

South African fruit export growth faces market and logistics pressure

Absa's AgriTrends 2026 Spring Edition report states that crop growth remains a source of long-term opportunity for South Africa, but increasing volumes do not necessarily translate into higher grower returns. Profitability depends on whether additional volumes can be placed in markets at commercially sustainable prices.

Zama Sangweni, agricultural economist at Absa AgriBusiness, said citrus illustrates the shift. South Africa is the world's largest citrus exporter, but the report points to limited market diversification as volumes increase.

Citrus export earnings rose from about US\$80 million in 2001 to an estimated US\$2.5 billion in 2025. However, disruptions in the Middle East during the 2026 season limited market access and required exporters to redirect fruit.

"Producer margins aren't negative, but competition is becoming more intense. The focus now needs to be on expanding markets," Sangweni said.

The report expects lemons to remain exposed to disruptions in Middle Eastern markets, while orange returns will remain sensitive to competing supply in major destinations. Soft citrus is comparatively well positioned due to marketing windows and demand for newer varieties.

Table grapes faced a different challenge during the 2025/26 season. Export volumes increased by about 8%, with almost 79 million cartons shipped, but port disruptions affected financial returns.

Daneel Rossouw, head of sales for agriculture at Nedbank, said inefficiencies and strong winds at the Port of Cape Town delayed exports. This resulted in South African fruit reaching markets at the same time as competing supply, putting prices under pressure.

Sangweni said port delays during December and January disrupted export programs, extended time in the cold chain, and contributed to quality claims. Fruit arriving in suboptimal condition had to be discarded, adding dumping costs and

reducing grower margins.

"Industry estimates put losses across the value chain at more than R3 billion. This highlights the vulnerability of a time-sensitive horticultural supply chain to infrastructure and operational disruptions," she said.

With export volumes continuing to increase, the report said market diversification, export execution, and logistics will become increasingly important for converting higher crop volumes into grower returns.

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