Southern African citrus exports drop amid local demand and trade challenges

In the 2024 export season, Southern African citrus growers packed 164.5 million 15kg cartons for delivery to global markets. While this is 600,000 cartons less than last year, the slight decline is still a strong performance for the sector, given the truly uniquely demanding circumstances growers faced.

Several unforeseen factors forced the Citrus Growers Association of Southern Africa (CGA) to adjust its export estimates regularly during the year. The initial estimate for total exports was 181.7 million 15kg cartons. The final figure falls 9% short of this.

One of the most prominent factors affecting export volumes was the high price offered for oranges destined for local processing. Precious Kunota, Business Intelligence & Data Manager at the CGA, explains: "Sources in the juice industry reported a significant increase of between 60% to 80% in volumes of oranges processed at their facilities, compared to the 2023 season. It's estimated that about 6 million 15kg cartons of oranges."

The final packed figures for 2024:

- This year 14.3 million cartons (15kg equivalent) of Grapefruit were packed for export. This is 300,000 less than in the 2023 season and is a 14% shortfall from the initial estimates made in April 2024.
- 41.6 million cartons of Mandarins were packed, representing a notable 3.6 million increase since the previous season. It is, however, 3% less than the initial estimate.
- Lemons showed a decrease compared to both the previous season and the estimate: 34.7 million cartons of Lemons were packed in 2024, being 9% down from the estimate and 1.1 million cartons down from 2023.
- Navel Oranges packed for export have shown an increase of 400,000 cartons compared to 2023. This year 25.1 million cartons of Navels were packed, a 2% decrease from the original estimate.
- A total of 48.7 million cartons of Valencia Oranges were packed this year. Notably, this is 4.7 million less than in the 2023 season and is a significant 16% shortfall from the initial estimates.

Port efficiency remained a serious concern for the citrus industry during the past season. The lower-than-expected citrus export volumes reduced peak volumes at ports dramatically, which eased pressure on the container terminals. However, all indications are that this is just a reprieve from pressure on our underperforming ports and will not last. Volumes will increase over the next few seasons and if ports are not improved and capable of handling it, citrus exports and the wider economy will suffer greatly.

It should also be noted that the European Union's unscientific and unnecessarily restrictive trade measures on Citrus Black Spot (CBS) and False Coddling Moth (FCM) continued to have a dampening effect on exports. These measures still represent an entire opportunity cost for local growers of R3.7 billion. South Africa's historic cases against these measures at the World Trade Organisation are making progress and are set to enter the next phase in the dispute process in mid-December.

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