

"A man who is a master of himself is a master of his fate." – Marcus Aurelius

IDENTIFYING THE RIGHT OPPORTUNITIES FOR CHANGE IN TRADE

In his book titled *Clear Thinking*, Shane Parrish writes about self-accountability and makes a very important observation: self-accountability is the strength of realising that even though you don't control everything, you do control how you respond to everything. Our response is a decision and a choice that we make, and it is very important that, as we do so, we use our strengths to mitigate risks. The opposite only makes us appear to be victims and seem powerless!

2025 has so far been a year in which the international trade environment – within which we operate as a country and as citrus industry – has changed significantly. This change was, and still is, largely beyond our control. We depend on our counterparts in these negotiations as we seek to conclude a trade deal on favourable terms with the US administration. "Favourable" in the real sense of the word, as we do not threaten US producers and jobs because we are counter-seasonal to US citrus producers.

However, what we have been in control of, as Parrish teaches us, is how we respond and adapt to the changed environment. It reminded me of a proposal we made in one of the earlier newsletters where we advocated for the use of sidebar discussions with G20-member countries and invitees visiting our country. This would be to address shifts in market access and exchange offers to soften the blows from reciprocal tariffs.

South Africa is next week hosting the G20 meeting on agriculture, and in November the G20 Summit, where South Africa will hand over the G20 presidency to the United States. We have an advantage which we can equate to strength. As hosts we can drive the agenda to create and build momentum on how the rest of the G20 responds to the "seismic changes" in the international trade environment. Whilst the G20 Ministers of Agriculture are visiting our shores next week, we have the opportunity to use their presence here to make requests and exchange offers through which we can offset each other's trade woes. It might not be an environment wherein these discussions are concluded or finalised, but we would have made a choice on how we as South Africa use this momentous occasion to impact the response of our country and other G20 member countries to the trade shifts. We can lead the way to finding lasting solutions and bring back a sense of certainty, which is what market participants, including our growers, are looking for. Let's hope that while we pursue market diversification, as government has suggested, we also use the opportunities before us to fast-track new market access opportunities based on sidebar talks. Beyond the headwinds we face in 2025, we still have 2026 ahead of us. Will we look back and say we took advantage of opportunities we had, or will we regret not seizing opportunities we were offered? Only time will tell.

STAKEHOLDER INPUTS FOR THE BUSINESS INTELLIGENCE TEAM

If you have not done so already, growers and stakeholders are invited to share their information/data needs with the CGA Business Intelligence Team. These inputs will be used to shape the direction this team moves in ahead of the next season. Please use this link to capture your perspective: <https://forms.office.com/r/zJcKE6xyeE>

PACKED AND SHIPPED VOLUMES

End of Week 36 million 15 Kg Cartons	Packed	Packed	Packed	Shipped	Shipped	Original Estimate	Latest Prediction	Final Packed	Vision 260
SOURCE: PPECB/AGRIHUB	2023	2024	2025	2024	2025	2025	2025	2024	2025
Grapefruit	14.1 m	14.3 m	15.1 m	13.6 m	14.8 m	15.3 m	15.4 m	14.4 m	16.8 m
Lemons	36.3 m	34.4 m	40.3 m	33.1 m	39.0 m	32.9 m	41.1 m	34.7 m	41.5 m
Mandarins	38.4 m	40.7 m	49.8 m	36.4 m	46.1 m	44.9 m	51.7 m	41.6 m	43.9 m
Navels	26.0 m	24.7 m	30.9 m	22.0 m	29.4 m	26.1 m	31.6 m	25.1 m	21.7 m
Valencia	47.3 m	41.4 m	51.6 m	31.3 m	44.4 m	52.0 m	58.9 m	48.8 m	58.0 m
Total	162.1 m	155.5 m	187.7 m	136.4 m	173.7 m	171.2 m	198.7 m	164.6 m	181.9 m

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