

A PROFILE OF THE SOUTH AFRICAN CITRUS MARKET VALUE CHAIN

2019



Directorate Marketing
Private Bag X 15
Arcadia
0007

Tel: 012 319 8455
Fax: 012 319 8131
E-mail: MogalaM@daff.gov.za
www.daff.gov.za



agriculture,
forestry & fisheries

Department:
Agriculture, Forestry and Fisheries
REPUBLIC OF SOUTH AFRICA

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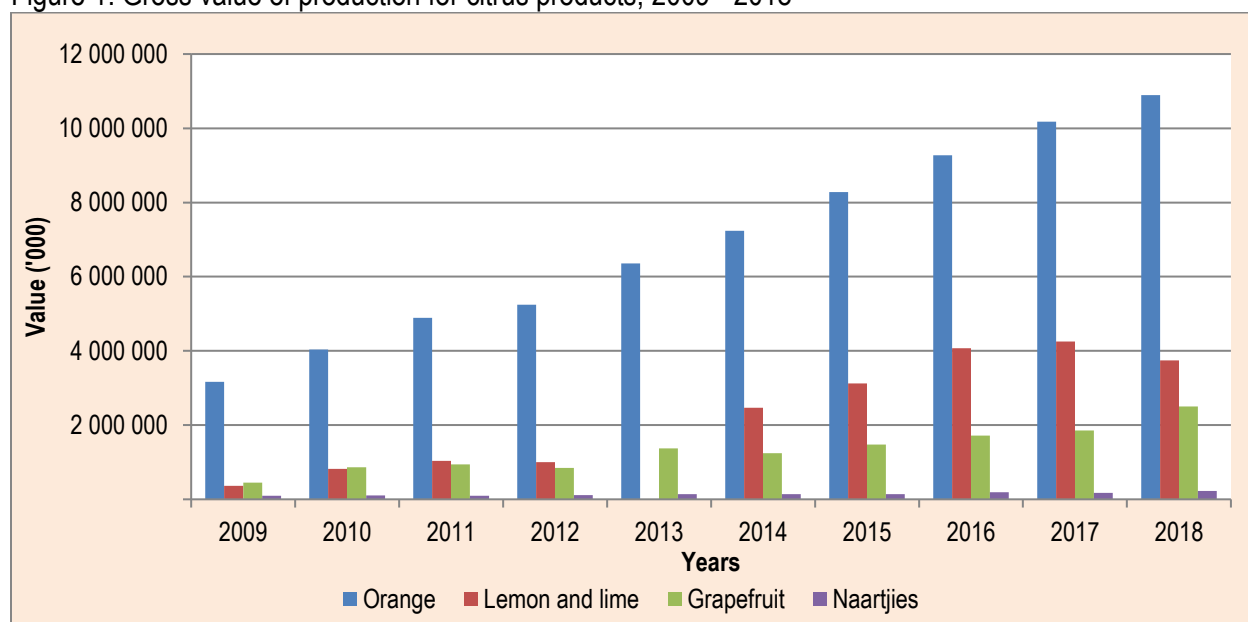
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1. DESCRIPTION OF THE INDUSTRY

In terms of gross value, the citrus industry is the second largest horticultural industry after vegetables. Since 2012, the industry has been faced with additional phytosanitary measures for fruit originating outside the CBS pest free areas particularly markets such as EU and Americas. During the 2017/18 production season the industry contributed R19.3 billion to total gross value of South African agricultural production. This represented 25% of the total gross value (R77.9 billion) of horticulture during the same period. The industry is also an important foreign exchange earner and comprises of four broad categories, namely oranges, easy peelers (soft citrus), grapefruit, and lemons and limes. Gross value of citrus production for the past decade is shown in Figure 1.

Figure 1: Gross value of production for citrus products, 2009 - 2018



Source: DAFF, 2019

As depicted on Figure 1 on average, the gross value of production (GVP) for citrus has been increasing over the past ten years. The industry experienced nine successive good years starting from 2010 to 2018. The increase was mainly due to amongst others increased exports and the weakening of the Rand against the major currencies of South Africa's trading partners. The total gross value of all citrus products increased by 6% between 2010 and 2011, 156% between 2002 and 2011, 19% between 2012 and 2013, 26% between 2013 and 2014, 22% between 2014 and 2015 and 17% between 2015 and 2016. The total gross value of citrus increased by 8% in 2017 compared to 2016 season. In 2018, total gross value of citrus increased by 5.5%. The biggest contributor to total citrus gross value is oranges, which accounted for 63% in 2018. The other three categories of citrus products except naartjie accounted for more than R1 billion each during the same period. The total gross value is driven by among other things the volume of production, volume of exports, the exchange rate, international prices, etc.

1.1 Production areas

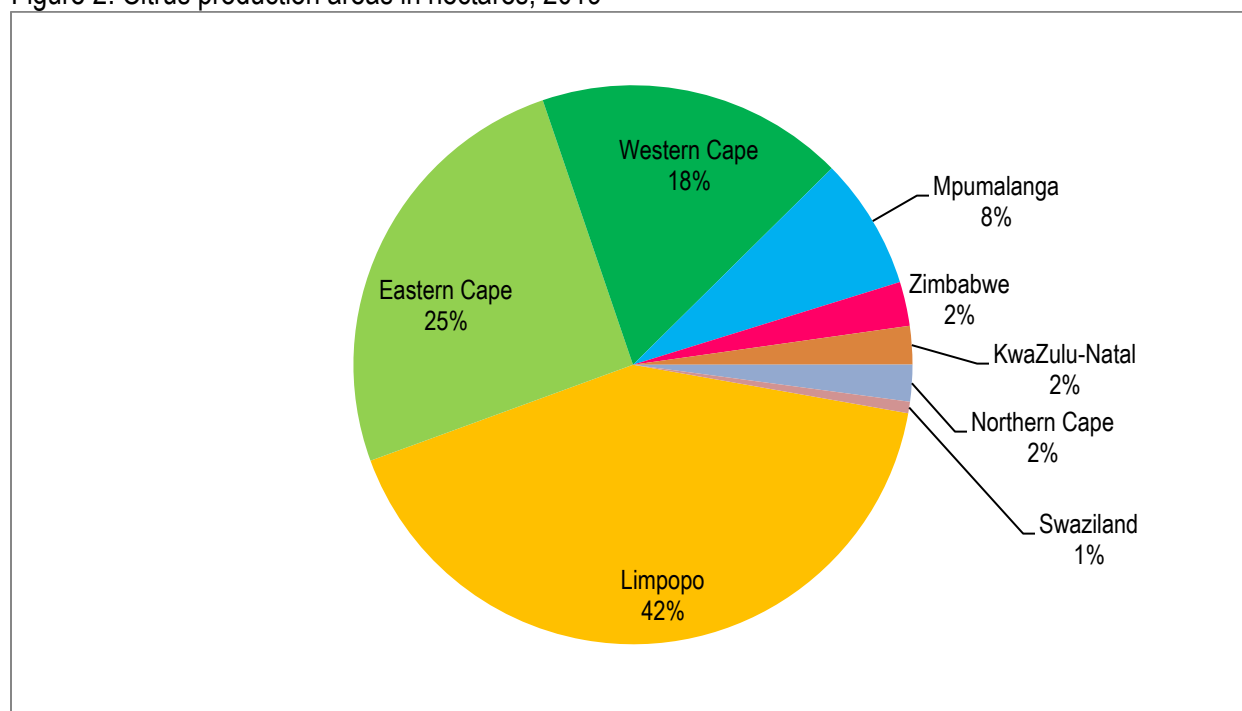
Citrus represents one of South Africa's most important fruit group by value and volume. Production occurs mainly in the Limpopo, Western Cape, Mpumalanga, Eastern Cape, KwaZulu-Natal and Northern Cape

provinces (see Figure 2 and Map 1). Within the Southern African Development Community (SADC) region Zimbabwe, Swaziland and Mozambique also produce citrus, although in much smaller volumes. Swaziland had 554 ha of land under citrus cultivation in 2018. A total area of 83 490 ha was under citrus production in South Africa during 2018.

There are important differences between production regions in South Africa based mainly on climate. The Western Cape and Eastern Cape are considered 'cooler' citrus growing areas and production is focused on Navel oranges and lemons. The cooler climate allows farmers to respond to consumer demand for easy peelers like clementines and satsumas, and most of the country's easy peelers are produced in these two regions. Farm sizes are also smaller and most citrus in the Western and Eastern Cape is packed by privatized cooperatives in huge facilities that are amongst the largest in the world.

In Mpumalanga, Limpopo and KwaZulu-Natal, the climate is warmer and better suited to the cultivation of grapefruit and Valencia oranges. Farm sizes in these regions are larger and many farmers pack in smaller privately owned facilities. The size in hectares and percentage contributions of the various citrus production regions to total citrus production during 2018 are depicted in Figure 2.

Figure 2: Citrus production areas in hectares, 2019



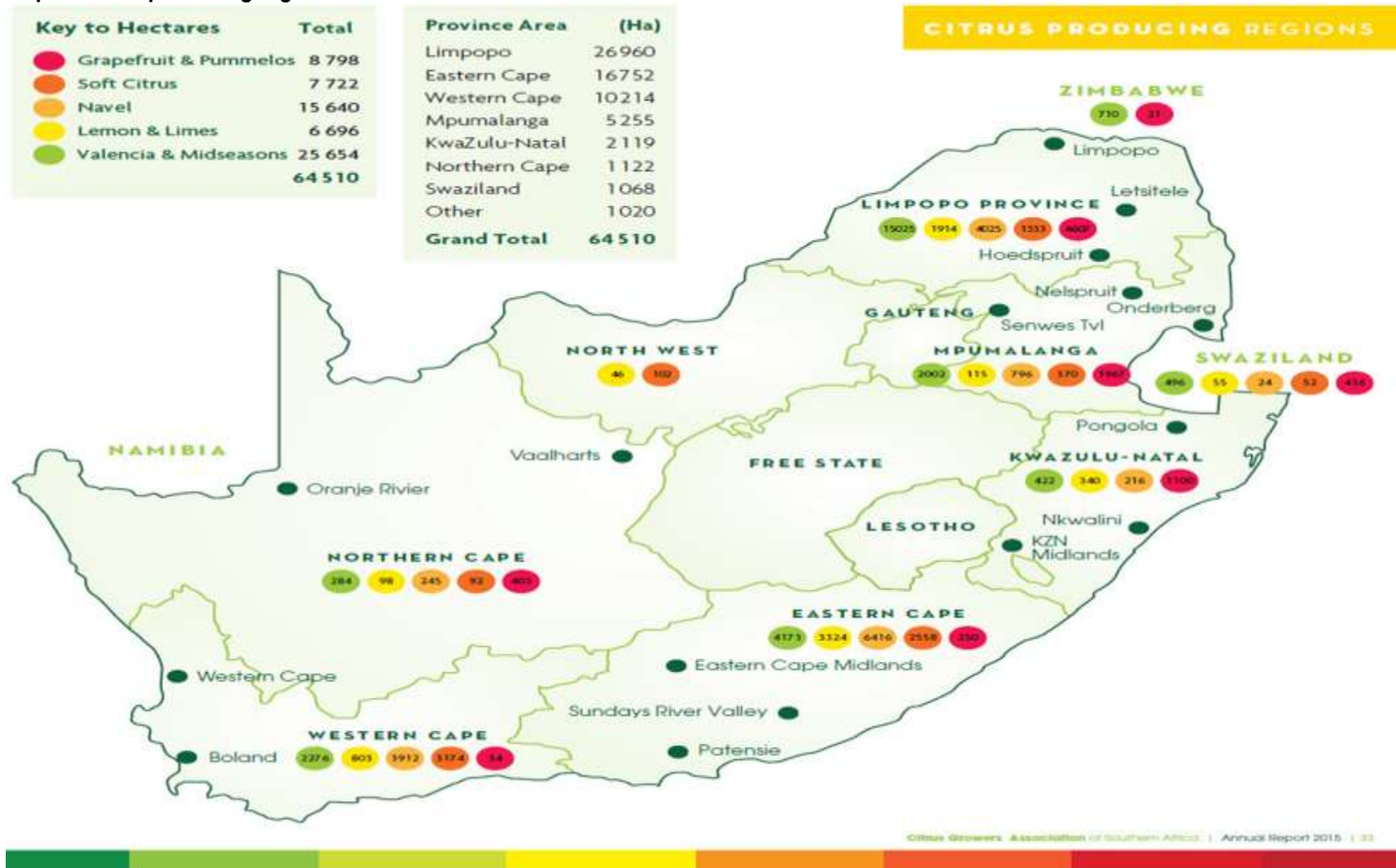
Source: Citrus Growers Association (CGA), 2019

It is evident from Figure 2 that most citrus production takes place in the Limpopo province at 42% (34 763 ha). Limpopo is followed by the Eastern Cape and Western Cape at 25% (21 157 ha) and 18% (14 883 ha) respectively. Citrus production in hectares has increased in Mpumalanga from 5 739 ha in 2017 to 6 363 ha in 2018 after a series of land under citrus production decline. Kwazulu Natal and Northern Cape increased by 4% at 1 853 ha and by 19% at 1 773 ha respectively during the same period.

The major citrus production areas in Kwazulu Natal are Pongola, Nkwalini and Kwazulu Natal Midlands (see Map 1). In the Eastern Cape, the major citrus production areas are the Eastern Cape Midlands, Sundays

River Valley and Patensie. The Boland region and Ceres region are the main citrus production areas in the Western Cape. Onderberg, Nelspruit and Senwes are the main citrus production areas in Mpumalanga while the major areas in Limpopo are Hoedspruit, Groblersdal, Zebediela, Letsitele and Vhembe.

