Dr Boitshoko Ntshabele
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Week 41/26

FROM THE DESK OF THE CEO

"I am still learning."
(Michelangelo)

SUSTAINABILITY AND MARKETS – 10 YEARS OF SIZA INDEPENDENCE

I often write about market access from the outside. This week, I want to look at it from the inside - at one of the instruments that has helped us along in a very meaningful way. It is a controversial topic, or at least it was so initially.

When social and environmental standards first appeared, those working on international standard-setting in government (and I spent some time on that side of the fence) saw them as an imposition: foreign values laid over sovereign states. We called them "private standards" because they sat above those set by International Standard-Setting Bodies and by a membership made up of government delegates. For those of you familiar with the Spencer book: our cheese was moved.

These new standards were mostly written by European supermarket chains. Over the years, more bodies entered this space, and with them came a multiplication of requirements our growers had to meet simply to keep exporting and earning foreign currency. The audits, the paperwork, the duplicated certifications - all of it placed a real burden on growers, and in a sense, the burden persists today, even as efforts to consolidate them have had success. South Africa's fruit industry is built on exports. That orientation has driven its growth to where it stands now, and it is also where SIZA found its purpose: closing the compliance gap between what our growers do and what overseas markets require. Its valuable contribution has been to take standards on labour, environment, and the rest and give them a local interpretation that achieves equivalence with international benchmarks. That is what has allowed us to compete on an equal footing with our southern-hemisphere peers.

Recently, we gathered in Paarl to mark ten years since SIZA became independent. Originally, it was developed in 2008 by Fruit South Africa. SIZA's CEO, Retha Bekker, and others who contributed significantly to the organisation, including our very own Paul Hardman, were recognised for their hard work during the development. What started as a local response to an external demand is now the locally preferred standard, internationally accepted, relevant, and fully independent. For an export-oriented agricultural industry, this is not simply about achieving a certificate or passing an audit, but about ensuring that businesses remain responsible, resilient and "compliance fit" - all so that they can continue to access international markets and grow their footprint.

Bekker said the next ten years at SIZA will be about continued innovation, growth and purposeful leadership, in service of the industry's ongoing compliance fitness.

We are operating in a period shaped by big geopolitical shifts and rifts we did not choose and cannot control. Industries that dither in that environment lose ground. We need to keep a finger on the pulse of where things are heading, stay ahead of the curve rather than reacting to it, and hold, and improve, the market positions we have built.

We also need to learn to shape our own future rather than simply respond to someone else's. Alongside organisations like SIZA, that means building the capacity to sustain our own compliance systems, not just comply with those set elsewhere. International markets and the organisations that govern access to them will continue to evolve, and the requirements attached to that access may become more complex. The cheese will keep moving. Our task is to be aware and to adapt.

Through ten years of independence SIZA has earned its place as one of the institutions that made South African citrus exports viable. Here's to the next ten.

INTERESTING FACTS

SIZA auditor capacity has increased 360% since 2016. They service over 40 commodities and over 120 varieties. Roughly 400 markets accept the SIZA Audit Programme globally.

For the latest South African citrus packed and shipped volumes, please visit the CGA website:
Stats 01 – Shipping & Cold Stores Stock Statistics Dashboard | CGA

CGA CITRUS SUMMIT

Registration for the 2027 CGA Citrus Summit is now open to ***everyone!*** We encourage you to register early to secure your place at the Summit from 9-11 March 2027!

There are still some sponsorship opportunities available – should you be interested, please contact tanya@cga.co.za.

PACKED AND SHIPPED VOLUMES

End of week 40 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**	14.4 m	15.3 m	15.3 m	15.2 m	14.8 m	17.8 m	15.5 m	15.3 m	15.5 m
Lemons	34.7 m	41.3 m	51 m	40.6 m	48.4 m	45.9 m	51 m	41.6 m	43.4 m
Mandarins	41.6 m	53.4 m	50.6 m	51.1 m	48.8 m	52.7 m	50.6 m	53.5 m	50 m
Navels	25.1 m	31.5 m	25.2 m	30.6 m	24.4 m	30 m	25.2 m	31.6 m	32.3 m
Valencia	48.5 m	60.7 m	57.4 m	56.5 m	51.6 m	63 m	58.8 m	62 m	67.8 m
Total	**164.3 m**	**202.2 m**	**199.5 m**	**194 m**	**188 m**	**209.4 m**	**201.1 m**	**204 m**	**209 m**

* **Grapefruit Packed Distribution**: Class 1 & 2 volumes remained relatively stable at 12.5 m cartons (2026) vs 13.4 m (2025) and 13 m (2024), while PP volumes increased to 2.8 m cartons from 1.8 m (2025) and 1.4 m (2024).

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