit van der Merwe, Hannes de Waal, Jan-Louis Pretorius, and members of Resolve Communications – Paul Boughey, Loftus Marais, and Erin Dodo – met every second Friday to deliberate on communication and media-related matters. Resolve Communications provided support with written, television, and radio interviews, as well as the development of communication content, including articles and media statements. In addition, the team assisted with the formulation of the annual strategic communication plan, monthly social media planning, and stakeholder correspondence.

South African Fruit Journal (SAFJ)

The South African Fruit Journal (SAFJ) is published bi-monthly, with all registered CGA members receiving a complimentary copy. Shareholders of the publication include the CGA, Hortgro, South African Table Grape Industry (SATI), and the Fresh Produce Exporters' Forum (FPEF). SAFJ offers a broad range of content relevant to the fruit industry, including research development, technical information, market updates, skills development initiatives, and other industry-related articles. To access the digital edition, visit *www.safj.co.za*. For editorial enquiries, contact *editor@safj.co.za*, and for advertising opportunities, email *sales@safj.co.za*.

Roadshows

As is customary, the CGA hosted its biennial grower roadshows during February and March 2026, with two CGA teams travelling across all fourteen citrus-growing regions in South Africa, while also engaging with growers from Zimbabwe and Eswatini.

The primary focus of the roadshows was to provide growers with an update on Vision 260 and to unpack the five key strategic objectives identified during the Strategic Session held towards the end of 2025. These strategic priorities include deepening market and consumer intelligence; elevating industry standards and policy influence; optimising market access and supply chain performance; strengthening ecosystem connectivity and collaboration; and driving growth and transformation through insight and innovation.

The programme also included updates on the CGA board structure, the CGA Memorandum of Incorporation (MOI), confirmation of the CGA Variety Focus Group representatives, and brief updates from the Citrus Research International (CRI), CGA Cultivar Company (CGACC), and the RBX Group on their ongoing initiatives.

As in previous years, growers extended generous hospitality to the travelling teams, while CGA board members played a leading role in facilitating discussions with attendees. Nedbank once again partnered with the CGA as a sponsor, assisting with refreshments after the events and creating valuable networking opportunities.

The first week of the roadshows saw Dr Boitshoko Ntshabele's team comprising Mitchell Brooke (CGA), Jana Janse van Rensburg (CGA), Vaughan Hattingh (CRI), Rob Elfick (RBX), and Jan de Wit (CGACC), visit the Burgersfort, Hoedspruit, Letsitele, and Limpopo River regions. During the same week, Paul Hardman's team, consisting of Albert Coetzee (CGA), Amy Grundling (CGA), Sean Moore (CRI), Sean Thackeray (RBX), and Jon Roberts (CGACC), travelled to the Groblersdal, Nelspruit, and Onderberg regions.

During the second week, the teams were adjusted slightly. Albert Coetzee, Sameera Ebrahim (CGA), and Paula Bester (CGA/RBX) joined Dr Ntshabele's team for visits to the Boland, Western Cape, and Northern Cape regions. Paul Hardman's team was joined by Mitchell Brooke and Samantha Dunlop (CGA logistics consultant) for visits to the Patensie, Sundays River Valley, and Eastern Cape Midlands regions.

The final roadshow engagement took place in Nkwalini, attended by Paul Hardman and a revised team comprising Amy Grundling, Robert Miller (CGA), Portia Magwaza (CGA), Rauff Dawood (CGA), Sean Moore, Paul Biebuyck (RBX), and Daniel Tooley (RBX). The event was well supported by growers from across the KwaZulu-Natal region, with attendees travelling from as far afield as Pongola and the Midlands.

REPRESENTATION

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 Council | Dr Boitshoko Ntshabele, Cornel van der Merwe, Charles Rossouw

Agbiz Fruit Desk | Paul Hardman

Agbiz Media Campaign Group | Paula Bester

Agrihub Board | Albert Coetzee

Agriculture Trade Forum | Amy Grundling, Jana Janse van Rensburg

BI Steering Committee | 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, Vaughan Hattingh, Elma Carstens, Rocco Renaldi, Boet Mouton, Fredri Kok, George Hall, Paul Bristow

CGA Communication Committee | Jan-Louis Pretorius, Gerrit van der Merwe, Hannes de Waal, Paul Hardman, 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, Siyabonga Pityana, Pheladi Tlomatsane

CGA Grower Development Chamber Khaya Katoo, Bennet Malungane

Citrus Academy Board | Phillip Dempsey, Bennet Malungane, Frikkie Olivier

Citrus Improvement Scheme | Paul Hardman, Smit le Roux – replaced by Cornel van der Merwe (from October 2025)

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, Andries van Wyngaardt to take over from Piet Engelbrecht from April 2026, Louisa Mogotsi (co-opted - 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 | Boitshoko Ntshabele

Fruit Industry Value Chain Round Table Trade Sub-Committee | Amy Grundling

Fruit Industry Value Chain Round Table Resources Sub-Committee | Albert Coetzee

Fruit SA IT Steering Committee / SFA Sustainability Task Force | Paul Hardman

Fruit South Africa / SA Fruit Journal Board / SFA / ATF | Paul Hardman

HLB Steering Committee | Jock Danckwerts, Cornel van der Merwe

Market Access Working Group for Fresh Produce | Elma Carstens

National Logistics Crisis Committee Mitchell Brooke

Perishable Produce Export Control Board Ian Beukes, Pheladi Tlomatsane, Albert Coetzee (From February 2026)

River Bioscience / Xsit Board | Jan-Louis Pretorius, Marius Jurgens, C P Mouton, Rajen Govender

SIZA Board | Alana Snyman

SIZA Working Groups | Albert Coetzee

Joint Grower Association Forum with the Registrar's Office | Paula Bester

Food Safety and Quality Assurance – Food Safety Forum | Paula Bester

Department of Health – Preparatory meetings for Codex Committee for Pesticide Residues and Food Additives Paula Bester

ORANGE HEART

Sive Silo

Orange Heart is the social investment initiative of the CGA, established to support and strengthen communities within South Africa's citrus-growing regions. The initiative provides a coordinated platform through which citrus growers and industry partners can contribute to meaningful social development by helping to improve the quality of life of community members while advancing the industry's commitment to sustainable and inclusive growth.

Orange Heart delivers its impact through two key programmes: the Orange Heart Fruit Drive and the Summit Outreach Initiative.

Launched in 2020 in response to the widespread challenges brought about by the COVID-19 pandemic, the Orange Heart Fruit Drive mobilises fruit and food donations from citrus growers and packhouses for distribution to organisations serving vulnerable and food-insecure communities across the country.

The Orange Heart Committee was formally established in 2025 to provide strategic oversight and governance for the initiative. Members are Jan-Louis Pretorius (CGA Director), Boitshoko Ntshabele (CGA CEO), Robert Miller (CGA company secretary), Justin Chadwick (Orange Heart), Jacomien de Klerk (General Manager of the Citrus Academy, where Orange Heart is housed), and Sive Silo (Orange Heart coordinator).

The committee meets regularly to review and approve funding proposals from various citrus-growing regions, ensuring supported initiatives align with Orange Heart's mission of creating a meaningful and sustainable impact in citrus-producing communities.

The CGA Citrus Summit Outreach Initiative supports community development organisations in the citrus-growing regions, involved in, amongst others, education centres, youth development and sports. This support fosters collaboration between the citrus industry and community-based organisations and supports the sustainability of these initiatives. Funding is made available for infrastructure, equipment and resources.

Through these initiatives, Orange Heart demonstrates the citrus industry's dedication to making a positive and lasting contribution beyond agricultural production. By supporting food security, community wellbeing, and social development, the initiatives help create stronger, more resilient communities and ensures that the benefits of a thriving citrus industry are shared more broadly across rural South Africa.

Orange Heart Funding Approvals

During the year under review, Orange Heart received funding proposals from a range of organisations working in youth development, education, and community upliftment across citrus-growing regions. Following consideration of each proposal, the following funding was approved, totalling R843,497.

Organisation	Region	Approved Amount
Citrus Academy – Citrus Secondary Programme Support	KwaZulu-Natal	R120,000
Kaross Foundation – Library and Computer Lab Structure	Letsitele	R160,000
Shaya Izibalo Maths Institute (SIMI) – Rural Maths Education	KwaZulu-Natal	R160,000
Addo Football Youth Academy (AFYA) – Education and Sports Development	Sundays River Valley	R129,000
Evoke Wellness Mental Health Centre – Rural Mobile Mental Health Units	KwaZulu-Natal	R80,000
The Rural Map Foundation – Digital Learning and After-School Development Hub	Letsitele	R194,497
Total		**R843,497**

orange heart

Orange Heart reflects the CGA's commitment to creating a sustainable social impact within rural citrus-growing communities. By supporting a broad range of educational, developmental, and wellbeing initiatives, including digital learning programmes, educational programmes, youth sport development, and mental health awareness, the initiative contributes to improved opportunities and outcomes for young people, families, and communities across South Africa's citrus-producing regions.

Mandela Day Outreach – The Seed Fund, Durban North

Summit colouring in competition prize winner handover

Morei Primary School winner: Manyane Mashile

Mpikaniso Primary School winner: Risima Dlamini

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

The 2025 season was the first of the new four-year statutory levy cycle approved by the Minister in Government Gazette No. 11779 on 20 December 2024. This new levy period will run until the end of the 2028 season.

The levy for 2025 was R1,65 per carton, and an amount of R316 million was collected and used to fund the various services provided by the CGA to growers.

The statutory CGA levies for the remaining seasons in the levy cycle are as follows:

2026 – R1,67 per 15kg carton
2027 – R1,70 per 15kg carton
2028 – R1,76 per 15kg carton

CGA Group BEE Status

In 2025, the CGA Group renewed its B-BBEE certification, maintaining a Level 5 rating on the Agricultural Sector B-BBEE 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 & 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 July 2025.

All CGA Group companies undergo an annual audit conducted by PricewaterhouseCoopers (PwC) South Africa.

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. The audit and financial statements for the period 1 April 2025 to 31 March 2026 revealed no matters of concern.

RISK MANAGEMENT

Robert Miller

Below are the main risks identified by the CGA during the year under review and 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.
- Market Access Liaisons are 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.
- Market Access Liaisons are actively engaging with key stakeholders.
- Discussions are ongoing with government representatives.
- A WTO dispute is in progress.
- 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 – Huang Long Bing (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.
- A ring-fenced reserve fund has been established to support future HLB mitigation measures.

Geo-politics and trade dynamics

Middle East conflict

A Crisis Committee has been established, comprising growers, exporters, logistics role players and various experts. The committee is considering both short- and long-term factors, including shipments, the impact on export volumes and prices, diversions to other markets, and the effects on non-Middle East markets.

AGOA and the U.S. market

The African Growth and Opportunity Act (AGOA) has been extended for one year. However, the risk of future tariffs remains high. Agbiz has been engaged to assist and advise the CGA on matters related to AGOA. It is engaging with government departments to assess the impact of potential tariffs on the citrus industry, particularly in relation to employment, foreign income, and broader trade dynamics. Agbiz and the CGA are lobbying and, where possible, assisting government in securing a trade agreement that will cover citrus exports to the U.S. market.

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 (DoA), the Department of Trade, Industry and Competition (the dtic), and foreign counterparts with the aim of opening new export destinations for citrus.

Additional budget has been allocated to fund research into various markets.

WTO dispute

The WTO legal case is progressing. A consultation panel has been appointed, and an agreement between the CGA, DoA, and the dtic is in place. Hilton and 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, so lower export volumes reduce levy revenue and may affect funding for CGA activities. However, reserves built up during stronger export seasons help offset shortfalls. Careful budgeting, informed by long-term crop models, Variety Focus Groups (VFG), and seasonal estimates, also supports financial sustainability.

CGA Reserves

Liquid reserves held are currently healthy, and the surplus levies from the 2025 season have offset the deficit from the 2024 season. Reserve funds will be required over the next twelve months to fund the CBS/FCM WTO dispute.

Logistical constraints on export volumes and levy income

- A Logistics Development Manager is employed to address this risk with the support of a Logistics Risk Committee.

- 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.

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 initiatives.
- 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 for emerging growers, further promoting transformation.
- Changes in land expropriation legislation, including the passage of a new Land Reform Bill, are being actively monitored. The CGA works closely with industry body Agbiz on this matter.

Effect of B-BBEE rating on future levy approvals

- The CGA needs to remain BEE compliant to receive statutory levy approval.
- The CGA Group receives a combined B-BBEE rating, enabling all companies in the group to benefit from its 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 certification.

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 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. Group companies are also encouraged to keep growers informed of their activities.
- Variety Focus Groups (VFG) and Citrus Marketing Forums (CMF) have also been established.

Industry information, IT systems, cyber risks, POPIA compliance, and Artificial Intelligence (AI)

Industry Information

- The portfolio is overseen by the Industry Affairs Manager (IAM).
- A Data Analyst and a Research Economist support the IAM.
- Industry information is shared with all growers.
- The annual industry statistics book is produced and distributed.

Cyber Risks and the POPIA Act

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

IT Systems

- The CGA employs an IT consultant/specialist.
- Data is backed up regularly, with off-site backups and continuous monitoring of company data storage.
- Finance and accounting data are backed up off-site daily.

Artificial Intelligence (AI)

- An AI working group, comprising representatives from all the CGA companies, has been established.
- All aspects relating to the impact of AI and data management are being addressed.

LOGISTICS

Mitchell Brooke

The 2025 South African citrus export season achieved a historic milestone, with the country officially becoming the world's largest citrus exporter by volume.

Propelled by a combination of exceptional growing conditions, maturing orchards, and crucial structural improvements in national transport networks, Southern Africa successfully packed and exported 203,9 million 15kg cartons (approximately 3,06 million tonnes) of fresh fruit. This volume represents a 22% increase compared to the 2024 season and exceeded the initial April industry forecast of 171,2 million cartons by 19%.

During the season, 119,000 FEU containers of citrus were exported, up from 94,000 containers – an incredible milestone. From a logistical perspective, the season operated smoothly, albeit with a slight disruption in container supply around July when volumes increased. The port terminals recovered rapidly from the challenges experienced in 2024 and were well-positioned to serve the industry's needs. While strong global demand and high yields set the stage, the true backbone of the 2025 season was a resilient supply chain. Logistical bottlenecks that plagued previous seasons were significantly eased through joint public-private operational frameworks, targeted infrastructure investments by Transnet Port Terminals, and an expanded role for specialised reefers and rail corridors.

Port performance and infrastructure upgrades

Following severe equipment deficits in 2024, port performance reached a definitive turning point in 2025. Collaborative efforts between the CGA, shipping lines, logistics groups, and state entities minimised seasonal bottlenecks.

Durban hub resilience: As the exit gateway for nearly 40% of the country's citrus, Durban handled the unprecedented surge with significantly improved container turnaround times. Total shipping volumes increased to 119,000 40-foot equivalent containers (FEUs), up from 94,000 the previous year.

Cape Town and the U.S. window: The Port of Cape Town successfully managed a shortened and high-velocity shipping window to the United States. This expedited movement enabled exporters to maximise volumes before a steep 30% import tariff came into effect in August 2025.

Transnet capital injection: Efficiency gains were directly driven by Transnet's R9 billion multi-year terminal investment plan. This introduced new rubber-tyred gantry cranes, reach stackers, and haulers into the coastal nodes. Crucially, the introduction of employee productivity incentives significantly boosted daily container throughput.

Shipping dynamics: containers vs. specialised reefer vessels

The massive scale of the 2025 harvest necessitated a highly diversified maritime transport strategy to alleviate container shortages. The use of specialised reefer vessels operating out of Durban, Gqeberha, and Cape Town provided a critical safety valve. These vessels insulated high-value, time-sensitive shipments from standard container terminal delays. For the first time, co-loading of specialised reefer vessels was utilised for the Japanese, Chinese, and South Korean markets – a truly historical occasion. Vessels were also deployed to the United States and Russian markets, with both programmes executed successfully.

Inland transport and the shift to rail

Road logistics continued to bear the primary burden of moving fruit from inland orchard hubs, such as Limpopo, to coastal terminals. However, 2025 saw major strides toward shifting heavy freight back to rail infrastructure.

Refrigerated rail corridors: Spearheaded by private logistics providers, weekly specialised trains equipped with 48 refrigerated containers operated during the peak season, mainly from Bela-Bela to Durban. These units featured integrated plug points to ensure strict temperature maintenance along the 1,000 km journey. Additional rail operations were implemented from City Deep to Durban, Bayhead to Durban Port, Dual Party in Gqeberha to the Port of Coega, and Belcon to the Port of Cape Town.

Structural concessions: To address the growing number of truck trips – projected to increase from 2,200 to 3,800 trips in coming seasons – the Ministry of Transport confirmed that 11 private operators had been awarded concessions across 41 rail routes. This structural shift is expected to significantly reshape the rail landscape, as private-sector rail operators augment rolling stock and equipment along critical rail corridors.

Transition of DCT Pier 2 to Durban Gateway Terminal

The operational involvement of International Container Terminal Services Inc. (ICTSI) at the Durban Container Terminal (DCT) Pier 2, represents a pivotal private-sector-led transformation aimed at reversing years of chronic congestion and inefficiencies at South Africa's busiest maritime gateway. Following the resolution of intense legal challenges from competing bidders, Transnet and ICTSI officially activated their 25-year joint venture partnership. As Southern Africa's primary container gateway, this reform presents significant opportunities for improved efficiency and enhanced operational performance.

Developments at the Port of Maputo

The Port of Maputo achieved historic growth and underwent major infrastructure transformation in 2025, firmly positioning itself as the premier alternative logistics hub for the Southern African region. Managed by the Maputo Port Development Company (MPDC) – a joint venture between Mozambique's CFM, Grindrod, and DP World – the port overcame significant regional bottlenecks and political instability to achieve record operational milestones. Due to political unrest, citrus exports through the Port of Maputo were constrained during 2025, resulting in only limited citrus volumes being exported through the port.

A masterplan is currently underway to radically transform the citrus export landscape through Maputo. The CGA has pursued agreements to facilitate the export of in-transit containers from South Africa through Mozambique to Asian markets. Large-scale development is anticipated in Komatipoort to support these initiatives.

Performance-Based Standards

Performance-Based Standards (PBS) primarily refer to a logistics framework using "Smart Trucks" designed to optimise heavy vehicle performance, increase payload capacity, and improve long-term sustainability. This framework will assist the industry in managing major export surges while reducing pressure on traditional road transport systems. The CGA conducted extensive technical and operational evaluations of the application of PBS for the citrus industry. Trials will be conducted to demonstrate the practical application of this transport method within the citrus sector.

Conclusion

The CGA logistics portfolio has embarked on a long journey, collaborating with government, private stakeholders, and industry partners to achieve positive logistical outcomes for future generations of citrus producers. Billions of rands have been invested across multiple segments of the logistics value chain to sustain industry growth. By 2030, much of this infrastructure investment is expected to be commissioned, paving the way for greater efficiencies and more effective logistics platforms for the industry.



BUSINESS INTELLIGENCE

Albert Coetzee, Portia Magwaza, Sameera Ebrahim

Data accuracy is the foundational principle of the CGA. The CGA recognises that the value of its intelligence is only as strong as the quality of the inputs and the stability of the systems that manage them. Our focus remains on proactive risk mitigation and maintaining standards of excellence.

In 2025, the CGA successfully navigated significant personnel transitions. In April 2025, Albert Coetzee assumed additional responsibilities within the Business Intelligence portfolio following the resignation of the previous Information Manager. This was followed by the appointment of Sameera Ebrahim as Data and Reporting Analyst.

To ensure the retention of critical institutional knowledge – particularly regarding complex coding and storage procedures – the CGA implemented a structured transition with outgoing personnel. This continuity has been essential for maintaining the Quality Management System (QMS). Our in-house validation script rigorously audits input sources against the Perishable Products Export Control Board (PPECB) master files, achieving an impressive 99,998% accuracy rate. This ensures that the intelligence powering our dashboards remains highly reliable.

Central to our shared intelligence is the Business Intelligence (BI) Steering Committee, established in late 2025. This committee serves as our strategic anchor, ensuring that technical development is not an isolated exercise but is guided by the practical needs of our growers. Their insights allow us to translate raw industry requirements into actionable strategies.