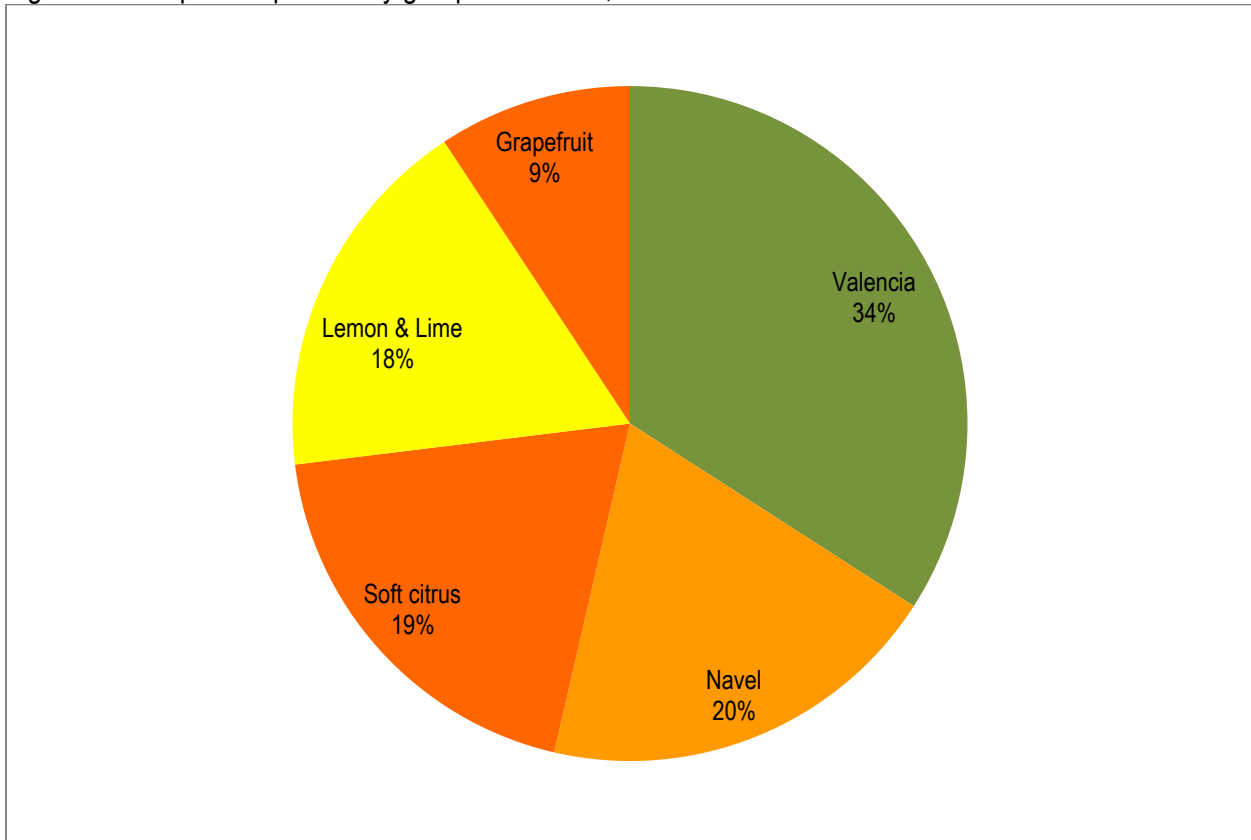
Map 1: Citrus producing regions of South Africa



Source: Citrus Growers Association (CGA), 2017

The area planted per citrus variety or group during 2018 is shown in Figure 3. It can be observed from Figure 3 that the most planted citrus variety in 2018 was Valencia/midseason at 34% (28 455 ha). Limpopo province contributed 60 percent of all Valencia oranges in planted in 2018. Another citrus variety planted the most in 2018 was Navel oranges (20% or 16 285 ha). The Eastern Cape Province contributed 40 percent of all Navel oranges planted in 2018. The third largest planted citrus category was soft citrus at 19% (16 234 ha) of total area planted to citrus products in 2018. Lemons and limes accounted for 18% (14 740 ha) while grapefruit accounted for 9% (7 743 ha) during the same period.

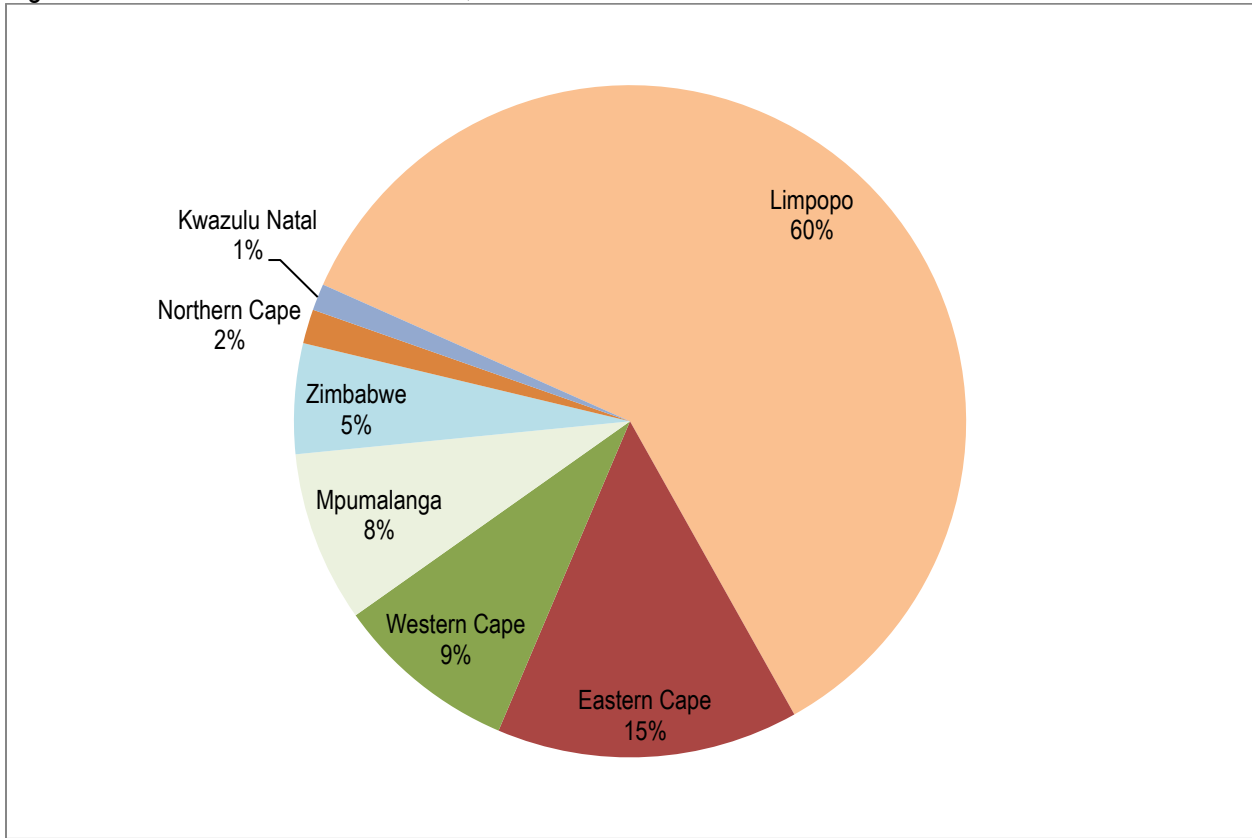
Figure 3: Area planted per variety group in hectares, 2018



Source: Citrus Growers Association (CGA), 2019

The production areas for Valencia oranges are shown in Figure 4. In 2018 most Valencia oranges were planted in the Limpopo province (60%) (17 009 ha). Limpopo was followed by the Eastern Cape province at 15 percent (4 105 ha) and Western Cape province at 9 percent (2 489 ha). Another important grower of Valencia oranges during 2018 was the Mpumalanga province which accounted for 8% of total area planted to Valencia oranges during the same year. The total hectares planted to Valencia oranges in 2018 was 28 454 ha. The 2018 figure was 0.06% higher than that of 2017 total hectares planted to Valencia.

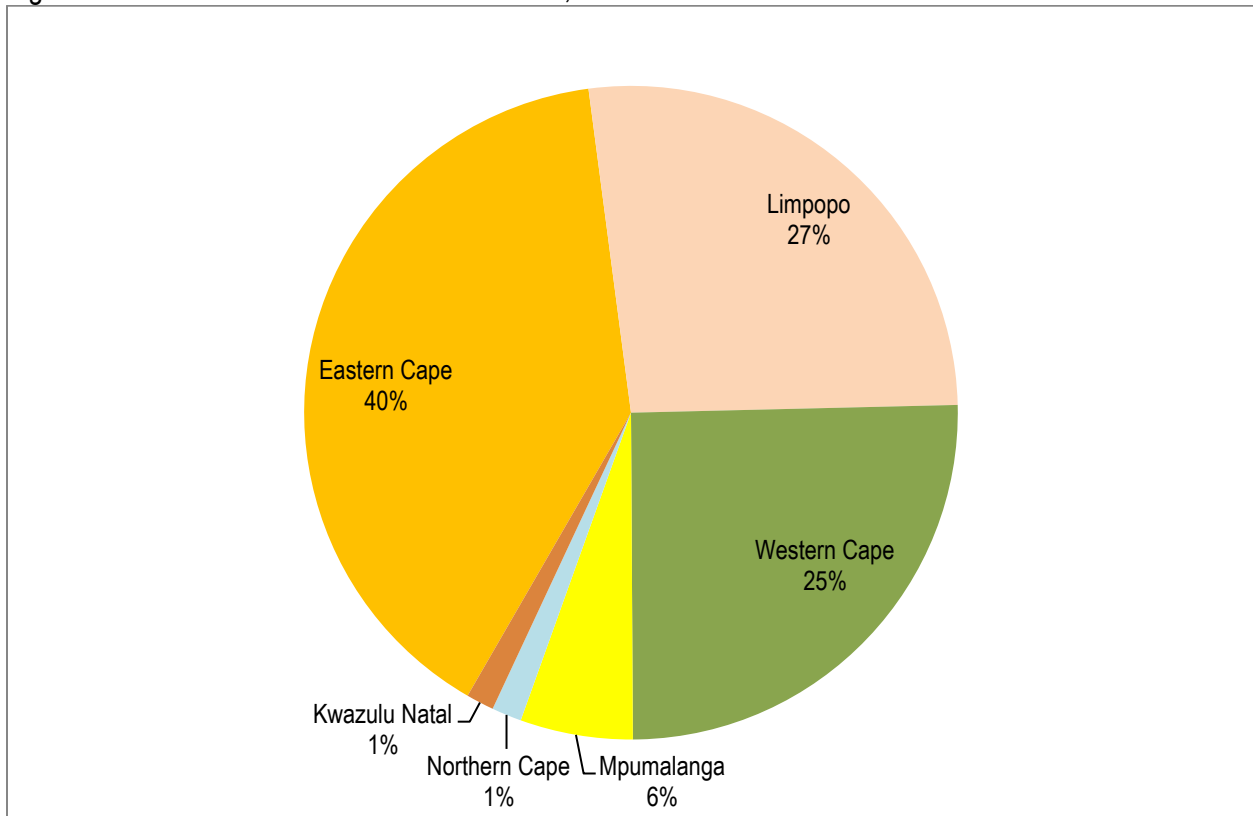
Figure 4: Production areas of Valencias, 2018



Source: Citrus Growers Association (CGA), 2019

Figure 5 presents production areas for navel oranges during 2018. The Eastern Cape Province is the leading grower of navel oranges at 40 percent (6 367 ha). Second is Limpopo Province and Western Cape at 27 percent at 4 294 ha and at 25% at 4 067 ha respectively. Mpumalanga was the fourth largest navel grower at 6% (896 ha). The total hectares planted to navel oranges in 2018 was 16 234 ha. The total area planted to navel oranges during 2018 was 1.3% higher than the area planted in 2017.

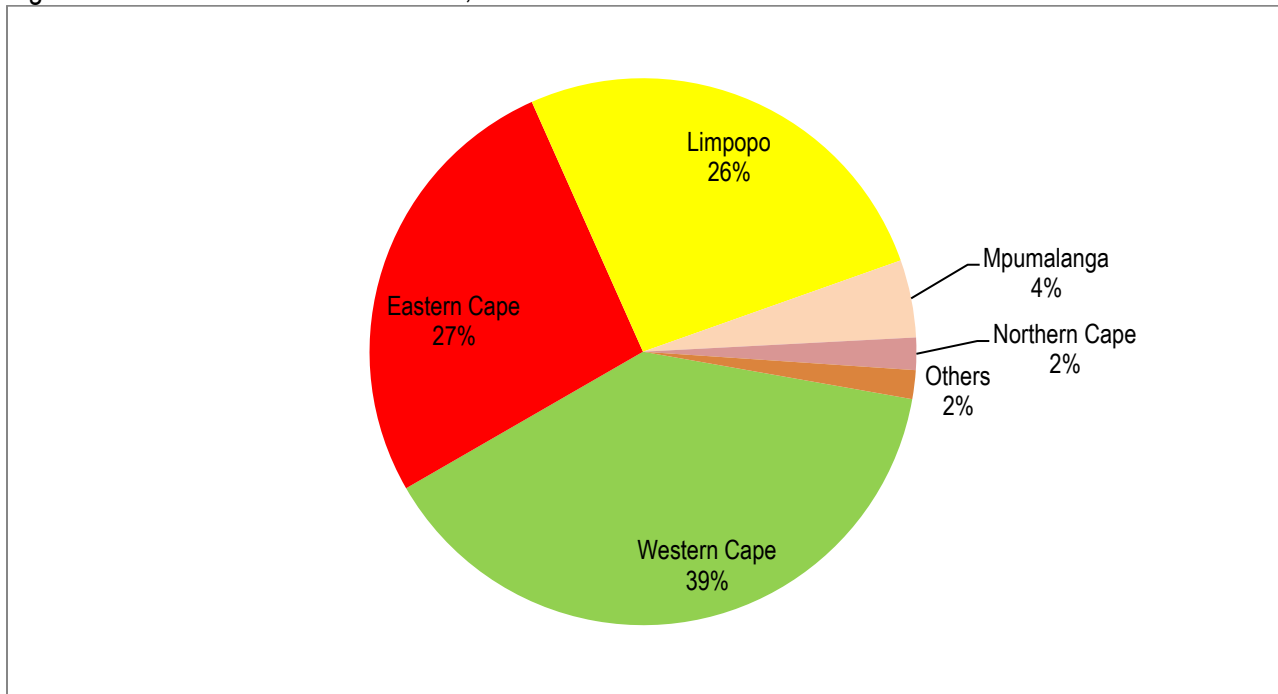
Figure 5: Production areas of navels in hectares, 2018



Source: Citrus Growers Association (CGA), 2019

Figure 6 presents production areas for soft citrus in 2018. The Western Cape Province is the leading grower of soft citrus at 39 percent (6 335 ha). It is followed by the Eastern Cape Province at 27 percent (4 341 ha) and Limpopo province at 26 percent (4 274 ha). The total hectares planted to soft citrus in 2018 was 16 285 ha. This was 23 percent higher than the area planted in 2017.

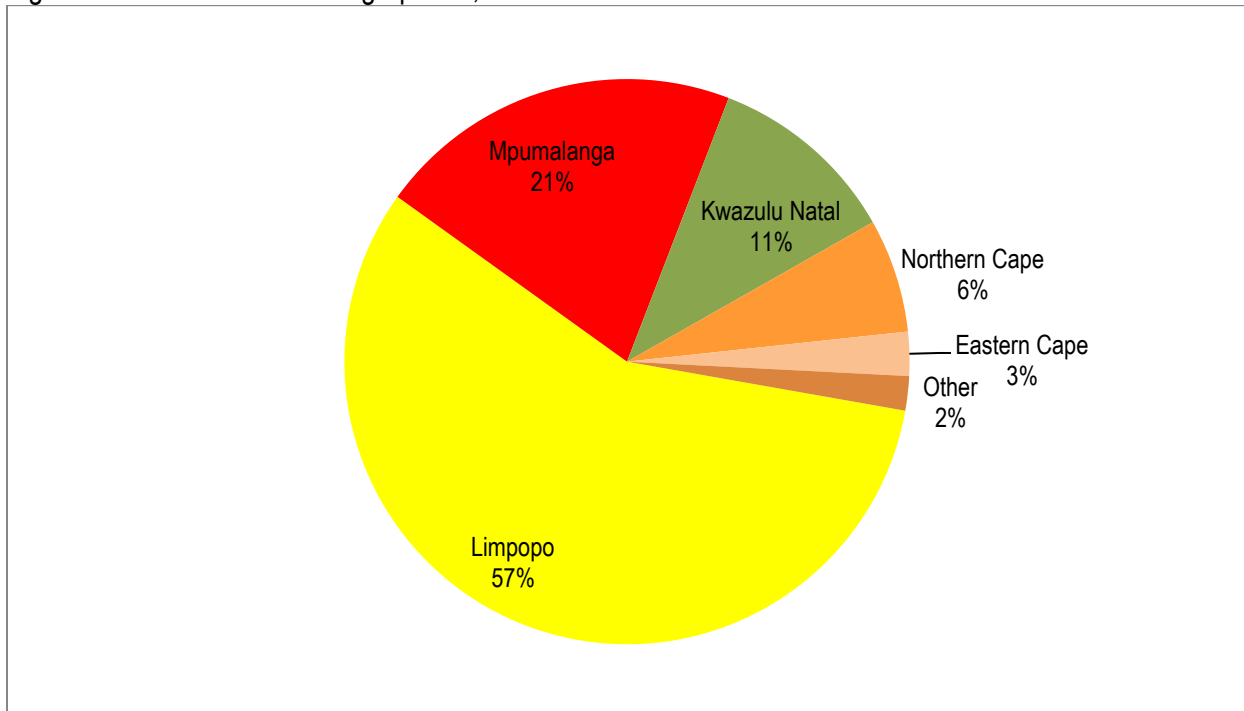
Figure 6: Production areas of soft citrus, 2018



Source: Citrus Growers Association (CGA), 2019

Figure 7 presents production areas for grapefruit in 2018.

