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Report Highlights:

The production of South African citrus, mainly soft citrus, new orange varieties, lemons and limes is estimated to continue its strong growth in the 2020/21 Marketing Year (MY), based on the increase in area planted, improved yields, high level of new-plantings coming into full production, and the minimal impact of COVID-19 on labor and input supply. This increase is expected to be partially offset by drought conditions in some production areas of the Eastern Cape, and hail damage in some production areas of Mpumalanga. Duty free exports of all citrus types to the United States under the African Growth Opportunity Act (AGOA) reached a peak of 91,402 MT in 2020, and are expected to continue their strong annual growth in 2021, as the United States is still considered a premium market.

Commodities:
Citrus, Other, Fresh
Grapefruit, Fresh
Oranges, Fresh
Tangerines/Mandarins, Fresh
Lemons, Fresh
Orange Juice

Exchange rate: Rand/US$ Exchange = 13.42 as of June 7, 2021
Marketing Year (MY) – January to December
MT – Metric Tons

Sources:
Citrus Growers Association - http://www.cga.co.za/
Summer Citrus South Africa - https://www.summercitrus.com/
Ministry of Agriculture, Land Reform and Rural Development - https://www.daff.gov.za/
South African Revenue Services - https://www.sars.gov.za/

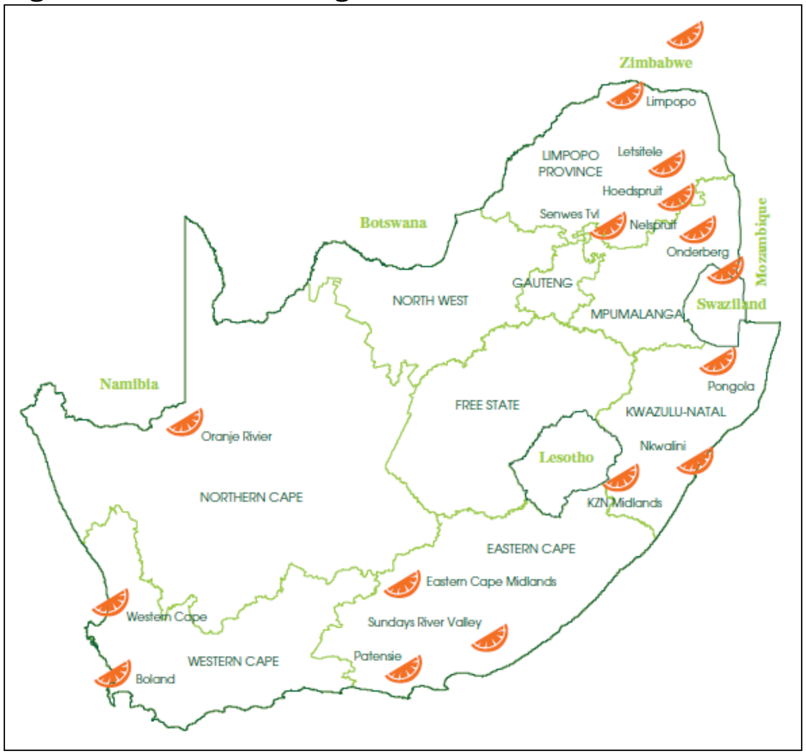
Background

Citrus in South Africa is grown across the country mainly in the Limpopo, Eastern Cape, Western Cape, Mpumalanga, Kwa Zulu Natal, Northern Cape and North West provinces. **Figure 1** shows the map of the citrus growing areas in South Africa. A total of 94,329 hectares was planted to citrus in South Africa in 2020, a 9 percent increase from 86,808 hectares in 2019. This growth trend is estimated to continue in 2021 to 98,700 hectares, based on the significant investments and aggressive new plantings of soft citrus, lemons, and new varieties of oranges.

The Limpopo province is the country's largest citrus production area, accounting for 40 percent of the total area planted, followed by the Eastern Cape (27 percent), Western Cape (19 percent), Mpumalanga (8 percent), Kwa Zulu Natal (3 percent), Northern Cape (2 percent), North West (1 percent), and Free State (less than 1 percent). The Western Cape and Eastern Cape have a cooler climate, which is suited for the production of the navel oranges, lemons, limes, and tangerines/mandarins (soft citrus). The Mpumalanga, Limpopo and KwaZulu-Natal provinces have a warmer climate, which is better suited to the production of grapefruit and Valencia oranges.

While oranges are the biggest citrus type produced in South Africa and account for 48 percent of the total citrus area planted, there has been notable growth in the area planted to soft citrus (25 percent) and lemons/limes (19 percent). This growth is driven by the attractive investment returns, profit margins from soft citrus and lemon production, and a spike in global demand. **Table 1** shows the most common citrus varieties planted in South Africa. In 2016, the tango citrus variety, which was developed by the University of California Riverside, was granted the plant breeders right in South Africa and is expected to offer competition to the Nardocott variety. **Table 2** shows that the citrus harvesting season typically ranges from February to September.

Figure 1: Citrus Growing Areas in South Africa.



Source: Citrus Growers Association (CGA)

Table 1: Citrus Varieties

Citrus Type	**Varieties**
Grape fruit	Star Ruby, Marsh, Rose, Flame, Nelspruit Ruby (Nelruby), Flamingo
Oranges	**Valencias -** Delta, Midknight, Turkey, Oukloon (Olinda, Late), Du Roi, Benny. **Navels -** Palmer, Bahianinha, Washington, Robyn, Navelina, Lane Late, Newhall, Cambria, Cara, Rustenburg, Autumn Gold
Mandarins/ Tangarines	**Clementine -** Nules, Marisol, SRA, Oroval, Esbal, Clemenpons, Oronules. **Mandarin –** Tango, Nadorcott (Afourer), Nova, Or (Orri), Minneola, Mor , B17, Tambor , Naartjie, Thoro Temple, Sonet, B24 (African Sunset) **Satsuma -** Miho Wase, Owari, Kuno, Miyagawa Wase, Okitsu Wase, Aoshima.
Lemons/Lime	Eureka, Eureka SL, Lisbon, Limoneira, Genoa

Source: CGA

Table 2: South Africa Harvest Period for Citrus

Citrus	**Harvest Period**
Marsh Grapefruit	March to June
Star Ruby Grapefruit	April to September
Navel Oranges	March to July
Valencia Oranges	July to September
Mandarins/Tangarines	March to August
Lemons/Lime	February to September