The CGA and the Fresh Produce Exporters' Forum (FPEF) collaborate to fund the procurement of citrus data from two primary sources. The PPECB provides weekly updates on citrus volumes packed and approved for export, while Agrihub – a legal entity formed by the South African fruit export industry alongside four competing software providers – supplies real-time shipping data and reporting.

To support the industry's projected growth, Agrihub has modernised its technical infrastructure to handle significant data surges during peak seasons. This enhancement will improve the Agrihub platform's capability for automated data cleaning, error detection, and integration with additional data sources.

Internally, to mitigate the risk of system latency, the CGA has secured a Service Level Agreement (SLA) with CloudZA. This partnership provides the high-level technical expertise necessary to minimise downtime during peak volume periods.

The migration of the Long-Term Crop Projection Model from a legacy MySQL platform to Python represents a significant leap in analytical capability. The Python-based environment enables the team to conduct rapid scenario modelling, allowing assessment of the impacts of market shifts or environmental changes in near real time. With this refined platform, the CGA now projects a growth trajectory of 260 million 15kg equivalent cartons by 2036.

Business Intelligence (BI) dashboards

The strategic success of Business Intelligence depends on breaking down data silos between growers, exporters, shipping lines, and regulatory bodies. To strengthen this ecosystem, the CGA has launched several Expanded Access Initiatives. Since February 2026, verified exporters have gained access to the BI dashboards through a partnership between the CGA and the FPEF. The CGA is also developing specialised dashboards for shipping lines, facilitating a "data-for-data" exchange that enhances our near-real-time visibility of the global pipeline. In addition, the CGA provides targeted, objective intelligence to cultivar Intellectual Property (IP) managers and the chemical industry to address complex commercial queries without compromising data neutrality.

Citrus statistics booklet

The annual industry statistics booklet provides a comprehensive data update, with a primary focus on the 2025 export season. The publication consolidates information from several key sources, including annual tree census data submitted via eCert, export inspection records from the PPECB, verified export volumes from Agrihub, and local market data from the Department of Agriculture.

The scope of the booklet encompasses a broad range of citrus categories, namely oranges, soft citrus, grapefruit, and lemons. It presents detailed analyses of area planted by region, tree age distribution, and budwood sales. In addition, the publication examines historical trends in production, revenue, and pricing, as well as export destinations and the performance of various loading ports. South Africa's performance is also placed in the context of other Southern Hemisphere producers and global rankings.

The electronic version can be found on the CGA website or downloaded by scanning the QR code below.

SCAN ME

Download the 2026 Key Industry Statistics Book

World Citrus Organisation (WCO)

Our international collaboration includes partnerships with the World Citrus Organisation (WCO) and the Southern Hemisphere Fruit Alliance (SHFA). As a founding member of the WCO, the CGA actively supports this initiative, which aims to foster a global community of citrus producers and promote citrus consumption.

In many markets around the world, per capita citrus consumption lags behind that of other fruit sectors, and the WCO provides a platform for sharing ideas and strategies to address this challenge. 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.

Southern Hemisphere Fruit Alliance (SHFA)

The major Southern Hemisphere fresh citrus-exporting countries participate in a collaborative initiative in which members report shipment information, including volumes and destinations, to the SHFA secretariat. This body collates and disseminates the information to participating SHFA members.

The future of CGA Business Intelligence lies in hyper-accessibility. For intelligence to be actionable, it must reach decision-makers instantly, whether they are in a boardroom or an orchard.

Variety Focus Groups

The Variety Focus Groups play a critical role throughout the citrus season, commencing with the establishment of initial export estimates and continuously refining these projections as updated packing and shipment data becomes available. The groups assess market conditions, exchange insights, and adjust forecasts to reflect current trends. Outcomes of the meetings are regularly communicated to growers through circulated minutes and key summaries included in the CEO's weekly newsletter. In addition, the groups provide considered input on dispensation requests referred to them by the Department of Agriculture.

During the 2025 season, the focus groups convened regularly via MS Teams, with the CGA coordinating and facilitating all engagements. Notably, Botswana participated as a new entrant, marking its first export season.

The Citrus Growers' Association of Southern Africa extends its sincere appreciation to the regional representatives for their commitment and contributions in supporting fellow growers. Appreciation is also extended to the representatives of the Fresh Produce Exporters' Forum for their valuable participation in the focus groups.

The variety focus groups held meetings as follows:

Month	Grapefruit	Oranges	Lemons	Mandarin	Total
January	0	0	1	0	1
February	0	0	1	0	1
March	1	1	1	1	4
April	2	0	1	1	4
May	2	1	1	1	5
June	2	1	2	1	6
July	1	2	1	1	5
August	1	2	1	1	5
September	1	1	1	1	4
October	0	1	1	1	3
Total	**10**	**9**	**11**	**8**	**38**

The regional representatives of the Variety Focus Groups for the 2025 season are as follows:

Regions	Grapefruit	Lemon	Mandarin	Valencia/Navel
Boland		E. van Greunen	S. Bruwer	
Burgersfort / Ohrigstad		J. Nel	J. Nel	J. Nel
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	J. Nel	A. Muller
Nkwalini	M. Wafer	R. Nadioo		R. Nadioo
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. Kleyn
Pongola	A. Rouillard	A. Barnard		
S.R. Valley		L. Venter*	P. van der Merwe	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	S. Geldenhuys	S. Geldenhuys		G. Brown
Zimbabwe	P. Bristow	P. Bristow		P. Bristow
Botswana	E. van der Westhuizen	E. van der Westhuizen	E. van der Westhuizen	E. van der Westhuizen

** Chairperson*

CONSUMER ASSURANCE

Albert Coetzee, Paula Bester

SUSTAINABILITY

The rapid evolution of compliance requirements in key export markets continues to reinforce the importance of the Consumer Assurance (CA) portfolio within the CGA. The portfolio remains focused on proactively anticipating regulatory changes, keeping growers informed, influencing regulatory processes to ensure they are practical and relevant, and supporting the industry with effective and implementable solutions.

During 2025 and 2026, the European Union (EU) introduced a series of "Omnibus" reforms aimed at simplifying regulatory requirements and improving competitiveness. These changes narrowed the scope of certain regulations, most notably the Corporate Sustainability Reporting Directive (CSRD) and the Corporate Sustainability Due Diligence Directive, which now primarily applies to very large companies. While this has reduced the number of entities directly subject to reporting obligations, it has not reduced the depth or rigour of compliance expectations. Core principles such as double materiality, value chain transparency, and third-party assurance remain firmly in place. As a result, many agricultural exporters – including citrus growers – are increasingly affected indirectly through customer-driven data requirements and compliance expectations cascading through supply chains.

At the same time, the regulatory landscape is shifting beyond reporting towards operational and product-level compliance. Key developments include enhanced supply chain due diligence requirements and a growing emphasis on traceability and verification. The most immediate and significant development for the citrus industry is the Packaging and Packaging Waste Regulation (PPWR), which will apply from 12 August 2026. This regulation represents the most substantial overhaul of EU packaging legislation in three decades and will require fundamental changes to packaging design, material selection, labelling, and compliance processes, with clear cost and operational implications for exporters.

A further defining trend is the increasing integration of previously separate regulatory areas. Sustainability reporting, packaging compliance, supply chain due diligence, and product-related requirements are becoming interconnected, necessitating a single, consistent data ecosystem. Collectively, these developments reinforce the importance of robust traceability systems and high-quality, reliable data across all aspects of production and trade.

In response, the CGA continued to play an active and influential role within the Southern Hemisphere Fruit Alliance (SHFA), particularly through participation in the Sustainability Working Group. This platform enabled engagement in cross-country discussions on sustainability, food safety, and retailer-driven requirements, as well as the regulatory implications of emerging EU legislation such as the PPWR. The CGA also contributed to knowledge-sharing initiatives, webinars, and consultations aimed at promoting a coordinated Southern Hemisphere response to increasing compliance complexity and cost pressures.

The CGA maintained active engagement with key international retailers and importers, including structured dialogues with UK and EU retail chains. These engagements focused on sustainability requirements and emerging assurance standards, with the objective of ensuring that retailer expectations are scientifically sound, technically justified, and practically implementable within Southern Hemisphere production contexts. Close collaboration with the CRI and internal technical specialists ensured that the CGA consistently communicated a unified, evidence-based industry position.

The organisation also continued to monitor developments in sustainability-linked finance and related assurance requirements. As financial institutions increasingly integrate environmental and social criteria into lending and investment decisions, the CGA tracked global trends and insights to better understand how sustainability performance, transparency, and verification may influence future access to finance for growers.

A key focus area during the year was the CGA's involvement in the development of the GLOBALG.A.P. Environmental Sustainability Solution (ESS). Through both the SHFA and national technical structures, the CGA provided detailed technical input, feedback, and strategic guidance on proposed requirements. Critical issues raised included data confidentiality, cost implications, audit duplication, and alignment with existing certification systems. The CGA also participated in working groups, desktop trials, and consultations to help shape a solution that supports environmental improvement while avoiding disproportionate compliance burdens.

At an industry level, the former Sustainability Initiative of South Africa (SIZA) reference group was restructured into a broader Citrus Audit Reference Group. This expanded forum now addresses the full spectrum of compliance issues, including public and private standards, carbon-related requirements, and audit processes. The CGA convened and supported this group to address recurring audit challenges, track outstanding actions, and improve coordination across certification and assurance requirements. The group contributes to greater transparency, consistency, and strategic alignment across the citrus value chain.

The Citrus Sustainability Forum (CSF) continued to serve as a valuable platform for engaging growers and value-chain partners on evolving sustainability and compliance challenges. Discussions highlighted the cumulative burden associated with multiple certification schemes, increasing administrative demands, and rising costs – particularly for small- and medium-sized growers. Feedback from the forum has informed the CGA's positions in both international and domestic engagements, reinforcing the need for proportionate, science-based approaches and improved alignment across standards.

FOOD SAFETY

Advocacy to retain MRLs for key active substances in Europe

UPL Mancozeb Summit in Great Britain

Paul Hardman and Paula Bester attended the Mancozeb Summit at the Rothamsted Research Centre in Great Britain in June 2025. The purpose of the summit was to consolidate inputs from growers, researchers, and the registration holder into a white paper aimed at regulatory decision-makers in Europe. The unintended consequences of phasing out key active substances without proper impact assessments were highlighted. The CGA extends its gratitude to UPL for organising this valuable and insightful event, where we were proud to represent Southern African citrus growers.

EU Food and Feed Omnibus

In the "New Vision for Agriculture", the decision-makers in Europe made it clear that EU grower competitiveness and resilience need to take centre stage. This resulted in the so-called EU Food and Feed Omnibus, proposing changes in key pieces of legislation that will affect growers from third countries – most notably Regulation (EC) 396/2005 governing the maximum residue limits (MRLs) of active substances on foodstuffs in Europe. The aim is to lower all MRLs of active substances no longer approved for use in Europe to the limit of quantification (technically zero).

The CGA saw this disposition play out in the adoption of the French Decree of January 2026, which prohibits the import of certain agricultural goods from third countries with residues of specific active substances no longer authorised for use within Europe. The CGA provided inputs to the EU Commission and DIRCO Paris office, which were discussed during an extraordinary SCoPAFF meeting between EU Member States.

The CGA will continue to participate in public consultation phases and impact assessments of proposed changes to key legislation in Europe that may affect citrus growers from Southern Africa.

Retailer engagements

The CGA met with the major retailers in Great Britain in June 2025. The high cost of compliance and private residue requirements were the main points of concern raised. The CGA, in collaboration with other World Citrus Organisation members, communicated the impact of unjustifiable private retailer active substance and residue requirements, which were widely distributed amongst UK and EU retailers. It is clear that citrus growers, even from the Northern Hemisphere, struggle with the same challenges and often cannot meet unrealistic private requirements. Collaboration in this regard remains key.

Overall, the CGA continuously provided inputs to multiple retailer strategic active substance lists and policies to try to influence non-scientific "bans" or restrictions of key active substances approved for use on citrus in South Africa.

SA's Pesticide Policy, and The Fertilizers, Farm Feeds, Agricultural Remedies and Stock Remedies Act (No. 36 of 1947)

Colloquium

The CGA participated in the first-of-its-kind colloquium arranged by the Department of Agriculture on South Africa's Pesticide Policy and the reform of Act 36. This event brought together inputs from activist groups, farm workers, farmers, grower associations, academics, agrochemical registration holders, and multiple government departments on the country's pesticide policy and subsequent legislation. The CGA subsequently had the opportunity to address the Parliamentary Portfolio Committee for Agriculture on the importance of chemical plant protection products in agriculture. Sincere thanks are extended to CropLife SA and Agbiz for collaboration in this regard.

Stakeholder Engagement

The CGA continues advocacy activities where these can assist in creating the environment for long-term sustainable solutions for citrus growers. The CGA participated in the annual Agbiz media day focused on the importance of plant protection products in sustainable agriculture, in the form of a panel discussion, followed by the opening remarks by the CGA CEO. Journalists were invited to capture the key considerations. The CGA was also represented at the SA-Brazil Bio-Alliance Conference. Brazil brings a lot of experience to the table regarding biological products. Although the increasing uptake of bio-based products is encouraging, the CGA's stance remains that growers need a range of different crop protection tools to remain sustainable, which may consist of both chemical and biological nature.

Codex Committee Meetings

The CGA supported key active substance Codex MRLs in the form of motivations submitted via the Department of Health (notably, for a key miticide and post-harvest sour rot options). Sincere thanks are extended to the Department of Health for creating these platforms to provide meaningful inputs on behalf of growers.

GLOBALG.A.P.

The CGA chaired the GLOBALG.A.P. National Technical Working Group meetings, primarily focused on developing the National Interpretation Guidelines (NIGs) for GLOBALG.A.P. standards. Valuable deliberations took place with scheme managers and auditors about the challenges on farms to comply with the letter of the Pest Control Operator (PCO) regulations, to prevent non-compliances being raised for growers seeking to comply but without a PCO licence.

Communication

Online Citrus Sustainability Forums (CSFs) were held approximately every quarter. Relevant MRL and active substance authorisation updates were shared. A special CSF was held at the start of 2026, bringing together all the officially recognised laboratories to explain frequently asked questions around citrus sampling and residue analyses. The CSF remains an effective platform to communicate the most urgent updates and to gather feedback from the industry on pressing issues.

Cutting Edges summarising changes in key active substance MRLs were communicated throughout the season and reflected in the latest version of the CGA/CRI Recommended Usage Restrictions (MRL) document.

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Citrus Growers' Association OF SOUTHERN AFRICA

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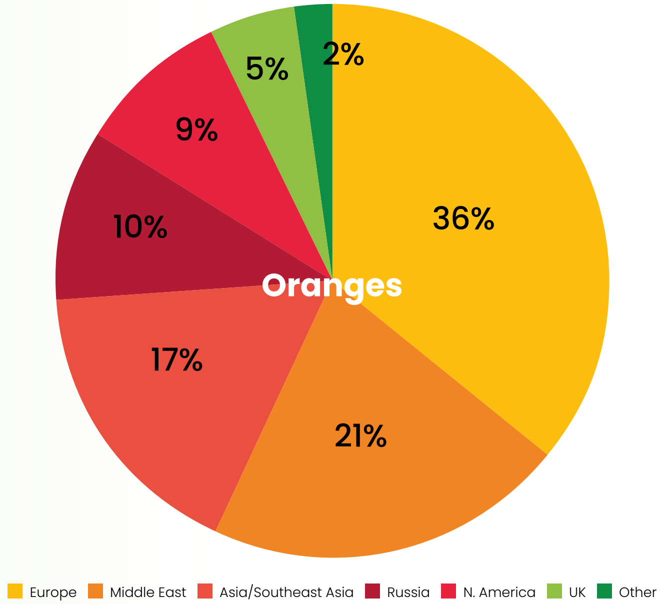
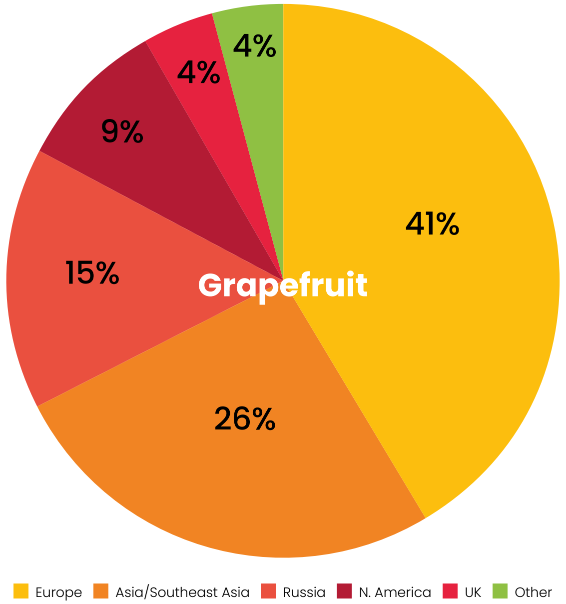
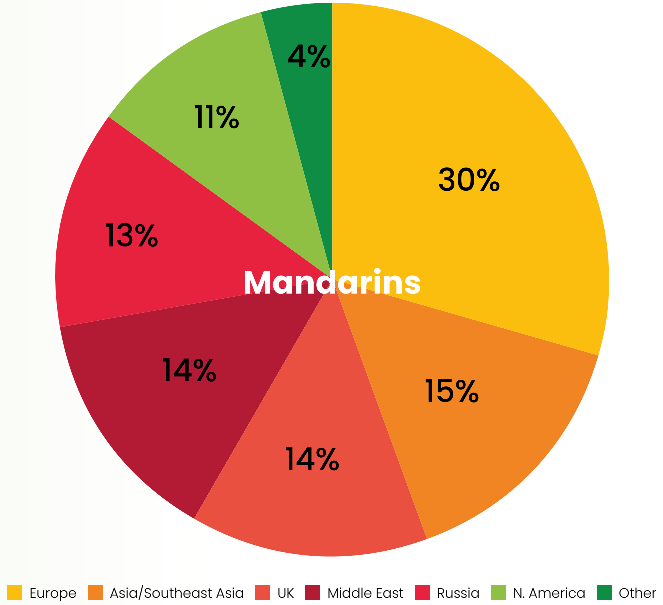
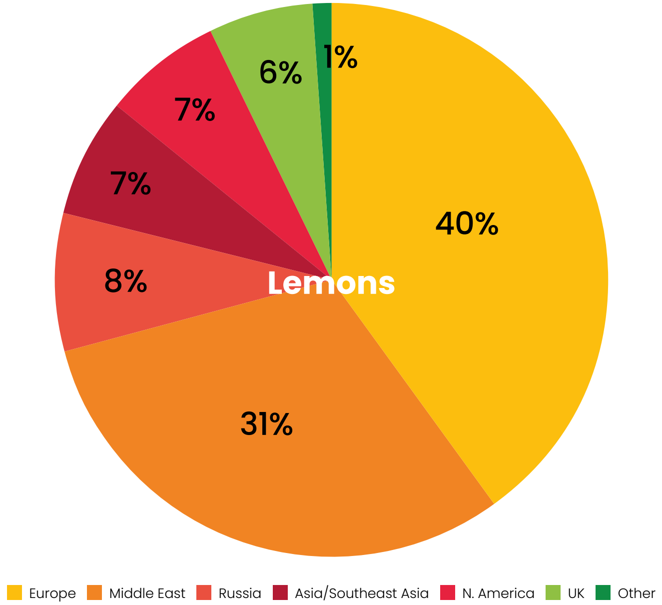
EXPORTS 2025









MARKET ACCESS AND OPTIMISATION

Dr Boitshoko Ntshabele, Amy Grundling, Jana Janse van Rensburg, Nick Gutierrez, Dr Vaughan Hattingh, Dr Elma Carstens

"Gaining, Retaining, and Optimising" (GRO) market access remained a key strategic priority for the Citrus Growers' Association of Southern Africa (CGA) during 2025.

Enabled by the scientific research outputs and technical expertise of Citrus Research International (CRI), the industry continued to expand and strengthen sanitary and phytosanitary (SPS) market access opportunities for Southern African citrus exports. South Africa currently enjoys citrus export access to more than 120 international markets.