Figure 7: Production areas for grapefruit, 2018

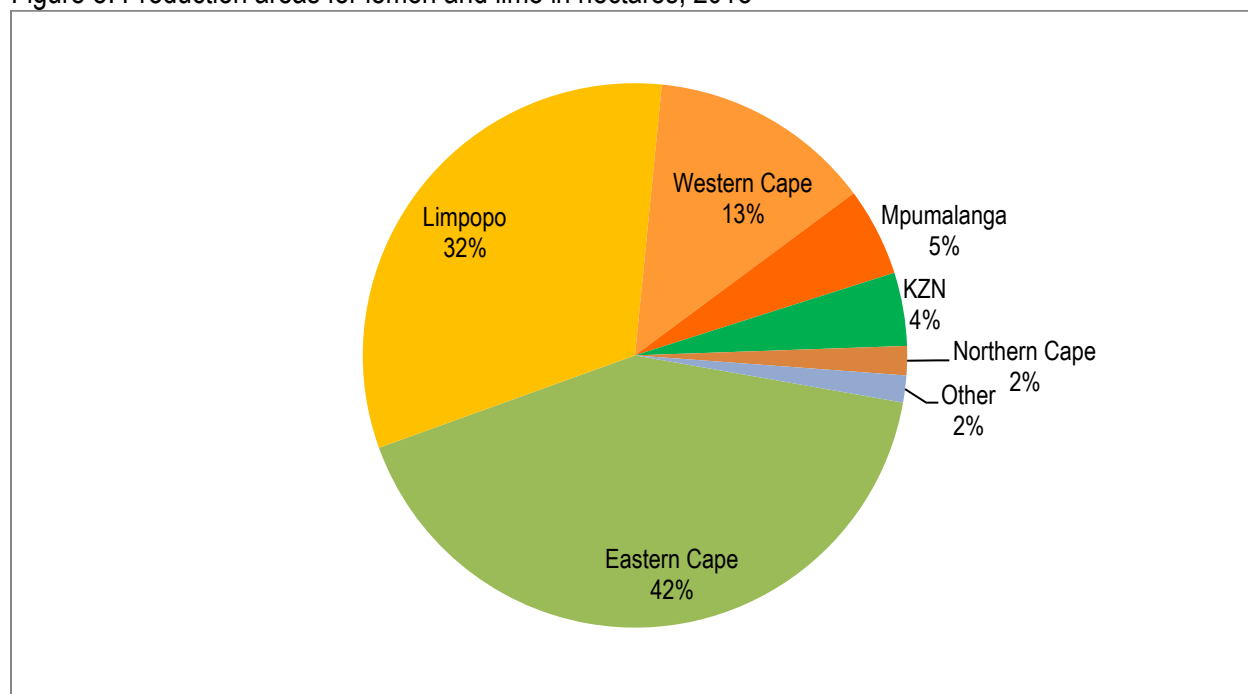


Source: Citrus Growers Association (CGA), 2019

The Limpopo Province is the leading grower of grapefruit at 57 percent (4 424 ha). It is followed by the Mpumalanga Province at 21 percent (1 622 ha), Kwazulu-Natal Province at 11 percent (846 ha), Northern Cape and Eastern Cape at 6 percent (504 ha) and 3 percent (195 ha) respectively. The total hectares planted to grapefruit in 2018 was 7 743 ha. This was less than 1.8 percent to the total area planted to grapefruit in 2017.

Production areas for lemons and limes during 2018 are presented in Figure 8. The Eastern Cape Province is the leading grower of lemons and limes at 42 percent (6 148 ha). It is followed by the Limpopo and Western Cape at 32% (4 730 ha) and 13% (1 956 ha) respectively. The Mpumalanga Province is also a significant producer of lemons and limes, accounting for 5% (773 ha) during 2018. The total hectares planted to lemons and limes in South Africa during 2018 was 14 740 ha and this was 24 percent higher than the area planted in 2017. The production of lemons and limes, measured in land under production has been on the rise over the past 6 years.

Figure 8: Production areas for lemon and lime in hectares, 2018

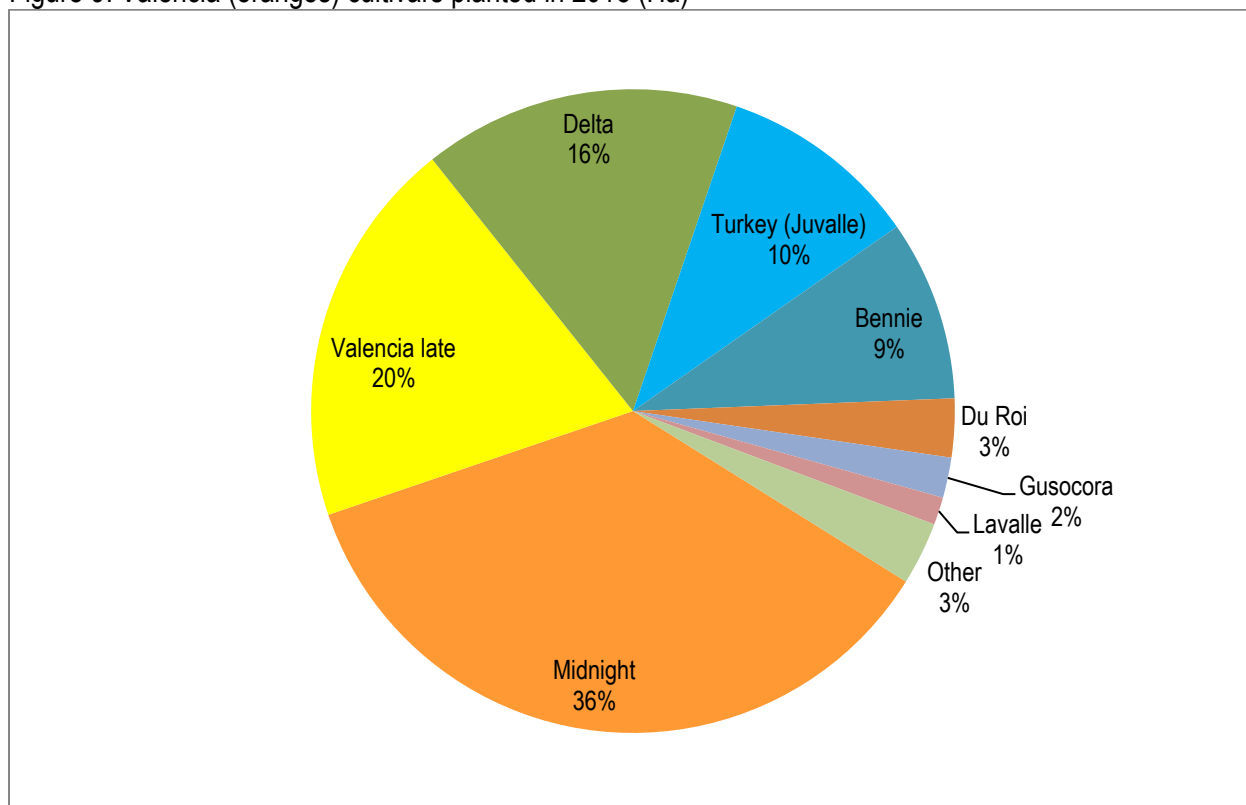


Source: Citrus Growers Association (CGA), 2019

1.2 Citrus cultivars

A number of cultivars or varieties of oranges, soft citrus, grapefruit, and lemons and limes are grown in South Africa. The varieties of Valencia oranges planted in South Africa during 2018 are presented in Figure 9. The cultivars planted mostly in South Africa are Midnight (36% or 10 211 ha), Valencia Late (20% or 5 552 ha), Delta (16% or 4 536 ha), and Turkey (Juvalle) (10% or 2 864 ha). Together, the four cultivars accounted for 82% of total Valencia oranges planted during 2018. The total area planted to Valencia oranges in South Africa during 2018 was 28 454 ha. The area planted was 0.06 percent higher than that planted in 2017.

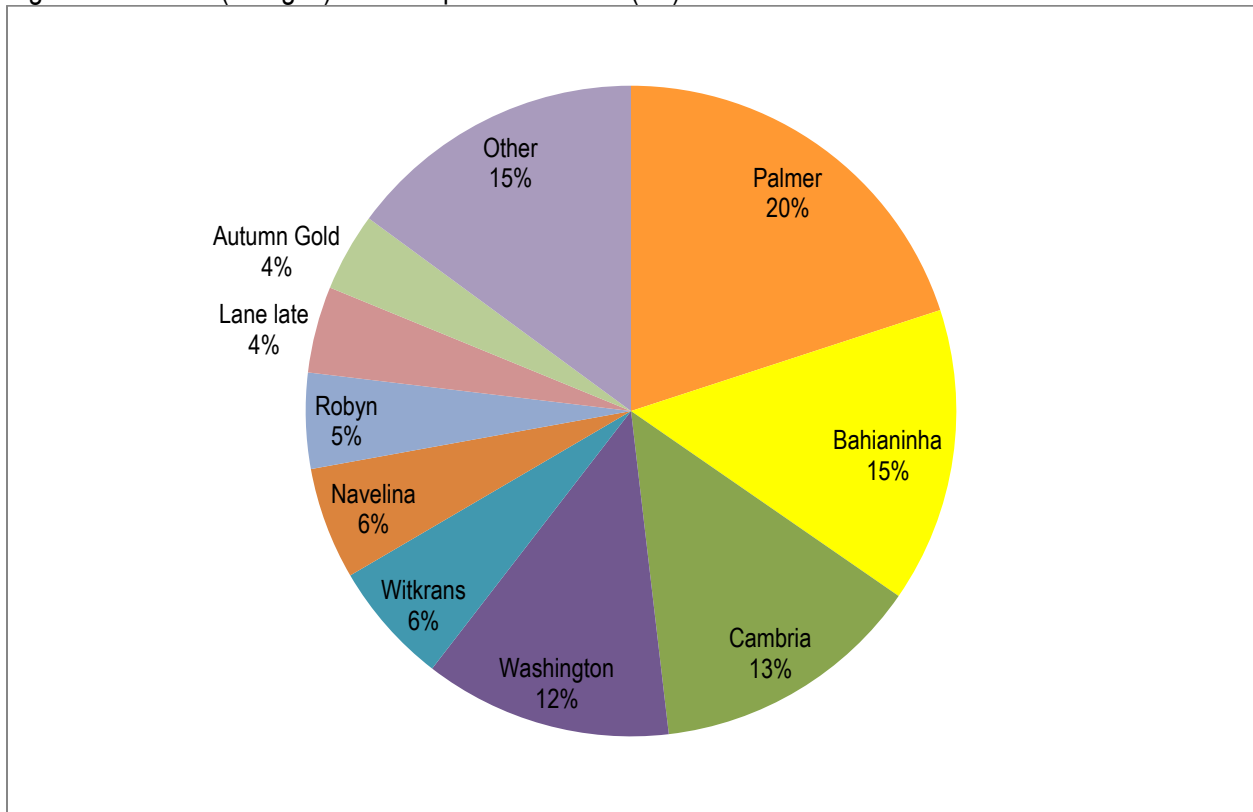
Figure 9: Valencia (oranges) cultivars planted in 2018 (Ha)



Source: Citrus Growers Association (CGA), 2019

The cultivars of navel oranges cultivated in South Africa during 2018 are illustrated in Figure 10.

Figure 10: Navels (oranges) cultivars planted in 2018 (Ha)

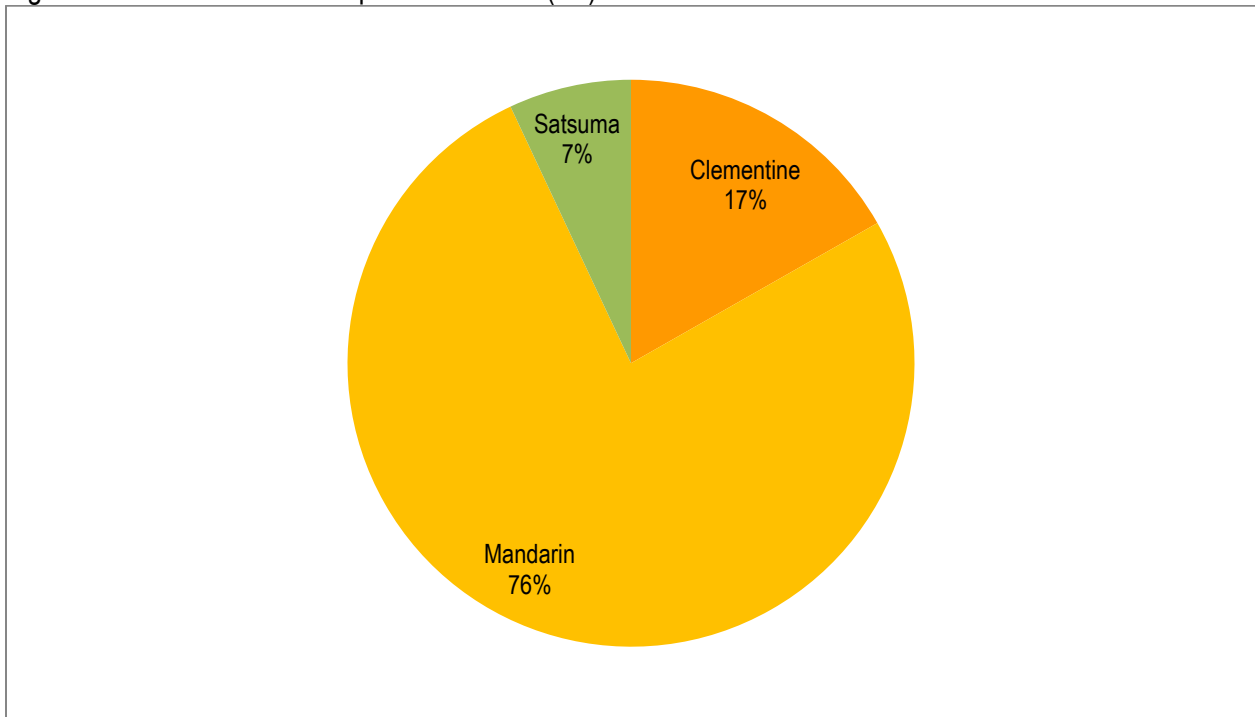


Source: Citrus Growers Association (CGA), 2019

The major cultivar of navel oranges planted in South Africa is Palmer, with 3 243 ha of land planted to it in 2018. This represented 20% of total area planted to navel oranges in 2018. Palmer is followed by Bahianinha at 15% (2 378 ha), Cambria at 13% (2 195 ha) and Washington at 12% (2 000 ha). Other cultivars accounted for 15% (2 421 ha) of total area planted to navel oranges in 2018. The total area planted to Navel oranges during 2018 was 16 234 ha.

