Dr Boitshoko Ntshabele
7 August 2026
Week 32/26

# FROM THE DESK OF THE CEO

*"One of the secrets of success is to refuse to let temporary setbacks defeat us."*
*(Mary Kay Ash)*

## AN UPDATE ON THE 2026 SEASON

We have this week revised the total export estimate for 2026 downward from 209.4 million 15kg cartons to 205.3 million 15kg cartons, following the most recent meetings of the various variety focus groups. It has been a very challenging season for our growers on a number of fronts. The season started with many stop-and-go's as the northern regions experienced interruptions due to rain, and later in May we had floods in the Western and Eastern Cape. Since February, exports to the Middle East have been impacted by the war in that part of the world. Under normal conditions the region takes 20% of exports. The CGA established a crisis committee that continues to meet with the intention to provide regular updates and information. The war has also placed considerable pressure on input and logistics costs, such as diesel and, most notably, shipping rates.

The potential spread of the conflict to the Red Sea and any disruptions at the Port of Jeddah is a growing concern for shipping routes and for grower options going forward.

The Mandarins estimate has been lowered by 2.7 million 15kg cartons with harvesting for Nova and Leanri completed, and packing that remains is for late Mandarin types such as Orri, Nadorcott and Tango.

The orange estimate of Navels is down by 4.6 million 15kg cartons from the original estimate in March 2026 with most packing completed; there is less than 6 million cartons of late Navels to pack. The Valencia season packing will reach its peak over the next two to three weeks, and this season has seen marginal adjustments to the Valencia orange estimates. There is an overall trend of excellent yields per hectare in the northern regions which has been offset by a lower crop in the Eastern and Western Cape. Orange juice factories are processing considerable volume of fruit. The expectation is that the season might be somewhat longer than usual.

The grapefruit estimate has been lowered by 1.7 million 15kg cartons since the original estimate. The Northern regions have completed packing for grapefruit. The Oranje Rivier and KZN areas are drawing to a close. Class 1 and 2 year-to-date volumes are lower than in past years, while fruit destined for processing factories is higher.

The lemons had a reasonably good run this season and saw a total increase of 5.4 million cartons from the original estimate. Packing has drawn to a close in most regions, and only the country's largest lemon-producing region, the Eastern Cape, is left and have less than 10% of the crop to go.

The season has reached its peak volumes, and ports, especially Durban, are experiencing pressure due to supply chain constrains. The CGA is in contact with all players to find solutions and resolve the congestion.

Furthermore, the CGA is reiterating the importance of quality discipline across the value chain: ensuring the right fruit, of the right quality, reaches the right market.

There's no denying this is a very tough season for our growers. Yet, the long-term growth of our industry remains within reach. Realising it will depend on decisive action on two fronts: government must move with urgency to improve market access for our fruit; and, fast-track private sector participation in rail and ports infrastructure. These are not new goals, but they are becoming more urgent. If we get them right, the resilience of our growers will finally be matched by the enabling environment they deserve.

## INTERESTING FACTS

The largest orange – with a circumference of 63,5cm – was recorded on 22 January 2006 by Guinness World Records. It grew in the garden of Patrick and Joanne Fiedler in Fresno, California.

From the Desk of the CEO
WhatsApp group

CGA Logistics and Shipping
WhatsApp group

CGA Consumer Assurance
WhatsApp group

## PACKED AND SHIPPED VOLUMES

| *End of week 31 million 15 kg cartons* | *Packed* | *Packed* | *Packed* | *Shipped* | *Shipped* | *Original Estimate* | *Latest Prediction* | *Final Packed* | *Vision 260* |
|---|---|---|---|---|---|---|---|---|---|
| SOURCE: PPECB / AGRIHUB | 2024 | 2025 | **2026** | 2025 | **2026** | 2026 | **2026** | 2025 | **2026** |
| **Grapefruit** | 13.5 m | 14 m | 14.2 m | 13.4 m | 13.3 m | 17.8 m | 16.1 m | 15.3 m | 15.5 m |
| **Lemons** | 31.7 m | 36.8 m | 47.5 m | 34.6 m | 44.1 m | 45.9 m | 51.3 m | 41.6 m | 43.4 m |
| **Mandarins** | 31.2 m | 36.6 m | 35.9 m | 30.6 m | 30.1 m | 52.7 m | 50 m | 53.5 m | 50 m |
| **Navels** | 19.5 m | 25.3 m | 19.6 m | 22.1 m | 17.4 m | 30 m | 25.3 m | 31.6 m | 32.3 m |
| **Valencia** | 19 m | 25.3 m | 21.3 m | 17.4 m | 14.7 m | 63 m | 61.9 m | 62 m | 67.8 m |
| **Total** | **114.9 m** | **138 m** | **138.5 m** | **118.1 m** | **119.6 m** | **209.4 m** | **204.6 m** | **204 m** | **209 m** |

***Grapefruit Packed Distribution**: Class 1 & 2 volumes remained relatively stable at 11.4 m cartons (2026) vs 12.4 m (2025) and 12.1 m (2024), while PP volumes increased to 2.8 m cartons from 1.6 m (2025) and 1.4 m (2024).

*THE CGA GROUP OF COMPANIES (RIVER BIOSCIENCE, XSIT, CGA CULTIVAR COMPANY, CGA GROWER DEVELOPMENT COMPANY AND CITRUS ACADEMY) AND THE RESEARCH AND TECHNICAL SERVICES PROVIDED BY CITRUS RESEARCH INTERNATIONAL, ALL PROVIDE ESSENTIAL SUPPORT TO THE CITRUS GROWERS OF SOUTHERN AFRICA*