SPS-based market access remains a fundamental pillar underpinning the competitiveness and sustainability of the Southern African citrus industry. This includes gaining new market access opportunities, retaining existing access through the implementation and maintenance of phytosanitary programmes, and optimising export protocols based on scientific evidence and technical advancements, resulting in improved operational efficiency and commercial competitiveness.

As the global geopolitical and trade environment becomes increasingly complex, and as Southern African citrus export volumes steadily increase, the market access landscape has evolved significantly beyond SPS matters alone. Whereas SPS technical issues remain the foundation, increased CGA resources are being added to also address tariffs, non-tariff trade barriers, logistics and supply chain constraints, as well as coordinated market development initiatives aimed at positioning South African citrus as the preferred country of origin in key global markets.

To support this evolving environment and the next phase of industry growth, the CGA has identified five strategic outcomes to guide industry activities and coordination:

- Deepen market and consumer intelligence;
- Elevate industry standards and policy influence;
- Optimise market access and supply chain performance;
- Strengthen ecosystem connectivity and collaboration; and
- Drive growth and transformation through insight and innovation.

These strategic outcomes recognise the importance of coordinating the entire citrus value chain – from production and logistics to trade policy, market intelligence, and consumer demand – to ensure the long-term competitiveness, resilience, and sustainability of the industry.

Within this framework, outcomes 1 and 3 are particularly aligned to the expanding Market Access and Optimisation mandate. "Deep market and consumer intelligence" focuses on understanding market demand drivers, consumer preferences, and trade dynamics to ensure the right fruit is supplied to the right markets, while supporting initiatives aimed at stimulating demand. "Optimise market access and supply chain performance" focuses on strengthening SPS market access, reducing tariff and non-tariff barriers, improving logistics efficiency, and enhancing the competitiveness of Southern African citrus exports.

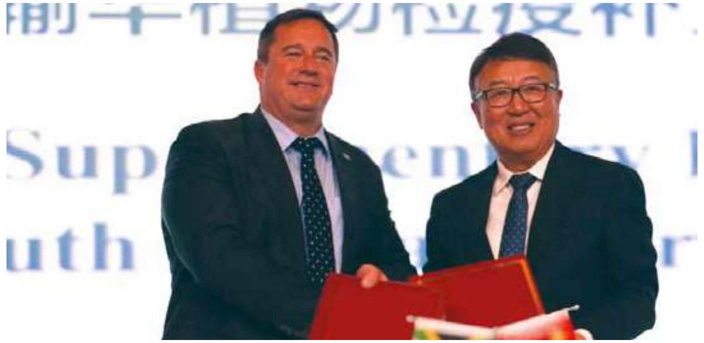
These strategic priorities underpinned the broad range of market access, trade, and market development activities undertaken between March 2025 and April 2026.

Gaining, Retaining, and Optimising (GRO) Market Access – SPS and technical

GROing market access remains the foundation of the competitiveness and sustainability of the Southern African citrus industry. CRI is well positioned to continue providing the research, technical and expert contributions that are essential to GRO market access. It has become increasingly important for the industry's sustained success that the requisite scientific research outputs and technical expertise is available to be able to retain access to existing markets. Likewise, the value of scientific research outputs is clearly evident through improvements made to the phytosanitary conditions stipulated in revisions to bilateral citrus export protocols, reflecting the optimisation of market access.
CRI continued to support the Department of Agriculture (DoA) in bilateral exchanges with National Plant Protection Organisations (NPPOs) of numerous trading partner countries, and importantly in providing implementation support to DoA, PPECB, exporters and growers, to ensure ongoing compliance with phytosanitary requirements for export. The CGA is well positioned to leverage these market access opportunities through various citrus industry advocacy initiatives, such as political lobbying and participation, together with CRI, in industry delegation visits to market countries such as those facilitated by FSA.

China

CRI proposed an amendment to the existing China citrus export protocol to the DoA in June 2025, incorporating improved phytosanitary treatment measures for citrus, excluding lemons. The proposal was based on previous CRI research outputs. Following evaluation of the proposal by the DoA, the amendment request was officially submitted to the General Administration of Customs of the People's Republic of China (GACC). The CGA leveraged support for the proposal through engagements with the Chinese Embassy. The GACC subsequently communicated its agreement with the proposed amendments, noting that implementation could follow after South Africa and China had formally signed the revised protocol. The protocol amendment was signed on 10 April 2026. The revised protocol represents a significant improvement in the technical conditions governing South African citrus exports to China and is expected to significantly enhance access to this market.



Minister John Steenhuisen and Ambassador Wu Peng signing the amended citrus protocol.

India

Since 2017, the South African and Indian NPPOs have engaged on the reinstatement of in-transit cold treatment for South African citrus exports to India. Although several trial consignments were conducted over the years to demonstrate that SA can reliably implement in-transit cold treatment, no positive outcome was achieved. The application gained impetus in 2024 and 2025 when a FSA delegation, including representatives from CRI, the CGA and the DoA, met with the Indian NPPO in New Delhi. Following an official technical meeting between the two countries in September 2025, it was indicated that India would notify, through the World Trade Organisation (WTO), its intent to renew acceptance of in-transit cold treatment for South African citrus exports to India. At the end of this reporting period, the publication of the WTO notice was still pending.

Japan

South Africa's efforts to expand and improve citrus market access to Japan have faced lengthy delays, with key amendment requests remaining unresolved for many years. These include the inclusion of all mandarin cultivars (excluding Satsumas), inclusion of improved phytosanitary treatments for all citrus types, and the inclusion of all navel orange cultivars under the existing bilateral protocol. The requests for improved access were based on CRI research outputs, technical analyses and equivalence with phytosanitary treatments adopted by the IPPC in International Standards for Phytosanitary Measures. Between 2004 and 2024, numerous official and technical engagements, including numerous scientific data packages compiled by CRI, were exchanged between SA and Japan. Once Japan had concluded on South Africa's request to allow the export of South African avocados to Japan in 2024, Japan's Ministry of Agriculture, Forestry and Fisheries (MAFF) again began paying attention to the outstanding citrus market access requests as South Africa's top current market access priority with Japan. There was a high-level political visit to Japan in March 2025, which provided added impetus. CRI has continued to provide the required technical support to DoA for exchanges with Japan MAFF. Based on CRI's consultations with growers and exporters, it was agreed to prioritise the inclusion of improved phytosanitary treatment options within the current protocol. At the end of this reporting period, a draft protocol from Japan MAFF was pending.

Philippines

CRI proposed an amendment to the existing Philippines citrus export protocol to the DoA to incorporate improved phytosanitary treatment measures for oranges, grapefruit and mandarins, and the exclusion of lemons from the mandatory phytosanitary treatment measures. The proposal was based on CRI research outputs. Following evaluation by the DoA, the amendment request was officially communicated to the Philippines in May 2025. CRI has continued to support the DoA with scientific data for communication with the Philippines, in pursuit of an agreement to revise the protocol.

South Korea

In 2024, in a meeting between Korean officials and an FSA delegation, including representatives from the DoA, CRI and the CGA, Korea acknowledged South Africa's long-standing export history of more than 25 years and proposed amending the bilateral protocol to remove mandatory consignment-by-consignment joint (the DoA and APQA) inspections as a requirement, and instead, adopt a systems-based audit approach. To evaluate such a change, a Korean delegation, together with CRI, the DoA and PPECB, conducted a comprehensive audit of South Africa's citrus export system in February 2025. The audit outcome was positive, resulting in agreement that Korean inspectors would no longer be required to conduct pre-shipment inspections for every consignment for a three-year trial period. Instead, Korean officials would implement a systems-based audit process, while increasing phytosanitary inspections upon arrival in South Korea. Recognising the importance of maintaining compliance under the revised system, the DoA, CRI and industry stakeholders convened a joint meeting in March 2025 to address continued concerns relating to phytosanitary pests and carton and pallet markings. In support of these efforts, a Cutting Edge communication was distributed to stakeholders in April 2025, reminding exporters and registered facilities of the critical control measures required to minimise the risk of pest infestations and incorrect markings. Several engagements and exchanges of correspondence took place between the DoA, CRI and PPECB to finalise the amendment of the current protocol, whereby a systems-based audit approach is included. In March 2026, the DoA confirmed that the protocol has been adopted. During the FSA delegation visit to South Korea in September 2025, APQA again expressed satisfaction with the management of the programme, and this was also reflected in the final report that was sent to the DoA in December 2025.

In July 2025, the DoA officially requested South Korea to amend the current protocol to include additional improved phytosanitary treatments and to exempt lemons from mandatory phytosanitary treatments. This request was based on scientific evidence provided by CRI. South Korea advised that it would consider the request once the revised audit-based protocol had been finalised.

Thailand

CRI proposed an amendment to the existing Thailand citrus export protocol to the DoA to incorporate improved phytosanitary treatment measures for oranges, grapefruit and mandarins, and the exclusion of lemons from the mandatory phytosanitary treatment measures. The proposal was based on CRI research outputs and equivalence with other existing phytosanitary trade regulations. Following the DoA assessment, this request was officially submitted to Thailand in December 2024. A response from Thailand is pending.

Vietnam

South Africa historically exported significant volumes of citrus fruit to Vietnam, but this was interrupted when Vietnam announced that they would require pest risk analysis (PRA) to continue. In support of South Africa's application to continue with the export of citrus fruit (all types – oranges, mandarins, grapefruit and lemons), CRI provided the DoA with the required technical data in 2008 for communication with Vietnam. In 2013, Vietnam indicated it would proceed to first evaluate oranges, followed by other citrus types. Between 2013 and 2022, numerous official and technical engagements, including scientific data packages compiled by CRI, were exchanged between South Africa and Vietnam. In 2022, Vietnam conducted a SA site visit. In 2024, the import conditions for oranges were agreed upon, with import permits being issued as of 1 May 2024.

The CGA ensured that South Africa's current priority for the Vietnam market remains other citrus types, following concerns that avocados had incorrectly been prioritised above citrus. In August 2024, the DoA officially notified Vietnam's Plant Protection Department (PPD) that South Africa's export priorities for Vietnam are, in the order of mandarins, followed by grapefruit and lemons. During a high-level bilateral meeting between SA and Vietnam in October 2025, SA reiterated that current market access is limited to oranges and emphasised the strategic importance of obtaining access for mandarins, grapefruit, and lemons. In November 2025, a Memorandum of Understanding was signed between SA and Vietnam to expand cooperation across multiple sectors, including bilateral agricultural trade. The aim of the MOU is to enhance market access for South African agricultural products, including citrus. A response is pending from PPD.

United States

There continues to be no progress on the long-standing citrus-related matters (access for citrus from the rest of South Africa (CBS areas), inclusion of other Western Cape magisterial districts in the current export program, revised pest list and updated workplan), due to U.S. demands for unrelated trade concessions from South Africa (animal health issues).

South America

CRI requested the DoA to apply for market access to the following countries: Costa Rica, Guatemala, El Salvador, Honduras, Mexico, and Brazil. These countries requested the completion of a Pest Information Package (PIP), which CRI provided to the DoA for further communication.

Tariff and trade policy developments

The global trading environment continued to shift away from predictable multilateral rules towards a more fragmented and competitive trade landscape. While the WTO remains the foundation of the global rules-based trading system, its ability to deliver new market-opening outcomes and effectively resolve disputes has weakened in recent years, particularly due to challenges surrounding the Appellate Body and the dispute settlement mechanism. As a result, countries are increasingly relying on bilateral and regional trade agreements to secure preferential market access, reduce tariff exposure, and manage geopolitical and supply chain risks. The WTO currently records more than 380 regional trade agreements in force globally, reflecting the growing shift away from reliance on multilateral trade liberalisation alone.

For the Southern African citrus industry, these developments have significant competitiveness implications. South Africa negotiates trade agreements through the Southern African Customs Union (SACU), comprising South Africa, Botswana, Eswatini, Lesotho, and Namibia. While SACU provides important regional integration benefits and collective negotiating leverage, it also limits South Africa's ability to independently negotiate tariff concessions or to rapidly conclude bilateral trade agreements.

The competitiveness impact is increasingly evident across Asian markets, where South African citrus continues to face tariffs ranging from approximately 15% to 50%. In contrast, competitors, such as Australia, benefit from a far more extensive network of preferential trade agreements, allowing Australian citrus to enter many markets at substantially lower tariff rates.

Despite these structural challenges, meaningful progress was achieved during the year under review.

China

In June 2025, during the Forum on China-Africa Cooperation, China announced that it would grant zero-tariff treatment on 100% of tariff lines to 53 African countries with diplomatic relations with China (excluding Eswatini). However, uncertainty remained regarding how the offer would be implemented under WTO regulations, as formal trade arrangements between the respective countries were still required.

In February 2026, South Africa and China signed the China-Africa Economic Partnership Agreement framework agreement on economic partnership, formally initiating trade negotiations between SACU and China. The current tariff on South African citrus exports to China ranges from 11% to 12%, depending on the citrus category. The CGA therefore provided inputs advocating for citrus to be included in the package benefiting from immediate tariff relief, rather than being subjected to a ten-year phase-down period. These negotiations are taking place in parallel with China's unilateral tariff offer, which will come into effect on 1 May 2026. However, uncertainty remains regarding the duration and long-term validity of the unilateral arrangement. A formal trade agreement between SACU and China would therefore provide more predictable and permanent tariff relief for South African citrus exports.

India

SACU and India formally launched negotiations for a Preferential Trade Agreement (PTA) in October 2007. Although five rounds of negotiations were held, discussions stalled before a final agreement could be concluded. However, renewed momentum has recently emerged, with India's Commerce Minister visiting SACU in Namibia in September 2023 to help revive and advance the process. This progress continued with the review of the Terms of Reference between the two parties at the end of 2025, which were expected to be finalised in 2026, paving the way for formal trade negotiations to resume, including efforts to reduce India's current tariffs of 25% on grapefruit and 30% on other citrus categories.

United States

The African Growth and Opportunity Act (AGOA)

The AGOA came into force in May 2000 as a cornerstone of U.S.–Africa trade policy, granting eligible sub-Saharan African countries duty free access to the U.S. market and supporting export growth across sectors, including the Southern African citrus industry. Although AGOA was renewed for a further ten years in 2015, the process was accompanied by heightened scrutiny from the U.S. Congress, reflecting concerns around compliance, eligibility, and the lack of reciprocal market access. Tensions with South Africa, particularly regarding restrictions on U.S. poultry, pork, and beef imports, resulted in threats to suspend its AGOA benefits and contributed to delays during the renewal process. As a result, U.S. exports of these products are technically permitted, but under strict conditions established in 2015, with tariff-rate quotas for poultry and strict sanitary and phytosanitary requirements governing pork and beef imports. The ten year extension lapsed on 30 September 2025 and, amid policy uncertainty and shifting U.S. trade priorities, AGOA was only temporarily extended on 3 February 2026 to 31 December 2026. In parallel, the introduction of U.S. reciprocal tariffs in April 2025 effectively undermined AGOA's duty free benefits until February 2026. While most favoured nation duties may be waived, the framework's advantages have largely been neutralised by broader tariff measures, leaving the future of AGOA uncertain.

Reciprocal tariffs

In April 2025, the U.S. administration introduced reciprocal tariffs on imports from most trading partners, citing persistent trade imbalances and non-reciprocal trade practices. A baseline tariff of 10% was applied broadly, alongside higher country specific tariffs for countries with significant trade deficits with the U.S. South Africa was identified among the more exposed economies, facing tariffs of 30%. Following the announcement, a temporary adjustment period of 90 days was introduced, during which higher tariffs were suspended while negotiations continued. This meant that, for a portion of South Africa's 2025 citrus export season, trade largely occurred under the baseline 10% tariff rather than the higher rates, providing only limited and short-term relief.

In February 2026, the U.S. Supreme Court ruled that these tariffs imposed under the International Emergency Economic Powers Act (IEEPA), exceeded presidential authority, effectively terminating those measures. Shortly thereafter, the administration introduced a temporary global tariff of 10% under Section 122 of the Trade Act of 1974, applicable for 150 days (until July 2026). Concurrently, the U.S. administration initiated broader trade enforcement actions in March 2026, including investigations under Section 301 of the Trade Act, targeting 60 countries, including South Africa, with the potential for additional, higher tariffs depending on the outcome of these reviews.

Following the Administration's decision in November 2025 to grant product specific relief, oranges (globally) were exempted from U.S. tariffs, representing a positive development for the citrus sector. However, mandarins, grapefruit and lemons continue to face tariffs, and ongoing engagements raise the question of why a similar exemption was not extended to this category.

Ongoing bilateral engagements between South Africa's Department of Trade, Industry and Competition (dtic) and the U.S. Trade Representative (USTR) remain critical in seeking a mutually beneficial outcome. Progress towards a negotiated arrangement could help stabilise market access and potentially moderate more severe tariff outcomes, particularly in light of ongoing U.S. trade actions and investigations (including those under Section 301), which may result in additional duties. An early agreement would therefore be instrumental in preserving export competitiveness and reducing policy uncertainty for the South African citrus industry.

South Africa maintained a highly successful citrus export programme to the U.S. in 2025, with exports valued at approximately USD 116 million and totalling 119,176 tonnes (source: USDA). This indicates that the U.S. remains a strategically important and high value market for the Southern African citrus industry, making continued engagement and market access critical for the sector's long-term sustainability and growth. The CGA actively engaged in advocacy efforts to underscore the importance of AGOA and the severe impact of reciprocal tariffs on the citrus industry, working closely with national government authorities, agricultural sector representative bodies, and key international stakeholders, including the Corporate Council on Africa in the U.S., International Fresh Produce Association (IFPA), the South African Embassy, and relevant importers. In March 2026, the CGA further strengthened these engagements by attending the Wonderful Citrus Symposium in California, followed by meetings in Washington, D.C. with the USDA, USTR, the Corporate Council on Africa, and the South African Embassy, ensuring that industry perspectives continued to be communicated to policymakers and stakeholders where required.

Market development and efficiency

Market and consumer intelligence were identified as key strategic priorities during the most recent CGA strategy session, recognising the importance of understanding global consumer trends, purchasing behaviour, and consumption patterns to support long-term market development and sustainable demand growth for South African citrus.

In support of these objectives, the first South African citrus market development campaign was launched as a pilot project in India during 2025 under the theme "Beautiful Country, Beautiful Fruit, Exceptional Taste". The campaign was implemented across four major Tier 1 cities – Delhi, Mumbai, Chennai, and Bengaluru – with a strong focus on wholesale markets, trade merchandising, and importer engagement.

This approach was particularly important, as approximately 80% of fruit sales in India still occur through informal "cart" market channels. The campaign therefore focused on educating importers, wholesalers, and trade stakeholders on the quality, reliability, and counter-seasonal value proposition of South African citrus, while positioning South Africa as a preferred citrus supplier in the market.

Limited retail- and consumer-focused activities were also undertaken to support broader consumer awareness of, and demand for, South African citrus. Although modern retail and quick-commerce platforms are expanding rapidly in India, these channels still account for a relatively small share of overall fruit sales.

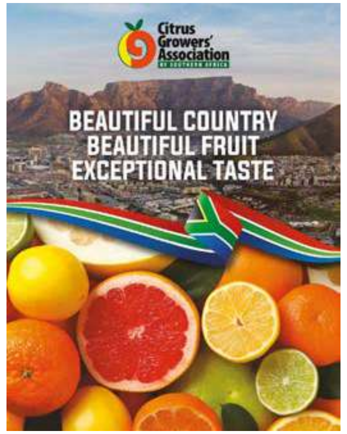
The campaign coincided with strong market growth, with South African citrus exports to India increasing by 85% year-on-year. Mandarins performed particularly well, supported by growing consumer preference for easy-peeling citrus varieties with favourable taste profiles and convenience attributes.

Although India is one of the world's largest citrus producers, particularly of oranges, local production does not directly compete with South African imports due to differences in varieties, seasonal supply windows, and market positioning. India's large and growing population, expanding middle class, rising health consciousness, and predominantly vegetarian consumer base therefore continue to position the country as a significant long-term growth opportunity for South African citrus exports.

