

South Africa's citrus growth pressures Spain's early season

Spanish grower organisations report increased pressure on early-season clementine and satsuma markets as South African citrus volumes continue to rise in the European Union. Farming associations in Valencia state that reduced tariffs under the 2016 EU–South Africa trade agreement have increased South African access to the EU market, with growers in Spain reporting reduced competitiveness at the start of their harvest window. According to Ava-Asaja, production of early clementines and satsumas has declined from 361,226 tons in 2016 to 211,718 tons, a drop of 40%. The association links this trend to increased South African mandarin shipments, which have grown from 53,869 tons to 180,140 tons over the last decade.

Spanish groups point to expanded late-season mandarin plantings in South Africa, with an estimated 10 million seedlings established between 2012 and 2017. They estimate that this represents around 24,000 hectares of new orchards with a potential output of 750,000 tons once mature. Ava-Asaja has expressed concern about labour and environmental cost differences between the two production regions and has raised issues related to citrus black spot and false codling moth detections in imports. They referenced European Commission monitoring records and noted one case involving false codling moth larvae in an orange shipment. The organisation is engaging with EU policymakers to request a review of phytosanitary protocols and aspects of the trade agreement.

The Citrus Growers' Association of Southern Africa stated that compliance with EU phytosanitary rules continues to influence market access. CEO Boitshoko Ntshabele said that requirements for false codling moth and citrus black spot particularly affect smaller growers and noted that producers had spent R3.7 billion (US\$202 million) to meet EU standards. He added that the issue is before the World Trade Organisation. Ava-Asaja also reported that some growers in Spain are leaving orchards unharvested due to market pressure.

EU import data indicates continued demand for South African fruit. By September 2025, the EU had imported more than 752,000 tons of oranges from non-EU suppliers. South Africa accounted for 132,443 tons in September, representing

more than 78% of extra-EU orange imports that month. From January to September, South Africa shipped 308,251 tons of oranges to the EU, a year-on-year increase of 45%. Small citrus varieties increased by 24.5% over the same period.

Market shifts outside Europe have also contributed to increased South African supply to the EU. A 30% U.S. tariff on South African citrus implemented in 2025 resulted in some export volumes being redirected. At the same time, the EU continues to phase out remaining tariffs on South African oranges, with full removal scheduled for 2026. Spanish exporters report that these developments coincide with the start of their picking season, influencing early-season pricing and sales across the Valencian citrus region and other producing areas.

Source: BusinessTech (<https://businesstech.co.za/news/business/842557/south-africa-beating-major-european-country-in-its-own-backyard/>)

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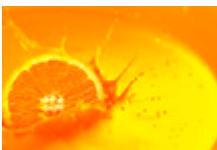
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