Figure 11 presents cultivars of soft citrus planted in South Africa during 2018. The major soft citrus cultivar planted in South Africa during 2018 was Mandarin, representing 76% (12 416 ha) of total soft citrus cultivars planted in 2018. It was followed by Clementine at 17% (2 731 ha) and Satsuma at 7% (1 138 ha). A total area of 16 285 ha was planted to soft citrus in 2018.

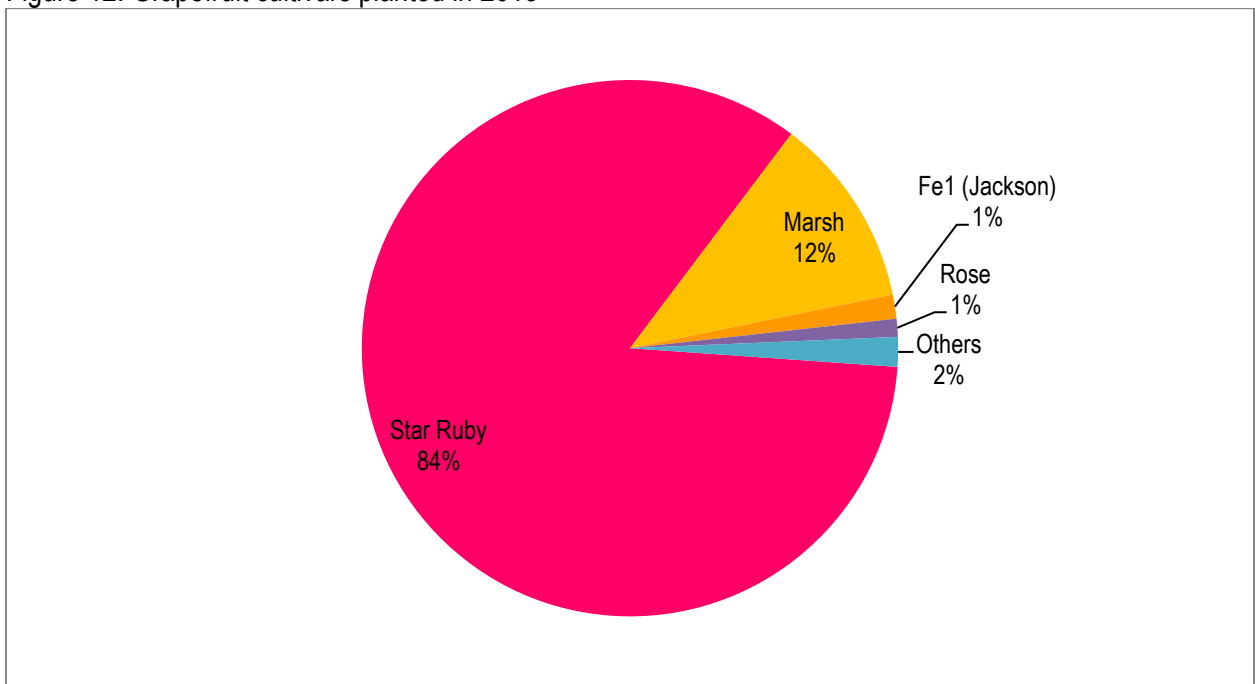
Figure 11: Soft citrus cultivars planted in 2018 (Ha)



Source: Citrus Growers Association (CGA), 2019

The cultivars of grapefruits cultivated in South Africa during 2018 are presented in Figure 12.

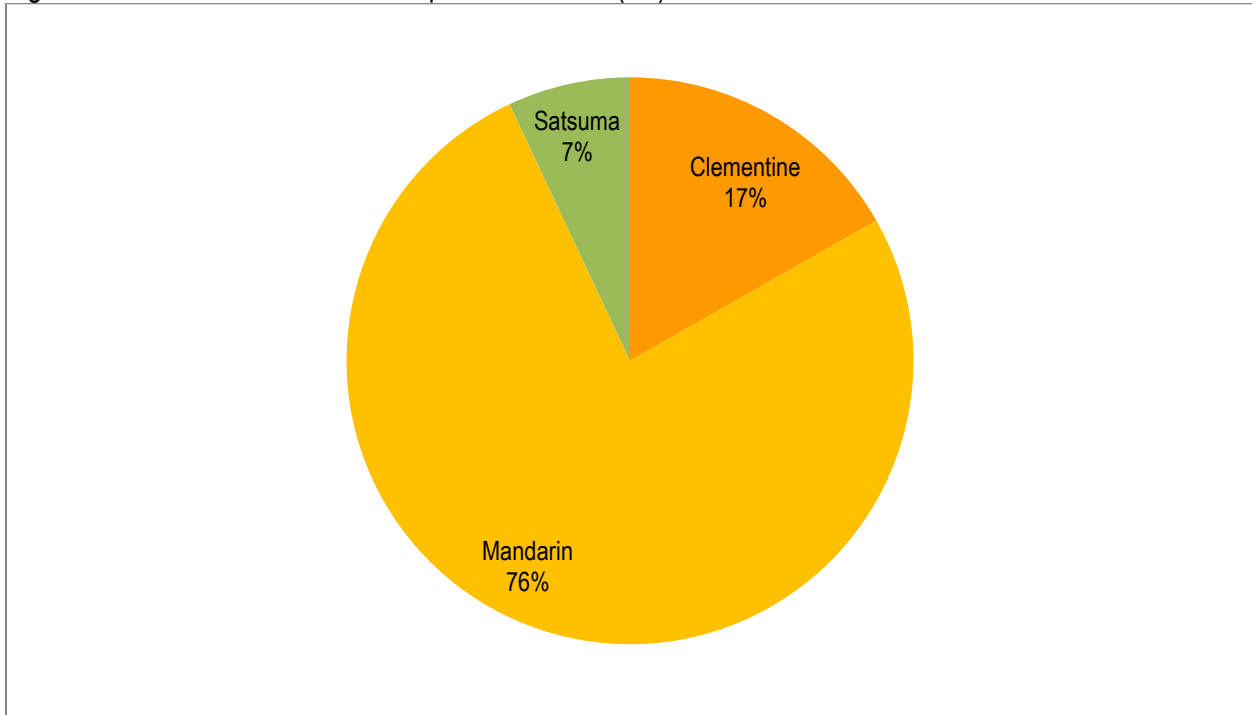
Figure 12: Grapefruit cultivars planted in 2018



Source: Citrus Growers Association (CGA), 2019

During 2018, Star Ruby accounted for over four-fifth (84% or 6 517 ha) of the total grapefruit cultivars planted in South Africa. It was followed by Marsh at 12% (892 ha), Fe1, and Rose each at 1% while other cultivars accounted for 2%. A total area of 7 743 ha was planted to grapefruits in 2018. The cultivars of lemons and limes planted in South Africa in 2018 are presented in Figure 13.

Figure 13: Lemon and lime cultivars planted in 2018 (Ha)



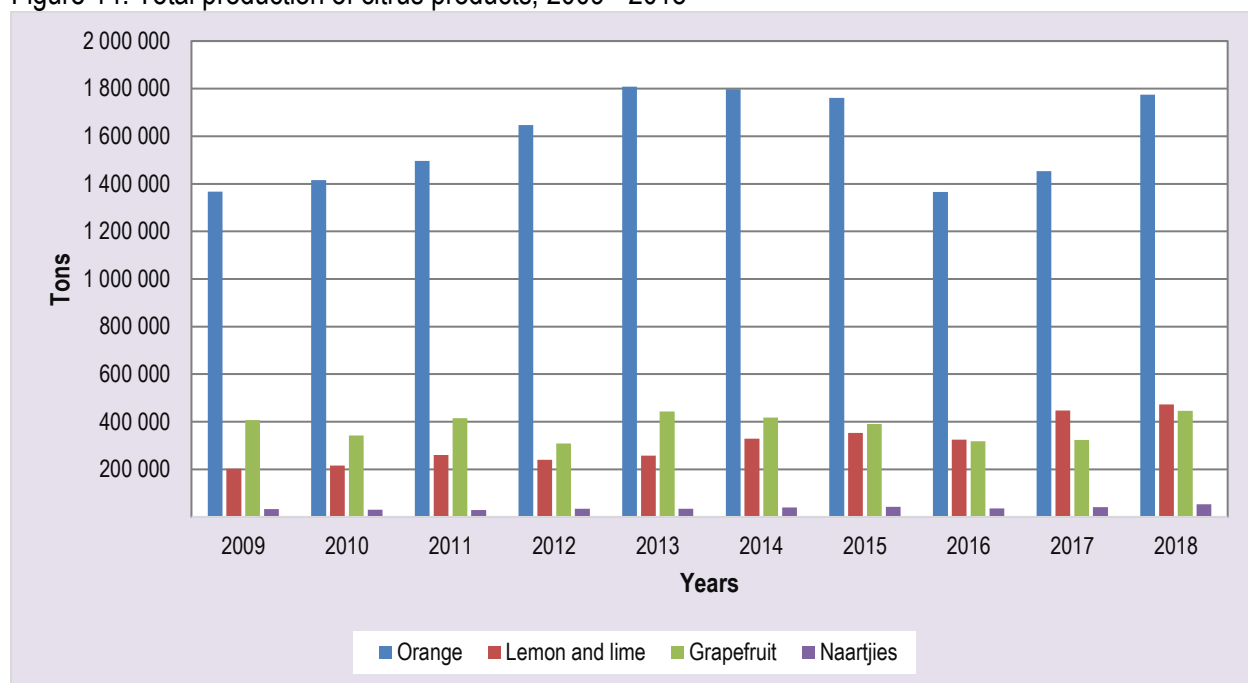
Source: Citrus Growers Association (CGA), 2019

The most important cultivar of lemons and limes planted in South Africa is Eureka. Figure 13 indicates that Eureka was planted on a total area of 11 119 hectares, representing 75% of the total area planted to lemons and limes in 2018. Eureka was followed by Lisbon at 8% (1 244 ha) and 3X97 and Limoneira both at 5% (703 Ha and 667 Ha respectively). A total area of 14 740 ha was planted to lemons and limes in 2018.

1.3 Production

Citrus production has over the past ten years has been fairly stable (see Figure 14). In 2018 oranges contributed 65 percent of total citrus production. It was followed by lemons and limes at 17%, grapefruit at 16% and soft citrus at 2%.

Figure 14: Total production of citrus products, 2009 - 2018



Source: Statistics and Economic Analysis, DAFF

According to Figure 14, orange production has been a steady increase since the 2009 production season. The increase has been mainly due to expansion of orchards and good climatic conditions in leading production areas. Production of oranges however experienced a 22% decline in 2016 when compared with 2015 and increased again to just over 1.4 million tons in 2017. Orange production increased by 18% between 2009 and 2015. In 2018, orange production increased significantly moving from over 1.4 million tons to over 1.7 million tons. The volume of lemons and limes remained stable between the previous decade. The volumes of lime and lemon increased by 46% in 2018 when compared to 2017 while production of grapefruits increased by 39%. The production of soft citrus also decreased by 30% during the same period.

1.4 Employment

The citrus industry is labour intensive and it is estimated that it employs more than 100 000 people, with large numbers of workers in the orchards and packing houses. An unspecified number of people are employed throughout the supply chain services such as transport, port handling and allied services. It is estimated that more than a million households depend on the South African citrus industry for their livelihood.

The Minimum Wage Act 9 of 2019 came into effect in January 2019. The Act applies to all workers and their employers, except members of the South African National Defence Force, the National Intelligence Agency, the South African Secret Service, and volunteers who perform work for another person without remuneration. Under this Act, farm workers are entitled to a minimum wage of R18 per hour. The Act establishes the National Minimum Wage Commission, which is tasked to review the national minimum wage and make recommendations to the Minister on any adjustment of the national minimum wage. The new national minimum wage will as from March 2020, be adjusted by 3.8%. Therefore, farm workers are entitled to a minimum wage of R18.68 per hour.

2. MARKET STRUCTURE

Citrus production in South Africa is mainly aimed at the export market. Locally, citrus produce is sold through different marketing channels such as National Fresh Produce Markets (NFPMs), informal markets (street hawkers and bakkie traders), and directly to processors for juice making and dried fruit production. The fruits are also sold directly to wholesalers and retailers through direct supply contracts. The annual crop distribution and prices of the different citrus products are presented below.

2.1 Orange crop distribution

The annual distribution of oranges to the different markets is presented in Figure 15. In 2018, 74% (1 168 363 tons) of all oranges produced (1 585 796 tons) was exported. This indicates the importance of export markets to South Africa's production of oranges. The second most important market for South African oranges is the processing sector. The sector absorbed 20% (317 164 tons) of total orange production in 2018 while the remaining 6% (100 269 tons) was sold through the local markets. The total volume of oranges that were processed during 2018 were 67% higher than those processed in 2017 while the volumes exported increased by 8% and those sold through the local markets increased by 14% during the same period.

Figure 15: Orange crop distribution, 2009 - 2018

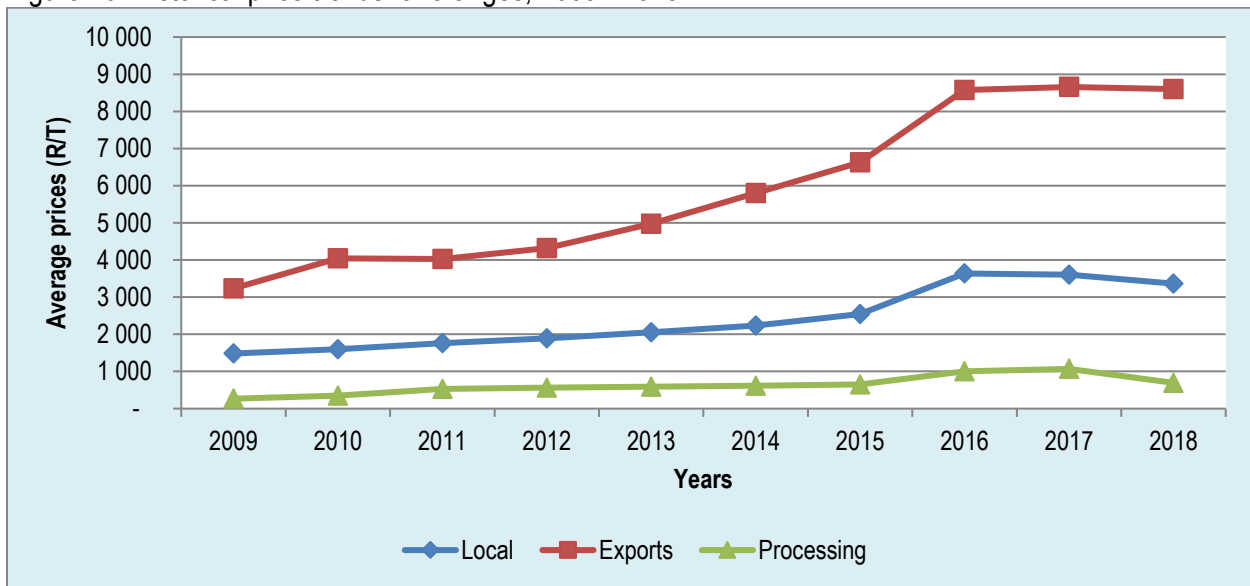


Source: Citrus Growers Association (CGA), 2019

2.2 Orange prices

Figure 16 presents historical price trends of oranges during the past decade.