Export performance

Market conditions on both the supply and demand side continue to influence export volumes across key destinations. Export statistics reflect volumes shipped to destination ports and may not fully account for fruit further transhipped to neighbouring markets. These figures should therefore be interpreted alongside broader market intelligence, including competitor export volumes, domestic production trends, and consumption dynamics, to provide a more comprehensive market assessment.

The markets discussed below include both high-growth opportunities in Asia and established strategic markets such as Russia, the U.S., and Canada, which continue to play an important role in supporting export volumes, market diversification, and overall industry returns.





2025 Campaign Activities: Beautiful Country, Beautiful Fruit, Exceptional Taste

Please note that all market share calculations and references in this report are based on trade volumes sourced from the International Trade Centre (ITC) Trade Map database, using 2025 trade data. Where reporter data was unavailable, trade data for Russia and Vietnam is based on mirror statistics. All Gross Domestic Product Purchasing Power Parity (GDP PPP) data (constant 2021 international dollars) is sourced from the World Bank.

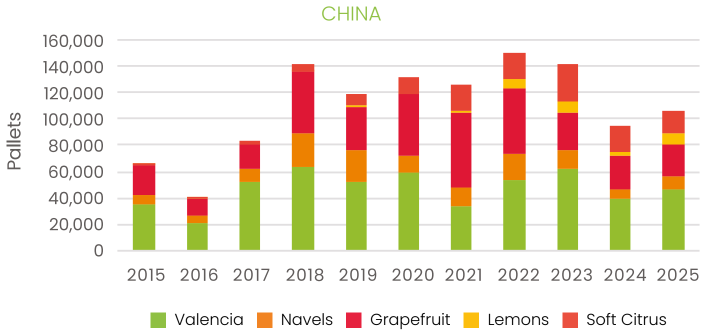
ASIA

China and Hong Kong

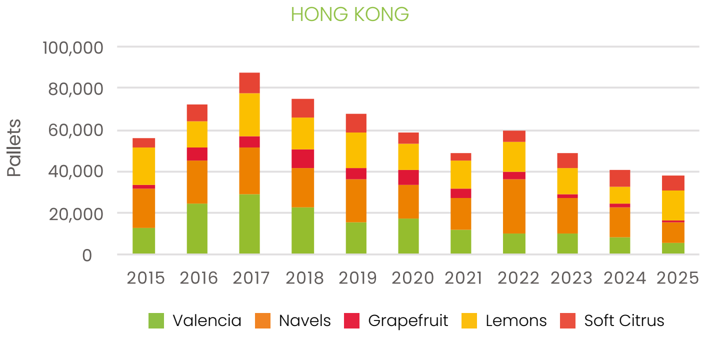
China: Since 2022, South African citrus export volumes to China have shown an overall declining trend, although 2025 recorded a slight recovery compared to 2024. China continues to expand its domestic citrus season, reducing the counter-seasonal supply window traditionally available to Southern Hemisphere exporters such as South Africa.

China's citrus imports have also declined, while imports of other fruit categories, including bananas and blueberries, have increased, reflecting changing consumer preferences. Although China's GDP PPP has continued to rise since 2020, indicating improving purchasing power, increased domestic production and changing consumption patterns remain the main drivers behind declining citrus imports.

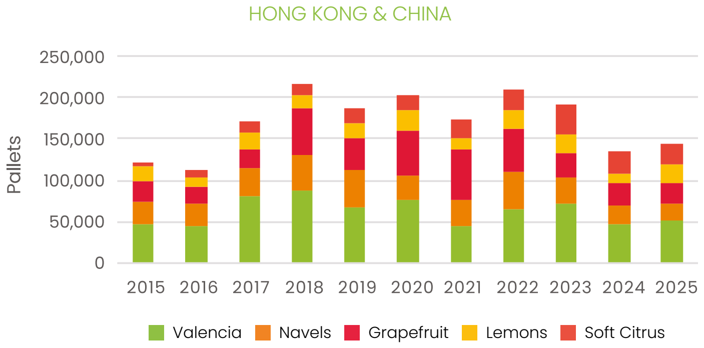
South Africa remains the largest citrus exporter to China with an estimated 40% market share. However, Australia continues to gain market share due to lower trade barriers and shorter shipping distances, highlighting the need to further improve South Africa's competitiveness in this market.



Hong Kong: Export volumes to Hong Kong reached their lowest level in 2025, despite facing fewer trade barriers than mainland China.



The combined export volumes to Hong Kong and China increased slightly compared to the previous season. China and Hong Kong remain key priority markets due to their large consumer base and growing middle-class purchasing power, highlighting the importance of continued consumer education and strengthening South Africa's country-of-origin positioning.

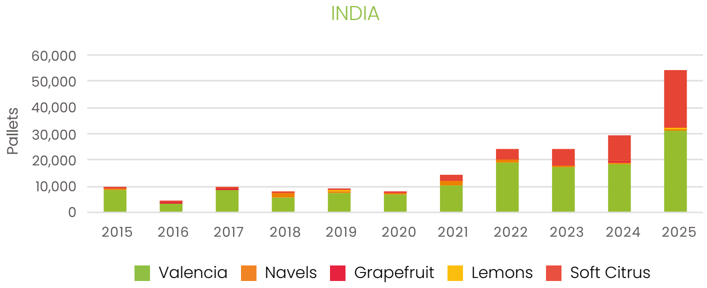


India

India has experienced strong GDP PPP growth since 2020, reflecting rising purchasing power, continued middle-class expansion, and broader economic growth. Increasing disposable incomes continue to support demand for premium and healthy food products, including imported citrus.

Although India is one of the world's largest citrus producers, South Africa is able to supply premium citrus during India's off-season, contributing to steady growth in imported citrus volumes and South African exports. Egypt currently remains the largest citrus supplier to India with an estimated 50% market share, followed by South Africa at 34%, China at 12%, and Australia at 3%.

Australia is expected to continue increasing its market share due to its Free Trade Agreement with India, which provides reduced tariff access and improves competitiveness within a similar export window to South Africa. Continued efforts to improve South Africa's tariff competitiveness therefore remain important.

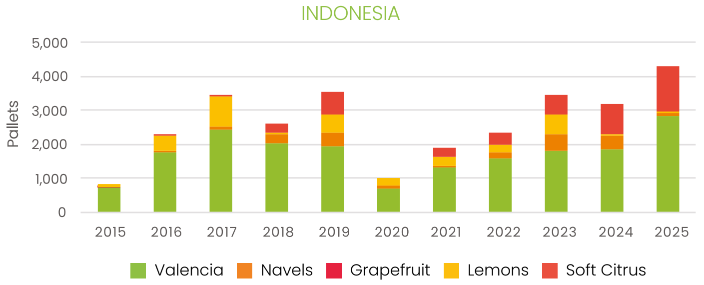


Indonesia

Indonesia, the world's 14th largest citrus producer, has a well-established citrus consumption market. At the same time, Indonesia's GDP PPP has shown steady growth since 2020, indicating improving consumer purchasing power and supporting the broader upward trend in imported fruit demand, particularly for soft citrus imports from China.

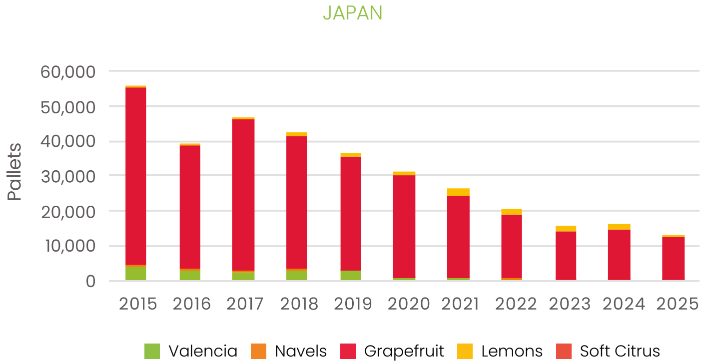
South African citrus exports to Indonesia have, however, remained relatively static, while Australia has strengthened its position as South Africa's main Southern Hemisphere competitor, supported by lower tariff access.

Indonesia therefore remains an important market for South Africa to optimise and expand its current market share of 3%, compared to China at 76%, Australia at 12%, and Pakistan at 7%.



Japan

Over the past two decades, global citrus exports to Japan have declined significantly, particularly from the U.S., due to increased domestic production, changing consumer preferences, and demographic shifts. However, counter-seasonal supply opportunities have enabled Southern Hemisphere exporters such as South Africa and Australia to expand their presence, with Australia gaining market share.



Grapefruit imports have declined the most, partly due to Japan's ageing population and concerns around grapefruit interactions with certain medications. Japan's relatively modest GDP PPP growth, compared to markets such as China and India, has also limited growth in imported fruit demand. However, other citrus categories do not face the same health-related concerns, highlighting the importance of consumer education on the nutritional benefits of citrus to stimulate demand.

Fruit South Africa outward mission to Japan – retail visits and industry engagements.

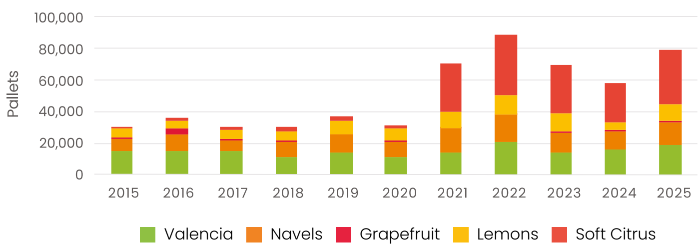
Malaysia

Malaysia has experienced overall growth in citrus imports over the past decade. However, relatively stagnant growth in GDP PPP has limited opportunities for significant expansion in citrus consumption.

South Africa currently holds the largest market share among Southern Hemisphere suppliers, a position that remains important to protect. While South African citrus faces a relatively low import tariff of 5%, Australia benefits from tariff-free access. Nevertheless, this still provides South Africa with a more competitive and level playing field compared to many other export markets.

China remains the largest overall supplier to Malaysia, accounting for 39% of the market, followed by South Africa at 29%, Egypt at 16%, Vietnam at 6%, Thailand at 5%, and Australia at 3%.

MALAYSIA



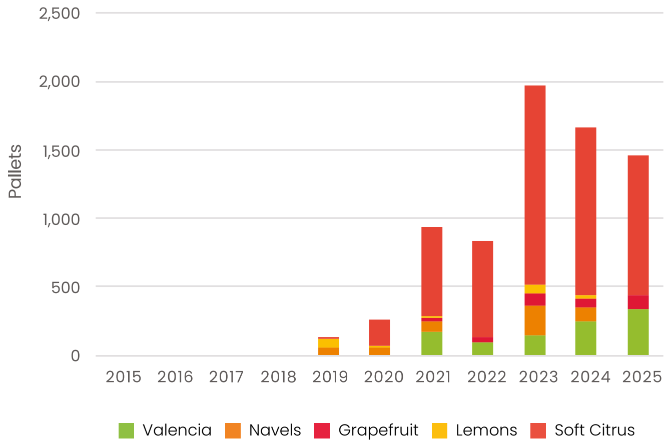
Philippines

Despite relatively stagnant growth in GDP PPP, overall citrus imports into the market have increased, particularly for soft citrus and lemons, with China driving much of this growth.

During the Southern Hemisphere supply window, Australia has significantly expanded its market share, while South Africa has recorded only modest growth and Argentina's presence has declined.

Ongoing efforts therefore remain focused on improving South Africa's competitiveness and expanding its current market share of 2%, compared to China at 83%, Australia at 7%, Pakistan at 4%, and Argentina at 3%.

PHILIPPINES



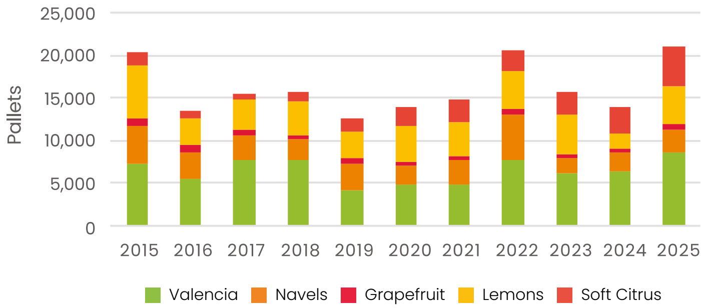
Singapore

Global citrus imports into Singapore have remained relatively stable over the past two decades. However, imports from China have increased significantly since 2024, with China now holding the largest market share at 29%. South Africa remains the leading Southern Hemisphere supplier with a 24% market share, while other major suppliers include Egypt at 17%, Malaysia at 9%, and Australia at 9%.

Despite Singapore's relatively small population of around 6 million people, it remains a high-income economy with stable purchasing power, supporting consistent demand for imported citrus. Singapore therefore remains an important market for South Africa to maintain and protect its market share, particularly as tariffs have been removed for all trading partners, creating a more equal trading environment.

Although South Africa exported record citrus volumes to Singapore in 2025, the market still accounted for only approximately 1% of South Africa's total citrus export volume, highlighting that it remains a relatively small but strategically important market.

SINGAPORE

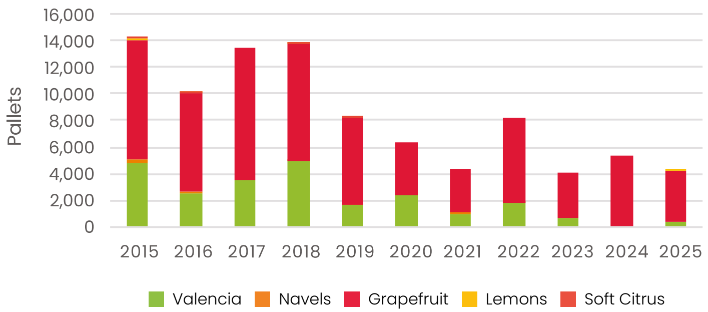


South Korea

Overall global citrus exports to South Korea have declined, particularly from the U.S. during the Northern Hemisphere supply window, where exports have decreased significantly. During the Southern Hemisphere window, Australia has gained market share and now holds 12% of the market, while South Africa's market share has continued to decline to 4%, particularly for grapefruit.

South African export volumes to South Korea continue to decrease, especially grapefruit volumes. This trend is similar to what is being observed in Japan, where an ageing population and declining grapefruit consumption are linked to health considerations, as grapefruit can interact negatively with certain medications.

SOUTH KOREA

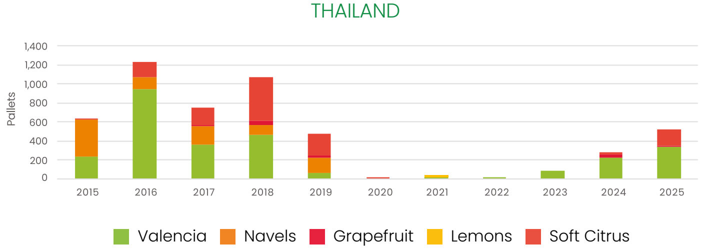


Fruit South Africa outward mission to Japan – retail visits and industry engagements.

Thailand

Overall citrus imports into Thailand have declined, particularly during the Northern Hemisphere supply window, with China remaining the dominant supplier, holding an estimated 80% market share.

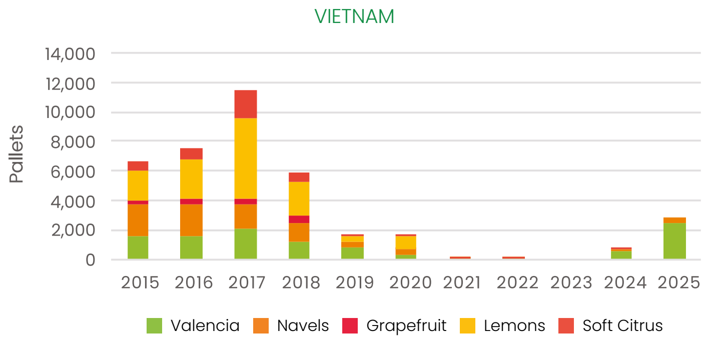
During the Southern Hemisphere supply window, South Africa has lost market share to Australia, which has increased its presence to approximately 16% following the elimination of tariffs in 2010. This has significantly improved Australia's competitiveness, while South Africa continues to face tariff barriers in the market.



Fruit South Africa outward mission to Thailand – meeting with the Ministry of Agriculture.

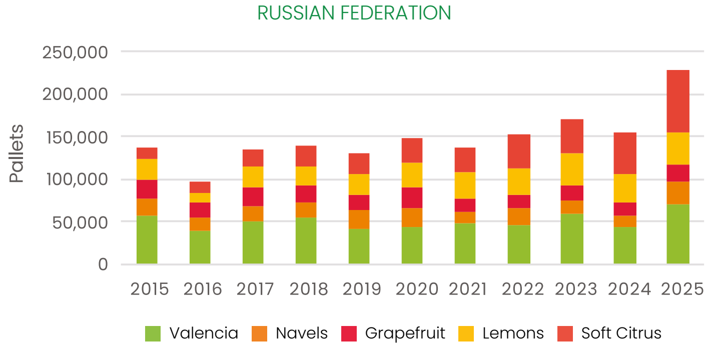
Vietnam

Vietnam, itself ranked among the world's larger citrus producers, remains one of the markets with the greatest potential for South Africa to expand and optimise citrus exports. Overall citrus imports into Vietnam are dominated by China with an estimated 95% market share, followed by Australia at approximately 3%, while South Africa currently holds only around 1% of the market. Growth in imports has been particularly noticeable in the mandarin category.



RUSSIA

Russia remains an important market for South African citrus, absorbing almost 10% of South Africa's total citrus export volume and reaching record export levels in 2025, particularly driven by growth in oranges and soft citrus. Global citrus exports to Russia have continued to increase, supported by rising GDP PPP and stable consumer demand despite ongoing geopolitical conflict.



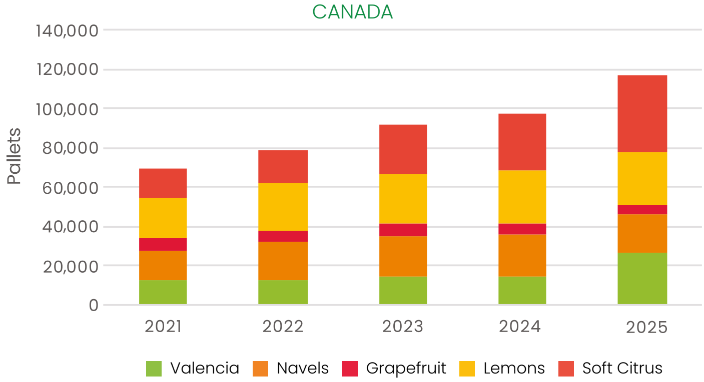
South Africa remains the largest Southern Hemisphere supplier to the Russian market, holding a 21% market share. However, citrus consumption remains strong during the Northern Hemisphere winter months, when Turkey is the largest supplier with a 39% market share, followed by Egypt at 14%, and China at 12%.

NORTH AMERICA

Canada

Global citrus exports to Canada have remained relatively stable, supported by steady GDP PPP growth and a slight increase in purchasing power since 2022. Imports from the U.S. (23%) have declined significantly since 2020, while South Africa (26%), Morocco (16%), Mexico (7%), and Egypt (5%) have all increased their market share in 2025.

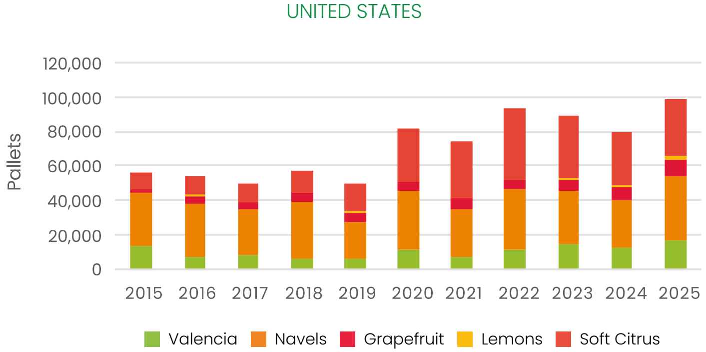
South African exports to Canada increased significantly in 2025 and reached the highest volume recorded in the past five years. The rapid growth was driven both by soft citrus and oranges.



United States of America (U.S.)

