FROM THE DESK OF THE CEO (44/25)
Boitshoko Ntshabele, 31 October 2025

"It does not matter how slowly you go, as long as you do not stop." – Confucius

WINDOW OF OPPORTUNITY FOR DEALS CLOSING?

As the year slowly comes to an end and one looks back, it is quite clear that it was an eventful year with notable disruptions. With disruptions, as we have noted before, there is a lot of difficulty and drama, but also opportunity. The Trump tariffs were indeed a disruptive force. Amid all the uncertainty though, 2025 was also the year in which government reconfiguration, following last year's elections, delivered a functional, stand-alone Department of Agriculture as a separate entity – a remarkable tool for honed trade negotiations. Reports on the agriculture economy have also been positive despite the tariffs and other headwinds.

Various trips have been undertaken in the past twelve months with Ministers and the President as government sought to improve market access and diversify countries to which South Africa can export. As the CGA, we monitor the progress made on this front, but concrete gains have unfortunately not materialised yet. We know that these types of trade discussions are never a singular action that delivers a singular result, and thus some of the talks kickstarted can proceed for some time.

But in a certain way these trade visits culminate in the November 20th G20 Summit. We have through the year stressed that government should use the G20 platforms to rally countries to engage in sidebar discussions and expedite improved trade. We are well aware of initiatives like the offer by China to African countries for tariff-free market access, the updating and signing of protocols, as well as discussions between India and the Southern African Customs Union (SACU) on a preferential trade agreement, amongst others.

South Africa, as a nation in dire need of economic growth and job creation, must urgently guide these trade opportunities towards some crescendo.

Last week we read about the government's discussions with the United States on a framework trade deal. We also know that this week some deals were concluded on the margins of the Association of Southeast Asian Nations (ASEAAN) meetings. As we cast our eyes further, to November, what are our expectations? Are we seizing the moments and pursuing these deals mindful that our window of opportunity, bolstered by our Chairmanship of the G20, is slowly disappearing?

The agriculture sector remains concerned about what 2026 holds if we as a country do not conclude and agree to a framework deal with the US, like most other countries have done. In a sense, the citrus industry was lucky in that the tariff imposition was mitigated by the frontloading of shipments prior to mid-August. The simple truth is that a 30% tariff makes us uncompetitive in the US as our competitors sit at a 10% tariff.

This spring it was beautiful to see the blossoms on the citrus trees in orchards across our country, but it is already almost summer. One hopes the potential of the 2026 season will be realised.

PACKED AND SHIPPED VOLUMES

End of Week 43 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	41.3 m	34.5 m	40.9 m	32.9 m	41.3 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	61.7 m	48.1 m	59.7 m	52.0 m	61.7 m	48.7 m	58.0 m
Total	**170.8 m**	**164.6 m**	**203.3 m**	**162.6 m**	**198.6 m**	**171.2 m**	**203.3 m**	**164.6 m**	**181.9 m**

*Latest figure unavailable due to technical issues.