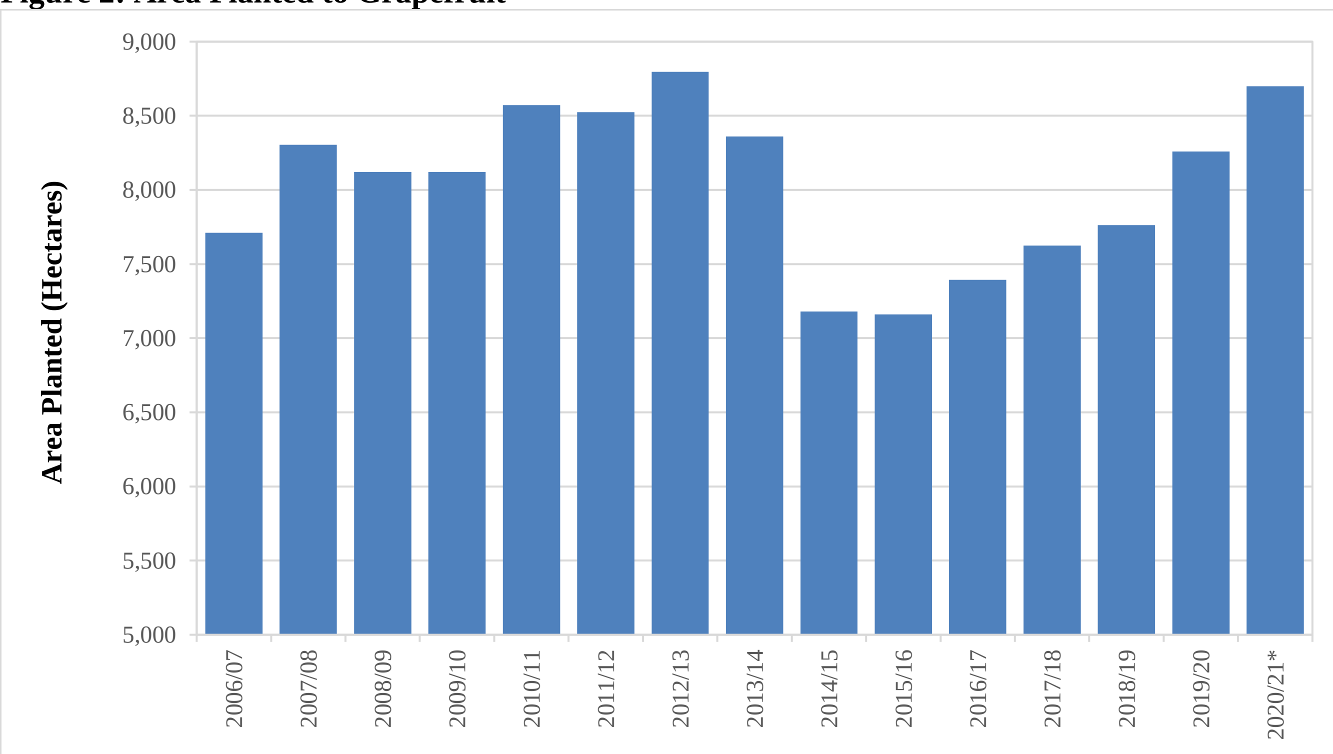
Source: CGA

Grapefruit, Fresh

Area Planted

The area planted to grapefruit is estimated to increase by 5 percent to 8,700 hectares (ha) in the 2020/21 Marketing Year (MY), from 8,259 ha in the 2019/20 MY, based on the industry responding to the increasing global demand especially in Europe, Asia and the Middle East. **Figure 2** shows that while grapefruit area planted has been increasing since the 2014/15 MY, it has not reached the peak area planted recorded in the 2012/13 MY. Limpopo is the leading growing region for grapefruit accounting for 56 percent of the total area planted, followed by Mpumalanga (21 percent), Kwa-Zulu Natal (11 percent), Northern Cape (7 percent), Eastern Cape (5 percent) and the Western Cape (less than 1 percent). The predominant variety planted is the Star Ruby accounting for 84 percent of the area planted due to its high global demand, followed by the Marsh variety at 11 percent. Other grapefruit varieties planted include Rose, Redheart, Pomelit, Java Shaddock, Flame, Nartia, and Fe 1(Jackson).

Figure 2: Area Planted to Grapefruit



*Estimate
Source: CGA & Post Estimates

Production

The production of grapefruit is estimated to increase by 8 percent to 373,000 Metric Tons (MT) in the 2020/21 MY, from 344,626 MT in the 2019/20 MY. This is based on normal weather conditions, good rainfall received in the main growing areas, and the increase in area planted. Dam levels in all the production areas in 2020 seem to be higher than the levels in 2019, an indication that there will be sufficient irrigation water in the upcoming 2020/21 MY. Furthermore, grapefruit production tends to be cyclical and the 2019/20 MY was a down year. Grapefruit is normally harvested between March and September, and the impact of COVID-19 on production, harvest and labor has been minimal to date.

Consumption

Grapefruit consumption is estimated to increase to 8,500 MT in the 2020/21 MY, from 8,000 MT in the 2019/20 MY. This is based on the rise in production, and to the growing awareness and perceived health benefits of grapefruit in the domestic market. Citrus has seen a surge in demand due to the assumed benefits of Vitamin C in boosting immunity against COVID-19.

Notably, grapefruit is not a very popular citrus fruit in the domestic market, with many consumers largely unfamiliar to its qualities and taste in South Africa. As a result, the fresh grapefruit per capita consumption in South Africa is still relatively low at below 1 kg per annum because the majority of the population has not acquired the taste for grapefruit.

Processing

On average, 29 percent of total grapefruit produced is used for processing. Post estimates that the grapefruit delivered for processing will increase by 12 percent to 105,000 MT in the 2020/21 MY, from 94,000 MT in the 2019/20 MY, based on the increase in production. Grapefruit is processed to juice and concentrate, the majority of which is exported to Europe. The left-over pulp following commercial juice extraction is an important source of grapefruit oil which is used as a flavoring agent in many soft drinks. The inner peel is a source of pectin and citric acid, which are both used by the food industry to preserve fruits, jams, and marmalades. Naringin is also extracted from grapefruit peel, and gives tonic-water its distinctive bitter flavor. The grapefruit peel oil is used in scented fragrances.

Exports

Post estimates that grapefruit exports will increase by 7 percent to 260,000 MT in the 2020/21 MY, from 244,334 MT in the 2019/20 MY, based on the rise in production, continued demand for citrus in global markets for health reasons, and the pace of exports up to April 2021. Citrus has seen a surge in demand due to the assumed benefits of Vitamin C in boosting immunity against COVID-19. The 2019/20 MY export of grapefruit was revised downwards to 244,334 MT based on final Trade Data Monitor figures.

Europe is the largest market for South African grapefruit exports accounting for 42 percent of total exports in 2019, followed by Asia at 39 percent. Although South Africa has a free trade agreement with the European Union (EU) which allows duty free access for its citrus exports, South Africa continues to face challenges due to Citrus Black Spot (CBS) and False Coddling Moth (FCM) in the EU market. Industry estimates that it is costing South Africa almost R1.8 Billion (US$134 Million) to address and comply with the CBS requirements in the EU market. In 2021, South Africa ("Fruit South Africa") and China (Chamber of Commerce) signed a Memorandum of Understanding (MOU) to promote greater cooperation and statistical information exchange between the two countries` fresh fruit industries.

While total volumes are still low, grapefruit exports to the United States have been growing exponentially by an average of 65 percent per annum in the past five years, from 76 MT in the 2012/13 MY, to 5,310 MT in the 2019/20 MY. Grapefruit exports to the United States are expected to continue rising based on the growing demand, good quality fruit, and to a lesser extent the continuation of duty free access through the African Growth and Opportunity Act (AGOA). The Middle East, Canada and Africa are also growing markets for South African grapefruit.

Table 3: South African Fresh Grapefruit Exports

South Africa Exports to the World							
Commodity: 080540, Grapefruit, Fresh Or Dried							
Calendar Year: 2016-2020 and January-April: 2020, 2021							
Partner Country	Unit	Calendar Year			January-April		
		2018	2019	2020	2020	2021	%Δ 2021/20
World	T	288,155	258,423	244,334	20,690	21,844	6%
Netherlands	T	68,184	75,083	71,975	8,145	9,530	17%
China	T	54,530	36,439	48,083	3,529	3,196	-9%
Japan	T	37,688	30,072	27,046	394	63	-84%
Russia	T	20,064	14,128	21,931	2,521	1,255	-50%
Hong Kong	T	13,761	12,130	13,603	1,790	1,663	-7%
United Kingdom	T	12,275	11,779	10,498	468	872	86%
Italy	T	12,858	10,434	9,399	907	1,939	114%
Canada	T	9,504	6,665	6,252	468	499	7%
United States	T	4,729	5,347	5,310	0	66	0%
Portugal	T	7,768	7,384	4,522	131	593	353%
South Korea	T	9,732	6,918	4,113	0	40	0%
United Arab Emirates	T	4,156	4,128	3,517	852	485	-43%
Eswatini	T	4,861	7,459	3,339	27	185	585%
Taiwan	T	3,268	2,233	2,429	189	45	-76%
Ukraine	T	1,427	1,339	2,029	74	218	195%
Germany	T	3,912	4,135	968	85	42	-51%
Romania	T	694	267	818	36	0	-100%
Saudi Arabia	T	1,168	1,033	748	80	53	-34%
France	T	4,328	5,106	712	34	74	118%
Greece	T	1,535	1,326	647	94	94	0%
Singapore	T	729	688	624	84	181	115%
Iraq	T	93	595	557	42	0	-100%
Ireland	T	1,011	3,321	516	98	84	-14%
Malaysia	T	1,085	614	483	10	67	570%
Sweden	T	481	2,857	481	72	72	0%
Bulgaria	T	914	751	429	69	0	-100%
Lithuania	T	624	550	381	88	38	-57%
Spain	T	1,105	1,053	295	0	21	0%
Georgia	T	178	225	283	20	0	-100%
Belgium	T	1,735	113	272	108	0	-100%

Source: Trade Data Monitor (TDM)

Imports

South Africa is not a major importer of grapefruit. Imports mainly originate from Eswatini (formerly Swaziland), Spain, Turkey and Israel to fill the small demand gap towards the end of the season. Eswatini benefits from duty free access to South Africa under the Southern African Customs Union (SACU) and the close proximity as a neighboring country.

Table 4: South African Fresh Grapefruit Imports

South Africa Imports from the World									
Commodity: 080540, Grapefruit, Fresh Or Dried									
Calendar Year: 2016-2020 and January-April: 2020, 2021									
Partner Country	Unit	Calendar Year					January-April		
		2016	2017	2018	2019	2020	2020	2021	%Δ 2021/20
World	T	3,983	1,211	2,703	1,476	1,325	801	861	7%
Eswatini	T	2,862	66	2,083	685	753	531	0	-100%
Turkey	T	275	354	93	122	220	45	478	962%
Spain	T	474	514	374	382	196	166	259	56%
Israel	T	136	225	134	248	127	59	124	110%
Egypt	T	0	0	0	0	29	0	0	0%
India	T	0	0	18	0	0	0	0	0%
Canada	T	19	0	0	0	0	0	0	0%
China	T	19	0	0	0	0	0	0	0%
Netherlands	T	21	0	0	0	0	0	0	0%
Portugal	T	0	0	0	19	0	0	0	0%
Other	T	177	52	0	20	0	0	0	0%

Source: TDM

Prices

Table 5 shows the local, export and processed market prices for grapefruit since the 2004/05 MY. Grapefruit prices for the export and local markets have increased over the past five years based on the weakening rand to the United States dollar exchange rate. Processed and local market prices tend to fluctuate based on supply. Export prices continue to provide the highest prices for South African grapefruit, which explains why the industry is export oriented.

