The CGA welcomes the inclusion of oranges in the >200 agricultural products now exempted from US tariffs, to ease rising food prices and address supply challenges. The CGA will monitor these developments closely during the 2026 citrus export season and beyond.

Optimising market access

Beyond gaining or retaining entry, optimising conditions in existing markets offers major potential to enhance SA's citrus competitiveness, profitability, and sustainability. High tariffs remain a major barrier, especially in Asia, where competitors like Australia, Chile, and Peru benefit from Free Trade Agreements (FTAs) that grant preferential access.

SA, as part of the Southern African Customs Union (SACU), must negotiate trade deals collectively, which slows progress on bilateral agreements. Encouragingly, talks around a SACU-India Trade Agreement and a Framework Agreement with China signal renewed momentum toward reducing tariff barriers.

Technical improvements also play a vital role. There are opportunities to refine phytosanitary measures, replacing costly postharvest treatments like cold disinfestation with systems approaches that maintain compliance while improving fruit quality and reducing costs.

A clear example of operational optimisation came during the 2025 season with South Korea, where inspections shifted from a pre-clearance system to an audit-based approach. This change introduced significant efficiencies and marked a milestone after two decades of successful exports.

Together, these strategic, technical, and operational enhancements underscore the importance of continued improvement in market access tactics. For SA's citrus industry, optimising market conditions is key to staying competitive in a global landscape shaped by trade dynamics, regulatory complexity, and evolving consumer expectations.

So, in its expansion efforts, the citrus industry of SA has sharpened its focus on maintaining profitability, avoiding market saturation, and responding to increasingly protectionist trade policies. With export volumes rising, coordinated efforts among industry bodies, government departments, and international trade partners are essential to sustain momentum and manage risk.

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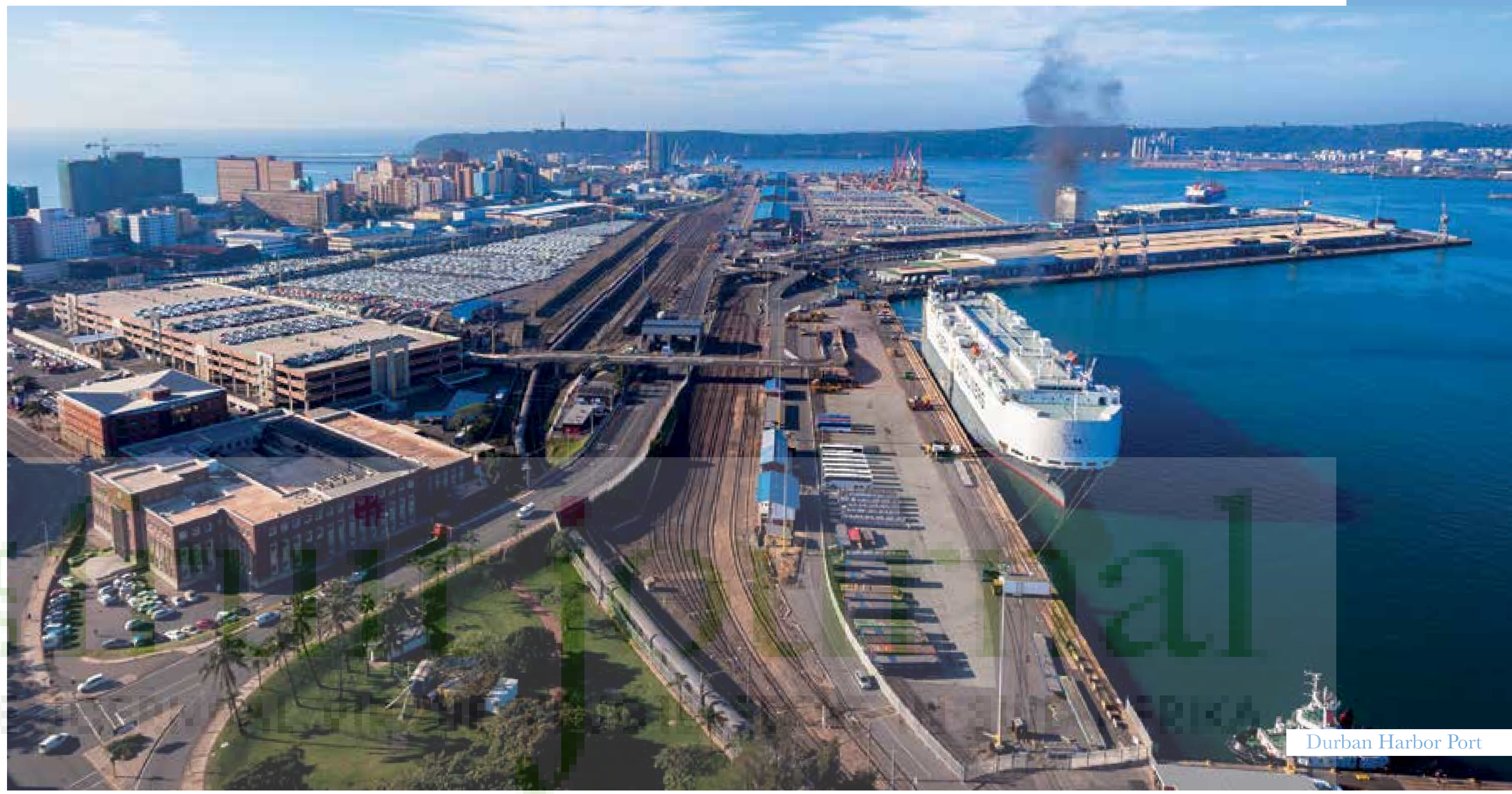
DEVELOPMENTS on the northern citrus corridor to Durban