Due to a decline in U.S. citrus production, overall citrus imports have increased over the past decade, particularly from countries such as Mexico (45%), Chile (23%), Peru (8%), South Africa (7%), and Morocco (5%). Growth in U.S. GDP PPP indicates strengthening consumer purchasing power, supporting increased demand for imported fruit.

South African exports to the U.S. increased in 2025 to the highest volume in the past five years. The surge was largely driven by oranges, alongside increasing volumes in all other commodities compared to the previous season.



Nick Gutierrez and Jana Janse van Rensburg meeting with key stakeholders in Washington D.C

EU AND UK MARKET ACCESS

Jana Janse van Rensburg, Rocco Renaldi,
Dr Vaughan Hattingh, Dr Elma Carstens

General

The European Union (EU) remains South Africa's largest export market. Despite 2025 being a record-breaking season for citrus exports by volume, the EU maintained a steady 36% share – highlighting the strength of South Africa's global market diversification. In 2025, the Netherlands (66%), Portugal (12%), and Italy (8%) continued to be the key channels for imports, although each saw slight declines of 2%, 1%, and 2% respectively compared to 2024. Across all citrus categories, Europe continued to lead as the primary destination, accounting for 41% of grapefruit, 40% of lemons, 36% of oranges, and 30% of soft citrus exports. To ensure alignment with the EU's prescribed import window, the export season concluded on 20 September 2025.

With specific reference to grapefruit, the SummerStar Ruby Taste Summer campaign managed by Stardust Global, represents a landmark step in the CGA's strategy to grow the global relevance of South African Star Ruby grapefruit. Launched in Germany in 2025 under the campaign platform "Your 24-Hour Grapefruit", the initiative was designed to directly confront the most persistent barriers to grapefruit consumption – the perception that it is bitter, outdated, and limited to the breakfast table. By repositioning SummerStar Ruby as a sweet, tangy, and versatile fruit for modern living, the campaign introduced a new generation of European consumers to a product that has long been undervalued in global markets. This work is not simply about selling fruit – it is about building a category, creating brand preference, and securing long-term demand for South African growers.

The United Kingdom (UK) remains a steady market, with an 8% share in 2025 – down 1% from the previous season. It accounted for 14% of soft citrus, 6% of lemons, 5% of oranges, and 4% of grapefruit in total export volumes of South Africa. The most recent concerns for South African citrus exports to the UK are the efforts to harmonise Sanitary and Phytosanitary (SPS) measures between the EU and UK, which were initiated in May 2025 and aim to simplify trade, reduce border delays, and align import requirements. While negotiations have been ongoing since late 2025, an agreement is expected in 2026, with full implementation likely by 2027.

This may negatively impact citrus exports by introducing stricter compliance requirements and potentially limiting market access as UK regulations align more closely with EU standards. The CGA has been working closely with the Fresh Produce Consortium in the UK to engage on these developments and represent the interests of citrus exporters.




Tariffs

The SADC–EU Economic Partnership Agreement (EPA), which came into force in October 2016, significantly improved access for South African citrus exports into the EU. The agreement forms part of a broader EU trade framework aimed at supporting developing regions in the Southern African Development Community through preferential access, and it has resulted in the removal or reduction of tariffs in general on approximately 98% of South African exports to the EU market. While this represents substantial liberalisation, citrus remains classified as a sensitive agricultural sector, meaning that tariff liberalisation is not applied uniformly, but instead operates through a structured and conditional framework.

Under the EPA, tariffs on citrus are applied through a layered framework that combines three key mechanisms: seasonal duty free access, phased tariff reductions, and price based protection through the Entry Price System (EPS). Part of the tariff liberalisation includes a "staging category", which is essentially a timeline or rulebook that sets out how and when tariffs (import taxes) are reduced and eventually eliminated. The key economic logic behind the gradual (phased) tariff phase-out strategy of the EU for sensitive citrus products (such as sweet oranges) was to protect EU growers (especially Spain, Italy, and Greece during the early harvest period), avoid sudden market shocks (with tariffs reduced progressively over a ten-year period), and allow adjustment for domestic producers. This explains why immediate duty-free access was granted only in low-risk periods (EU off-season), while sensitive periods (October–November) saw gradual liberalisation.

The phased tariff reductions over a ten-year period on sweet oranges came to completion on 1 January 2026, when the remaining duties were eliminated. During this ten-year period, sweet oranges entered the EU at 0% duty between

The CGA meeting with Western Cape Government officials at Fruit Attraction in Madrid, 2025.

The CGA team meeting with key stakeholders from the Netherlands at Fruit Attraction in Madrid, 2025.

The CGA participating at the World Citrus Organisation meeting at Fruit Logistica in Berlin, 2026.

Nicci Stewart (Stardust Global), José Antonio Garcia (Ailimpo) and Jana Janse van Rensburg at Fruit Logistica in Berlin, 2026

June and mid-October, corresponding to the EU off-season. During the more sensitive period from mid-October to the end of November – when EU production begins – tariffs that previously applied before the EPA were gradually phased out over the ten year period, reaching full elimination of remaining duties as of 2026. This phased approach illustrates how the EU uses staging periods to smooth the impact of liberalisation and prevent sudden market disruptions.

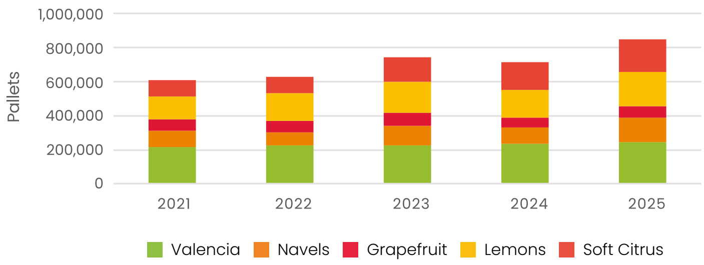
A defining feature of the current EU market access framework for citrus is the continued use of the EPS. This mechanism operates independently of standard tariffs and remains one of the most important tools used by the EU to regulate imports of fruit and vegetables. The EPS establishes a minimum price threshold for imported citrus, against which the declared import value, or a calculated Standard Import Value (SIV), is assessed. If imports enter the EU at prices below this threshold, additional duties are applied, effectively increasing the import cost and preventing price undercutting in the EU market. As a result, even in cases where tariffs have been reduced to zero, exporters may still face additional charges if market prices are low. This means that, in practice, market access is not determined solely by tariff levels, but by a combination of timing, product category, and prevailing market prices, which together shape the competitiveness of South African citrus exports in the EU market.

The CGA continued to engage diplomatically with the EU, key Member State markets, and industry stakeholders, in close collaboration with the South African government. Despite the ongoing citrus-related EU–SA WTO dispute and a complex global geopolitical landscape, both South Africa and the EU remain committed to strengthening their strategic partnership. This commitment was reaffirmed at a bilateral summit held in Johannesburg on the sidelines of the G20 in November, where significant new investment commitments were secured. South Africa's engagement in the WTO dispute settlement procedure, contesting aspects of the current EU CBS and FCM phytosanitary import regulations, remains ongoing. The legal-technical dispute process is continuing, with an expectation that this will progress to formal hearings in the near future.

European Union (EU)

South African exports to the EU increased significantly in 2025, reaching their highest volumes in the past five years. Year-on-year growth remained positive across key citrus categories, with soft citrus up 26%, oranges rising 17,6%, lemons increasing 20,3%, and grapefruit growing 13,7%. Overall, this reflects a strong 20% increase compared to the previous year.

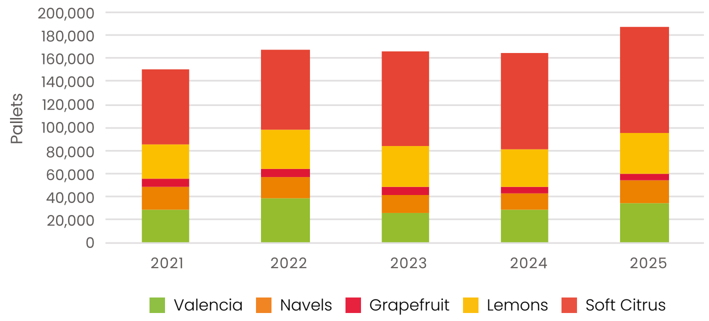
EUROPEAN UNION (EU)



United Kingdom (UK)

South African citrus exports to the UK increased significantly in 2025, reaching the highest volumes recorded over the past five seasons. While 2022 also experienced a notable rise in export volumes and remains the peak year for orange shipments, soft citrus dominated exports by a significant margin in 2025. Lemon export volumes have remained relatively stable over the period. In contrast, grapefruit exports have shown a gradual decline since 2021, with a modest recovery observed last season. Year-on-year growth was positive across key categories, with soft citrus (11,8%), oranges (26,4%), lemons (3,8%), and grapefruit (9%).

UNITED KINGDOM (UK)



Ports

It's not how much you move – it's how well you handle it. The success of any port (large or small) lies in understanding its capacity and consistently sustaining it. The Port of Rotterdam in the Netherlands leads as the primary entry point for South African citrus, while London Gateway in the UK ranks fourth in 2025. Annual CGA visits are conducted to major European import hubs, as well as to local importers, port authorities, and EU inspection bodies responsible for phytosanitary controls, residue testing, customs, and quality assurance. These engagements have proven invaluable in fostering mutual understanding and ensuring the smooth execution of citrus campaigns every season.

***The CGA Exhibition**, together with the Citrus Academy and XSIT, at the Western Cape Government Budget Speech, Cape Town, March 2026. Most citrus fruits were generously donated by ALG Estates.*

TRIBUTE TO DEON JOUBERT

The CGA and the citrus family at large lost Deon Joubert in late 2025. Deon was at the very centre of South Africa's citrus industry since he joined the CGA as its European Union Special Envoy in 2014.

As an agricultural economist and trade expert, he was a prominent figure in the fruit industry. Deon dedicated decades of his life to advancing market access, building bridges between producers and global partners, and championing agricultural exports. He was widely known and deeply respected in many circles for his immense knowledge of trade policy, export dynamics, and supply chain logistics.

Deon's expertise was always accompanied by a unique energy and humour. His charisma, warmth and sociability naturally created a wide network of friends, colleagues, and fruit growers who will miss him dearly. He had an exceptional appetite for good company, good food, and good ideas. He savoured life deeply, and his passion enriched everyone around him.

Rest in peace, Boeta.

CRI - RESEARCH & TECHNICAL

Dr Vaughan Hattingh

Governance and funding

The 2025/26 year was the first year of the new four-year levy cycle. In the previous cycle, the upscaling of research and technical support services as provided for in the CRI 1+4Y strategic plan, was successfully implemented. CRI was able to upscale research from 75 projects in 2020/21 to 131 projects in 2024/25, and to 151 projects in 2025/26. The number of research collaborators has stabilised at 19 in 2025/26. Overall, the CRI research and technical operations have attained the level envisaged in the 1+4Y plan and this level will be maintained through the current levy term (2025-2029), as provided for in CRI's strategic 4Y2 plan.

The CRI board of directors changed due to resignations of Prof Danie Brink (Stellenbosch University), Piet Engelbrecht (CGA nominee), and Chris Kellerman (consultants association). From 1 April 2026, Prof Kennedy Dzama (University of Stellenbosch) and Andries Van Wyngaardt (CGA nominee) will serve on the board. There remains a vacancy for an Agricultural Research Council (ARC) nominee. The CRI executive committee consisted of Piet Smit (chairman), Deon Joubert (vice-chairman), Mike Woodburn, Eddie Vorster, and Piet Engelbrecht. Andries Van Wyngaardt will replace Piet Engelbrecht from 1 April 2026, and the rest of the executive committee remains 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.

Market access technical

Gaining, Retaining and Optimising (GRO) market access remains a central component of CRI's mission. The research portfolios, programmes, and projects that are overseen by CRI, are strategically designed to produce scientific research outputs that form the basis for phytosanitary regulations that govern fresh citrus fruit exports from Southern Africa. In parallel, the research outputs are intended to enable growers to produce fresh citrus fruit competitively and sustainably while meeting the expectations of trading partners.

The expertise inherent within CRI staffing and the broader CRI-group scientific collaborator network plays a critical role in supporting Southern African countries in their official government-to-government engagements that are essential for GRO-ing market access. Although CRI research outputs and technical expertise remain the foundation for market access, these are not elaborated upon in this section, since this annual report deals with market access in a separate section.

Research

2025/26 was the first year within the second levy term applicable to CRI's 1+4Y and 4Y2 strategic plans. Strong growth was evident in all CRI's research metrics, including funding, the number of research projects, and the number of research collaborators. The number of collaborators has stabilised after selection of the partners for term research relationships. As in CRI's 4Y2 strategic plan, the current four-year levy cycle is focused on stabilising and consolidating CRI capacity and operations, after the upscaling that took place during the preceding four years.

The benefits of the industry investment in upscaled research operations are increasingly evident. Additional spinoff benefits from CRI's research are evident in the number of student qualifications and peer-reviewed international scientific publications. Since research was transferred from Capespan to CRI in 2001, approximately 230 PhD and MSc students have been trained through CRI-funded research projects. Approximately 73% of these graduates have been employed in the citrus industry and in supporting industries, making investment in research an investment in technical upskilling and succession planning. Since 2001, CRI research has generated more than 380 international peer reviewed scientific publications. This provides the industry with the assurance that reliable scientifically generated information is available to drive improved market access and production practices.

In the 2025/26 research year, the **Integrated Pest Management (IPM)** research portfolio comprised 76 continuing and new projects, distributed across four programmes: *False Codling Moth (FCM) and Other Lepidoptera (33%), Fruit Fly (18%), Other Pests (38%),* and *HLB (11%).*

Most of the projects within the *FCM and other Lepidoptera* programme have an applied focus, aimed at the optimisation of both pre- and postharvest management strategies. Research includes a fundamental understanding of FCM biology, including dispersal dynamics and host selection for egg laying. In harvest management, FCM control products were evaluated, including potential repellents and biological agents such as viruses and bats. Research was conducted on the mass production and formulation of entomopathogenic nematodes for FCM control. Novel virus delivery systems were explored for enhanced field efficacy. Studies on postharvest detection technologies progressed through volatile organic compound profiling for the detection of FCM infestation. Postharvest research focused on developing new cold treatment options and on an improved understanding of the influence of host medium on cold treatment efficacy. Significant progress was made in modelling the probability of FCM introduction through international fruit trade pathways. Finally, the programme included the development of new pre- and postharvest management tools for other lepidopteran pests potentially affecting citrus.

Research within the *Fruit Fly* programme was focussed on improving pre- and postharvest cold treatment strategies. In pre-harvest management, enhanced suppression of fruit fly populations was demonstrated through the integration of a male attract-and-kill system with protein bait applications. The value of orchard sanitation practices was quantified. Biological control was further explored, using parasitoids, entomopathogenic fungi, and viruses. Novel attractants for fruit fly pests were investigated. To support implementation of pre-harvest control measures, a decision support system (DSS) was developed using key parameters, including temperature, trap catches, citrus cultivar, time to harvest, and the presence of susceptible crops adjacent to citrus orchards. The DSS was subsequently tested in mandarin orchards in the Western Cape Province. Postharvest management studies continued and confirmed the efficacy of internationally approved Mediterranean fruit fly (Medfly) cold treatments against other fruit fly pest species. Research also quantified the economic impact of fruit fly pests in citrus and modelled the potential value of additional investment in control measures.

The *Other Pests* programme included key IPM pests such as

thrips, red scale, and mealybugs, as well as mites, minor and sporadic pests. This programme experienced the greatest growth during the reporting period, and the expansion reflects the challenges associated with reduced availability of crop protection options and increasingly stringent residue demands for exported citrus fruit. Thrips remains among the most important insect pests of citrus, as damage directly affects fruit quality and profitability. The impact of thrips is further exacerbated by CBS spray programmes, where mancozeb-based CBS programmes negatively affect predatory mite populations, whereas copper-based programmes have a lower impact on important natural enemies of thrips. Holistic thrips management was explored, with a focus on an integrated strategy incorporating application of crop protection products, fertilisation practices, pruning, and ground cover management. Novel control approaches, including repellents and application technologies such as drone-based applications, are also being explored. Research on red scale investigated alternatives to mineral oil applications and the development of parasitism-based thresholds to improve decision-making. For mealybugs, fundamental studies were conducted on the phenology and distribution of species within this pest group. The development of postharvest control strategies for mealybugs of quarantine importance was studied using fumigation and cold. Research on mites is extensive, including control of bud mite on budwood, development of monitoring methods for bud mite, and fundamental studies on red mite, two-spotted mite, and flat mites, which will provide the basis for optimisation of future control strategies. The programme further included general arthropod pest studies, such as the development of a key for the identification of arthropod pest damage, investigations into insect pests of citrus in Botswana, and comparisons of pest occurrence under netted production systems versus open-field conditions. Snail management is also being explored.

The HLB programme focused on building a management package in the event of the introduction of *Diaphorina citri*, one of the top priority biosecurity threats identified for the Southern African citrus industry. Development of robust morphological identification tools for HLB vectors continued, enabling clear distinction from indigenous congeneric psyllid species that can be found in citrus environments. Additional studies investigated the feeding of these indigenous psyllids on citrus, potential pathways for the entry of *D. citri* into South Africa from areas where it currently exists in Africa and the associated risks, as well as the risk of HLB vector movement through physical breaches in insect-proof nursery structures. New control methods for HLB vectors are being explored, and an automated detection system for HLB vectors on sticky traps is being developed.

Sustainable and effective management of various pre- and postharvest pathogens is essential to produce high-quality citrus. These include fungal, viral, viroid, and bacterial pathogens. Due to the unique nature of these different pathogens, the **Disease Management Portfolio** is divided into the following research programmes: Preharvest Diseases (fruit and foliar, including Citrus Black Spot (CBS), and soilborne diseases), Graft Transmissible Diseases (GTD), HLB and Greening Disease, and Postharvest Diseases (PHD).

Research in the *Preharvest Diseases* programme is focused on identification of pathogen species, their epidemiology, fungicide sensitivity, and optimised and alternative management strategies. Citrus Black Spot (CBS) remains a high priority research focus due to its phytosanitary importance for EU access. Projects are aimed at improved diagnostic protocols for *Phyllosticta citricarpa*, the causal pathogen, and evaluating new chemical management options and the efficacy of cultural management practices. Potential fungicide resistance development and the management thereof is also being studied. CRI PhytRisk was developed as a CBS prediction platform and is continuously being improved as a management tool. Other research covers the early events of fruit infection by the CBS pathogen, the tempo of CBS infection in young orchards, and the development of a CBS risk matrix that can be used to predict the CBS risk associated with orchards. Other important aspects being studied include the efficacy of postharvest fungicide treatments in inhibiting CBS symptom development during transport, and how all the different management strategies can be combined into a CBS management system (systems approach).

Alternaria diseases of citrus, and specifically *Alternaria Brown Spot* (ABS), have increased in the recent past due to planting of more sensitive cultivars and the increased installation of protective netting over orchards. This led to several projects focussing on disease prediction modelling, better chemical and biological control options, and the characterisation of the causal pathogen and 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 being studied. Focus is placed on the fungal species involved, their epidemiology, the development of disease prediction models, and subsequently chemical and non-chemical control options. A project on various aspects related to citrus scab and its causal organism was initiated due to the increased importance of the causal pathogen in the EU.

Soilborne diseases and nematodes remain serious constraints to citrus production. The research on soilborne pathogens and nematodes focuses on management. This includes the evaluation of new fungicides, fungicide sensitivity, the correct application of biological control agents and cover crops, and the behaviour of tolerant rootstocks in replant orchards.

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 in the research of the programme is therefore aimed at developing accurate and reliable diagnostic tools for these various pathogens that can spread through infected plant material. Another focus area is the improvement of CTV cross-protection through better understanding of the pathosystem and different strains used for 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 also the 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 covers construction of a comprehensive *Liberibacter* genome reference database in support of accurate detection and identification assays, which is critical for the success of the HLB Action Plan. Further research established a test orchard under protection where potential African Greening and HLB management options can be evaluated, along with a project looking at area wide management practices and their efficacy. A strategic project that focuses on psyllids, their natural enemies, and the *Liberibacter* diversity has also been launched in Tanzania.