Table 5: Grapefruit Prices

MY	Local Market Average Price Rand/ MT	Export Market Average Price Rand/ MT	Processed Average Price Rand/ MT
2004/05	1,487	925	325
2005/06	1,493	1,764	386
2006/07	1,796	2,712	237
2007/08	2,283	3,658	152
2008/09	1,839	1,846	240
2009/10	1,437	4,351	268
2010/11	2,107	3,723	383
2011/12	2,275	4,371	377
2012/13	2,352	5,060	376
2013/14	3,020	5,247	401
2014/15	3,866	5,737	310
2015/16	5,154	7,898	409
2016/17	2,472	7,762	596
2017/18	5,246	8,234	1,593
2018/19	2,908	7,990	1,523
2019/20	6,563	8,960	1,571

Source: CGA

USD $1 = Rand R13.42 (as of June 6, 2021)

Table 6: Production, Supply and Demand (PSD) of Grapefruit, Fresh

Grapefruit, Fresh	2018/2019		2019/2020		2020/2021	
Market Year Begins	Jan 2019		Jan 2020		Jan 2021	
South Africa	USDA Official	New Post	USDA Official	New Post	USDA Official	New Post
Area Planted (HECTARES)	7762	7762	8000	8259	8200	8700
Area Harvested (HECTARES)	7400	7400	7700	7700	7900	7900
Bearing Trees (1000 TREES)	7400	7400	7600	7600	7800	7800
Non-Bearing Trees (1000 TREES)	800	800	900	900	920	920
Total No. Of Trees (1000 TREES)	8200	8200	8500	8500	8720	8720
Production (1000 MT)	372	372	358	345	360	373
Imports (1000 MT)	1	1	1	1	1	1
Total Supply (1000 MT)	373	373	359	346	361	374
Exports (1000 MT)	258	258	256	244	260	260
Fresh Dom. Consumption (1000 MT)	8	8	8	8	9	9
For Processing (1000 MT)	107	107	95	94	92	105
Total Distribution (1000 MT)	373	373	359	346	361	374
(HECTARES) ,(1000 TREES) ,(1000 MT)						

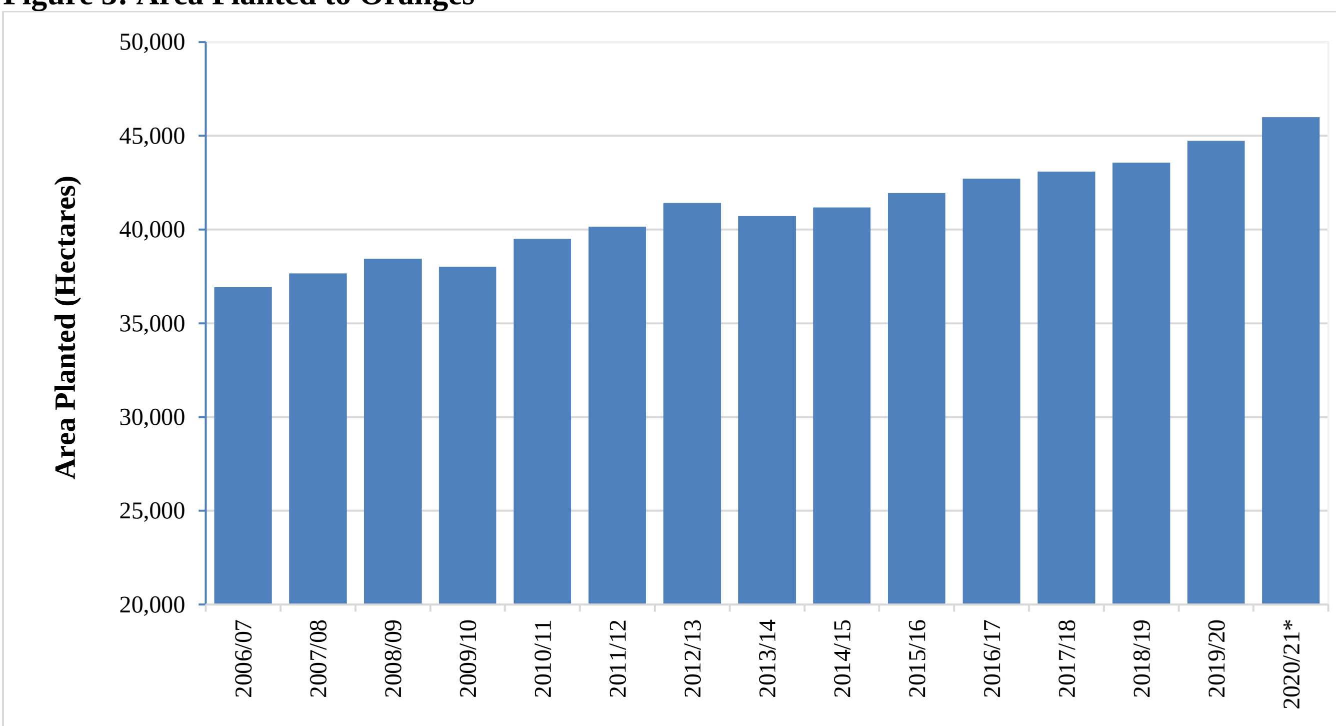
Oranges, Fresh

Area Planted

The area planted with oranges is estimated to grow by 3 percent to 46,000 hectares in the 2020/21 MY, from 44,728 hectares in the 2019/20 MY, based on the increases in area planted to seedless orange varieties and late maturing varieties. This rise will be partially offset by the industry shift from orange production to soft citrus in the Western Cape and Limpopo growing regions. **Figure 3** below shows the growing trend in the area planted to oranges since the 2006/07 MY.

Limpopo is the leading growing region for oranges accounting for 48 percent of the total area planted, followed by the Eastern Cape (26 percent), Western Cape (15 percent), Mpumalanga (7 percent), Northern Cape (2 percent), KwaZulu Natal (2 percent), North West Province (less than 1 percent), and the Free State (less than 1 percent). Valencia's account for about 64 percent of the total area planted to oranges, and Navels account for 36 percent. The predominant variety planted is the Midnight accounting for 25 percent of the total area planted, followed by the Valencia Late variety at 12 percent, Delta (10 percent), Turkey (7 percent), Bennie (7 percent), Palmer (6 percent), Cambria (6 percent), Bahianinha (5 percent), and Washington (4 percent).

Figure 3: Area Planted to Oranges



*Estimate
Source: CGA & Post Estimates.

Production

The production of oranges is estimated to increase by 2 percent to 1.65 million MT in the 2020/21 MY, from 1.62 million MT in the 2019/20 MY. This increase is based on normal weather conditions, good rainfall in the main growing regions, the rise in area planted, better water management techniques by farmers, and new plantings of high yielding and late maturing varieties. However, this increase will be partially offset by small fruit sizes in some production areas in the Eastern Cape due to drought conditions; and hail damage in some growing regions in the Mpumalanga Province. The drought in the Eastern Cape only affected growers who rely on the Gamtoos river system and the Kouga Dam, which accounts for an estimated 30 percent of the production in the Eastern Cape. Oranges are normally harvested between March and September, and the impact of COVID-19 on production, harvest and labor has been minimal to date.

Consumption

Post estimates that the consumption of oranges will increase by 3 percent to 82,000 MT in the 2020/21 MY, from 80,000 MT in the 2019/20 MY, based on the rise in production and increase in demand due to the associated benefits of Vitamin C in boosting immunity against COVID-19. South Africa prioritizes supplying export markets, and the surplus oranges or those that do not meet the export standards are supplied to the fresh domestic and processed markets. Fresh oranges are the most popular citrus consumed in South Africa with a per capita consumption of about 1.5 kg per annum.

Exports

The export of oranges is estimated to rise by 3 percent to 1.29 million MT in the 2020/21 MY, from 1.26 million MT in the 2019/20 MY, based on the increase in production, continued spike in demand due to the assumed benefits of Vitamin C in boosting immunity against COVID-19, and the pace of exports up to April 2021. The growth in exports and the continued rise in citrus production resulted in the world largest specialized reefer vessel ("the Cool Eagle") being used in South Africa in 2021.

The EU remains South Africa's largest export market for oranges, accounting for 44 percent of the total export market. However, exports to Asia and the Middle East have grown steadily over the years due to the industry's focus on growing these markets.

Exports to the United States are expected to continue based on the duty free access under the African Growth and Opportunity Act (AGOA). However, a gradual shift from oranges to easy peelers and soft citrus exports is expected over time, as South African farmers supplying the U.S. market have been re-planting their orchards from oranges to soft citrus and new orange varieties in response to market preferences and the higher premium received in the U.S. market. Exports to the United States decreased in 2019, due to the shift from oranges to soft citrus and small fruit sizes. However, orange exports to the United States increased by 71 percent to 53,121 MT in the 2020, based on the record breaking production in South Africa.