Figure 16: Historical price trends for oranges, 2009 - 2018



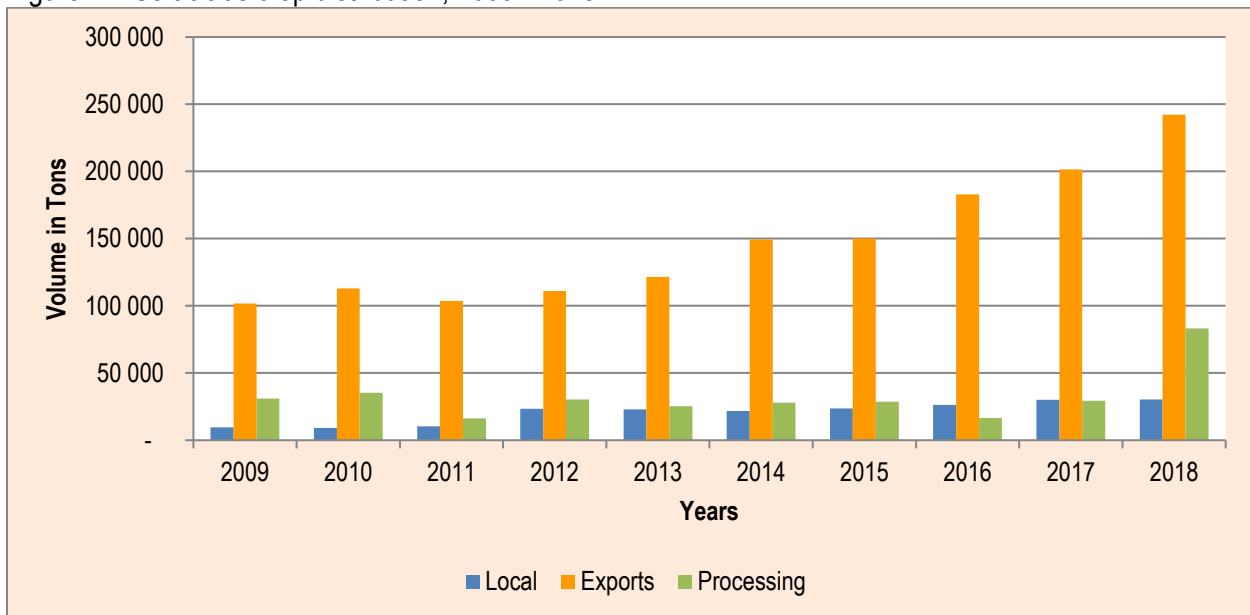
Source: Citrus Growers Association (CGA), 2019

As can be seen in Figure 16 oranges fetch higher returns in the export markets. The average price per ton in the export markets during 2018 was R8 600. This was 0.6% lower than the average export price during the previous year. The average prices of oranges increased significantly during the period under review. However, orange prices in the export market remained fairly stable during the past three years. Oranges sold in the local markets in 2018 fetched an average price of R3 361.00 per ton while those absorbed by the processing sector fetched the lowest price at R693.00 per ton.

2.3 Soft citrus crop distribution

The annual soft citrus crop distribution for the past ten years is presented in Figure 17. The majority of the South African annual soft citrus crop is absorbed by the export market. A total volume of 242 123 tons of soft citrus was exported in 2018. This represented 68% of the total production (355 613 tons) of soft citrus in 2018. The local market is the second most important market for soft citrus in South Africa, absorbing approximately 8% (30 204 tons) of the total crop in 2018.

Figure 17: Soft citrus crop distribution, 2009 - 2018

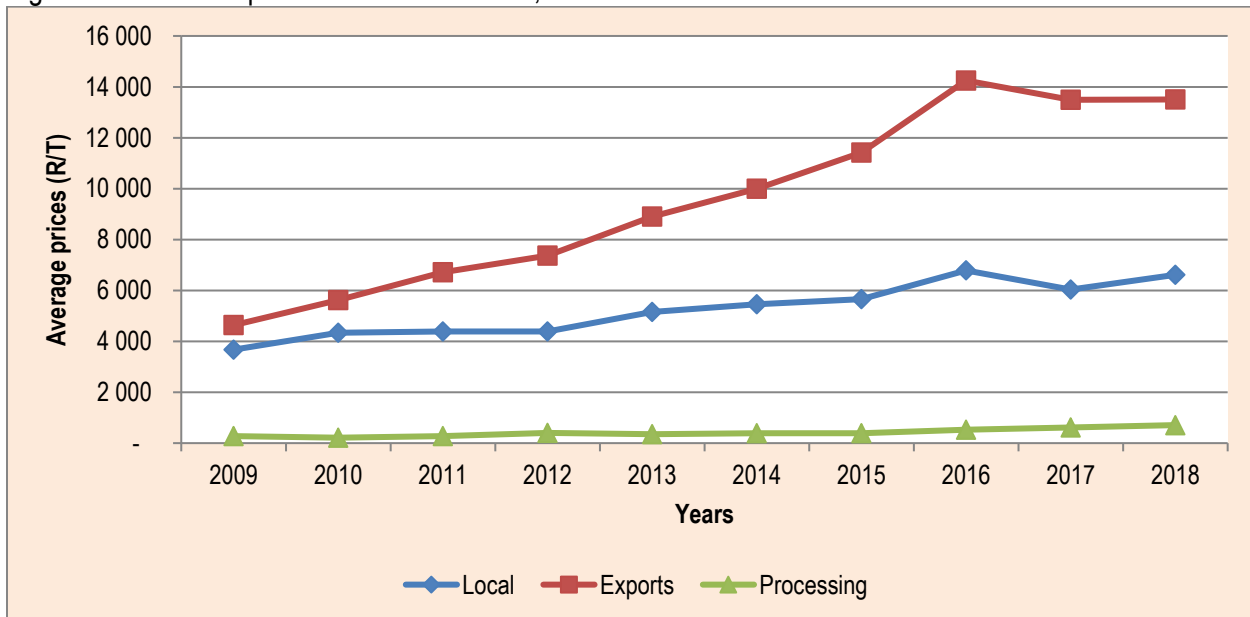


Source: Citrus Growers Association (CGA), 2019

2.4 Soft citrus prices

Historical price trends for soft citrus for the past ten years are presented in Figure 18.

Figure 18: Historical price trends of soft citrus, 2009 - 2018



Source: Citrus Growers Association (CGA), 2019

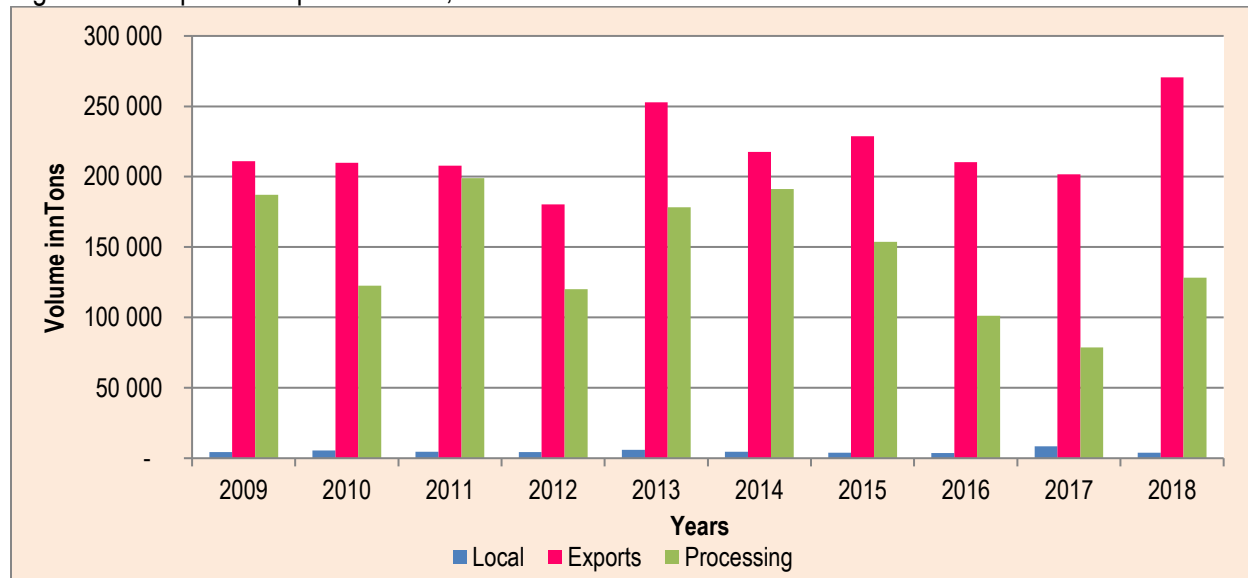
As in the case of oranges, soft citrus fetch the highest returns in the export markets. The average price received by a South African exporter in the export markets in 2018 was R13 489.00 per ton. Soft citrus also fetch higher prices in the local markets. The average price received in the local markets during 2018 was R6

617.00 per ton. It is important to note that prices of soft citrus for exports markets remained stable between 2017 and 2018 while prices in local market also increased by 10% during the same period.

2.5 Grapefruit crop distribution

Figure 19 presents the annual distribution of grapefruit in South Africa during the period 2009 to 2018. The leading market for South Africa’s grapefruits is the export market. Approximately 67% (270 566 tons) of the total grapefruits produced in South Africa during 2018 (402 660 tons) was exported. Another important market for grapefruits in South Africa is the processing sector. The sector absorbed 32% (128 210 tons) of the total crop in 2018. A very minimal (3 884 tons) amount of grapefruit is sold through the locally markets annually.

Figure 19: Grapefruit crop distribution, 2009 - 2018

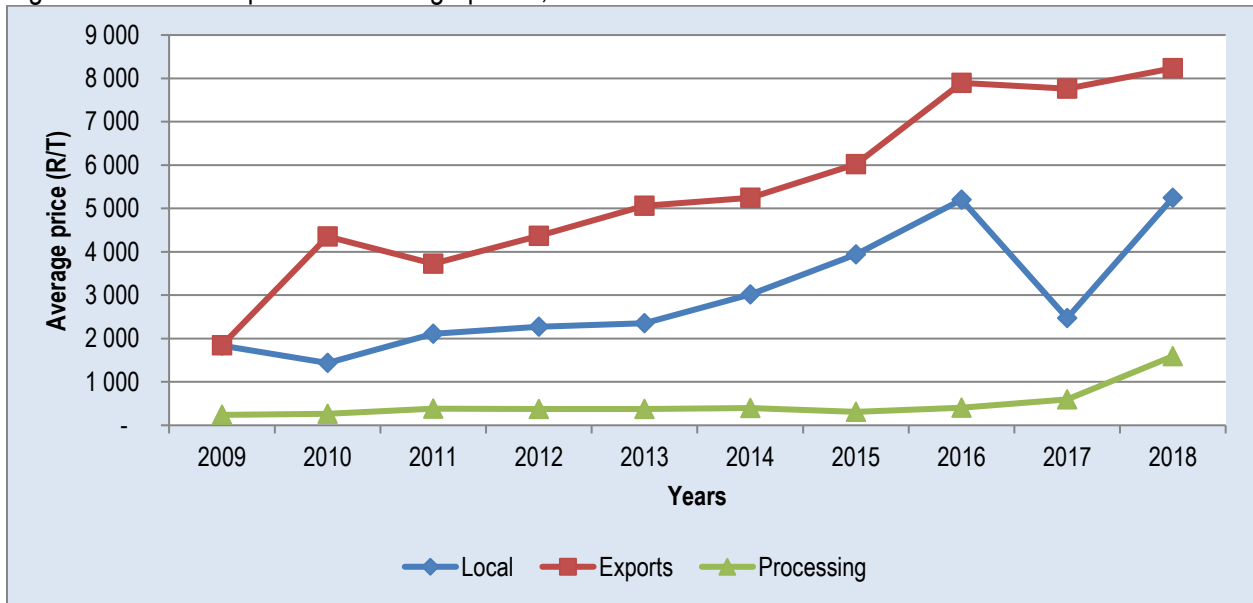


Source: Citrus Growers Association (CGA), 2019

2.6 Grapefruit prices

Figure 20 illustrates historical price trends for grapefruits during the past ten years.

Figure 20: Historical price trends for grapefruit, 2009 - 2018



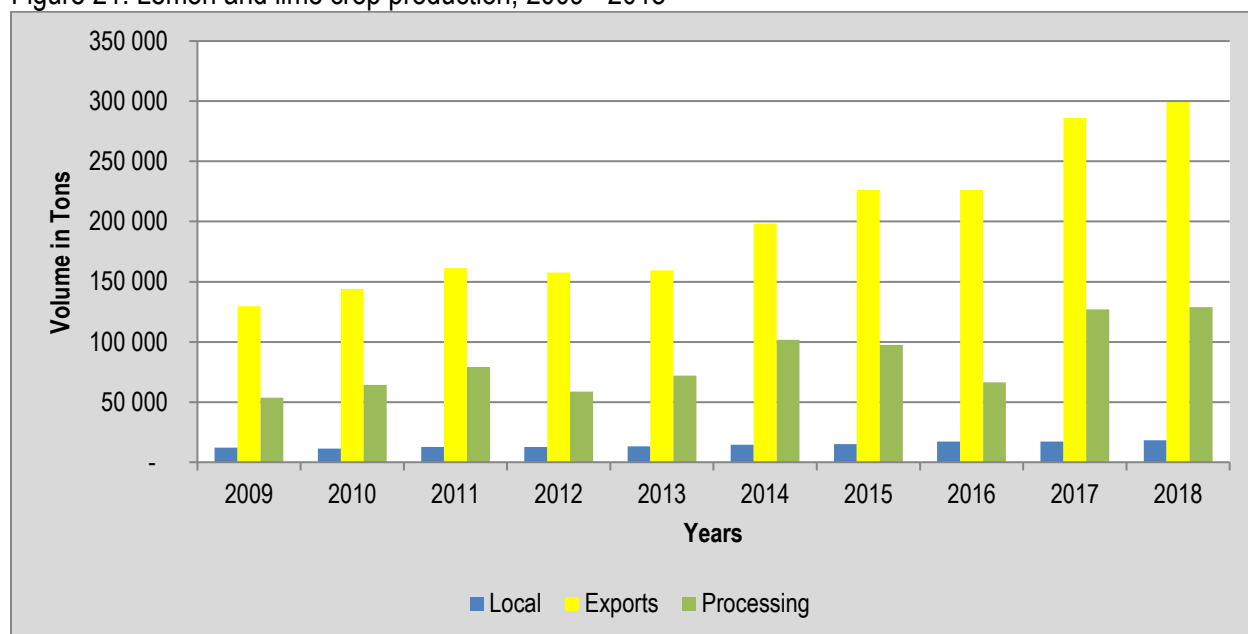
Source: Citrus Growers Association (CGA), 2019

The net realisation in the export market has been highly volatile during the past decade, reaching a high of R8 234 per ton in 2018 and a low of R1 856.00 per ton in 2009. The average price realised in the export market during 2018 was R8 234 per ton while those in the local and processing markets were R5 246.00/ton and R1 593.00/ton respectively. Prices realised in the export market has been on a rising trajectory over the past ten years but they all declined in 2017 while those in the local and processing sector experienced significant growth between 2017 and 2018.

