

South African citrus export projections show 'balanced growth and excellent quality'

Ahead of the official start of the 2025 citrus export season in April, a variety of focus groups of the Citrus Growers' Association of Southern Africa (CGA) presented their predicted volumes available for export in the upcoming season.



"All available data project exports that are in line with the five-year average, which means there will be sufficient fruit for our global markets. The outlook suggests no oversupply or undersupply," said Gerrit van der Merwe, Chairman of the [CGA](#).

Overall, the quality of the fruit for 2025 looks to be excellent, the CGA said. The breakdown of various variety estimates indicates a balanced season ahead.

The current prediction is that 32.9 million 15kg cartons of lemons will be exported to key markets, a 5% decrease from last year. Estimates for citrus-producing regions the Sundays River Valley, Senwes (Marble Hall and Groblersdal), Boland, and Patensie are all down, but Hoedspruit is estimated to increase its lemon production.

Early lemons have already been sent to overseas markets, especially the Middle East, Russia, and Canada.

Oranges

Figures for Navel and Valencia oranges are expected to be up this year. Predictions show a 5% increase in export volume for Navel oranges, at 26.1 million 15kg cartons available for packing.

For the first time, the Orange focus group has split estimates into Early/Mid Navels (11.34 million cartons) and Late Navels (14.75 million cartons) to improve tracking. Last year, unusual weather events such as floods in the Western Cape and frost in Limpopo affected Navel exports, but weather permitting, volumes are expected to improve in 2025.

After four years of slight declines in Valencia orange exports, they will likely improve in 2025. A 6% increase in 2024 figures to 52 million 15kg cartons is projected. The possible impact of juicing prices on this figure is not yet quantifiable.

Last year, unusually high local processing prices suppressed exports of Valencia oranges.

Grapefruit

Grapefruit exports are also predicted to increase. The 6% growth figure translates into 13.5 million 17kg cartons.

The peak period for grapefruit exports is expected to be between mid-April and mid-May. This season, the grapefruit focus group is embarking on a new marketing project aimed at increasing grapefruit consumption among a younger target audience in the European market.

Mandarins

Two early mandarin varieties show stability in supply. The Satsuma season is likely to again end up around the 1.8 million 15kg cartons mark. The Nova season shows a slight 2% decrease to 4.5 million 15kg cartons. The third early mandarin variety, Clementines, presents a solid increase of 10%, with exports expected to increase to 5.4 million 15kg cartons.

The estimates for late mandarin varieties will only be made next month when more accurate production data is available. During the season, various focus groups meet regularly to track and update estimates if needed.

Long-term projections still show that if all role-players work together to address challenges, the South African citrus industry can reach its target of exporting 260 million cartons by 2032 and, in the process, create 100,000 new jobs.

Challenges for South African citrus

Two of the most significant challenges to achieving this target remain deficient rail and port logistics and the European Union's unnecessary phytosanitary (plant health) measures regarding Citrus Black Spot (CBS) and False Coddling Moth (FCM).

"The CGA is grateful for the progress made by Transnet in terms of equipment acquisitions at ports, but the only long-term way to achieve the needed efficiency is through the structural change that only Public Sector Participation can bring," said Mitchell Brooke, the CGA's Logistics Development Manager.

A recent study by the Bureau for Food and Agricultural Policy (BFAP) found that the total cost of inefficient logistics to the citrus industry amounted to R5.27 billion per year.

CGA said in a release that two historical cases at the World Trade Organisation's trade dispute body focus on the EU's restrictive and unscientific trade measures on CBS and FCM.

"We hope for swift progress on the cases, but disputes like these take time. We remain optimistic about the issue being finalized before the 2026 season. Every season, the measures cost SA's growers no less than R3.7 billion, keeping especially emerging growers out of the EU market," said Justin Chadwick, outgoing CEO of the CGA.

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