Table 7: South African Fresh Orange Exports

South Africa Exports to the World							
Commodity: 080510, Oranges, Fresh							
Calendar Year: 2016-2020 and January-April: 2020, 2021							
Partner Country	**Unit**	**Calendar Year**			**January-April**		
		2018	**2019**	**2020**	**2020**	**2021**	**%Δ 2021/20**
World	T	1,278,935	1,186,426	1,259,714	5,543	5,631	2%
Netherlands	T	233,619	224,343	288,463	451	230	-49%
Portugal	T	79,998	58,390	104,774	0	0	0%
United Arab Emirates	T	80,989	75,602	89,527	705	759	8%
China	T	109,995	150,388	81,289	0	23	0%
Russia	T	87,147	71,665	79,408	50	54	8%
United Kingdom	T	75,954	62,362	72,879	117	211	80%
Bangladesh	T	59,399	44,041	66,001	0	28	0%
Saudi Arabia	T	84,448	83,587	61,823	452	127	-72%
Hong Kong	T	66,255	54,827	55,459	26	111	327%
United States	T	45,120	30,990	53,121	25	0	-100%
Italy	T	42,667	31,355	41,244	0	0	0%
Canada	T	36,722	29,957	38,239	164	48	-71%
Malaysia	T	30,704	32,601	29,461	0	278	0%
Iraq	T	26,413	34,692	28,465	46	28	-39%
Oman	T	10,339	9,926	13,171	58	201	247%
India	T	9,705	10,044	11,500	0	64	0%
Kuwait	T	21,029	15,062	10,258	221	167	-24%
Singapore	T	14,384	9,343	9,521	0	27	0%
Qatar	T	12,287	10,389	8,800	75	122	63%
Germany	T	16,276	13,073	7,442	25	23	-8%
France	T	17,456	18,186	7,421	0	0	0%
Sweden	T	6,141	7,167	6,981	0	0	0%
Ukraine	T	3,686	3,772	6,722	0	0	0%
Ireland	T	6,136	5,405	6,314	0	23	0%
Botswana	T	3,310	3,446	5,742	650	839	29%
Denmark	T	1,234	3,420	4,691	0	0	0%
Spain	T	6,928	9,202	4,540	0	0	0%
Namibia	T	4,321	4,670	4,526	636	576	-9%
Belgium	T	6,411	7,610	4,136	0	0	0%
Mozambique	T	6,115	6,598	4,004	672	288	-57%
Taiwan	T	5,934	4,387	3,948	0	0	0%
Bahrain	T	4,096	4,292	3,801	0	0	0%
Eswatini	T	4,704	3,412	3,601	275	485	76%

Source: TDM

Imports

The import of oranges is estimated to remain flat at about 2,000 MT in the 2020/21 MY, based on the high available supply. Relatively small volumes of oranges are usually imported into South Africa in November and December to close supply gaps and satisfy year-end demand.

Table 8: South African Fresh Orange Imports

South Africa Imports from the World									
Commodity: 080510, Oranges, Fresh									
Calendar Year: 2016-2020 and January-April: 2020, 2021									
Partner Country	Unit	Calendar Year					January-April		
		2016	2017	2018	2019	2020	2020	2021	%Δ 2021/20
World	T	3,468	3,326	3,672	3,834	2,147	1,378	1,384	0%
Spain	T	531	1,150	645	991	1,063	833	810	-3%
Eswatini	T	350	805	2,270	2,671	720	271	402	48%
Egypt	T	24	121	136	52	161	161	149	-7%
Sweden	T	0	0	0	0	64	0	0	0%
Morocco	T	0	0	0	0	46	46	0	-100%
Israel	T	11	6	0	0	37	37	18	-51%
Unidentified	T	2,310	1,080	621	69	55	29	0	0%
Saudi Arabia	T	0	113	0	0	0	0	0	0%
Turkey	T	26	24	0	0	0	0	0	0%
Portugal	T	21	0	0	24	0	0	0	0%
Mozambique	T	0	0	0	27	0	0	0	0%
Netherlands	T	122	0	1	0	0	0	0	0%
Italy	T	0	0	0	0	0	0	5	0%
Malaysia	T	22	0	0	0	0	0	0	0%
Bahrain	T	0	27	0	0	0	0	0	0%
Belgium	T	50	0	0	0	0	0	0	0%

Source: TDM

Prices

Table 9 shows the local, export and processed market prices of oranges. The export market provides the highest prices. As a result, the South African citrus industry is export-oriented because the domestic and processed markets offer lower prices.

Table 9: Oranges Prices

MY	Local Market Average Price Rand/ MT	Export Market Average Price Rand/ MT	Processed Average Price Rand/ MT
2003/04	1,090	2,425	274
2004/05	1,111	1,580	229
2005/06	1,025	1,843	301
2006/07	1,278	2,832	354
2007/08	1,430	3,443	419
2008/09	1,483	3,235	268
2009/10	1,599	4,043	349
2010/11	1,762	4,691	529
2011/12	1,895	4,318	564
2012/13	2,054	4,975	591
2013/14	2,230	5,781	618
2014/15	2,535	6,576	652
2015/16	3,799	8,570	1,002
2016/17	3,604	8,656	1,069
2017/18	3,361	8,600	693
2018/19	3,643	8,268	699
2019/20	4,897	10,329	519

Source: CGA

Table 10: PSD for Oranges, Fresh

Oranges, Fresh	2018/2019		2019/2020		2020/2021	
Market Year Begins	Jan 2019		Jan 2020		Jan 2021	
South Africa	USDA Official	New Post	USDA Official	New Post	USDA Official	New Post
Area Planted (HECTARES)	43578	43578	44500	44728	46000	46000
Area Harvested (HECTARES)	39600	39600	40500	40500	41000	41000
Bearing Trees (1000 TREES)	39000	39000	39500	39500	40000	40000
Non-Bearing Trees (1000 TREES)	4200	4200	4300	4300	4400	4400
Total No. Of Trees (1000 TREES)	43200	43200	43800	43800	44400	44400
Production (1000 MT)	1590	1590	1650	1620	1700	1650
Imports (1000 MT)	4	4	2	2	2	2
Total Supply (1000 MT)	1594	1594	1652	1622	1702	1652
Exports (1000 MT)	1186	1186	1292	1260	1320	1285
Fresh Dom. Consumption (1000 MT)	75	75	78	80	80	82
For Processing (1000 MT)	333	333	282	282	302	285
Total Distribution (1000 MT)	1594	1594	1652	1622	1702	1652
(HECTARES) ,(1000 TREES) ,(1000 MT)						

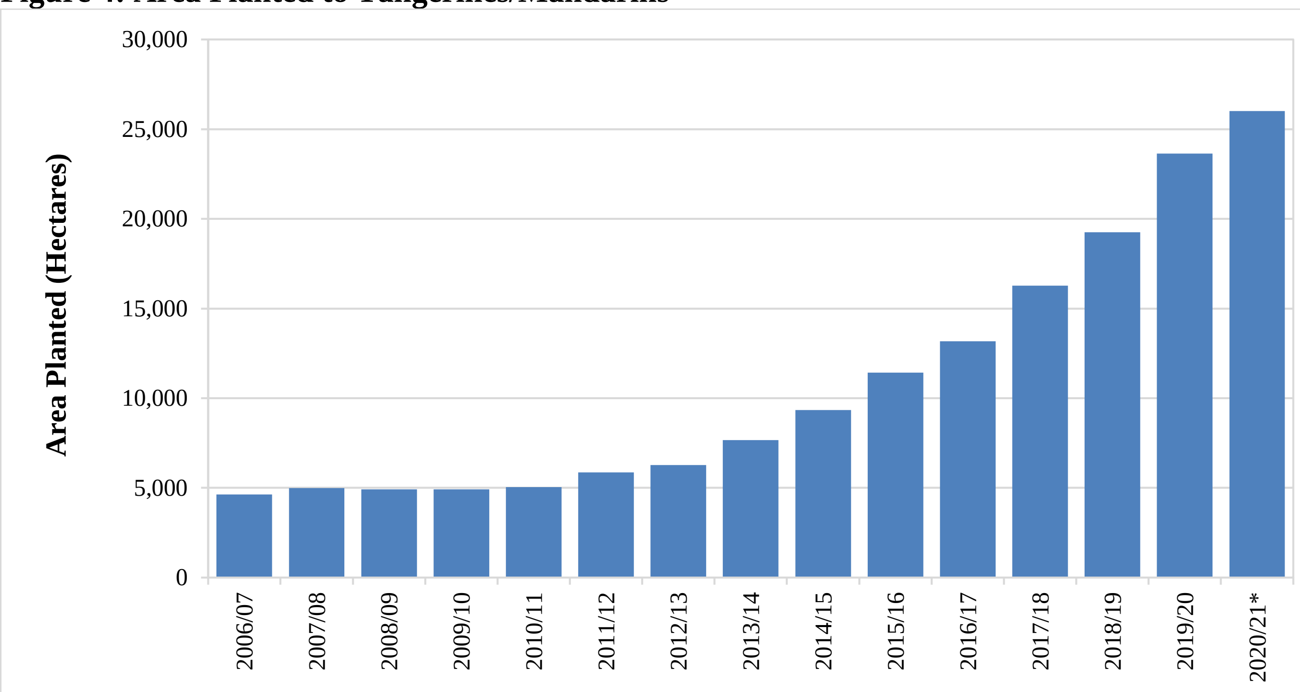
Tangerines/Mandarins (Soft Citrus), Fresh

Area Planted

The area planted to tangerines/mandarins (soft citrus) is estimated to increase by 10 percent to 26,000 hectares in the 2020/21 MY, from 23,635 hectares in the 2019/20 MY. This is due to growers responding to the increasing global demand for seedless tangerines/mandarins, and high margins from soft citrus relative to other citrus types. **Figure 4** shows that the area planted with tangerines/mandarins was flat from the 2006/07 MY to the 2010/11 MY. Thereafter, there has been significant annual increases in area planted, due to the increased investment in new orchards in response to global demand and high revenue.