2.7 Lemons and limes crop distribution

The annual distribution of lemons and limes for the period 2009 to 2018 is presented in Figure 21.

Figure 21: Lemon and lime crop production, 2009 - 2018



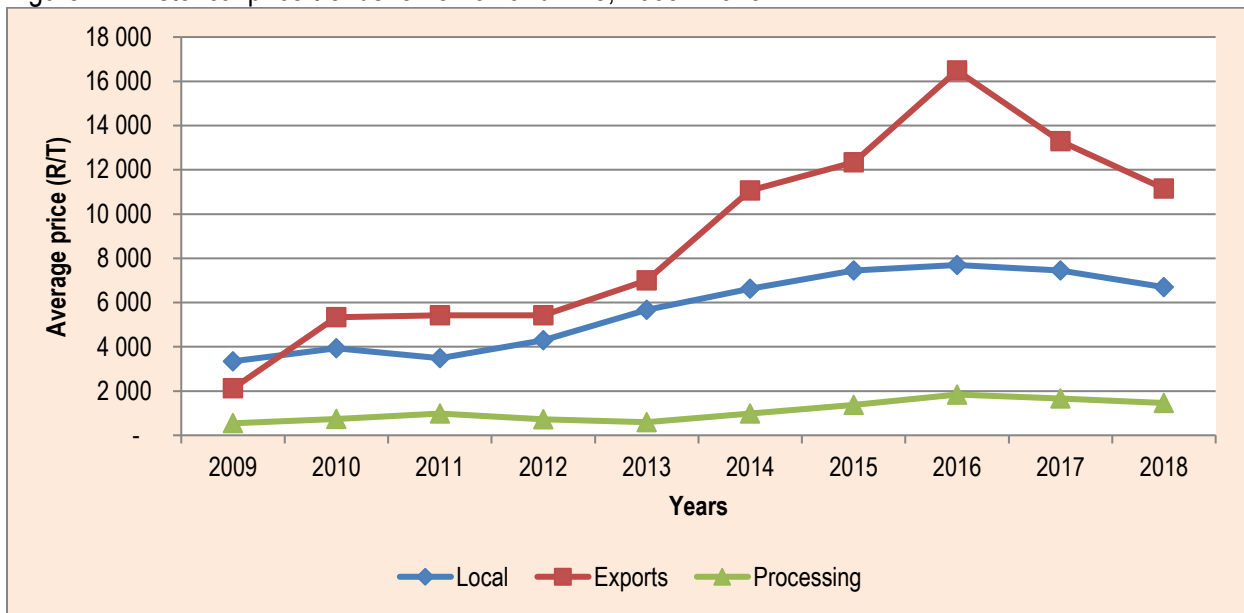
Source: Citrus Growers Association (CGA), 2019

Over 299 thousand tons of lemons and limes were exported in 2018. This represented 67% of the total production of lemons and limes in 2018. The second most important market for South African lemons and limes is the processing industry. The processing industry accounted for 29% (128 833 tons) of the total annual crop was sent to the processing industry in 2018 while the remaining 4% was sold in the local markets. The quantities of lemons and limes sent to the export markets have been increasing throughout the last decade, those quantities to processing have been unstable while volumes sent to the local markets have been stagnant.

2.8 Lemon and lime prices

Historical prices of lemons and limes for the past decade are presented in Figure 22. Prices realised in the export markets fluctuated strongly during the last ten years and the biggest fluctuation was experienced between 2016 and 2018 when prices moved from just over R16 483.00 per ton in 2016 to over R11 151.00 per ton in 2018. The average price realised in the export markets during 2018 was R11 151.00 per ton. This was a 16% decrease in lemon and lime export prices in 2018 when compared to prices in 2017. Prices realised in the local markets increased steadily during the past decade, reaching a high of R7 697.00 per ton in 2016. However, prices realised in the local markets have been declining since the 2016 peak. Prices realised in the processing sector also decreased from R1 657.00/ton in 2017 to R1 463.00/ton in 2018. Prices realised in all categories decreased between 2017 and 2018.

Figure 22: Historical price trends for lemon and lime, 2009 - 2018

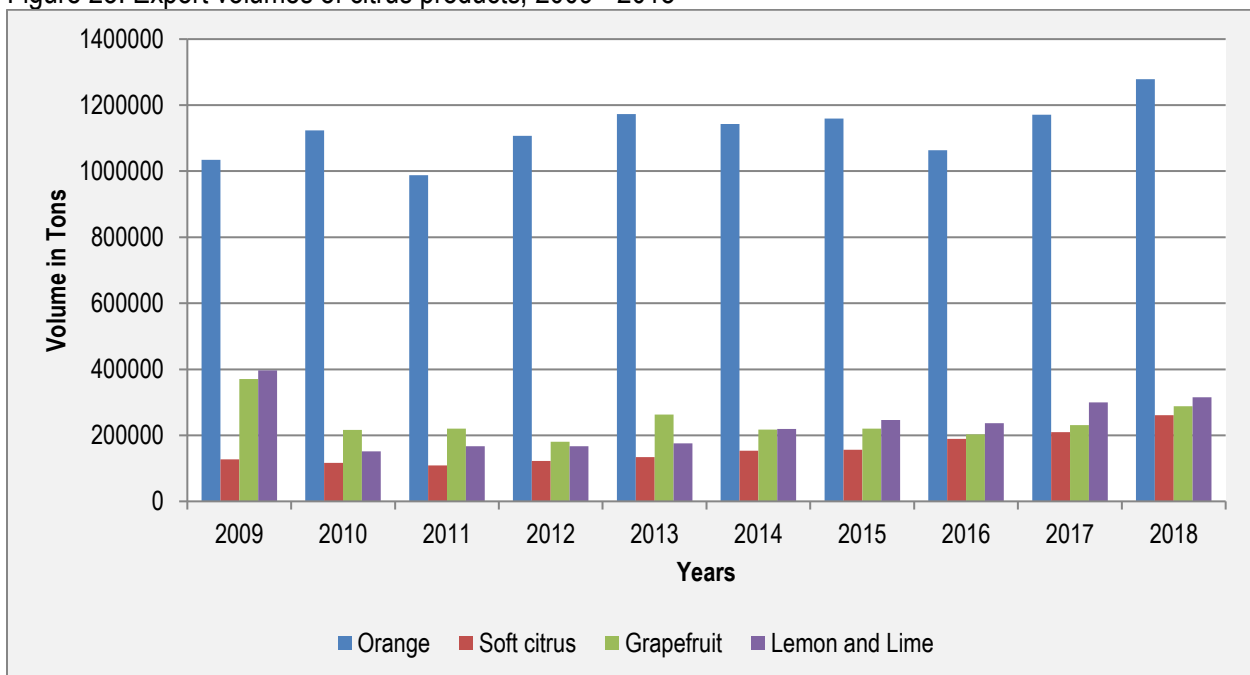


Source: Citrus Growers Association (CGA), 2019

2.9 Exports

As already indicated in the preceding subsections, citrus production in South Africa is mainly aimed at the export market. South Africa exported a total combined volume of 2 142 628 tons of citrus products in 2018. The volume exported was 12% higher than the volume exported in the previous year (2017). Annual citrus produce exported by South Africa to the world from 2009 to 2018 are depicted in Figure 23.

Figure 23: Export volumes of citrus products, 2009 - 2018



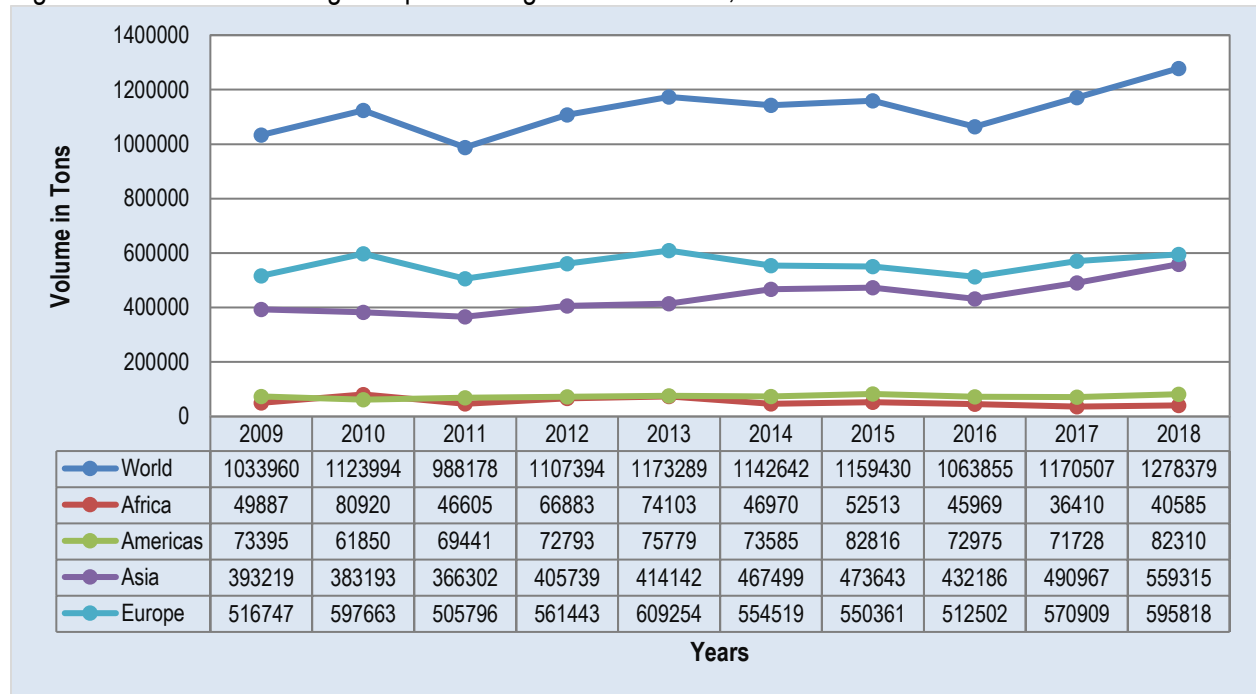
Source: Quantec Easydata

As can be seen in Figure 23, the biggest contributor to the total volume of South African citrus exports is oranges that contributed 60% (1 278 379 tons) to total citrus products exports in 2018. Oranges were followed by lemon and lime at 15% (315 247 tons), grapefruit and soft citrus at 13% and 12% respectively during the same year. Volumes of citrus products sold to export markets between 2009 and 2018 remained stable during the same period.

2.9.1 Oranges

Exports of South African oranges to the various regions of the world over the past decade are presented in Figure 24. Oranges totalling 1 278 379 tons and worth R11 billion were exported by South Africa in 2018. During the last decade most of South Africa's exports of oranges went to the European and Asian markets. In 2018 exports to Europe accounted for 47% of total South African orange exports while those to Asia accounted for 44%. South African exports of oranges to Europe have been relatively stable over the past decade, remaining over 500 thousand tons annually. Exports to Asia have also been relatively stable over the past decade. Exports to both Europe and Asia increased in 2018 compared to 2017 season. The Americas and Africa also constitute important markets for South African exports of oranges.

Figure 24: Volumes of oranges exports to regions of the world, 2009 - 2018



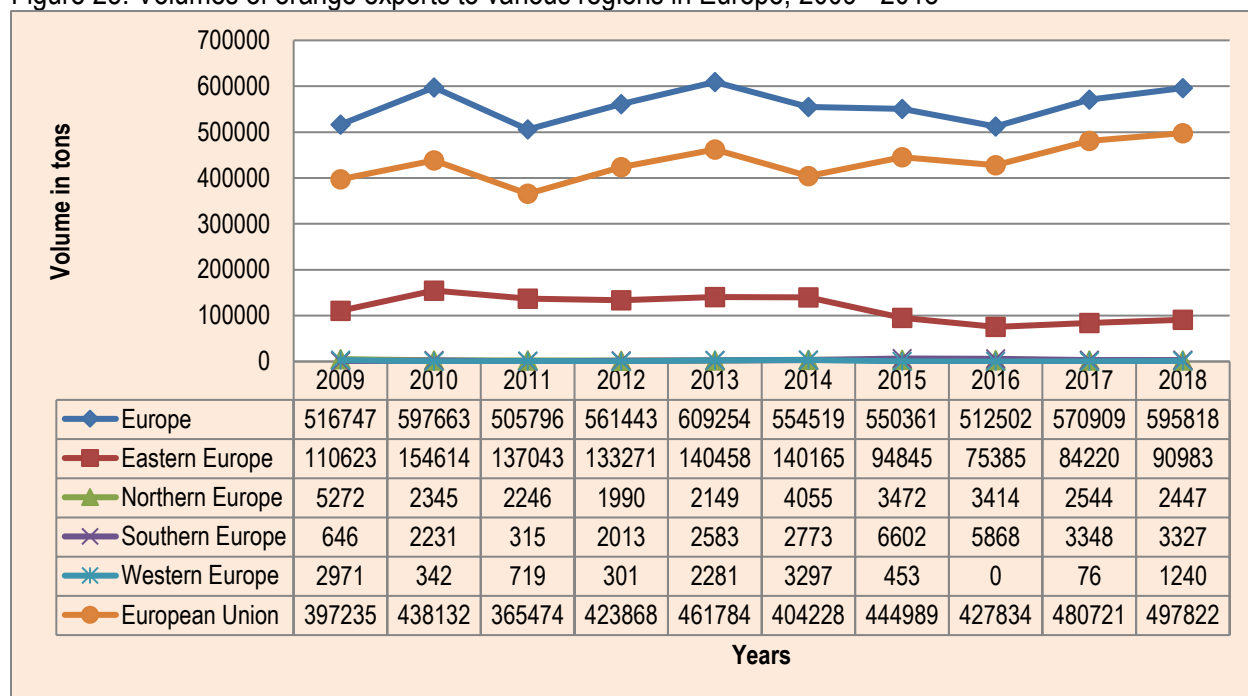
Source: Quantec Easydata

Due to their relative importance to exports of South African oranges, the European and Asian markets are further analysed below.

Volumes of South African orange exports to the various regions of Europe from 2009 to 2018 are presented in Figure 25. In Europe, the bulk of South African exports of oranges go to the European Union. 84% of all

South African exports of oranges to Europe in 2018 were absorbed by the European Union. The EU was followed by both Eastern Europe at 15% while the remaining 1% went to Northern, Southern and Western Europe. Exports to Europe peaked at 609 254 tons in 2013. The exports of South African oranges to the European Union and Eastern Europe increased by 3.5% and 7.1% respectively between 2017 and 2018. Exports to Europe as a whole also increased by 4% between 2017 and 2018.