Postharvest disease management is facing challenges in terms of increasing pressure to reduce the number of detectable residues present on export fruit. The focus in this programme is therefore on optimising chemical applications and developing 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 have been associated with problematic saprophytic fungal growth on the stem-end of exported fruit. The exact causes and remedial actions are being studied. Currently, GRAS chemicals, biocontrol options and organic management options are being tested as either preharvest sprays or postharvest applications with the aim of improved disease management and reduced residues on export fruit.

Within the **Citriculture Portfolio**, research focuses on the technical aspects of effective and sustainable orchard establishment and cultivation, as well as on crop preparation and fruit handling in the citrus cold chain.

To provide relevant information on cultivar and rootstock selections, an ongoing evaluation programme is maintained across all citrus regions. In soft citrus, there remains a focus on identifying the best mandarins for earlier and better colour and acid content before the main peak of current mandarins is harvested. Earlier cultivars are sought to replace Alternaria-prone and low-bearing cultivars. Additionally, evaluation of later-maturing cultivars after the main peak of Tango, ARCCIT9 (Nadorcott LS), and Nadorcott, is a priority. New navel plantings remain restricted, however, demand for red-pigmented navel fruit has risen, and newly established trial blocks are expected to come into production next year. Efforts to identify a productive cultivar similar to Turkey in the early-maturing Valencia group, are ongoing, and promising selections include KAS, Ngonini, and Gusocora early. Rootstock trials progressed into screening and semi-commercial trials, including a range of new rootstocks (20) from the University of Florida, which are coming into production, with 2026 providing the first harvest information.

Research in the production and quality programme is focused on improving the efficiency of tree water and nutrient use to enable reduction or control of input costs. These projects support a responsible approach to soil and resource management, leveraging technology to improve the accuracy of thinning applications and yield estimates. Detailed assessment of anatomical differences in vigorous (Rough Lemon) and dwarfing (US812) rootstocks indicates the genetic component affecting the vascular development and, thereby, possible water movement and related physiological processes at the canopy level. In a multi-seasonal evaluation of foliar nutrition, the risk of applying any phosphate-containing products to mandarin cultivars at and after colour break, was identified, and caution in their use is advised. The high incidence of phytotoxicity and resulting progressive rind lesions could lead to a dramatic loss of a crop's market value.

Rind colour development remains a key physiological process influencing crop quality and maturity, i.e. the stage of rind colour development at harvest was identified as a key driver of market colour. This highlights the need to harvest fruit well into their carotenoid synthesis to obtain a vivid rind colour. The risk of chilling injury can be mitigated to commercially acceptable levels by applying wax with 18% or higher solids and achieving ideal surface coverage. No additional postharvest packhouse treatments or products have yet been verified to increase fruit tolerance to low temperatures during cold shipment.

The critical link from the packhouse to the market is addressed through projects across the cold chain. This includes both operational work and focused fundamental research on cooling behaviour. Important advances have been made in carton design, and alignment of cartons under higher loads has been shown to be a crucial parameter for carton stability during export. Furthermore, the results indicate that unfilled carton configurations are unsuitable for creep testing. In terms of ease of use for industry, the single-carton creep test is potentially the most useful, however, the filled, double-stacked carton test could better represent how a carton is loaded in real life. An evaluation of two pallet designs (the 9-Slat and Opti-base) under real-world conditions showed that the mechanical, laboratory-based tests used in this project seem to mirror the results of real-world pallet use. It is recommended to start using the topperforming pallet designs, viz., the L7, H8, and Opti-Basev2 pallets, in limited quantities to assess their performance against the current pallets in the various markets.

Extension

There are heavy demands from citrus growers on the extension division. Given the extension model that provides for coordination of group-based technology transfer, it is not possible to meet expectations for one-on-one extension. Nonetheless, two more Postharvest Extension Officers were employed in 2025. The current staff complement for Extension is a National Extension Manager, four Area Extension Managers, four Postharvest Extension Officers, a Technical Postharvest Extension Officer, a Packaging Specialist, and an Events and Operations Coordinator. The coordinator: Postharvest Technical Forum retired at the end of March 2026 at the age of 79.

CRI's series of regional workshops continued to gain popularity due to the quality and practicality of the information presented. The workshop planning committees include extension and research staff, grower representatives, the CGA, and some members of the Exporters Technical Panel. The Postharvest workshops were presented in January and February 2026, and the Production, IPM and Disease Management workshops will be held in May and June 2026. The success of these workshops is reflected in the excellent feedback received from the attendees. The presentation skills training of staff certainly played a significant role in enhancing the quality and professionalism of the presentations.

In addition to the regional workshops, the regular study groups and packhouse forum meetings in all the growing areas continued to gain popularity with the aim to address specific problems and needs of the respective areas. Furthermore, several training courses were presented in the areas, mostly on scouting, irrigation, and fertilisation. On-farm implementation of integrated pest management remains one of the most challenging needs to address, and in-house training of extension staff and researchers was undertaken to support this initiative.

CRI's communication has improved significantly over the past few years through the implementation of diversified communication channels. Numerous podcasts and videos were released over the last year.

The appointment of a Packaging Specialist has positioned CRI to play an important role in ensuring that packing material complies with international standards in terms of integrity, compliance with food safety regulations, palletisation, and optimum cooling of fruit. Specialised equipment is being procured to support further research on packaging, adding further value to the packaging industry.

The Exporters Technical Panel (ETP) plays an important role in providing information on market requirements. The annual meeting, held in November 2025, was once again well attended with excellent interaction amongst the role players. Members of the ETP also serve on the planning committees of the CRI regional workshops to give input into the compilation of the respective agendas.

The excellent relationships at this point between the Extension and the Research Divisions, along with the growers, ETP, CGA, ag-chem companies and other role players, are key to successful technology transfer in the citrus industry.

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.

CRI's Biosecurity Advisory Committee (BAC) has 17 scientific and/or technical experts from CRI as members. The BAC meets once annually to review and advise on the strategic biosecurity objectives. Additionally, workgroups of BAC members were tasked with specific biosecurity support projects.

The BAC has identified the top ten threats to the industry but will review and prioritise these and other threats. Pest risk assessments were done for these top ten threats, and action plans for HLB, fruit flies, and Leprosis were developed. Additionally, a draft action plan for *Phytophthora palmivora*, which was reported on papaya in Limpopo and Mpumalanga, was developed.

The HLB/ACP Action Plan was updated following another round of scenario planning to test the plan's practical feasibility. It was evident from experiences in Brazil and the U.S., 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 scenario planning workgroup concluded that the HLB/ACP Action Plan must be updated to ensure practical feasibility of the proposed actions, and optimal deployment of resources. Resource-intensive and practically infeasible measures aimed at eradication were reconsidered. Eradication will only be attempted in situations where it was assessed as technically feasible. Otherwise, measures will be focused on the more realistically feasible containment objectives. 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 (CRT) to support emergency response in the event of any major biosecurity incursion. As part of this contingency plan, six Biosecurity Field Officer positions (BFOs) were approved for deployment in case of emergency.

Biosecurity operations mostly involve surveillance aimed at early detection of exotic pests and diseases in Southern African countries. Yellow sticky traps are placed and serviced by the Department of Agriculture (DoA) in various places across South Africa. CRI is also servicing trapping networks monthly in strategic locations, which were selected based on the modelled and anticipated incursion pathways of ACP from Tanzania. These include the Onderberg region through Eswatini down the KwaZulu-Natal coast to Port Edward, and the Limpopo region from Tzaneen to Limpopo River valley region. Trapping networks also cover borders of the African Greening buffer zones in Gqeberha, East London, and Knysna, and the area-wide Greening management project in the Buffeljags region. Trapping and surveillance networks were also established in Zimbabwe and Mozambique, but due to logistical reasons are serviced less frequently. Traps are read by the four Biosecurity Field Officers (BFOs) stationed at CRI-CRC in Nelspruit, Tzaneen, and Gqeberha. CRI supported training of two ARC teams, who now assist in ACP trap reading. BFO capacity is being allocated to the roll-out of additional ACP surveillance networks, and increased physical surveillance along trapping networks, on farms, nurseries, and urban settings.

CRI is funding a research project on *Diaphorina* and *Trioza spp.* and their associated *Liberibacters* in Tanzania, through the Sokoine University of Agriculture in Morogoro. Surveys to date have demonstrated the spread of ACP in Tanzania to the southern border with Mozambique. None of the trapped ACP or *T. erytreae* specimens were found to carry the HLB bacteria, including those trapped south of the Kenya border in proximity of the previous HLB report in Kenya, indicating that the HLB report from Kenya was likely from a false positive test.

HLB and ACP diagnosis in the Southern African context is markedly more complex than experienced 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 focused on resolving the diagnostic complexities. Other participating laboratories will be trained by CRI once protocols are finalised. As part of the post-entry quarantine diagnostics, the CRI and ARC laboratories are continuously conducting development and optimisation of diagnostic protocols of other identified biosecurity threats.

The citrus leprosis virus outbreak in the Eastern Cape Province was successfully contained, with good prospects of eradication. The disease has recently also been detected on another farm in the Eastern Cape, but the response plan is also being applied there.

Awareness is a very important aspect of biosecurity. Fact sheets for the top ten threats were developed, published as a series of articles in the South African Fruit Journal (SAFJ), and are available on the CRI website. Biosecurity talks were also presented at CRI's regional IPM and Disease Management workshops, as well as provincial workshops of the CGA-GDC to promote citrus biosecurity awareness to the provincial departments of agriculture and smallholder citrus growers. CRI additionally participated in the Biosecurity Indaba of the Eastern Cape Department of Agriculture.

To promote citrus biosecurity awareness to the public, CRI has been engaging with retail nurseries, expecting that the nurseries will then better inform their clients. BFOs started building a database of retail nurseries in their areas, particularly those that stock citrus trees. These nurseries are visited regularly, traps are serviced in these nurseries, and awareness materials on the Greening buffer zones and restricted movement of citrus propagation material are provided to them. An open day was held at the Citrus Foundation Block for nurseries in the Eastern Cape Province to promote awareness of the buffer zones in East London and Gqeberha. CRI has drafted a booklet, "Planting and Caring for Citrus Trees: A Practical Guide for Gardeners", which will be made available to retail nurseries for supply to their citrus tree customers. The booklet will also be available for free download on CRI's website.

CRI has good links with the NPPOs in Zimbabwe, Mozambique, Zambia, Botswana, and Eswatini and is working towards establishing 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 the 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 U.S. 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 with experts from the U.S., Italy, and Brazil. Paul Fourie and Hano Maree visited China for engagement with citrus researchers and to gain practical experience on the HLB status and management in China, as well as Yellow Vein Clearing Virus, which is a top ten threat.

The Citrus Improvement Scheme (CIS) is positioned 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 such that the scheme continues to support the biosecurity interests of the Southern African citrus industry. The CIS will continue to be administered and operated as a financially self-sustained unit.

Citrus Improvement Scheme (CIS)

Rootstock seed supply in the current season (2025/26) has increased markedly: 4,218 L (excluding seed produced in nurseries, which is typically ±420 L per season), compared to 3,050 and 2,308 L in the previous seasons. Following the increase in seed demand, there was a 29% increase in budwood demand in 2024 (3.27-million buds) from the low-point in the previous year (2.54-million buds), and a further 16% increase in 2025 to 3.79-million buds. Budwood demand was strongly driven by Valencia cultivars (54% of supply), and to a lesser extent mandarin hybrids (22%).

Development of the biosecure CIS citrus rootstock seed source in the Thornhill/Loerie area was completed, and about 9 ha of 37 rootstock cultivars was established, and the first fruit will be harvested in 2026. Orchards at the Citrus Foundation Block (CFB) will be removed when the rootstock seed yield at the seed farm exceeds the industry's demand.

During the November 2025 audit round, thirty nurseries were audited with an average audit score of 73,6%. Ten nurseries achieved a 5-star rating, fourteen a 4-star rating, five a 3-star rating, and one a 2-star rating. One nursery was certified as HLB-safe in terms of the HLB/ACP Action Plan of South Africa.

The Notice to establish a compulsory CIS was published in the Government Gazette for public comment on 8 September 2023. Provincial workshops were conducted to ensure adequate public participation to allow promulgation of the first compulsory scheme in South Africa. Promulgation of the compulsory statutory CIS was, however, postponed by the DoA until after the regulations of the updated Plant Improvement Act (PIA) had been promulgated (planned for December 2025). DoA has subsequently questioned the national variety listing (NVL) status of *Citrus*, which is handled under an open variety list and not a closed list, as in other statutory schemes. The industry previously opposed transition to a closed list, as it will delay commercialisation of new cultivars and impede the global competitiveness of the industry. The CIS Advisory Committee recommended that the industry application for promulgation of the scheme be put on hold until the NVL matter has been resolved between the CIS Manager and PIA Registrar, and any other potential issues have been resolved between DoA, CRI, and the CGA. This recommendation was upheld by the CRI board of directors and communicated to the CGA board of directors. At the end of the term of this report, the matter remained unresolved with DoA officials.

The Citrus Research Trust, as owner of the CFB farm, and CRI applied to the High Court in Makhanda (Grahamstown) for a semi-urgent interdict against ESKOM, which is in the process of acquiring servitudes for three 400-kV powerlines from Humansdorp to Gqeberha on a line route through Kruisrivier across the CFB farm. The objective is to ensure that ESKOM follows due process and does not move to expropriate prior to obtaining environmental authorisation to continue with the envisaged route. CRI contends that several of the specialist studies recommended by the basic assessment may demonstrate that the Kruisrivier line route is not "viable", and that an alternative route option must be considered. An alternative route option that is not in close proximity to the CFB will be the preferred outcome. At the end of this report period, the matter remained unresolved.

The bulk of CIS income is derived from supply of budwood and seed, and the decline in demand compromised the affordability of the CIS and its strategic initiatives. CIS reserve funds were used as bridging finance, but a price adjustment and recovery in demand have enabled the CIS to again move into a position of financial self-sufficiency.

CGA CULTIVAR COMPANY

Jon Roberts

Management overview

The year under review continued many of the themes experienced during the previous financial period, namely strong market demand for premium citrus cultivars, especially Valencias, resulting in ongoing challenges relating to the availability of propagation material. While the broader business and market environment remained largely unchanged, CGACC experienced improved collaboration across industry stakeholders and continued to strengthen its position within the cultivar management and licensing environment as it now moves towards providing the widest range of protected hard citrus cultivars. Specifically, these include the earliest to latest Valencias, seedless Valencias, navels, and Lycopene (pink) navels.

As such, demand for CGACC-managed cultivars remained strong throughout the bud sales season, with encouraging levels of enquiries, applications, and licensing activity.

However, the challenge, and probably one faced by all cultivar companies, remains the early Mandarin window. The citrus cultivar landscape continues to seek solutions for this window as growers increasingly pursue improved genetics, earlier selections, seedless lines, export suitability, and greater production efficiencies than those offered by the older Satsuma and Clementine cultivars.

Despite strong local market demand, the business again experienced headwinds due to the shortages of budwood for high-demand and newly released cultivars. CGACC was therefore unable, in several instances, to fully capitalise on market opportunities presented during the year.

However, our South African sales exceeded expectations and continued to perform well despite the budwood shortages. Offshore performance also exceeded expectations due to continued demand for Red Lina in Spain and the earlier-than-expected release of the cultivar in Turkey.

A significant milestone during the year was the appointment of Jan de Wit as Business Development Manager as part of CGACC's succession planning. Jan's integration into the organisation has been highly successful, and management believes this appointment positions the company strongly for future sustainability and growth.

Operational review

The major operational challenge during the year remained the availability of propagation material for key cultivars. The inability to supply sufficient buds constrained growth and, in several instances, prevented the company from fully capitalising on market opportunities presented during the year.

Continuous engagement with our suppliers during the year has resulted in improved alignment regarding future bud supply requirements. Encouragingly, provision has now been made for priority cultivars, although implementation will require time for the multiplication to mature before the full benefits can be realised.

Despite these constraints, management believes meaningful progress has been made towards improving future bud availability for priority cultivars.

Regulatory administration

Brenda Nell, having reached retirement age, continued to provide valuable support in cultivar applications, licensing administration, and regulatory compliance.

Given the increasing number of cultivars being released in recent years, succession planning within this critical administrative function became an important strategic focus during the year.

Financial administration

Despite some oversight and support challenges, financial controls and management processes remained operational, and the overall business structure remained unchanged, with Reyhana Vadee at the helm. We thank our company secretary, Robert Miller, as well as André Moolman and the staff of our sister company, RBX, for their valued oversight and ongoing support.

Cultivar development and evaluation

CGACC continued to prioritise the development, release, and evaluation of commercially relevant cultivars across all major citrus categories.

Priority cultivars

Easy peelers

Released priority cultivars included RBC-01, and Clemensoon.

Cultivars in the pipeline included Lee X Nova, Early Nova, Alternaria-tolerant Nova, Marathon Seedless Early, and UF 900 (early).

Navels

Released priority cultivars included Red Navel Line, Red Lina, Muller Red, Suitangi Late, Addo Early, and DeWet Closed navel.

Cultivars in the final stages of evaluation included Sunrise Early, Mustang Early, new red navel discoveries, Dragon's Egg, etc.

Valencias

Released priority cultivars included Bennie, Turkey, and Gusocora.

Early Nova

GIE5 early (Gusocora Early)

Muller Red (late navel)

RBC-01 (Murcott'Ole) 2nd crop in Spain

Priority cultivars under semi-commercial release included Kas Early, Wonderwhy Midknight, GIE5 Early (Gusocora Early), and Rosy Red Valencia.

Selections under final evaluation included Malinda, AB Seedless, and Beli SL.

Established lower-demand cultivars included McLean SL.

Grapefruit

Final evaluation continued for UF 914 grapefruit / pomelo hybrid.

Lemons

Selections under evaluation included Willow Tree Long Eureka, and Pink Eureka.

Management believes the current evaluation pipeline positions the company strongly for future cultivar releases and continued commercial relevance within the citrus industry, especially within the hard citrus categories. While, like other cultivar companies, the search for the elusive early-window Mandarin continues.

Strategic planning

A major development during the year was the comprehensive strategic planning process undertaken by the company. CGACC extends its sincere appreciation to Rob Elfick for the substantial effort, commitment, and detailed analysis he contributed, as well as for his continued support in implementing the strategic actions identified throughout this process. His primary focus was to evaluate how CGACC could further develop the resources and organisational capacity required to fully realise the value and commercial potential of the industry-leading cultivar portfolio the company has established.

One of the key outcomes arising directly from this strategic process was the appointment of Jan de Wit as Business Development Manager, forming part of the company's long-term succession planning strategy as Jon Roberts transitions towards retirement in the coming years.

CGACC takes this opportunity to formally thank Rob Elfick for the significant contribution he has made, and continues to make, to the organisation.

Jan's appointment, together with other initiatives arising from the successful strategic planning sessions, forms part of a structured transition towards future executive leadership and the strengthening of CGACC's operational capacity. During his initial months with the organisation, Jan has demonstrated strong leadership capability, a sound technical understanding of cultivars, and highly developed stakeholder engagement skills.

His successful integration into the business is regarded as an important milestone in ensuring the long-term sustainability, continuity, and future leadership of CGACC.

Outlook for the coming year

The coming financial year is expected to continue presenting strong opportunities for growth in cultivar licensing and planting demand, particularly in premium easy peelers and Valencia selections. Internationally, Red Lina will be released into new markets, including the U.S. and any additional Mediterranean Basin countries, during the following year.

Key strategic priorities for the year ahead include:

- Improving propagation planning and bud availability;
- Strengthening financial oversight support;
- Ensuring successful succession and knowledge transfer within administration;
- Supporting Jan de Wit's continued transition into broader leadership responsibilities;
- Expanding grower engagement both locally and internationally; and
- Advancing the evaluation and release of promising new cultivar selections.

While supply-side constraints remain a concern, management remains optimistic regarding the long-term prospects of CGACC and its position within the citrus cultivar industry.

Red Lina, left, (arrives in overseas markets)

Did You Know?