The predominant variety planted in South Africa is the Nardocott accounting for 22 percent of the area planted, followed by the Nules variety at 12 percent, Nova (11 percent), Tango (10 percent), Orri (8 percent) and Leanri (8 percent).

Figure 4: Area Planted to Tangerines/Mandarins



*Estimate
Source: CGA & Post Forecasts.

Production

The production of tangerines/mandarins is expected to continue its aggressive growth and is estimated to increase by 8 percent to 500,000 MT in the 2020/21 MY, from 460,934 MT in the 2019/20 MY. This is based on the rise in area planted, normal weather conditions, improved winter rainfall received in the main production area of the Western Cape, and the high level of new-plantings in the past years coming into full production. The COVID-19 pandemic has had a minimal impact on labor and input supply.

There is a growing trend of farmers aggressively establishing new orchards under netting which has improved the water efficiency, yields and the overall quality of soft citrus production in South Africa. In addition, there is an increasing trend of late varieties being planted, which has seen the peak harvest of soft citrus shift from week 20 (Beginning of May) to between weeks 21 to 30 (Mid-May to July). About 37 percent of tangerines/mandarins are produced in the Western Cape, followed by 27 percent in the Eastern Cape and 26 percent in Limpopo. The Western Cape is a winter rainfall region, and the 2020 winter rainfall will only be used for irrigation in the following year in 2021. Improved dam levels in the Western Cape in 2019 had a positive impact to the 2019/20 MY crop.

Consumption

The consumption of tangerines/mandarins is estimated to increase by 7 percent to 29,000 MT in the 2020/21 MY, from 27,000 MT in the 2019/20 MY, due to the increase in production and a surge in demand driven by the associated health benefits of citrus in boosting immunity and to fight COVID-19. The industry prioritizes export markets for soft citrus and only supplies surplus fruit to the local market. However, some high end retail chains such as Woolworths also sell some export grade citrus to the domestic consumers.

Exports

The export of tangerines/mandarins is estimated to increase by 7 percent to 415,000 MT in the 2020/21 MY, from 389,467 MT in the 2019/20 MY, based on the increase in production, the industry strategy of prioritizing export markets over domestic markets, a surge in demand due to the assumed benefits of Vitamin C in boosting immunity against COVID-19, and pace of exports up to April 2021.

Demand for tangerines/mandarins remains strong in the export markets, with the United Kingdom as the leading export market accounting for 23 percent of the total exports, followed by the Netherlands (21 percent), United States (8 percent), Russia (8 percent) and the United Arab Emirates (6 percent). Tangerines/mandarins exports are not impacted by South Africa's CBS challenges in the EU market.

Exports to the United States under the AGOA have grown by an average of 35 percent per year over the past four seasons, from 7,444 MT in the 2013/14 MY, to 32,458 MT in the 2019/20 MY. This growth trend is expected to continue based on the rising U.S. market preference for easy peelers, and continued duty free market access under AGOA.

Table 11: South African Fresh Tangerines/Mandarins Exports

South Africa Exports to the World							
Commodity: 080520/080521/080522/080529, Mandarins (Including Tangerines And Satsumas); Clementines, Wilkings And Similar Citrus Hybrids, Fresh Or Dried/Mandarins (including tangerines and satsumas)/Clementines/Other citrus hybrids							
Calendar Year: 2016-2020 and January-April: 2020, 2021							
Partner Country	**Unit**	**Calendar Year**			**January-April**		
		2018	**2019**	**2020**	**2020**	**2021**	**%Δ 2021/20**
World	T	260,850	295,607	389,467	25,791	20,431	-21%
United Kingdom	T	69,344	75,941	87,938	10,802	6,530	-40%
Netherlands	T	51,404	61,403	82,522	6,788	6,138	-10%
United States	T	13,695	18,690	32,458	48	0	-100%
Russia	T	28,425	23,709	32,379	4,692	4,678	0%
United Arab Emirates	T	10,457	13,022	24,136	1,033	823	-20%
Bangladesh	T	6,170	15,760	24,130	0	141	0%
Canada	T	11,554	11,972	18,898	224	326	46%
China	T	6,520	9,827	13,785	53	0	-100%
Portugal	T	6,309	6,275	7,762	0	72	0%
Hong Kong	T	11,427	12,366	7,298	51	0	-100%
Saudi Arabia	T	5,412	6,950	6,658	119	101	-15%
Ireland	T	6,889	4,853	5,265	1,193	967	-19%
Iraq	T	947	3,336	4,886	42	119	183%
Germany	T	3,307	3,683	4,184	0	13	0%
Senegal	T	832	2,540	3,958	0	96	0%
France	T	2,559	2,690	3,574	0	0	0%
Malaysia	T	3,314	3,762	3,000	0	0	0%
Norway	T	788	1,359	2,713	0	0	0%
Singapore	T	2,413	1,260	2,297	0	0	0%
Qatar	T	969	1,054	2,063	92	71	-23%
Mauritius	T	1,556	1,989	1,988	0	0	0%
Kuwait	T	1,803	2,293	1,916	45	47	4%
Oman	T	340	542	1,501	17	0	-100%
Italy	T	585	430	1,435	0	0	0%
Finland	T	526	635	1,338	112	0	-100%
Taiwan	T	158	374	1,142	42	0	-100%
Bahrain	T	602	743	1,007	23	23	0%
Nigeria	T	171	256	750	0	2	0%
Denmark	T	47	394	690	45	0	-100%
Namibia	T	363	682	648	73	71	-3%
India	T	550	550	596	0	0	0%
Sweden	T	140	49	535	0	0	0%
Gabon	T	489	595	534	0	0	0%

Source: TDM

Imports

Post estimates that the 2020/21 MY imports of tangerines/mandarins will remain flat at 2,000 MT. South African imports are only minimal in order to satisfy out of season demand.

Table 12: South African Fresh Tangerines/Mandarins Imports

South Africa Imports from the World										
Commodity: 080520/080521/080522/080529, Mandarins (Including Tangerines And Satsumas); Clementines, Wilkings And Similar Citrus Hybrids, Fresh Or Dried/Mandarins (including tangerines and satsumas)/Clementines/Other citrus hybrids										
Calendar Year: 2016-2020 and January-April: 2020, 2021										
Partner Country	**Unit**	**Calendar Year**					**January-April**			
		2016	**2017**	**2018**	**2019**	**2020**	**2020**	**2021**	**%Δ 2021/20**
World	T	1,268	1,472	1,246	1,833	2,446	2,101	2,739	30%
Spain	T	562	1,010	712	1,524	1,466	1,215	806	-34%
Morocco	T	0	0	0	47	793	769	1,830	138%
Israel	T	308	201	346	181	105	105	56	-47%
Other	T	328	144	73	42	47	0	0	0%
United Kingdom	T	21	49	0	0	22	0	0	0%
Egypt	T	0	0	43	39	12	12	21	75%
Germany	T	25	0	0	0	0	0	0	0%
India	T	0	0	30	0	0	0	0	0%
Canada	T	0	22	0	0	0	0	0	0%
Eswatini	T	0	0	41	0	0	0	0	0%
Thailand	T	1	0	0	0	0	0	0	0%
Turkey	T	22	46	0	0	0	0	25	0%

Source: TDM

Prices

Export markets provide the highest prices for South African soft citrus as shown in **Table 13**.