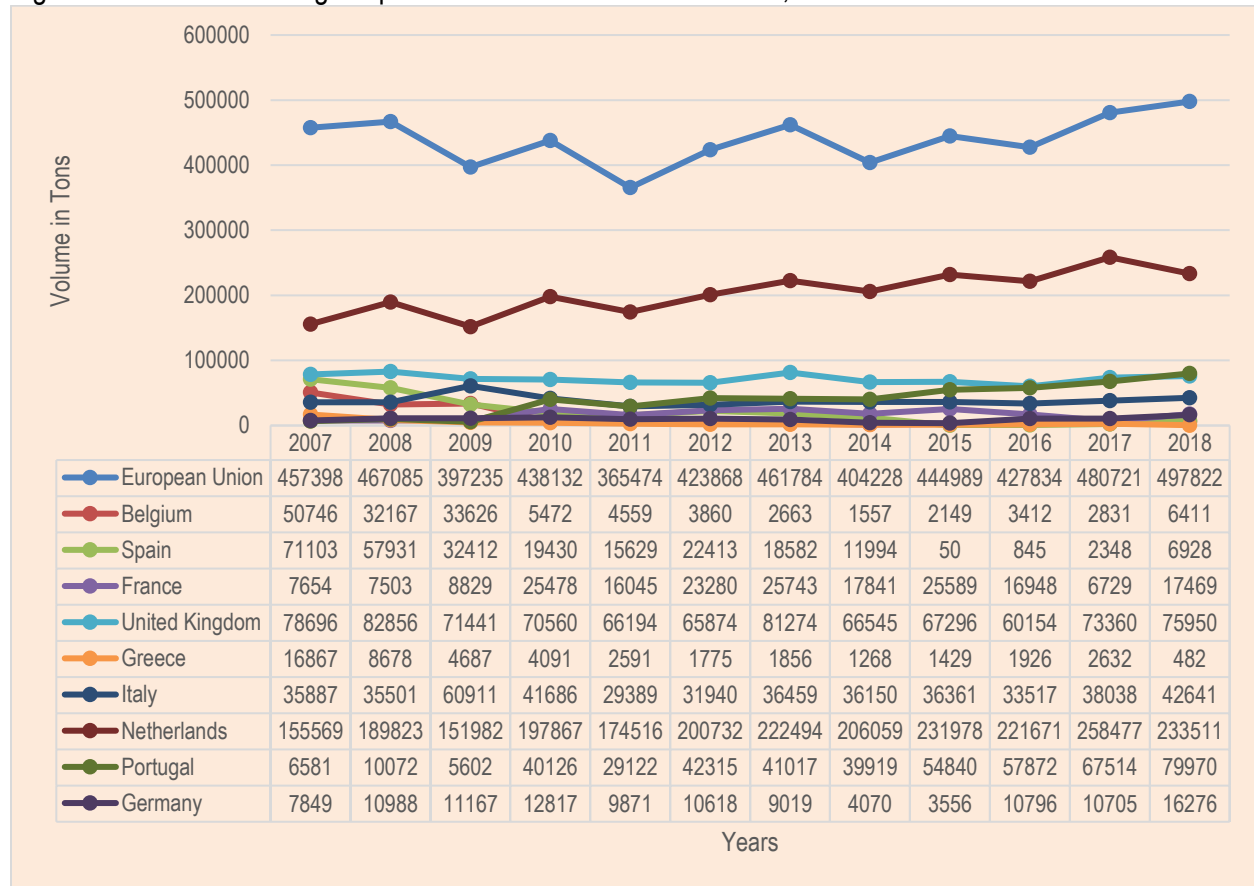
Figure 25: Volumes of orange exports to various regions in Europe, 2009 - 2018



Source: Quantec Easydata

Due to its significance to South African exports of oranges the European Union market is further disaggregated in Figure 26. It is important to note that only those countries whose orange imports from South Africa were at least 10 000 tons in at least one year during the period under review are shown in Figure 26. The major importers of South African oranges in the European Union are the Netherlands, the United Kingdom and Portugal. In 2018, the three countries accounted for 78% of all South African orange exports to the European Union (497 822 tons), with the Netherlands accounting for 47% and both the Portugal and United Kingdom contributing 16% and 15% respectively. Between 2017 and 2018, exports to the Portugal and United Kingdom increased by 18% and 4% respectively while exports to Netherlands decreased by 10%.

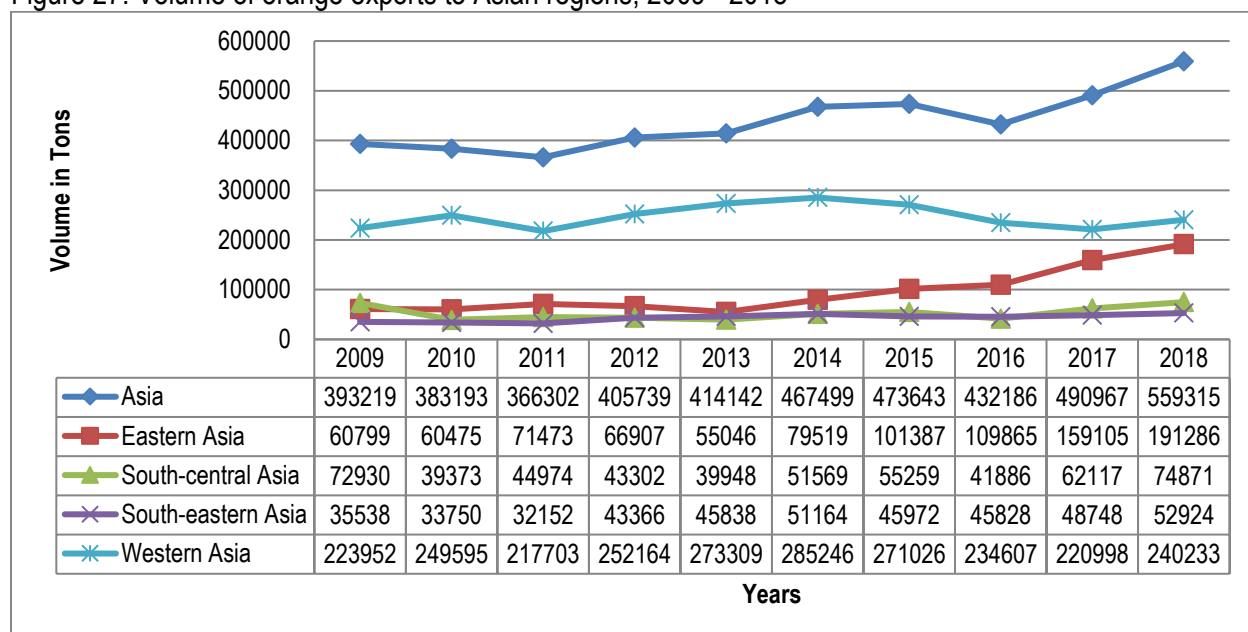
Figure 26: Volume of orange exports to various EU member states, 2009 - 2018



Source: Quantec Easydata

Volumes of South African exports of oranges to the different regions of Asia are presented in Figure 27. The most important Asian region in terms of South African exports of oranges is Western Asia. In 2018, exports to Western Asia accounted for 43% of total South African exports of oranges to Asia. Total South African exports of oranges to Asia peaked at 559 315 tons in 2018. There was a 14% increase in total exports to Asia between 2017 and 2018.

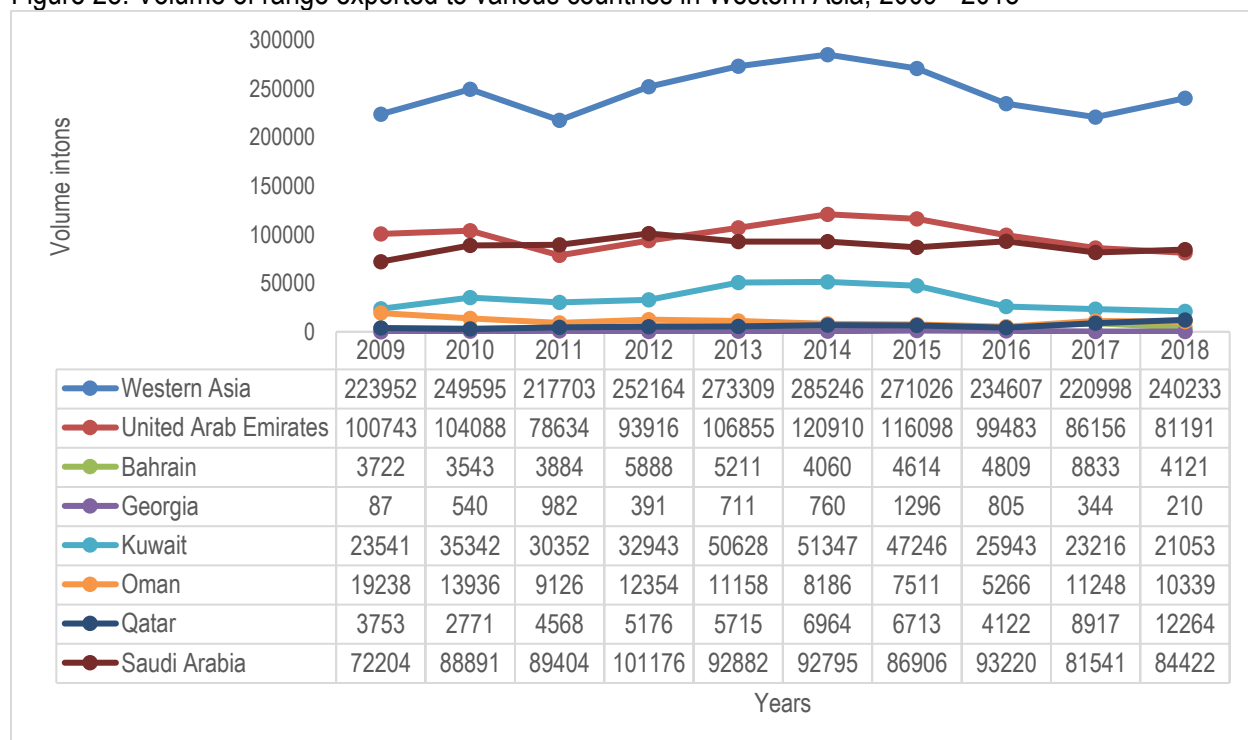
Figure 27: Volume of orange exports to Asian regions, 2009 - 2018



Source: Quantec Easydata

Volumes of South African orange exports to the different countries in Western Asia during the last decade are presented in Figure 28.

Figure 28: Volume of orange exported to various countries in Western Asia, 2009 - 2018



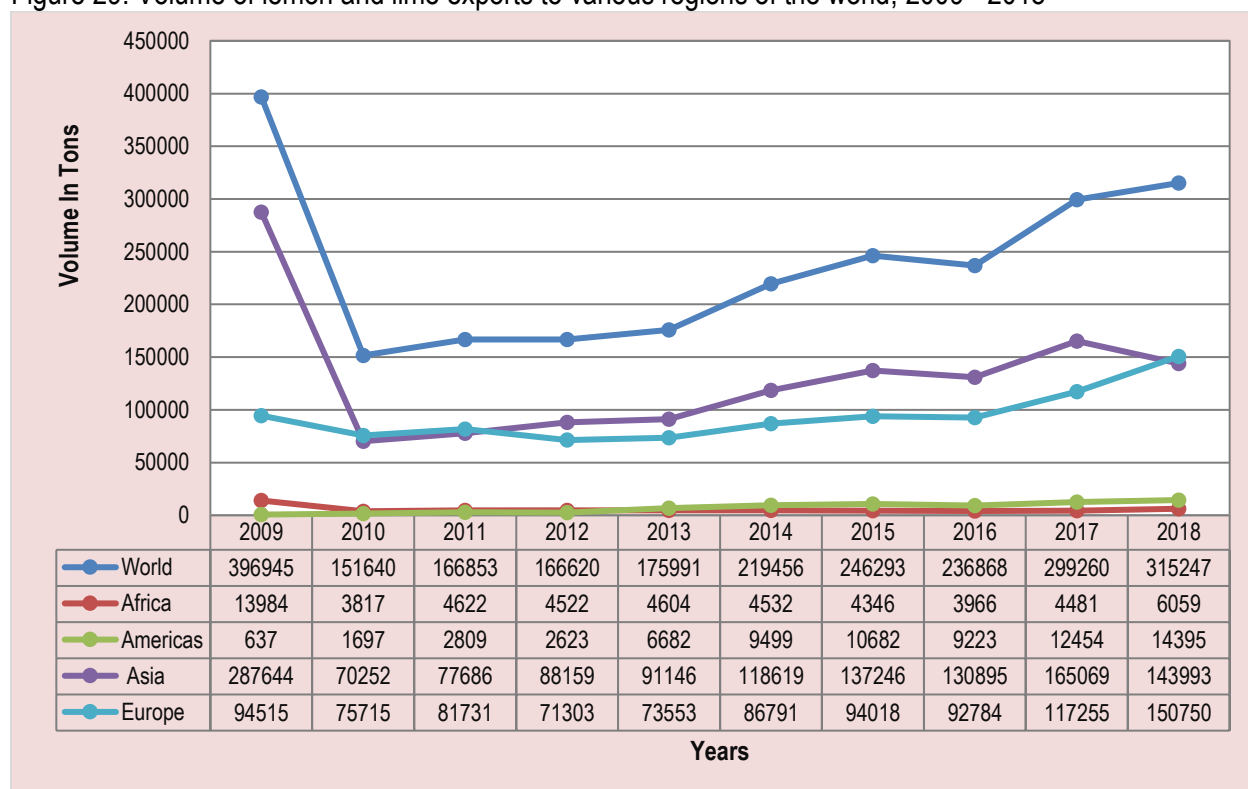
Source: Quantec Easydata

Note that only those countries whose orange imports from South Africa were at least 1000 tons in at least one year during the period under review are shown in Figure 28. The major importers of South African oranges in Western Asia are the United Arab Emirates and Saudi Arabia. In 2018 the Saudi Arabia imported 84 422 tons of oranges from South Africa while United Arab Emirates imported 81 191 tons from South Africa. Another notable importer of South African orange in the past decade was Kuwait, importing on average 34 000 tons. Between 2017 and 2018, South African exports of oranges to Saudi Arabia increased by 3.5% while those to the United Arab Emirates also decreased by 6%.

2.9.2 Lemons and limes

Exports of South African lemons and limes to the various regions of the world over the past decade are presented in Figure 29. Lemons and limes totalling 315 247 tons were exported by South Africa in 2018. Between 2009 and 2010 the total volume of lemons and limes exported by South Africa decreased by 62%. The total volume of exports however recorded an increase of 5% between 2017 and 2018. During the last decade most of South Africa's exports of lemons and limes went mainly to the European and Asian markets. In 2018 exports to Asia accounted for 46% of total South African lemons and limes exports while those to Europe accounted for 48%. It can be observed in Figure 29 that total South African exports of lemons and limes are predominantly determined by quantities absorbed by the Asian and European market. Total South African exports of lemons and limes to the world peaked in 2009 at 396 945 tons while those to Asia peaked at 287 644 tons during the same year. Africa and the Americas also constitute important markets for South African lemons and limes.