QUICK FACTS

- **Overall Export Ranking:** Based on the 2025 export season data South Africa is now the largest exporter globally.
- **Employment:** The citrus industry employs an estimated 160,000 people on farms and in packhouses.
- **Export Value:** According to the South African Revenue Service (SARS), citrus export earnings reached approximately US$2,47 billion, equivalent to around R44,8 billion.
- **Number of Export Markets:** Based on International Trade Centre (ITC) data, South African citrus was exported to more than 120 export markets.
- **Global Export Rankings by Citrus Type:**
  - Grapefruit: 1st
  - Lemons: 2nd
  - Oranges: 2nd
  - Mandarins: 4th
- **Research:** The citrus industry invested R188 million into research. South Africa is seen as a global leader in citrus research.
- **Transformation:** CGA invested over R65 million into black grower development (enterprise development) and human capital development.
- **Shipping:** Over 120,000 containers were used to export citrus in 2025. If placed in a row this would reach over 1,400kms long – or approximately the distance between Cape Town and Johannesburg.

CITRUS ACADEMY

Jacomien De Klerk

The Citrus Academy is a non-profit company established in 2005 by the CGA, with the mandate to enable human capital development in the citrus industry.

Citrus Academy board of directors

The following individuals served on the board of directors during the year under review:

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

Financial results

During the 2025/26 financial year, the Citrus Academy achieved a small surplus of R2,694, resulting in a retained surplus of R137,541. This compares with a surplus of R26,889 in the 2024/25 financial year.

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
2025/10/29	Board meeting	Frikkie Olivier
2026/03/18	Board meeting	Johann Engelbrecht

The eighteenth annual general meeting of the Citrus Academy was held via MS Teams on Tuesday, 26 August 2025.

Citrus Academy Staff

Alignment with the Citrus Industry Transformation Strategy

The Citrus Academy is a non-profit, established to implement the transformation agenda of the CGA.

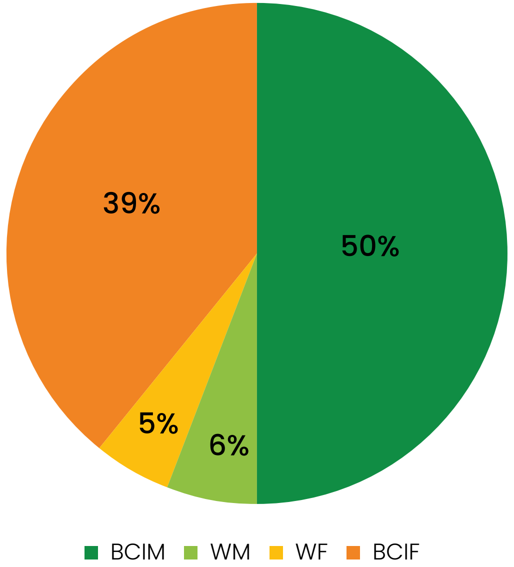
In February 2025, the Citrus Industry Transformation Strategy was approved by the CGA board. The Citrus Academy is identified as one of the main delivery mechanisms of the strategy. During the year under review, the Citrus Academy Transformation Strategy was developed and approved by the Citrus Academy board. This strategy is fully aligned with the Citrus Industry Transformation Strategy but focuses on the key activities that fall within the Citrus Academy's mandate.

During the year under review, all Citrus Academy activities were aligned with the transformation strategy. Efforts were also made to identify areas of alignment and cooperation with other CGA Group entities, particularly those sharing responsibility for the implementation of the transformation strategy.

Grower engagement

The Citrus Academy provides support and information to all citrus enterprises to promote skills development, employment equity and transformation, with a specific focus on black-owned enterprises. The Citrus HR Community, under the auspices of the Citrus Academy, now numbers 224 members, of whom 33 are from black-owned enterprises. The community met twice during the year, sharing information on developments in skills development and human resource management. Citrus Academy staff also attended eight CGA Grower Development Company study group meetings, providing direct advice and support to black-owned enterprises.

Citrus Academy Beneficiary Demographics



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. Of the 4,081 beneficiaries to date, 89% have been non-white, while 44% are female. During the year under review, beneficiaries were 98% non-white and 40% female.

Skills development planning

Under the new transformation strategy, the Citrus Academy will assist black-owned enterprises with skills development planning, aligned with their production plans and undertaken in collaboration with the CGA Grower Development Company. During the year under review, capacity and resources were put in place to enable the full implementation of this activity.

Technical extension capacity

The Citrus Academy's role in ensuring sufficient extension support for black-owned enterprises is to assist extension officers in the industry, particularly those employed by government departments, with the development of their skills and knowledge related to citrus production. The Citrus Extension Continuous Professional Development Programme is offered for this purpose. During the year under review, 160 extension officers from around the country participated in the programme. The Citrus Academy also established the Citrus Extension Community to promote peer learning and support.

Black-owned enterprises capacity building

One of the major focus areas of the Citrus Academy is the development of the internal capacity of black-owned enterprises. To this end, 841 training programmes were funded for employees of black-owned enterprises during the year under review, including technical, business administration, business management, and compliance training programmes. In addition, eight bursaries were awarded in 2025 to employees or family members of black-owned enterprise owners, while 12 bursaries have been awarded for the 2026 academic year.

Industry and workplace exposure

The Citrus Academy provides opportunities for industry and workplace exposure to all members of the Citrus Student Community. These opportunities take the form of vacation work, internships, and attendance of industry events. During the year under review, 14 students benefited from this programme.

Management development

Making available programmes and resources to enable the development of management capacity at all enterprises in the citrus industry, is a growing focus area for the Citrus Academy. During the year under review, the Citrus SuperPower Programme, aimed at supervisor training, was fully implemented, including the first workplace-based components. A total of 53 learners benefited from the SuperPower Programme during the year. The establishment of operational and senior management development programmes was initiated, with implementation planned for the next year.

Technical skills development

Providing programmes and resources to improve technical skills and knowledge of citrus production and packing remains the mainstay of the Citrus Academy. More than twenty programmes are now in place, in addition to resources in the Citrus Resource Warehouse and videos on YouTube. During the year under review, more than four hundred learners participated in technical skills development programmes. Resources, such as the Citrus Best Practice Handbooks, were widely used, and viewing numbers on YouTube continue to increase.

New talent attraction and development

To ensure that citrus enterprises continue to have access to a skills pool that meets their growing needs, the Citrus Academy is continuously working towards attracting and developing new talent for the industry. To attract new talent, the Citrus Academy represents the industry at career fairs around the country, focusing on citrus-growing regions. The Citrus Academy Bursary Fund remains the main vehicle for talent development. The number of bursaries awarded has decreased steadily over the past few years, mainly due to a decrease in the availability of funding and a shift towards postgraduate bursaries, which are more expensive. In the 2025 and 2026 academic years, 36 and 37 bursaries were awarded respectively. The Citrus Secondary Programme is playing a growing role in developing talent in citrus growing-regions. To date, almost 700 learners at high schools in the production regions have participated in the programme. We also saw the first graduates from the programme during the year under review.

Enabling industry absorption

In order to assist talented, trained young people to gain employment in the citrus industry and establish themselves in careers, the Citrus Academy hosts the Pick me! platform, where jobseekers can register and recruiters can find candidates. In addition, the Ready-Steady-Work Programme empowers new recruits to prepare for the workplace and settle in through a structured induction process.

Community development

The Citrus Academy manages and administers the CGA's Orange Heart charitable initiative. During the year under review, eight community development initiatives were supported through Orange Heart, with funding of just under R850,000 allocated. Please refer to the Orange Heart report for more details.

Citrus Production Short Course - Citrusdal

CSP Mahwahwa Prizegiving

Citrus Business Management learnership (funded through the ETBCG programme) graduation in Kirkwood, SRV

CGA GROWER DEVELOPMENT COMPANY (CGA-GDC)

Lukhanyo Nkombisa

In 2016, the CGA board took the important step of establishing the CGA Grower Development Company (CGA-GDC), building on the work of the Transformation Desk that had operated within the CGA since 2003.

The establishment of the CGA-GDC reflected the CGA's ongoing commitment to transformation and inclusive growth, providing dedicated support to citrus producers across the country and ensuring that black citrus growers are meaningfully included in, and benefit from, the continued development of the industry.

During the year under review, several initiatives were implemented. The following highlights provide an overview 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 Citrus Grower Development Chamber (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 62 farms and spent a total of R29,5 million across six 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.

Expenditure Per Province

Province	Expenditure (R)	% of Total
Eastern Cape	R12,208,694.28	41,0%
Limpopo	R9,715,464.72	32,9%
KwaZulu-Natal	R4,824,285.00	16,3%
Mpumalanga	R1,171,940.24	4,0%
Western Cape	R1,092,906.50	3,7%
North West	R500,664.50	1,7%

Tree census and seasonal overview

The area under production increased steadily from 7,577 hectares in 2023 to 7,732 hectares in 2024 and 7,760 hectares in 2025. Export volumes also grew during this period, rising from 6 million cartons in 2023 to 6,1 million cartons in 2024 and 8,3 million cartons in 2025, with a particularly strong increase recorded in 2025.

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

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. These annual events are held in the major citrus-producing provinces. During the year under review, information days were hosted in Limpopo, Mpumalanga, the Eastern Cape, KwaZulu-Natal, and the North West.

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 towards 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. Citrus study groups also present an opportunity for growers to meet and share common challenges. This assists black citrus growers to broaden and increase their participation in the citrus value chain. The CGA-GDC extension officers are working closely with the provincial government officers in hosting the citrus study group sessions. The collaboration between CGA-GDC and provincial governments is formalised through the Memorandum of Understanding (MoU).

During the year under review, eleven citrus study groups were active across all citrus-growing regions (three in the Eastern Cape, four in Limpopo, two in KwaZulu-Natal, one in the North West, and one in Mpumalanga.

New entrant support

New entrant support is provided to people who want to start citrus farming, as well as those who have just acquired land through the land reform programme.

Establishing a citrus orchard is a long-term investment that requires planning, as mistakes made during the establishment phase can affect production for the next 20 to 30 years. The CGA-GDC assists these individuals by assessing whether all the required resources for establishing citrus orchards are available. Land reform beneficiaries are supported through the provision of extension services and capacity-building initiatives.

CRI Cutting Edge articles

The CGA-GDC extension officers facilitate the distribution of CRI Cutting Edge articles to all black citrus growers. The CRI Cutting Edge articles are technical information sheets published by Citrus Research International (CRI), used to provide South African citrus growers with urgent, science-based recommendations on crop management, pest control, post-harvest treatments, and regulatory compliance. They cover topics such as fruit fly monitoring, phytophthora control, and MRL (Maximum Residue Limit) updates for exports.

Regional extension workshops

CRI regional extension workshops in South Africa aim to transfer the latest scientific research, technical knowledge, and best practices directly to citrus growers and packhouse staff. They ensure industry compliance with international phytosanitary standards, improve orchard and post-harvest performance, and enhance the profitability and sustainability of the South African citrus industry.

Black citrus growers are encouraged to attend these workshops. The CGDC, through the Citrus Academy, assists black growers with the payment of registration fees, while growers cover their travel and accommodation costs.

AgrigateOne programme

CGA-GDC embarked on the Data Enablement Project at the beginning of 2025. To deliver this, we partnered with AgrigateOne (AG1), a leading software provider with existing integrations across major packhouses. This project is also a step toward empowering black citrus growers with digital tools to improve traceability, financial visibility, ESG reporting, and market access. The project was structured in three phases.

Phase 1 target outcomes were as follows:

- Onboard 50 growers during the 2025 season
- Create a CGA-GDC platform login and profile
- Load grower data onto the CGA-GDC profile
- Allow growers to track pallet movements, access financial and ESG reports, and view tailored market insights

Outcomes Achieved

- **Received permission letters from 10 growers.** A key part of our process is receiving permission letters from the growers and packhouses to firstly pull their data, and then to display it on the CGA-GDC profile. The CGA-GDC extension officers have secured these permission letters from 10 growers.
- **Uploaded data for two growers on the CGA-GDC profile.** We triaged the integration process to start with growers where we already have integrations at the packhouse they use from our existing clients. Of the 10 permission letters we received, we had integration at packhouses for two growers.
- **Received buy-in from three significant partnerships.** Scrutiny from partner farms and packhouses around data security has proven to be a big challenge, with questions raised on how the CGA-GDC planned to use the data once received. After extensive discussions, we received verbal agreement from Alicedale Estates, FruitOne, and SRCC. These partners account for nine growers.
- **Successfully pulled data for 25 CGA-GDC PUCs.** A big win for us is that AG1 already has integrations and data available for 25 PUCs. Our next task is to finalise the permission letter process.

Integrated Pest Management (IPM) Programme

Progress / status: 3rd year of Integrated Pest Management (IPM) implementation.

Project overview: The project is being implemented by River Bioscience. IPM programmes have a proven track record of significantly reducing the risks associated with pesticide use, while improving environmental quality, plant health, and welfare. Some of the benefits of an integrated approach include promoting sound structures and healthy plants and promoting sustainable bio-based pest management alternatives.

The current season operated under a four-pillar methodology:

- **Programme planning and co-ordination:** Strategic alignment meetings, implementation schedules, pre-season grower engagement, and clearly assigned responsibilities.
- **Product supply and stewardship:** Forecast vs supply reconciliation, RBX > Distributor (Agent) > Grower supply chain management, correct application stewardship, study groups, and in-field support.
- **Effective monitoring and data collection:** Routine, risk-managed data sharing as and when required.
- **Grower training and support:** Regular workshops, on-site visits, and supporting written and visual materials.

Project scope: In the Southern Region, the programme is rolled out in the Kat River, covering 16 farms totalling 511,55 ha, while in the north there are three farms in Tshipise, Thohoyandou, and Marble Hall, covering 167,55 ha.

Product offering deployed:

- **Cryptomax** – for FCM control using a baculovirus, applied as a foliar spray.
- **Trichogramma** – egg parasitoids for FCM management, released in scheduled cycles throughout the season.
- **M3 Bait Stations** – for fruit fly population suppression, deployed at the onset of fruit fly pressure within orchards.

Partnerships and collaborations

Collaboration with the Eastern Cape Development Corporation (ECDC)

The two parties extended a Memorandum of Agreement (MoA) from the previous implementation period to include the refurbishment of Ripplemead. Subsequently, ECDC made available funds to the value of R3,5 million towards these alterations. Committees were set up to oversee the implementation of this project. The overarching committee, the Steering Committee (SteerCo) oversees the overall packhouse initiatives, while the Technical Committee is tasked with the current Phase 1 refurbishment.

The SteerCo is composed of the officials from the provincial government (including the district office), ECDC, Dr Mono Mashaba, and CGA-GDC. The Technical Committee is composed of the Engineering Division from Amathole District (where the packhouse is located), ECDC Engineering Services, and CGA-GDC.

Status:

A contractor was appointed, and a site handover meeting was held. The handover triggered a 14-day mobilisation period for the contractor to:

- Establish the site.

- Prepare and submit required contractual documents for the engineer's approval.
- Prepare and submit a full OHS file for approval by the appointed OHS agent.
- Procure and pay initial premiums for required insurances, including Public Liability Insurance, surety, and performance guarantees.

A professional service provider was appointed to project-manage the construction. The machinery supplier will be engaged to prepare equipment for installation.

Current project status: Work was paused due to the harvest period; once the packhouse is clear, contractors will resume work and take over the site.

Partnership with ANB Investments

The CGA-GDC and ANB Investments have signed a Memorandum of Understanding (MoU) to collaboratively implement and support a Citrus Development Programme. The programme aims to empower historically disadvantaged individuals and land reform beneficiaries who are entering or expanding citrus farming operations.

Commitments by the Parties

Cederberg and Du Roi Nurseries

- Will supply more than 100,000 certified, disease-free citrus trees at a 50% discount to approved growers.
- Trees will be available for planting between October 2025 and March 2027.

FarmNode

- Will offer a free subscription for Year 1 and a 50% discount for Year 2 for its farm management software.
- Software features include orchard mapping, crop monitoring, sampling, irrigation management, and chemical application tracking.

Firstfruits

- Will provide scientific horticultural and crop protection consultation services at a 20% discount in Year 1 and a 50% discount in Year 2 for approved growers.
- Advice will be tailored to ensure optimal crop performance across critical growth stages.

CGA-GDC

- Will promote the programme and facilitate the selection and approval of eligible growers through the application process.
- Will manage the R500,000 financial contribution from ANB Investments to support transformation initiatives.

Approved Farms

The programme will support four farms in the Eastern Cape, two farms in the Western Cape, two farms in Limpopo, and one farm in Mpumalanga.

Partnership with Land Bank and Khula

The CGA-GDC and Land Bank continue to collaborate to ensure that citrus growers are informed about available funding instruments offered by the bank for annual production support, including operational expenditure (Opex) and capital expenditure (Capex) requirements. As part of this effort, the team participates in a series of meetings and site visits across various regions. The CGA-GDC's role is limited to organising growers and conducting pre-screening assessments, while the responsibility for appraisal and approval rests with the bank.

It was further established that Khula is also involved in submitting citrus funding applications for blended finance. The bank has recommended that these activities be streamlined to improve efficiency and coordination. Going forward, the engagement will include participation in both pre- and post-investment support activities.

Key challenges identified include the need for expert input on financial and cash flow projections to ensure that business plans are bankable. The team will therefore focus on integrating financial and operational components to strengthen the overall quality and coherence of business plans. Specific areas for improvement have been identified, including updating existing business plans. Some farms have already engaged with Khula to assess whether their financial forecasts align with the requirements of lending institutions.

Key areas under this partnership include:

- Enhancing the quality and completeness of data used in business plans.
- Structuring the review process to ensure alignment between financial projections, cash flows, and operational plans.
- Reviewing and strengthening business plans.

Partnership with the Western Cape Department of Agriculture CPAC/DPAC

The Western Cape Department of Agriculture (WCDoA) implements a commodity-focused approach to allocating Comprehensive Agricultural Support Programme (CASP) funding. This strategy enables the department to provide tailored support services to producers across the province, including subsistence farmers, smallholder farmers, commercial land reform beneficiaries, and participants in the agro-processing sector.

Within this framework, the department operates through Commodity Project Allocation Committees (CPACs), which assess and approve funding applications in alignment with strategic priorities. One of the farms, located in Klapmuts in the Western Cape, was approved for funding of approximately R750,000. The approved funding allocation comprised R574,836.90 for packing, tipping and treatment, and R171,002 for fertilisers and chemicals.

Compliance support

Compliance support was provided to eight farming enterprises to assist them in implementing and maintaining certification and ethical compliance requirements. This assistance covered accreditation-related costs, including participation in inspection programmes, audit fees and audit inspection reports, enabling beneficiaries to meet both local legislative requirements and internationally recognised good agricultural practice standards. The support provided covered compliance with GLOBALG.A.P. and SIZA Social and Environmental Standards.

ECONOMIC TRANSFORMATION OF BLACK CITRUS GROWERS (JOBS FUND)

Robert Miller

The Economic Transformation of Black Citrus Growers (ETBCG) Project entered the Monitoring and Evaluation (M&E) phase in 2025. The M&E phase will run for a further five years.

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 installation, orchard maintenance, and packhouse repairs.

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 2026:

Indicator	Target	Achieved
New permanent jobs	316	139
New seasonal jobs	1,713	1,605
Short-term jobs created	7	22
Beneficiaries trained	1005	979
Hectares planted	746	548

CITRUS GROWER DEVELOPMENT CHAMBER (CGDC)

Sive Silo

The CGA remains steadfast in its commitment to fostering inclusive growth and meaningful transformation across the citrus industry.

A cornerstone of this commitment is the CGDC, a committee of the CGA board of directors, established to provide black-owned enterprises with a dedicated platform for representation, support, and active participation in the industry.

The CGDC serves as the collective voice of black-owned enterprises, ensuring they are meaningfully included in industry decision-making and development initiatives. It champions the needs of black-owned enterprises, broadens their access to industry resources, and promotes equitable participation throughout the citrus value chain.

Along with the Citrus Academy and the CGA Grower Development Company, the CGDC is a key delivery mechanism of the Citrus Industry Transformation Strategy, which was approved by the CGA board in February 2025.

