FROM THE DESK OF THE CEO (47/25)

Boitshoko Ntshabele, 21 November 2025

"If you want to go fast, go alone. If you want to go far, go together." – African Proverb

G20 TRADE DIPLOMACY

Citrus is South Africa's biggest agricultural export industry with destinations to over a 100 countries. But in a world where trade dynamics shift fast, multilateral gatherings such as the G20 Summit (22 - 23 November) are not just diplomatic talking shops, they're growth opportunities for our economy. The G20 shapes trade norms, food security strategies, and sustainability frameworks, ultimately impacting the world economy. For South Africa, participation also means influence - on tariff negotiations, phytosanitary standards, and market access. When the EU tightens pesticide residue limits or China adjusts import protocols, these decisions ripple through South African orchards. The G20 offers a platform to advocate - both in official and sideline meetings - for science-based standards and fair trade, ensuring that small policy tweaks in Brussels or Beijing do not become existential threats in Limpopo or the Eastern Cape.

The G20 Summit comes as the 2025 citrus season has concluded. Many of the countries in the G20 represent some of our largest citrus export destinations: Canada, China, France, India, Italy, Russia, Saudi Arabia, the United Kingdom and the United States .

In the past record-breaking season Southern African citrus growers packed just over 203 million 15kg cartons for delivery to global markets. This is a 22% increase from last year. And the industry will in all likelihood continue to grow.

One must acknowledge the hard work of our growers and all those they employ, and one hopes that - not just at the G20, but at other forums - it will be matched by the hard work of industry and government officials seeking favourable market access. The increase in citrus volumes must be matched with better access and increased foreign revenue, resulting in improved livelihoods in our rural communities were fruit is grown.

Last week brought some good news out of the United States (who implemented a 30% tariff from August) with the announcement of a tariff exemption for oranges. This is fantastic news for our growers in the Western and Northern Cape - the two provinces that are allowed to export to the US. However, our mandarins have not received an exemption. An exemption of mandarins makes sense because they share the same market dynamics and supply chain vulnerabilities than oranges. Applying tariffs to mandarins risks creating price spikes, supply shortages, and inflationary pressures in US.

Besides the US, when it comes to access, the industry also looks North: a satisfactory conclusion to the World Trade Organisation cases against the EU on Citrus Black Spot and False Coddling Moth is important. The EU's unnecessary, unscientific and trade restrictive plant health measures are costing our growers almost R4 billion a year. A resolution can boost our industry as this money will be put into our growers' hands and most likely be reinvested to enable our Vision 260 goal of exporting 260 million cartons by 2032.

And we also look East: if trade negotiations with India or China were to accomplish lower or even no tariffs on SA citrus, it would be massive wins.

PACKED AND SHIPPED VOLUMES

End of Week 46 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	14.2 m	14.4 m	15.3 m	14.1 m	15.0 m	15.3 m	15.3 m	14.4 m	16.8 m
Lemons	36.8 m	34.7 m	41.5 m	34.5 m	40.9 m	32.9 m	41.5 m	34.7 m	41.5 m
Mandarins	40.1 m	41.7 m	53.5 m	41.2 m	52.0 m	44.9 m	53.5 m	41.7 m	43.9 m
Navels	26.1 m	25.1 m	31.5 m	24.7 m	31.0 m	26.1 m	31.5 m	25.1 m	21.7 m
Valencia	53.6 m	48.7 m	61.9 m	48.2 m	59.8 m	52.0 m	61.9 m	48.7 m	58.0 m
Total	**170.8 m**	**164.6 m**	**203.7 m**	**162.7 m**	**198.7 m**	**171.2 m**	**203.7 m**	**164.6 m**	**181.9 m**

Citrus Growers' Association
OF SOUTHERN AFRICA

CRW