Durban Harbor Port

The CGA's vast citrus production projections require matching infrastructure and logistical developments that will enhance logistics capabilities in corridors.

By Mitchell Brooke

At the time of writing, the northern citrus regions had produced a combined 93.6 million (15 kg equivalent) cartons for export during the 2025 season. This is a 16.6 million carton increase on the 2023 season, of which 77 million cartons were produced for export. When aligned to the crop projection model and Vision 260, the combined growth projection for this region stands at 105 million cartons to be potentially produced for export by 2030.

This article highlights infrastructure and logistical developments that are in process that will enhance the logistics capability in the corridors.

Foreseeable peak production pressure points

What is the anticipated operational impact of the increased production?

- Road transportation demands will increase, and the demand for trucking is expected to be higher than available demand. This will create transport pricing pressure, given the strong relationship between demand and price increases.
- Due to the high production projected for Late Mandarins, typically requiring refrigerated transport, there will likely be a shortage of refrigerated trucking during the peak season. This demand uptick could also increase the cost of refrigerated transport.
- During the 2025 season, 118 000 reefer containers (up from 94 000 in 2024) were used to export the season's crop to markets. In 2025, 53 000 containers departed Durban (up from 42 000 in 2024). Based on the projection of 105 million (15 kg equivalent) cartons, 65 000 reefer containers will be needed to export that volume. And the national requirement at that stage is forecasted to be 135 000 containers. It is highly probable that during subsequent citrus seasons, when production and export volumes are typically on an upward trajectory, a shortage of empty container equipment will be inevitable.
- Durban Container Terminal Reefer plug capacity is radically augmented during the citrus season and is aligned to the current export demand. However, the reefer plug capacity augmentation is largely dictated by the current capacity. Should the demand for reefer containers be on an upward trajectory during subsequent citrus seasons, there will be frequent capacity shortages at the terminals.
- Shipping capacity will also present challenges on certain trade lanes like Europe, the UK, Northern America, and the Middle East. The changes to the current shipping services coming into effect along with limited reefer capacity on these specific trade lanes will potentially lead to a capacity crunch, particularly during the peak season.

If the industry collectively implements related strategies, many of these challenges can be mitigated.

Current infrastructure and logistics developments that are going to radically enhance the capability of the northern corridors logistics environment

- Private participation on the national rail network is imminent.
  - According to Minister Creecey, 21 rail operating companies have expressed interest in running private rail operations on the national network.
  - The minister has also announced the conclusion of slot allocations to a number of these entities.
  - Foreseeably, private rail operations will begin in 2026. Equally substantial is private operators running trains between Durban and the reef. These operations can pave the way for rail transport to be upscaled in the citrus industry.
- Currently, we are only aware of the reefer trains transporting citrus from Bela Bela and City Deep to Durban.
- The recently launched Port of Gauteng Project, south of Johannesburg near the Vosloorus area, proposes mass movement of containers between Durban and this terminal. The site also presents investment opportunities in developing cold storage facilities to manage citrus consignments for export.
- Rail Runner Africa also presents a unique transport solution to the citrus industry. This unique, multi-modal road and rail solution is compatible with the fruit export industry. Although still a concept, once the Rail Runner Africa design is approved, it will similarly present unique investment opportunities for producers. The Rail Runner concept is planned for purpose-designed refrigerated trailers being built that are compatible with transport for all fruit kinds on road and by rail, using the unique Rail Runner concept.