A significant highlight of the year under review was the CGDC Grower Indaba, held from 10 to 12 September 2025 at the Birchwood Hotel in Johannesburg. This milestone event brought together the owners of black-owned enterprises from across all citrus growing regions to deliberate on the future direction of transformation in the citrus industry and define the role of the CGDC in the implementation of the Citrus Industry Transformation Strategy.

The Indaba marked a pivotal moment for the CGDC, as it facilitated a change in leadership and the election of new CGDC members and executive committee members. The incoming leadership will continue to build on the foundation established by their predecessors, driving transformation and inclusive growth in the sector.

Following the election of the new CGDC, an induction session was held on 10 October 2025 to orientate CGDC members on the CGA and its structures. The session also incorporated a leadership development component, equipping the incoming CGDC members with the knowledge and skills needed to fulfil their roles effectively.

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 meetings were held:

Meeting Date	Body	Format
2025/06/25	CGDC executive committee	Virtual
2025/08/28	CGDC executive committee	Virtual
2025/10/10	CGDC	In-person
2025/11/03	CGDC executive committee	Virtual
2025/12/02	CGDC	In-person
2026/03/30	CGDC executive committee	Virtual

The members of the CGDC at the end of the year under review were:

Name	Region
*Sydney Mpahla	Eastern Cape Midlands
*Tozamile Lukhalo	Eastern Cape Midlands
Bismark Twaku	Eastern Cape Midlands
Khaya Katoo	Patensie
*Siya Pityana	Sundays River Valley
Steri Ndyenga	Sundays River Valley
Andre Klaase	Western Cape
Todani Raphalalani	Limpopo River
Bennet Malungane	Letsitele
Octavias Masalesa	Letsitele
Pheladi Tlomatsane	Letsitele
*Thabo Maripane	Marble Hall
Riebs Khoza	Nelspruit
Petros Shiba	Onderberg
*Mpho Maepa	Nelspruit
Simon Selowe	Nelspruit
Mziwoxolo Makhanya	KwaZulu-Natal
*Segomotso Letebele	Senwes
Petros Eric Shiba	Onderberg
Mziwoxolo Makhanya	KwaZulu-Natal
Louisa Maloka-Mogotsi	Senwes

**Executive committee members*

CGDC GROWER INDABA

Inclusivity
Equity
Diversity

Birchwood Hotel, Johannesburg
10-12 September 2025

CGDC GROWER INDABA

Jacomien de Klerk

The CGA is at the forefront of promoting inclusive growth and transformation within agriculture. Central to its mission is the CGDC, established as a platform to represent and support citrus growers from black-owned enterprises and to ensure they are meaningfully included in industry decision-making and development initiatives.

The CGDC Grower Indaba, held from 10 to 12 September 2025 at the Birchwood Hotel in Johannesburg, brought together owners and directors from black-owned enterprises across all citrus growing regions. Over the course of the two-day event, the future of transformation in the citrus industry was charted, shaped by the industry's commitment to partnerships and building sustainable black-owned enterprises.

The Indaba also marked a pivotal moment for the CGDC's leadership, facilitating a change in governance and the election of new executive committee members.

The Indaba opened with a powerful affirmation of the citrus sector's transformation credentials. The Chief Director of the DoA's Comprehensive Agricultural Support Programme (CASP), Elder Mtshiza, addressed delegates and highlighted that the 25,6% contribution by black-owned citrus enterprises is significantly above the national average of 13% across all agricultural commodities.

The Minister of Agriculture, John Steenhuisen, addressing the Indaba virtually, outlined three strategic priorities through which the citrus industry can remain globally competitive and locally empowering. The first is the establishment of a compact citrus value chain to align priorities and track progress on inclusivity and competitiveness. The second is scaling up support for black-owned enterprises, with clearly defined and measurable targets. The third is investing in climate and biosecurity resilience at farm level, where it matters most.

Minister Steenhuisen's commitment to the industry was unambiguous, concluding his address with a pledge that the DoA wants to walk this road with the industry, shoulder to shoulder, to grow the citrus sector and South Africa beyond even its wildest expectations. These words were received with deep appreciation by delegates.

The Indaba underscored the significance of external partnerships, particularly those between the industry and government. The commitments made by the Minister and the DoA are deeply valued by citrus growers across South Africa, and the Indaba provided a platform to strengthen these ties and align on a shared vision.

Equally important are the internal partnerships that form the backbone of the CGA and its structures. The CGA and the CGDC are built upon the principle of growers assisting each other. Collective engagement fosters shared learning, solidarity, and strategic collaboration. In an industry that is both competitive and complex, growers benefit immensely from exchanging knowledge, experiences, and practical solutions to common challenges. Gatherings such as the Indaba are therefore essential; they unite growers around a shared vision and strengthen the resolve of the entire sector.

A major focus of the Indaba was the presentation of the new Citrus Industry Transformation Strategy. The strategy affirms that transformation activities extend far beyond merely providing funding or access to funding. Its core principles focus on creating opportunities for growers to establish commercially viable farms, thereby stimulating the levy collection that enables continued growth and support.

The citrus industry's transformation journey is best understood through the people who live it, and the Indaba was an opportunity to celebrate the many growers whose stories embody the potential of the transformation agenda.

The CGDC Grower Indaba reaffirmed the citrus industry's commitment to transformation through collaboration, innovation, and empowerment. It demonstrated that the sector's success lies not only in external support from government and industry bodies, but also in the strength of the internal networks among growers.

RBX GROUP

Rob Elfick

The RBX Group's main objective is the development, commercialisation and distribution of sustainable crop protection technology by focusing on key pests through holistic and accurate programmes to support the competitiveness, sustainability, and market access of citrus growers.

The 2025/26 season saw a strong commercial performance for the RBX Group. River Bioscience recorded good sales volumes across its virus and macrobial portfolios, despite significant disruption in the broader crop-protection market. XSIT delivered the full value of its integrated programme offering to growers in the Eastern Cape, Western Cape, and Northern Cape. A large part of this performance can be attributed to the sustained investment made in our people – on the ground with agents and growers, and in production, quality control, regulatory, and administration – combined with rigorous transparent quality management across our live-biological supply chain helping to build confidence in these offerings and this sector.

Our new not-for-profit company, iLali Agri, was formed during this year with the objective of coordinating the efforts of as many stakeholders as possible to develop the future of sustainable agriculture. "iLali" means village in isiXhosa and advances the notion that it will take a village to raise the sustainable crop protection programmes of the future.

Quality certifications and accreditations

Our Addo facility successfully passed its ISO 9001 surveillance audit during the year, with certification renewed and upgraded to an Emirates International Accreditation. Following the original ISO 9001 certification earlier in the year, our virus product range has also been granted ECOCERT certification, broadening the range of markets and production systems in which our products can be used with confidence. Both milestones reflect the standards we set ourselves and the expectations of an increasingly sophisticated grower base in both domestic and export biological markets.

Consolidation and quality assurance

After seven years of sustained growth, our focus for the 2026/27 budget cycle was deliberately on consolidation. That means revisiting the processes introduced during our growth phase, embedding the large number of new team members who have joined us over the last two years, and ensuring our quality systems can comfortably support the higher volumes of newer products forecast in the years ahead. In practical terms, this includes tighter continuous process monitoring across production, a dedicated senior role focused on our biological processes across multiple sites, and improved coordination of technical information flow between sites. It is the less visible work, but it is what allows a business built on live biologicals to scale without compromising on what growers rely on us for.

The Sterile Insect Technique (SIT) programme for False Codling Moth (FCM)

For the first time in six years our XSIT facility in Citrusdal was unable to meet its moth production targets for a few weeks at the end of the 2024/25 season. The issue was methodically worked through, and production in Citrusdal returned to the level expected for the 2025/26 SIT season, with larval survival still receiving close technical attention.

The last year has also brought what we consider the most significant step forward for SIT funding in several seasons. The CGA has agreed to support iLali for SIT sustainability over a four-year period, with conditions attached to the final two years. The Western Cape Department of Agriculture (WCDoA) continues its long-standing support of the programme, and the Eastern Cape Government has now indicated it will support the SIT programme through the CGA's Grower Development Company (CGA-GDC) – an outcome we have been working towards for some time. The National Government has also expressed its intent to assist, and we continue to engage with the Department of Agriculture (DoA) in this regard, as all the above role players recognise the importance of this industry asset in maintaining market access.

If these commitments can be finalised, SIT becomes more affordable at an area-wide level, which in turn allows us to enter longer-term contracts with grower groups and reduce the pricing pressure that has historically constrained the programme. The prize is a more economically viable SIT offering for every grower in a given production area, which is what area-wide pest suppression requires to achieve optimal results. We are grateful for the leadership shown by the CGA, the provincial departments, and the growers and focus groups that have advocated for this support.

Strategic entry into macrobial distribution

A defining step in the RBX Group's strategy over recent years has been our investment in macrobial distribution capability, ensuring that the growers we serve have reliable access to a broad range of beneficial insect solutions – not only those produced in-house. This positions the Group to offer genuinely integrated pest management programmes rather than isolated products, and it gives us the in-market presence needed to support growers as they adopt more sophisticated IPM approaches. Longer-term planning is underway to make fuller use of our specialist staff year-round, including exploring opportunities to supply Northern Hemisphere markets during the Southern Hemisphere winter.

International collaboration and innovation

River Bioscience continued to expand its footprint in Southern and East Africa during the year, with product registration and development work progressing in Zimbabwe, Zambia, Malawi, Tanzania, Kenya, and Ethiopia. In parallel, we deepened our European engagements, with a senior technical and commercial team visiting partners and researchers across France and Spain and participating in the 8th International Entomophagous Insects Conference in Tours, France. At that conference, our Product Development and Innovation team presented two posters – one on our macrobial quality control system, and one on non-target chemical effects on Trichogrammatoidea cryptophlebiae, our mass-produced tortricid parasitoid – reflecting the kind of practical, grower-relevant science we see as central to our work.

Closer to home, a number of collaboration trials on new active ingredients and semiochemical technologies are progressing well, and independent workstreams to improve our virus formulations are showing early promise. These collaborations, along with our internal work on additional macrobials, are how we intend to remain a credible leader in holistic sustainable crop protection as grower and market expectations evolve.

Aligning with CGA Group companies

The RBX Group continues to host the CGA-GDC and the CGA Cultivar Company (CGACC) at our head office, where they have access to our facilities and infrastructure without the need to establish their own. Our accounting and administration team supports the Cultivar Company with back-office activities, and our sales and marketing team supports events such as the CRI Symposium. We were particularly pleased to host the Pre-Summit Study Tour ahead of the 2025 CGA Citrus Summit, welcoming close to 60 delegates alongside SAFRESCO to the Kirkwood region over two days of harbour, orchard, processing, and research-site visits. The collaborative agreement between River Bioscience and the CGA-GDC in the Kat River Valley continues to deliver a holistic FCM management programme for development growers, combining Trichogrammatoidea cryptophlebiae and CryptoMax with in-field stewardship and monitoring – and we expect this footprint to grow in the coming seasons.

People, values and culture

In October we brought the entire RBX team together for a national staff meeting to formally relaunch our refreshed values – Courage, Integrity and Honesty, Commitment, Respect and Equality, and Fun – under the banner "Real People, Real Stories. It is in our hands." The five values themselves have not changed; what has changed is the way we tell the story of how they show up in the work of actual people across our Head Office, Addo, Citrusdal, and regional teams. We also recognised 10- and 15-year long-service milestones and celebrated our annual value champions at team events in both the Eastern and Western Cape.

Systems investment: moving to Acumatica

On 1 April 2026, the RBX Group went live on Acumatica, a modern, fully integrated ERP platform, replacing Sage Pastel. After several years of strong growth, our operational and reporting needs have outgrown what our existing system could reasonably support. Acumatica brings real-time visibility across departments, significantly less manual processing, and workflows that will allow our finance and operations teams to focus on higher-value work. The depth of preparation and training that has gone into this transition has been substantial, and it is a clear signal that we are building for the long term.

Being part of our communities

The Group's community focus remains on early childhood development, poverty relief, and emergency support in the Eastern and Western Cape regions where we operate. This year, the team delivered Christmas party packs to the school we partner with in Addo and contributed meaningfully to the Santa Shoebox initiative. Our ongoing partnerships with the ACT Foundation in Citrusdal, the Hand-Up Foundation in the Eastern Cape, and several pre-schools continue – these are long-term relationships, not once-off gestures, and they matter to us. A practical recycling initiative rolled out across our offices and production facilities during the year is one small example of a broader commitment to making sustainability part of all our daily operations.

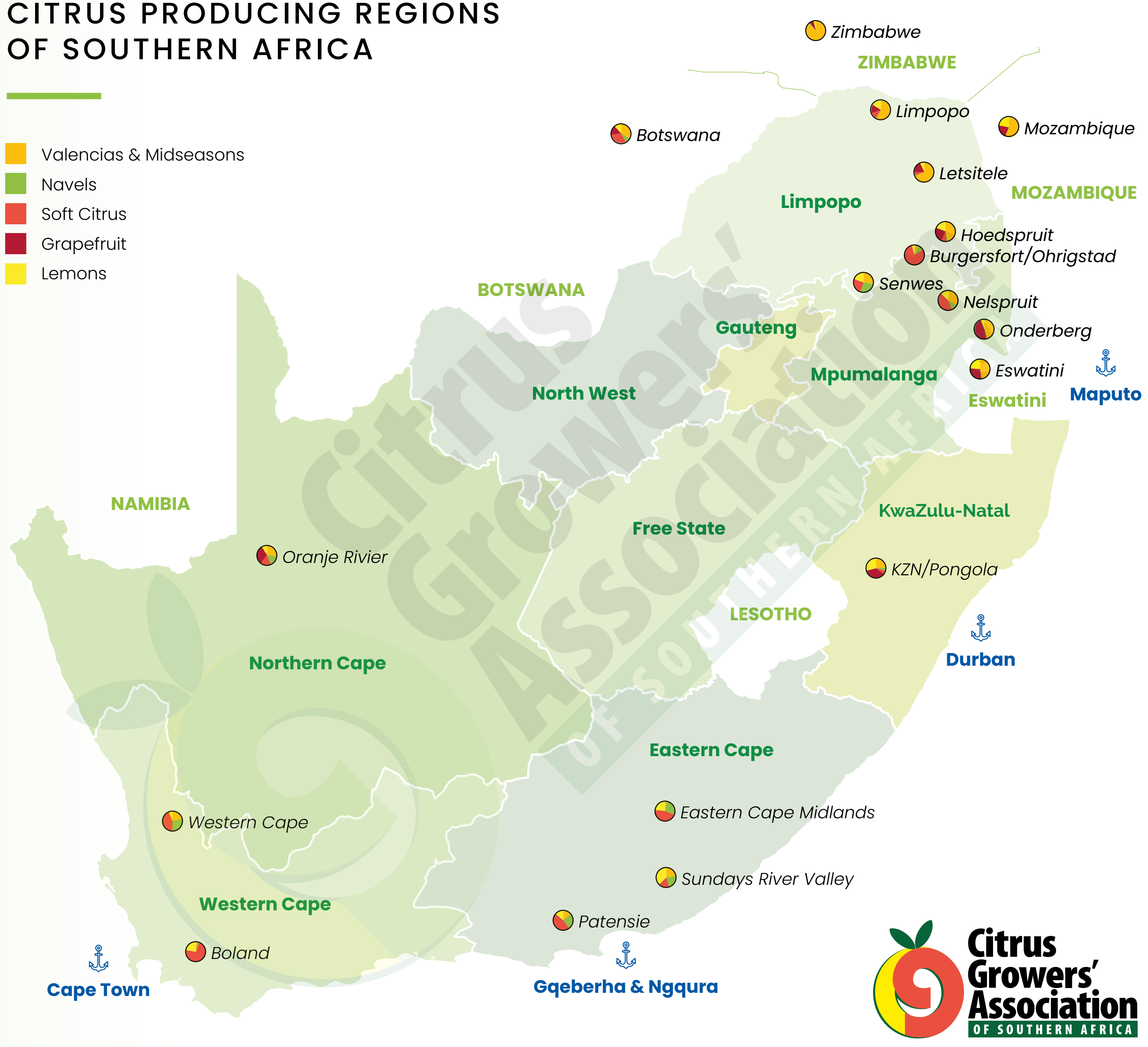
Condolences

During the year under review, we lost our friend and colleague Dr André Schreuder, who served on the RBX board for over five years. André was generous with his time, his experience, and his wise counsel – always willing to serve on committees and to offer ad hoc support on projects, typically for the price of a steak. His ideas and insight will be missed. Our thoughts and prayers remain with his wife, Nelia, and his family. We also record with great sadness the tragic helicopter accident in Patensie and the passing of several other colleagues during the year.

Looking forward

The RBX Group enters the 2026/27 season in a strong position. Our commercial performance is solid, our people are experienced and committed, our quality systems are accredited and improving, and the external support for SIT is stronger than it has been at any point in recent memory. Our focus for the year ahead is to consolidate what we have built, strengthen the base beneath it, and continue to deliver the holistic, quality-assured sustainable pest management programmes that southern African growers rely on. Thank you to every member of the RBX team — your technical skill and your sense of responsibility to growers is what this report is ultimately about.

CITRUS PRODUCING REGIONS OF SOUTHERN AFRICA



ABRIDGED FINANCIAL STATEMENTS

	Actual 2024/25	Budget 2025/26	Actual 2025/26	Budget 2026/27
Income	**282,934,424**	**328,492,000**	**325,471,591**	**350,285,000**
Statutory Levy - RSA	268,778,616	300,300,000	311,722,932	318,970,000
Voluntary Levy - Eswatini / Zimbabwe / Botswana	4,357,109	4,257,000	4,746,634	6,365,000
Draw From Reserves - CBS Provision		20,000,000		20,000,000
Property Income	271,413	285,000	280,431	300,000
Interest Received	5,136,911	3,500,000	5,403,145	4,500,000
Dividends Received - River Bioscience / XSIT				
Citrus Summit Income	4,237,766			
Other Income	152,609	150,000	3,318,449	150,000
Expenditure	**294,690,287**	**319,928,742**	**300,022,785**	**348,781,041**
Staff Costs	8,751,504	8,110,527	8,620,652	9,281,248
Travel & Accommodation	359,071	375,000	960,182	423,000
Office - Rent, Rates & Equipment	291,918	486,037	582,024	636,537
Office Expenses	798,822	765,000	820,943	648,000
Board Expenses	1,280,125	1,351,104	956,335	1,135,600
Services (Accounting, Legal & Insurance)	960,381	1,110,540	1,042,033	1,210,000
Subscriptions and Memberships	628,349	1,255,659	1,066,268	1,310,000
Communication	1,491,379	1,396,000	1,457,596	2,310,000
Market Access	13,657,016	12,156,292	13,614,416	16,405,667
Market Access - CBS / FCM	7,912,936	24,368,800	5,679,129	24,845,389
Fruit South Africa	1,265,689	1,272,000	1,492,620	1,582,177
Research Programmes - Citrus Research International	176,630,984	188,228,843	188,228,843	200,339,278
Research: CRT Bond	3,200,000			
Transformation - CGA incl. ETBCG Programme	5,026,918	3,923,900	2,781,575	2,199,040
Transformation - CGA Grower Development Company	48,644,329	52,500,000	50,000,000	55,650,000
Transformation - Citrus Academy	10,000,000	10,500,000	11,800,000	12,330,000
Depreciation	105,613	120,000	140,516	
Information	3,398,513	3,153,790	2,473,908	5,518,417
Provision for doubtful debts	478,030		2,048,470	
Leave Pay Provision	(2,125)		10,552	
Impairment of Loan - CGA Cultivar Company (Pty) Ltd	1,900,000			
Infrastructure & Logistics	2,715,589	5,251,000	2,777,482	5,459,608
Shipping		150,000		150,000
Market Development	957,480	3,404,250	3,469,241	7,297,080
Citrus Summit Expenses		4,237,766		
General		50,000		50,000
NET SURPLUS / (DEFICIT) FOR YEAR	**(11,755,863)**	**8,563,258**	**25,448,806**	**1,503,959**

Citrus Growers' Association OF SOUTHERN AFRICA

www.cga.co.za

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Designed and produced by www.sarahscottdesign.co.za