Table 13: Tangerines/Mandarins Prices

MY	Local Market Average Price Rand/ MT	Export Market Average Price Rand/ MT	Processed Average Price Rand/ MT
2003/04	1,705	3,638	251
2004/05	1,279	3,977	165
2005/06	2,133	4,423	188
2006/07	2,543	3,758	214
2007/08	3,038	4,965	367
2008/09	3,042	4,635	275
2009/10	3,805	5,618	214
2010/11	4,091	5,637	315
2011/12	3,760	7,133	419

2012/13	5,159	8,542	334
2013/14	5,442	10,004	465
2014/15	5,606	11,392	391
2015/16	6,785	14,242	532
2016/17	6,037	13,489	614
2017/18	6,617	13,498	709
2018/19	5,586	13,344	502
2019/20	6,866	16,387	280

Source: CGA

Table 14: PSD for Tangerines/Mandarins, Fresh

Tangerines/Mandarins, Fresh	2018/2019		2019/2020		2020/2021	
Market Year Begins	Feb 2019		Feb 2020		Feb 2021	
South Africa	USDA Official	New Post	USDA Official	New Post	USDA Official	New Post
Area Planted (HECTARES)	19255	19255	21000	23635	23000	26000
Area Harvested (HECTARES)	13600	13600	14500	14500	16000	16000
Bearing Trees (1000 TREES)	8000	8000	8500	8500	9000	9000
Non-Bearing Trees (1000 TREES)	2800	2800	3100	3100	3500	3500
Total No. Of Trees (1000 TREES)	10800	10800	11600	11600	12500	12500
Production (1000 MT)	375	375	486	461	515	500
Imports (1000 MT)	2	2	3	2	3	2
Total Supply (1000 MT)	377	377	489	463	518	502
Exports (1000 MT)	296	296	385	389	420	415
Fresh Dom. Consumption (1000 MT)	22	22	27	27	30	29
For Processing (1000 MT)	59	59	77	47	68	58
Total Distribution (1000 MT)	377	377	489	463	518	502
(HECTARES) ,(1000 TREES) ,(1000 MT)						

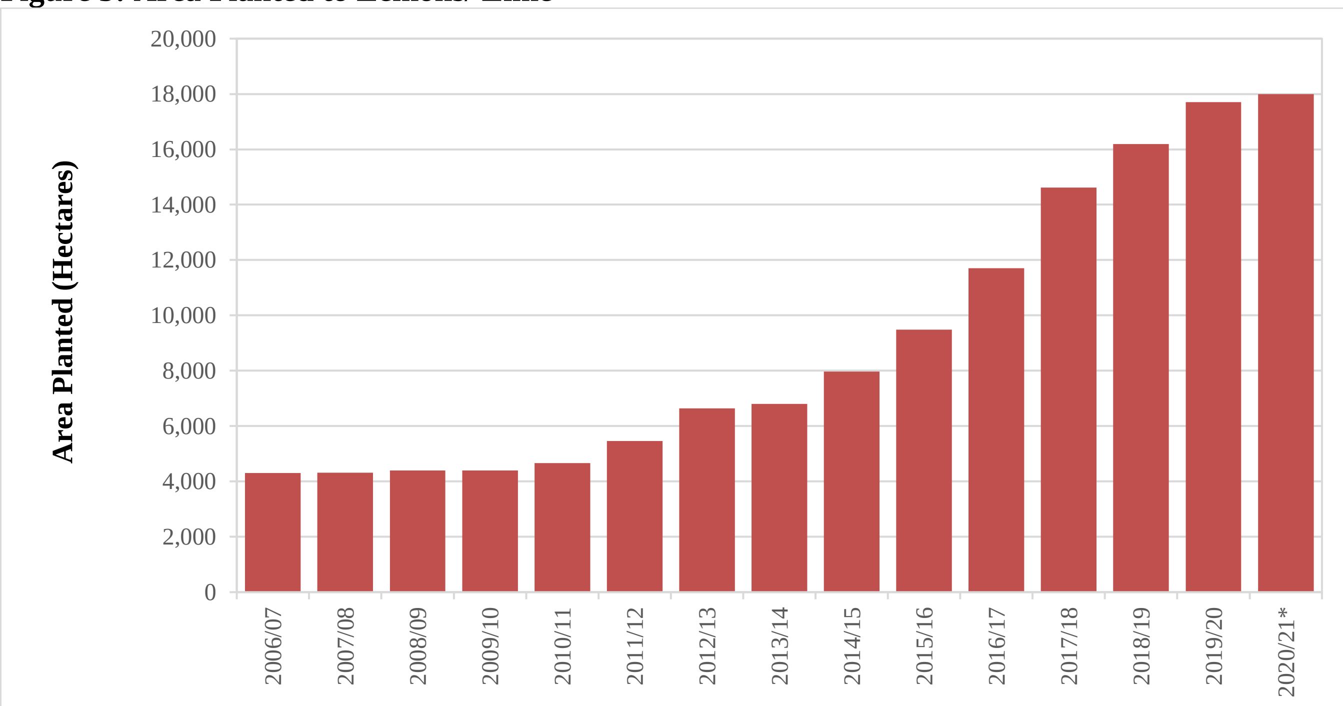
Lemons/Limes, Fresh

Area Planted

Figure 5 shows that the area planted with lemons/limes was initially flat from the 2006/07 MY to the 2009/10 MY. However, the area planted increased gradually from 4,667 hectares in the 2010/11 MY, to 18,000 hectares in the 2020/21 MY, in response to the growth in demand and higher prices in the export market.

The Eastern Cape Province is the leading growing region for lemons and limes in South Africa accounting for 42 percent of the total area planted, followed by Limpopo (31 percent), Western Cape (14 percent), Mpumalanga (6 percent), Kwa-Zulu Natal (5 percent), Northern Cape (2 percent) and North West (1 percent). The most popular variety of lemons planted in South Africa is the Eureka accounting for 75 percent of the area planted, followed by Lisbon (8 percent), 2Ph Seedless (6 percent), Limoneira 8A (4 percent), and Genoa (3 percent).

Figure 5: Area Planted to Lemons/ Lime



*Estimate.
Source: CGA & Post Forecast.

Production

The production of lemons/limes is estimated to marginally increase by 1 percent to 625,000 MT in the 2020/21 MY, from 619,522 MT in the 2019/20 MY. This is based on the rise in area planted, and the high level of new-plantings in the past five years coming into full production. This was partially offset by the impact of drought in some growing regions in the Eastern Cape. Notably, some growers mitigated the impact of the drought by drilling more boreholes. The impact of COVID-19 on production is expected to be minimal.

Consumption

The domestic consumption of lemons and limes is estimated to increase by 4 percent to 27,000 MT in the 2020/21 MY, from 26,000 MT in the 2019/20 MY, based on the growth in production, and increasing demand driven by health conscious consumers.

Processing

Post estimates that lemons and limes delivered for processing will increase by 1 percent to 139,000 MT in the 2020/21 MY, from 138,000 MT in the 2019/20 MY, based on the increase in production.

Processed lemons and limes are used as flavoring for savory dishes, and food ingredient for confectionary and dairy products. In the beverage industry lemons/limes are used to make lemonade, smoothies and liquors. In the cleaning industry, lemon juice is used as a degreaser and disinfectant, due to its high concentration of citric acid which can inhibit the proliferation of some molds and bacteria.

Exports

The exports of lemons and limes is estimated to increase by 1 percent to 461,000 MT in the 2020/21 MY, from 457,886 MT in the 2019/20 MY, based on the increase in production, and growth in demand from the Middle East and Asian markets. The European Union still remains the main export market for South African lemons and limes, accounting for 42 percent of the total exports.

Table 15: South African Fresh Lemons/Limes Exports

South Africa Exports to the World							
Commodity: 080550, Lemons And Limes, Fresh Or Dried							
Calendar Year: 2016-2020 and January-April: 2020, 2021							
Partner Country	**Unit**	**Calendar Year**			**January-April**		
		2018	**2019**	**2020**	**2020**	**2021**	**%Δ 2021/20**
World	T	315,197	350,245	457,886	112,009	87,843	-22%
Netherlands	T	43,059	45,046	92,152	11,122	1,608	-86%
United Arab Emirates	T	46,566	43,332	56,570	23,856	21,173	-11%
Saudi Arabia	T	30,864	41,762	37,520	16,068	12,692	-21%
Russia	T	27,750	26,957	37,175	11,177	14,726	32%
United Kingdom	T	29,897	26,049	36,967	2,904	1,120	-61%
Iraq	T	7,340	20,638	36,918	15,842	9,200	-42%
Canada	T	14,381	15,740	22,879	4,438	4,967	12%
Italy	T	14,564	17,526	21,664	1,369	103	-92%
Portugal	T	10,216	15,184	15,503	0	0	0%
Hong Kong	T	20,119	22,262	15,385	4,358	5,301	22%
Kuwait	T	9,940	11,962	11,653	4,961	3,045	-39%
Malaysia	T	8,599	11,305	9,242	2,539	4,565	80%

Germany	T	4,059	6,891	6,593	772	173	-78%
Qatar	T	4,097	5,254	6,109	3,352	1,765	-47%
Spain	T	1,955	2,094	5,609	0	0	0%
Singapore	T	4,632	4,176	5,088	1,072	1,502	40%
Bahrain	T	3,298	2,564	3,671	2,001	893	-55%
Ukraine	T	1,567	1,334	3,089	1,238	810	-35%
Greece	T	2,091	2,255	2,966	297	381	28%
Oman	T	3,456	3,243	2,922	1,155	745	-36%
Jordan	T	180	684	2,330	396	462	17%
Denmark	T	428	811	1,910	202	0	-100%
France	T	3,111	1,559	1,877	143	89	-38%
Ireland	T	2,404	1,760	1,770	138	124	-10%
Azerbaijan	T	1,608	780	1,603	229	77	-66%
Japan	T	920	1,050	1,449	0	75	0%
Mauritius	T	1,121	1,106	1,256	180	113	-37%
Georgia	T	306	722	1,250	344	165	-52%
Namibia	T	521	629	1,042	268	228	-15%
Romania	T	149	125	1,027	77	125	62%
Nigeria	T	322	351	1,003	138	246	78%

Source: TDM

Imports

Post forecasts that the 2020/21 MY imports of lemons/limes will remain flat due to the available domestic production which sufficiently meets the local demand. Imports are minimal from Spain, Eswatini and Brazil.

