

South African citrus industry beset by doubts about the way forward

As the citrus harvest winds down across South Africa, it's time to apply fertilizer for the 2027 crop, and given the unfavourable exchange rate and rising costs, cash flow is very tight on citrus farms everywhere, including in the Sundays River Valley where lemons are the forte. The lemon crop was "massive", says a packhouse manager: ten million more 15kg cartons than last year's 41 million cartons.

The 2026 lemon crop even exceeds by 7 million cartons the lemon forecast within the industry's growth strategy called the 'Vision 260': to export 265.7 million 15kg cartons of citrus by 2032.

Expected total citrus exports for 2026 will come to 198.5 million cartons, it is reckoned at this stage: significantly lower than 226.2 million cartons, which is how large the 2027 crop will be according to the Citrus Growers' Association's Vision 260 strategy.

Considering the good prices initially offered for lemons, farms were in a hurry to get most off by week 28. There was a big window from mid-April to around the middle of June, but in the space of a few weeks the market went from very strong to an oversupply. "We exported around 51 million cartons this year, and it was just too much for Europe," he says; the EU has taken a 47% share of the South African lemon export market at this point; last year it had been 42%.

"I've been in the industry for close to three decades and for the first time there were certain counts in class one, and certain counts in class two that we just didn't export. That is unprecedented."

Also unheard of, the anonymous packhouse manager adds, is not packing certain counts of late mandarins. He remarks that the industry is very concerned that South Africa is already finding it so difficult to export this year's volumes while it is still far off the 'Vision 260' total.



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"What will sustainability look like with those kinds of volumes?"

"We are facing a lot of questions like: is it really the right strategy to chase after 265.7 million cartons? When South Africa's total volumes are 5 million lower than last year's, and even so, markets are under such pressure with volumes, what will sustainability look like with those kinds of volumes? What strategy do we need to follow in the future when our volumes in the Valley grow to the predicted 62 million cartons?"

The strategy did not foresee a war in the Middle East and another tapping Russia's resources, both markets integral to the industry strategy of exporting 265.7 million cartons of citrus in 2032. The wars are not going away, as CGA CEO Dr Boitshoko Ntshabele remarks in his latest newsletter: "I sense we should anticipate the conflict and its related challenges persisting into the next season."

At the moment, it's cheaper to send fruit for juicing rather than exporting them but the reality is that with the war pushing up exports costs they've sent 15% or 20% to the Middle East of what they'd usually send there. Non-ideal counts are placed, optimistically, in other saturated markets or trucked to juice factories.

"Farmers have had to take a lot of fruit for juicing, if the factories will accept it, and with every load that's driven away, it's 80 crates for which that producer will be getting zero income. *And* he gets a bill for the transport."

Two years ago a tonne of juicing oranges could obtain R2,000 (€ 107), even R2,500 (€ 134) at a juice factory, this year the payout will be R400, perhaps R500 (€ 30) – if it's accepted because the factories are full, and therefore farms have been sending many more bags of oranges to the local market, just to salvage something from their orchards.

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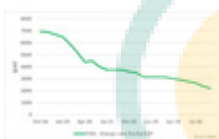
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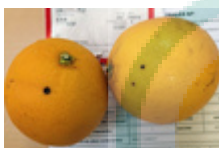
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