Mitchell Brooke's

The extensive growth forecast from the northern regions indicates a growing need for a diversified logistics chain.

- The *SA Fruit Journal* Oct/Nov '25 outlines the process and progress of implementing Performance Based Standards (PBS) truck and trailer designs.
  - Currently, we have produced two unique truck and trailer designs that can be adopted by transport operators or purchased and operated by producers.
  - The first is the Double A, tridem 11 axle skeletal truck trailer configuration that can transport two 12 m refrigerated containers. This combination can transport containers from inland loading points to ports for export and, similarly, transport containers from ports back inland.
  - The second combination is the Double A, tridem 11 axle refrigerated truck trailer combination that can transport 40 pallets of fruit from packhouse to port cold stores.
- SANRAL has commissioned the upgrading of the N3 and N2 between Cedara and Durban.
  - The roads are being widened to four lanes in either direction with the addition of major diversions and interchanges to provide safety and integrity for cargo, lessen traffic collisions and to smoothen traffic flows.
  - In addition, the N3 is being resurfaced for the most part, between Gauteng and Durban.
  - Once concluded these upgrades will unlock much smoother and more efficient access for trucks entering the Durban precinct.
- Transnet National Ports Authority (TNPA) commissioned the upgrading of Bayhead Road leading to and from the Durban Container Terminal (DCT).
  - Bayhead Road has been a point of contention for several years, as the road has been viewed as being unfit for purpose, considering the thousands of trucks travelling on it, delivering and collecting containers from the DCT.
  - Once completed, Bayhead Road will be widened to four lanes in either direction. This will be a revolution for the transportation of containers to and from this precinct, making for a more seamless road-use experience for truckers.
- Transnet Port Terminals (TPT) has made an extensive investment in fleet renewal for the DCT. Much of this equipment was commissioned for the 2025 citrus season, with more earmarked for before the 2026 season. Augmentation of additional fleets is also planned for the operations.
- The well-documented past performance of the DCT includes extensive shipping delays in Durban.
  - Due to the commissioning of the fleet renewal programme, incentive bonuses and management changes, performance at the Durban terminals has improved significantly.
  - Performance is expected to improve even further when the new fleets are brought to operation, and with the inclusion of International Container Terminal Services Inc. (ICTSI) as a terminal operating partner at DCT Pier 2.
- Cold storage capacity in Durban and along the entire northern corridor has seen extensive expansion in recent years, with even further expansion currently underway in Cato Ridge.
  - With the inclusion of the Precool Cold Storage and Maersk cold storage facilities, FPT Group Pty Ltd started the development of a further cold store in the precinct, in October.
  - Cato Ridge is set to become a cold storage and multi-modal transport mega hub for the citrus industry.
  - Both long distance and short distance road and rail opportunities will be implemented that will surely see a radically modernised citrus logistics chain in Durban.
  - A modernised container depot will also be developed to supply empty reefer containers to the cold stores located in the precinct, as well as extensive reefer plug-in capacity. Focused development and implementation of this precinct hold significant opportunities both for the PBS and Rail Runner applications.

The extensive growth forecast from the northern regions indicates a growing need for a diversified logistics chain.

A diversified approach that considers creation of an efficient, effective and economically viable logistics chain is required, and that explores ways to limit the exposure to these foreseeable constraints. This could include a diversified approach to road and rail transport, cold storage contracting, back of port reefer plug-in and pre-stacking capability and transporting of containers into terminal by rail.

Personally, I propose creating an environment that guarantees the timely arrival of products in the market, every time, in an impeccable condition.

The highlighted initiatives that are underway present and opportunity to create a uniquely diversified approach to the logistics chain. This brings a notable competitive edge.

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