Dr Boitshoko Ntshabele
24 July 2026
Week 30/26

FROM THE DESK OF THE CEO

'"Adopt the pace of nature: her secret is patience."
Ralph Waldo Emerson

REFLECTIONS ON THE 2026 SEASON SO FAR

The 2026 export season has been quite eventful, from geopolitical events to natural events. At the same time, we had some positive developments on supporting the flow of fruit to destinations on a long-term basis.

At the start of the year, we saw the installation of the PSP between Transnet and ICTSI at Durban pier 2, and later in April, the signing of an improved cold treatment protocol for citrus exports to China. This was later supported by the installation of a tariff-free export regime, a gift to 53 African states by China. This came on the back of a framework agreement between China and South Africa concluded in February. Expectations are that, as SA, we have two years to conclude a trade agreement with China. We hope that progress is being made in this regard. We also saw developments towards a Preferential Trade Agreement between SACU and India that would ease tariff pain faced by SA exports to India.

The floods in the north had delayed the start of the season as it impacted fruit picking and packing, and the floods a few months later in the south led to loss of fruit, reducing the initial estimates, especially for oranges and mandarins. In response to the Middle East war that broke out in February, we setup a Middle East crisis committee which meets on a fortnightly basis. The intention is to inform market players of the conditions and how these could potentially impact the flow of fruit. We assume that value chain operators use information to make good calls and thus remain optimistic that the entire value chain will cooperate to ensure that fruit moves seamlessly from farm to the ports, and that it reaches destinations timeously. Again, the events of the season reaffirm our view that quality of arrivals in destination markets will be a differentiator this season and into the future. Growers are reminded to ensure that only correctly graded fruit is packed, as marginal counts are not favoured in the market under current conditions.

The fragile peace deal in the Middle East concluded in June has collapsed. The challenges related to the passage of ships and the goods they carry in that part of the world have resumed. Indeed, not good news for us as an industry and the world at large! The Middle East market takes 20% of our fruit and with the peak of our season upon us, there is cause for concern. We had undertaken from the start of the season to provide all players with better information and for them to make well-informed decisions in order to mitigate known risks. The table this week indicates an increase in volumes with lemons as a key driver. The Middle East market is a natural home for our lemons. The growth in our volumes is certainly up against a litany of challenges.

From a climate perspective, conditions are progressively shifting towards an El Niño pattern. We are told to expect a very hot and dry spring and transition to summer, which might lead to a drought in the southern African region. This could bring about food security challenges as it will affect staples consumed in the sub-Saharan region. We might just learn to be grateful for the rains received in the beginning parts of the season, despite all the damage they also brought. These rains have ensured some degree of soil moisture and dams should have enough water to mitigate risk in the immediate to medium-term.

PACKED AND SHIPPED VOLUMES

End of week 29 million 15 kg cartons	*Packed*	*Packed*	*Packed*	*Shipped*	*Shipped*	*Original Estimate*	*Latest Prediction*	*Final Packed*	*Vision 260*
SOURCE: PPECB / AGRIHUB	2024	2025	**2026**	2025	**2026**	2026	**2026**	2025	**2026**
***Grapefruit**	13 m	13.5 m	13.6 m	12.3 m	12.6 m	17.8 m	16.4 m	15.3 m	15.5 m
Lemons	29.6 m	34.1 m	45.2 m	30.9 m	41.3 m	45.9 m	51.3 m	41.6 m	43.4 m
Mandarins	25 m	30.3 m	28.8 m	24.2 m	24.9 m	52.7 m	50 m	53.5 m	50 m
Navels	16.7 m	21.8 m	16.4 m	18 m	14.2 m	30 m	25.4 m	31.6 m	32.3 m
Valencia	12.7 m	16.8 m	13.9 m	10.5 m	9.6 m	63 m	62.5 m	62 m	67.8 m
Total	**97 m**	**116.5 m**	**117.9 m**	**95.9 m**	**102.6 m**	**209.4 m**	**205.6 m**	**204 m**	**209 m**

***Grapefruit Packed Distribution**: Class 1 & 2 volumes remained relatively stable at 10.9 m cartons (2026) vs 12 m (2025) and 11.6 m (2024), while PP volumes increased to 2.7 m cartons from 1.5m (2025) and 1.4 m (2024).

INTERESTING FACTS

In 2025, South Africa supplied 96 percent of grapefruit exports from the Southern Hemisphere.

CGA GROUP INFO

CITRUS MARKETING FORUM (CMF)

Date: 31 July 2026
Time: 10:00am
Venue: MS Teams
Link: Please contact portia@cga.co.za to receive the link

From the Desk of the CEO
WhatsApp group

CGA Logistics and Shipping
WhatsApp group

CGA Consumer Assurance
WhatsApp group

THE CGA GROUP OF COMPANIES (RIVER BIOSCIENCE, XSIT, CGA CULTIVAR COMPANY, CGA GROWER DEVELOPMENT COMPANY AND CITRUS ACADEMY) AND THE RESEARCH AND TECHNICAL SERVICES PROVIDED BY CITRUS RESEARCH INTERNATIONAL, ALL PROVIDE ESSENTIAL SUPPORT TO THE CITRUS GROWERS OF SOUTHERN AFRICA