Table 16: South African Fresh Lemons/Limes Imports

South Africa Imports from the World									
Commodity: 080550, Lemons And Limes, Fresh Or Dried									
Calendar Year: 2016-2020 and January-April: 2020, 2021									
Partner Country	Unit	Calendar Year					January-April		
		2016	2017	2018	2019	2020	2020	2021	%Δ 2021/20
World	T	2,109	878	1,193	983	2,012	1,707	731	-57%
Eswatini	T	24	136	280	355	1,801	1,657	612	-63%
Brazil	T	151	102	142	168	158	23	0	-100%
Spain	T	155	181	97	326	52	27	80	196%
United Arab Emirates	T	51	0	0	0	0	0	0	0%
Turkey	T	91	29	91	0	0	0	0	0%
United Kingdom	T	0	34	25	0	0	0	0	0%
Hong Kong	T	0	30	0	0	0	0	0	0%
Italy	T	0	0	0	108	0	0	0	0%
Unidentified	T	1,613	363	557	25	0	0	38	0%
Serbia	T	0	1	0	0	0	0	0	0%

Source: TDM

Prices

Export markets provide the highest prices for South African lemons/limes as shown in **Table 17**.

Table 17: Lemons/Limes Prices

MY	Local Market Average Price Rand/ MT	Export Market Average Price Rand/ MT	Processed Average Price Rand/ MT
2004/05	1,692	1,476	258
2005/06	1,753	2,478	178
2006/07	2,460	3,238	396
2007/08	3,105	3,961	611
2008/09	3,346	2,120	542
2009/10	3,940	5,329	731
2010/11	3,489	5,426	982
2011/12	4,291	5,426	720
2012/13	5,668	6,994	596
2013/14	6,619	11,058	1,288
2014/15	7,453	12,340	1,378
2015/16	7,697	16,483	1,842
2016/17	7,445	13,289	1,657
2017/18	6,697	11,151	1,463
2018/19	6,494	11,710	2,301
2019/20	5,804	13,570	770

Source: CGA

Table 18: PSD Lemons/Limes, Fresh

Lemons/Limes, Fresh	2018/2019		2019/2020		2020/2021	
Market Year Begins	Jan 2019		Jan 2020		Jan 2021	
South Africa	USDA Official	New Post	USDA Official	New Post	USDA Official	New Post
Area Planted (HECTARES)	16190	16190	17400	17707	18000	18000
Area Harvested (HECTARES)	11200	11200	12100	12100	14000	14000
Bearing Trees (1000 TREES)	6700	6700	7100	7100	7500	7500
Non-Bearing Trees (1000 TREES)	2500	2500	2600	2600	2900	2900
Total No. Of Trees (1000 TREES)	9200	9200	9700	9700	10400	10400
Production (1000 MT)	492	492	657	620	670	625
Imports (1000 MT)	1	1	2	2	2	2
Total Supply (1000 MT)	493	493	659	622	672	627
Exports (1000 MT)	350	350	455	458	500	461
Fresh Dom. Consumption (1000 MT)	21	21	26	26	27	27
For Processing (1000 MT)	122	122	178	138	145	139
Total Distribution (1000 MT)	493	493	659	622	672	627
(HECTARES) ,(1000 TREES) ,(1000 MT)						

Orange Juice

Production

The production of orange juice is estimated to increase by 1 percent to 50,000 MT in the 2020/21 MY, from 49,494 MT in the 2019/20 MY, based on the increase in the quantity of fresh oranges delivered for processing. The 2019/20 MY production of orange juice was slightly revised to 49,494 MT, based on updated volume of oranges delivered for processing.

Concentrated orange juice accounts for at least 90 percent of the total orange juice produced in South Africa. The South African citrus industry prioritizes the export of fresh citrus, and only processes the fruit that does not meet export standards.

Industry coordinated statistics for orange juice are largely unavailable in South Africa. The production, consumption and stock levels represent Post's estimates based on information derived from various sources, contacts and calculations of extractions from fresh oranges delivered for processing.

Consumption

The domestic consumption of orange juice is estimated to increase by 10 percent to 11,000 MT in the 2020/21 MY, from 10,000 MT in the 2019/20 MY, based on the increase in production and supply availability. The relatively high food price inflation has resulted in restricted growth in the domestic consumption of fresh fruit juices especially the one hundred percent fruit juice, and the shift in demand to orange juice concentrates.

Export

Post estimates that the 2020/21 MY exports of orange juice will increase significantly to 40,000 MT, from 29,549 MT in the 2019/20 MY, based on the increase in production and pace of exports up to April 2021. The 2019/20 MY exports of orange juice were revised downwards to 29,549 MT, based final Trade Data Monitor.

Post adjusted all the orange juice export data to the equivalent of 65 Degrees Brix based on the respective conversion factors shown on the export tables below. The orange juice exports under HS200919 were converted using a factor of 1.02. The orange juice exports under HS200911 were converted using a factor of 1.00. The orange juice exports under HS200912 were converted using a factor of 0.18. Degrees Brix represents the strength of the juice based on the sugar content. Thus, 65 Degrees Brix means that the orange juice has at least 65 grams of sucrose per 100 grams of orange juice.

Producers in South Africa prefer to export fresh oranges rather than to sell to processors as export prices are at least eight times higher than prices achieved from processors. Netherlands, Botswana, Mozambique, Mauritius, Namibia, Eswatini, Zambia and Zimbabwe are the biggest markets for South African orange juice exports.

Table 19: South African Orange Juice Exports – HS200919, HS200911 and HS200912

South Africa Exports to the World									
Commodity: 200911/200912/200919, Orange Juice, Frozen, Whether Or Not Sweetened/Orange Juice, Not Frozen, Of A Brix Value Not Exceeding 20/Orange Juice, Other Than Frozen, Whether Or Not Sweetened									
Calendar Year: 2016-2020 and January-April: 2020, 2021									
Partner Country	Unit	Calendar Year					January-April		
		2016	2017	2018	2019	2020	2020	2021	%Δ 2021/20
World	T	34,724	27,764	39,249	29,563	29,549	9,232	6,445	-30%
Netherlands	T	5,897	3,036	12,077	10,340	12,962	3,624	1,615	-55%
Spain	T	1,747	187	274	567	2,851	542	793	46%
Eswatini	T	3,461	3,013	3,300	3,183	2,797	1,306	966	-26%
Botswana	T	7,825	6,888	7,434	5,562	2,789	520	1,058	103%
Namibia	T	4,969	4,593	4,770	2,899	2,025	588	556	-5%
Italy	T	605	194	375	867	1,159	374	230	-39%
India	T	138	133	346	790	656	279	163	-42%
Greece	T	0	0	0	57	615	275	0	-100%
Zimbabwe	T	1,989	2,539	2,044	520	477	278	234	-16%
Lesotho	T	2,031	1,350	1,369	959	430	92	189	105%
Zambia	T	1,052	1,270	623	562	404	119	132	11%
Nigeria	T	14	1	22	1	369	365	0	-100%
Mozambique	T	1,454	948	780	327	279	193	53	-73%
United States	T	21	60	193	700	256	68	0	-100%
Taiwan	T	16	56	78	62	142	38	24	-37%
Congo (DROC)	T	180	139	152	123	120	55	34	-38%
Japan	T	35	8	6	7	97	95	90	-5%
Gabon	T	0	11	0	153	86	22	35	59%
Ghana	T	87	144	199	44	86	38	27	-29%
Mauritius	T	318	185	391	243	78	61	5	-92%
Ethiopia	T	799	674	456	264	77	44	68	55%
China	T	0	26	20	46	76	9	4	-56%
Philippines	T	37	178	270	52	63	17	14	-18%
Israel	T	378	19	511	615	61	61	0	-100%
France	T	11	10	35	38	57	22	16	-27%
Madagascar	T	105	108	139	61	43	16	4	-75%
United Arab Emirates	T	53	146	320	22	36	16	7	-56%
Malawi	T	291	341	213	29	34	8	13	63%
Congo (ROC)	T	79	121	184	32	33	19	11	-42%
Angola	T	91	206	92	3	31	3	3	0%
Singapore	T	50	60	90	3	29	6	3	-50%
Seychelles	T	24	98	53	10	26	7	15	114%

Source: TDM

Imports

The imports of orange juice are estimated to remain flat at 2,000 MT in the 2020/21 MY. Zimbabwe, Brazil and Spain are the main suppliers of orange juice to South Africa. The source of origin of United Arab Emirates imports is Brazil. Post also adjusted the orange juice import data to the equivalent of 65 Degrees Brix based on the respective conversion factors.

