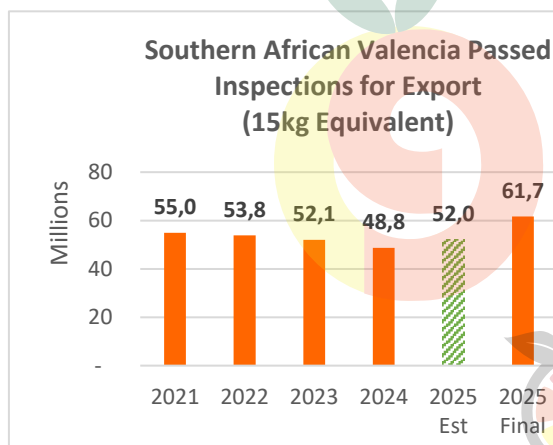


"Remember that the airplane takes off against the wind, not with it." – Henry Ford

2025 VALENCIA SEASON: A LARGER CROP IN THE MARKET

The Valencia crop forms the backbone of the Southern African orange season, representing most of the total citrus production. Its performance – from orchard health and fruit development to packing efficiency and market reception – has a decisive influence on the industry's annual results. The progression of the Valencia estimate is therefore monitored with intense focus by all stakeholders.

The initial estimate was 52 million cartons. As the season progressed, regional reports highlighted favourable agronomic conditions and strategic packing decisions that pointed toward a larger-than-expected crop. The Limpopo River region reported good fruit size and colour, while Letsitele, the largest producing region, noted that early colour development allowed for a faster start to packing compared with previous years. The season also marked a milestone for Botswana, which packed its first commercial Valencia crop with a strong focus on high-quality fruit. A recurring theme across production areas was the substantial volume of Class 2 and PP-grade fruit being packed for export. Impact of local juice price versus industrial (PP-grade) export was the main driver for higher than estimated volumes in the early part of the season. The Eastern Cape and Western Cape followed with record volumes due to favourable conditions. PP fruit ultimately accounted for 12% of total Valencia volumes.



Following the trend set by the navel season, the Valencia estimate increased steadily throughout the harvest, confirming that the industry was handling a much larger crop than initially anticipated.

In terms of markets, Europe remained the leading destination, receiving 20 million cartons. Exports to the Middle East rose sharply – from 6.9 million to 10.4 million cartons – while shipments to Russia increased to 5.7 million cartons. Exports to Asia also grew significantly, reaching 6.1 million cartons, up from 3.8 million the previous season.

The 2025 season ultimately confirmed a substantial increase in the Valencia crop, driven by excellent growing conditions and strong packouts. This surge in volume, however, placed considerable pressure on both the market and logistical infrastructure throughout the export period.

CGA ROADSHOWS

Please take note of the CGA Roadshow dates, which will take place in February and March 2026. Further details on venues, times, and the programme will be communicated in due course. Please RSVP to tanya@cga.co.za.

Planned start time: 14h30	Boitshoko's Team	Paul's Team
Monday, 16 February 2026	Burgersfort / Ohrigstad	Senwes / Groblersdal
Tuesday, 17 February 2026	Hoedspruit	Nelspruit / Eswatini
Wednesday, 18 February 2026	Letsitele	Onderberg
Thursday, 19 February 2026	Limpopo River / Zimbabwe	
Tuesday, 3 March 2026	Boland / Western Cape	Patensie
Wednesday, 4 March 2026	Northern Cape	Sundays River Valley
Thursday, 5 March 2026		Eastern Cape Midlands
Wednesday, 11 March 2026		KZN / Nkwalini