Jako van Lill - DKI Global

South Africa's Valencia season will be shaped by fruit size and market timing

Although South Africa's latest citrus export estimate has been revised slightly lower, the industry is still expected to export around 204 million 15kg cartons, making it another exceptionally large season. At the same time, logistical challenges and container shortages remain among the main constraints facing exporters this season.

According to Jako van Lill of DKI Global, several citrus categories appear to be progressing earlier than normal. "Some growers expect to finish packing sooner than usual. In the Eastern Cape, some producers believe they will complete the lemon harvest within the next two to three weeks. Even in the Western Cape, certain growers indicate that the lemon season is drawing to a close," he says. From a marketing perspective, however, Van Lill notes that an earlier finish may not necessarily benefit exporters. "In a season like this, a later harvest would actually be advantageous."

© DKI Fruit Marketing*The remainder of the South African citrus season will largely depend on the Valencia crop*

"The majority of our Valencia exports still lie ahead. Current export estimates stand at approximately 62 million cartons, while only a relatively small portion has been shipped so far. The season will ultimately be influenced by fruit size, the availability of Class 2 fruit, and geopolitical developments in the Middle East."

Van Lill adds that prolonged rainfall earlier in the season across some production regions is expected to reduce export volumes to key markets because of phytosanitary and quality challenges.

Several customers in India and the Middle East have indicated that they would prefer South African Valencias to arrive slightly later, allowing Egyptian supplies to clear before switching origins.

Buyers waiting for appropriate window before transitioning to South African Valencias

Fruit size is expected to play a significant role this season. Early indications suggest the Valencia crop in some key areas might consist predominantly of larger fruit, limiting the availability of the smaller counts required by markets such as India and the Middle East.

"Demand for South African Valencia oranges from India has strengthened in recent weeks, but Egyptian fruit is expected to remain available until around the second week of August. Buyers are therefore waiting for the appropriate window before transitioning to South African fruit," says Van Lill.

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The trend towards larger fruit has already been evident during the navel season, where sizes such as 48s, 56s and 64s dominated, he says, accompanied by higher percentages of Class 2 fruit following the severe winds experienced earlier this year. Early season late mandarins have also produced larger sizes, which traditionally suit Middle Eastern buyers.

However, ongoing regional instability has made exporters more cautious. "Producers are looking to reduce their exposure to the Middle East for the remainder of the season because of the renewed uncertainty. Longer transit times and higher logistics costs have also become important considerations."

While South Africa is still expected to export another exceptionally large citrus crop, he observes that fruit size, market timing and geopolitical developments are likely to play a decisive role in how successfully exporters position the remaining Valencia volume in key international markets.

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