Table 20: South African Orange Juice Imports – HS200919, HS200911 and HS200912

South Africa Imports from the World									
Commodity: 200911/200912/200919, Orange Juice, Frozen, Whether Or Not Sweetened/Orange Juice, Not Frozen, Of A Brix Value Not Exceeding 20/Orange Juice, Other Than Frozen, Whether Or Not Sweetened									
Calendar Year: 2016-2020 and January-April: 2020, 2021									
Partner Country	Unit	Calendar Year					January-April		
		2016	2017	2018	2019	2020	2020	2021	%Δ 2021/20
World	T	1,101	2,691	1,322	1,942	2,410	794	954	20%
Zimbabwe	T	698	771	845	1,652	2,304	730	718	-2%
Botswana	T	4	19	2	31	36	23	0	-100%
South Korea	T	0	1	2	0	17	17	0	-100%
Malaysia	T	0	5	10	11	10	5	0	-100%
Eswatini	T	2	163	1	8	9	8	0	-100%
Turkey	T	0	0	8	9	6	6	0	-100%
Thailand	T	0	0	0	18	3	3	0	-100%
Unidentified	T	0	44	7	1	2	0	2	0%
Pakistan	T	6	28	9	13	2	0	0	0%
Portugal	T	23	13	17	0	2	0	3	0%
Argentina	T	0	422	0	0	0	0	0	0%
Brazil	T	283	713	203	1	0	0	96	0%
Spain	T	0	450	178	96	0	0	0	0%

Source: TDM

Table 21: PSD Orange Juice

Orange Juice	2018/2019		2019/2020		2020/2021	
Market Year Begins	Apr 2019		Apr 2020		Apr 2021	
South Africa	USDA Official	New Post	USDA Official	New Post	USDA Official	New Post
Deliv. To Processors (MT)	333000	333000	282000	282000	302000	285000
Beginning Stocks (MT)	6302	6302	36349	36349	44349	48704
Production (MT)	63168	63168	49000	49494	52000	50000
Imports (MT)	1942	1942	2000	2410	2000	2000
Total Supply (MT)	71412	71412	87349	88253	98349	100704
Exports (MT)	29563	29563	35000	29549	40000	40000
Domestic Consumption (MT)	5500	5500	8000	10000	9000	11000
Ending Stocks (MT)	36349	36349	44349	48704	49349	49704
Total Distribution (MT)	71412	71412	87349	88253	98349	100704
(MT)						

Policies and Regulations:

U.S Authorizes Importation of Cold-Treated Citrus from South Africa into All U.S. Ports of Entry

On November 4, 2020, the U.S. Department of Agriculture's Animal and Plant Health Inspection Service (APHIS) announced that it had authorized the importation of cold-treated fresh citrus fruit from South Africa into all U.S. ports of entry. APHIS determined that citrus fruit from South Africa, which is cold-treated in transit, can safely enter all U.S. ports of entry without increasing the risk of introducing the false coddling moth or other pests of concern. Previously, APHIS restricted the entry of cold-treated citrus fruit from South Africa to four U.S. ports that have cold treatment facilities: Newark, Philadelphia, Houston and New Orleans. This action will help in facilitating trade by broadening the reach of South African citrus to other regions within the U.S. market, provide flexibility to U.S. retailers and wholesalers, and lower transportation costs of imported citrus.

United States Cold Sterilization Protocol

South Africa exports citrus to the United States under the cold treatment schedule to address False Codling Moth (FCM). The United States Animal Plant Health Inspection Service (APHIS) has reduced the cold treatment schedule from 24 to 22 days, which has been hugely beneficial to South Africa in terms of reducing shipping costs and in reducing fruit loss from cold damage.

South African Citrus Exports from Citrus Black Spot (CBS) Areas to the United States

Currently, South Africa can only export citrus to the United States from official CBS free areas. The CBS free areas are found in the Western Cape and Northern Cape, as well as relevant districts of the Free State and North West provinces. In 2014, APHIS issued a notice proposing to amend the fruits and vegetables regulations to allow the import of several varieties of fresh citrus fruit, as well as Citrus hybrids, into the United States from areas in South Africa where citrus black spot has been known to occur. The regulation would authorize imports on the condition of satisfying certain systems and SPS treatment procedures. This proposal can be found on the following link; http://www.regulations.gov/#!documentDetail;D=APHIS-2014-0015-0001. The comment period closed and the regulation is still in the process of being finalized.

Citrus Black Spot Challenges in the European Union Market

South Africa still faces challenges in the EU market as a result of the stringent CBS requirements, and normally voluntarily suspends citrus exports to the EU every season to avoid any further interceptions of fruit with CBS. For example, in October 2017, South Africa voluntarily suspended citrus exports to the EU, as a precaution and risk mitigation measure to prevent a ban on citrus exports to the EU. Complying with the EU requirements for CBS costs the industry a lot of money, constrains the already limited government capacity and the scientific basis for these measures have been questioned. In addition, Argentina and Uruguay are reported to have higher CBS interceptions than South Africa. Thus, South Africa considers these EU measures an unnecessary technical trade barrier, and the Ministry of Agriculture has publicly indicated that the internal process of lodging a WTO dispute has been initiated.

South Africa Fresh Produce Importers Association

The Fresh Produce Importers Association assists members with the importation of fresh fruit and vegetables in South Africa. Information on their members, contact details and services they provide can be obtained from the following website link, http://www.fpia.co.za/contact-us/ .

Custom Duties

United States citrus exports face a 4 percent customs duty in South Africa. **Table 22** reflects the applicable custom duties when exporting citrus to South Africa

Table 22: Custom Duties Applicable to Exports to South Africa

HS Code	Article description	Unit	Rate of Duty				
			General	EU	EFTA	SADC	MERCOSUR
08.05	**Citrus fruit, fresh or dried:**						
0805.10	**Oranges**						
0805.10.10	Fresh	kg	4%	free	4%	free	4%
0805.10.90	Other	kg	4%	free	4%	free	4%
0805.2	**Mandarins (including tangerines and satsumas); clementines, wilkings and similar citrus hybrids:**						
0805.21	**Mandarins (including tangerines and satsumas)**						
0805.21.10	Fresh	kg	4%	free	4%	free	4%
0805.21.90	Other	kg	4%	free	4%	free	4%
0805.22	**Clementines:**						
0805.22.10	Fresh	kg	4%	free	4%	free	4%
0805.22.90	Other	kg	4%	free	4%	free	4%
0805.29	**Other:**						
0805.29.10	Fresh	kg	4%	free	4%	free	4%
0805.29.90	Other	kg	4%	free	4%	free	4%
0805.40	**Grapefruit, including pomelos:**						
0805.40.10	Fresh	kg	4%	free	4%	free	4%
0805.40.90	Other	kg	4%	free	4%	free	4%
0805.50	**Lemons (CitrusLimon, Citrus Limonium) and limes (Citrus aurantifolia, Citrus latifolia):**						
0805.50.10	Fresh	kg	4%	free	4%	free	4%
0805.50.90	Other	kg	4%	free	4%	free	4%
0805.90	**Other:**						
0805.90.10	Fresh	kg	4%	free	4%	free	4%
0805.90.90	Other	kg	4%	free	4%	free	4%
2009.1	**Orange juice**						
2009.11	Frozen	kg	25%	free	25%	free	25%
2009.12	Not frozen, of Brix value not exceeding 20	kg	25%	free	25%	free	25%
2009.19	Other	kg	25%	free	25%	free	25%

Source: South African Revenue Services (SARS)

South African Import Regulations

The following links provide useful resources and regulations pertaining to importing fruit into South Africa:

Export Procedures to South Africa
http://www.nda.agric.za/doaDev/sideMenu/plantHealth/docs/importProcedure.pdf.

Maximum Residue Limits
http://www.nda.agric.za/doaDev/sideMenu/foodSafety/doc/South%20African%20Citrus%20MRLs%20 2013.pdf

Agriculture Product Standards Act No 119 of 1990
http://www.nda.agric.za/doaDev/sideMenu/Food%20Import%20&%20Export%20Standard/docs/Agric %20Product%20Standards%20Act%20No%20119%20%20of%201990.pdf

Agricultural Pests Amendment Act, 9 of 1992
http://www.nda.agric.za/doaDev/sideMenu/APIS/doc/Agricultural%20Pests%20Act.pdf

South African Special Export Protocols/ Programs/ Directives
https://www.nda.agric.za/doaDev/sideMenu/plantHealth/exportsProg.htm

Attachments:

No Attachments