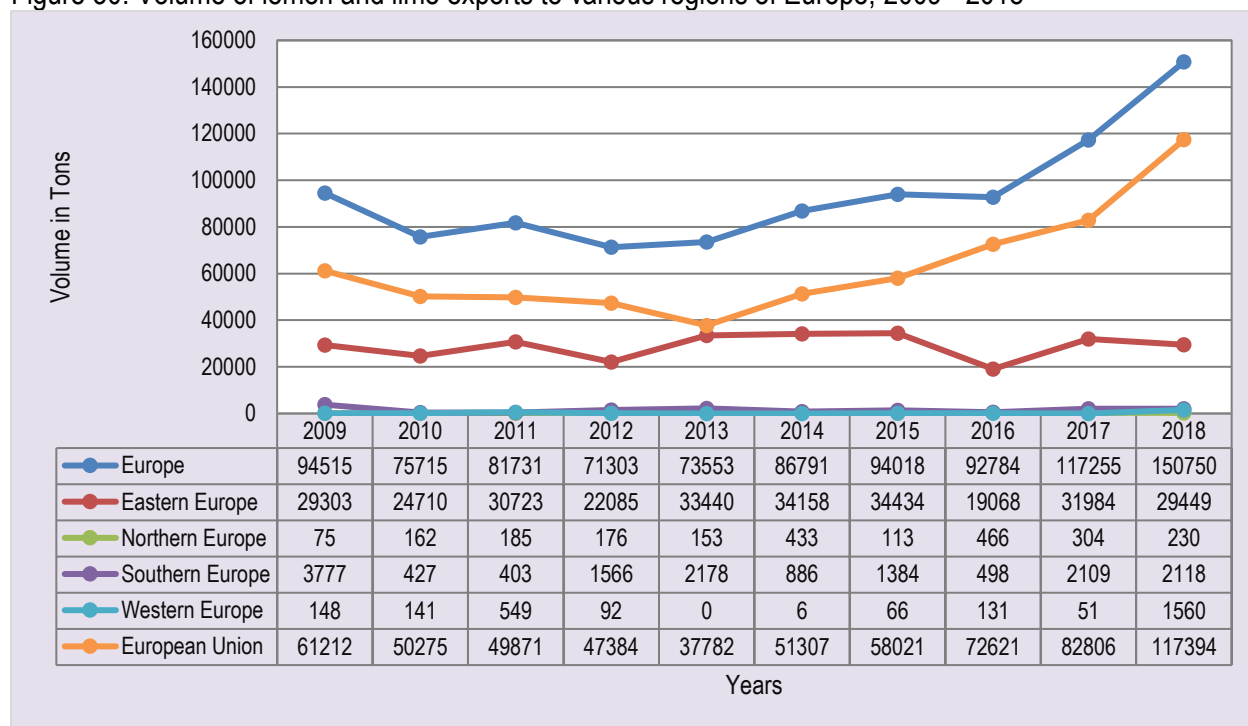
Figure 29: Volume of lemon and lime exports to various regions of the world, 2009 - 2018



Source: Quantec Easydata

Figure 30 presents volumes of lemons and limes exported to various regions of Europe during the last ten years. Europe absorbed a total volume of 150 750 tons of lemons and limes from South Africa in 2018. The volume was 29% up from the 117 255 tons imported from South Africa during 2017. Within Europe, the major markets for South African lemons and limes are the European Union and Eastern Europe. The European Union absorbed 78% of total South African exports of lemons and limes to the European continent in 2018.

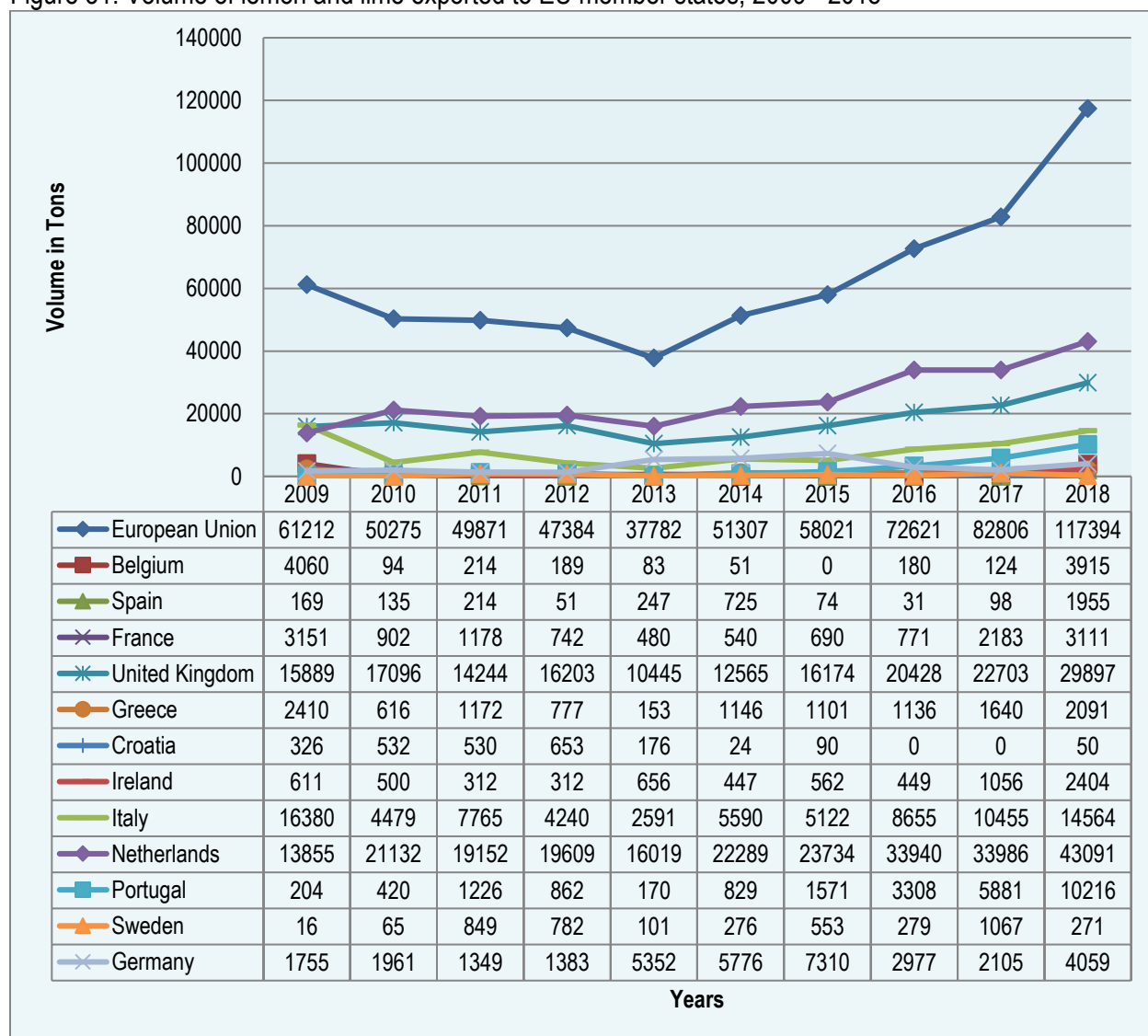
Figure 30: Volume of lemon and lime exports to various regions of Europe, 2009 - 2018



Source: Quantec Easydata

Due to its significance to exports of South African lemons and limes, the European Union market is further disaggregated in Figure 31. Within the European Union, the major importers of South African lemons and limes are the Netherlands and the United Kingdom. Together the two countries accounted for 62% of total European Union imports of lemons and limes from South Africa in 2018, with the Netherlands accounting for 37% and the United Kingdom accounting for 25%.

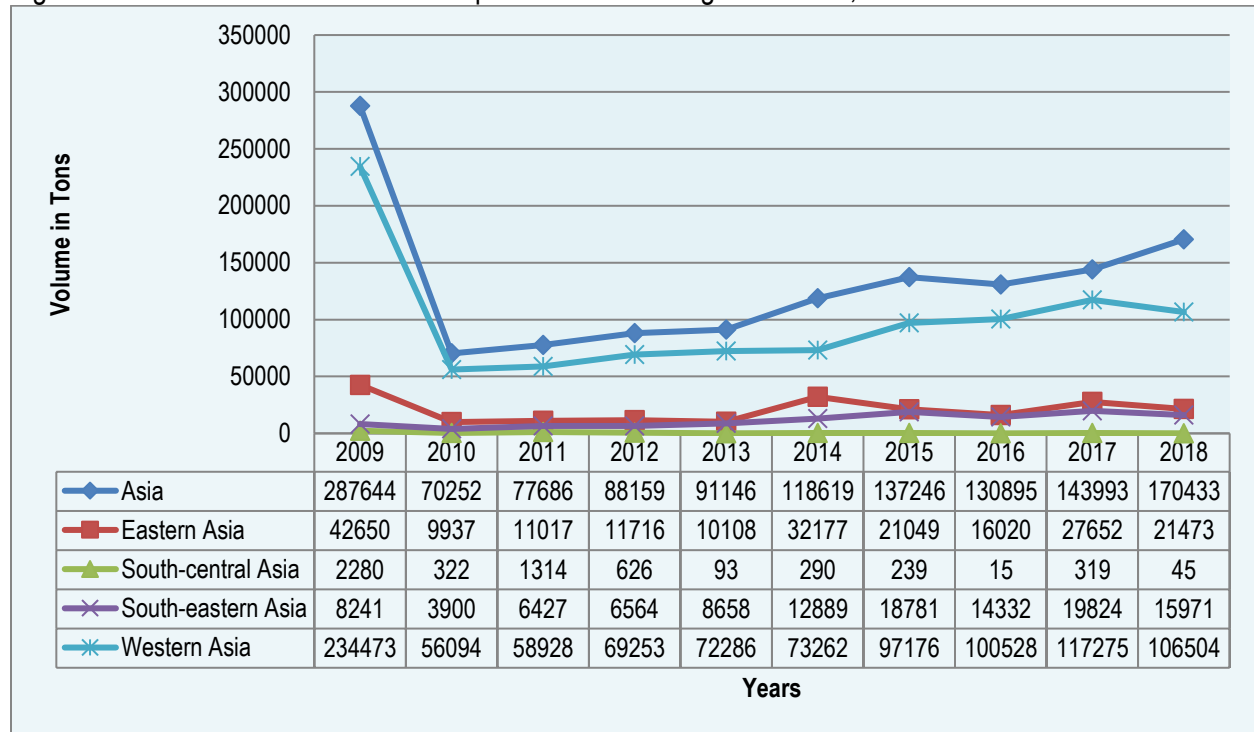
Figure 31: Volume of lemon and lime exported to EU member states, 2009 - 2018



Source: Quantec Easydata

Volumes of lemons and limes exported by South Africa to the various regions of Asia are presented in Figure 32. Asia has been a top importer of South African lemon and lime over the past five years. It is evident that the majority of South African exports of lemons and limes that went to Asia during the last decade were destined for Western Asia. Approximately 74% of all South African exports of lemons and limes to Asia in 2018 were absorbed by Western Asia. The remainder went to Eastern Asia (15%) and South-Eastern Asia (11%).

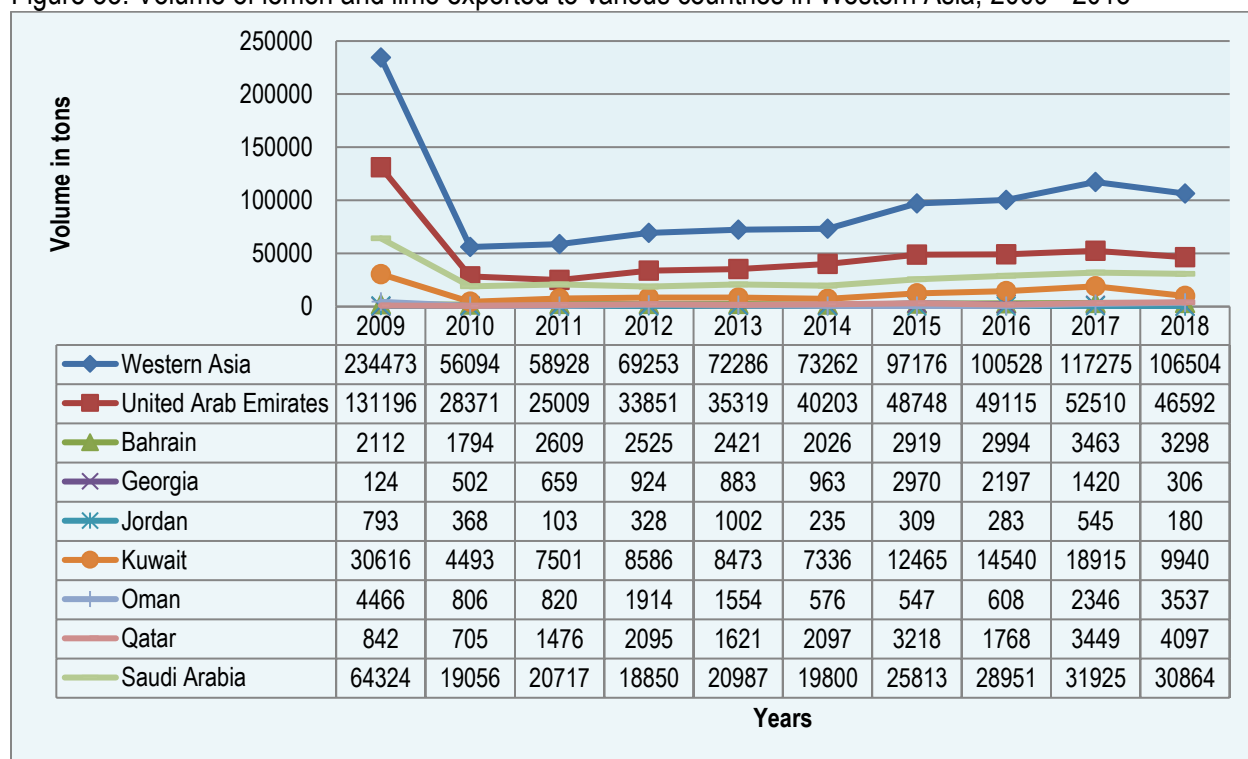
Figure 32: Volume of lemon and lime exported to various regions in Asia, 2009 - 2018



Source: Quantec Easydata

Volumes of South African exports of lemons and limes to the different countries within Western Asia during the last decade are presented in Figure 33. Note that only those countries whose imports of lemons and limes from South Africa were at least 1 000 tons in at least one year during the period under review are shown in Figure 33. It is evident that the major importers of South African lemons and limes in Western Asia are the United Arab Emirates and Saudi Arabia. In 2018 the two countries accounted for 73% of all South African exports of lemons to Western Asia, with the United Arab Emirates accounting for 44% and Saudi Arabia contributing 29%. Exports to the United Arab Emirates declined by 11% between 2017 and 2018 while those to Saudi Arabia also declined by 3% during the same period.

Figure 33: Volume of lemon and lime exported to various countries in Western Asia, 2009 - 2018

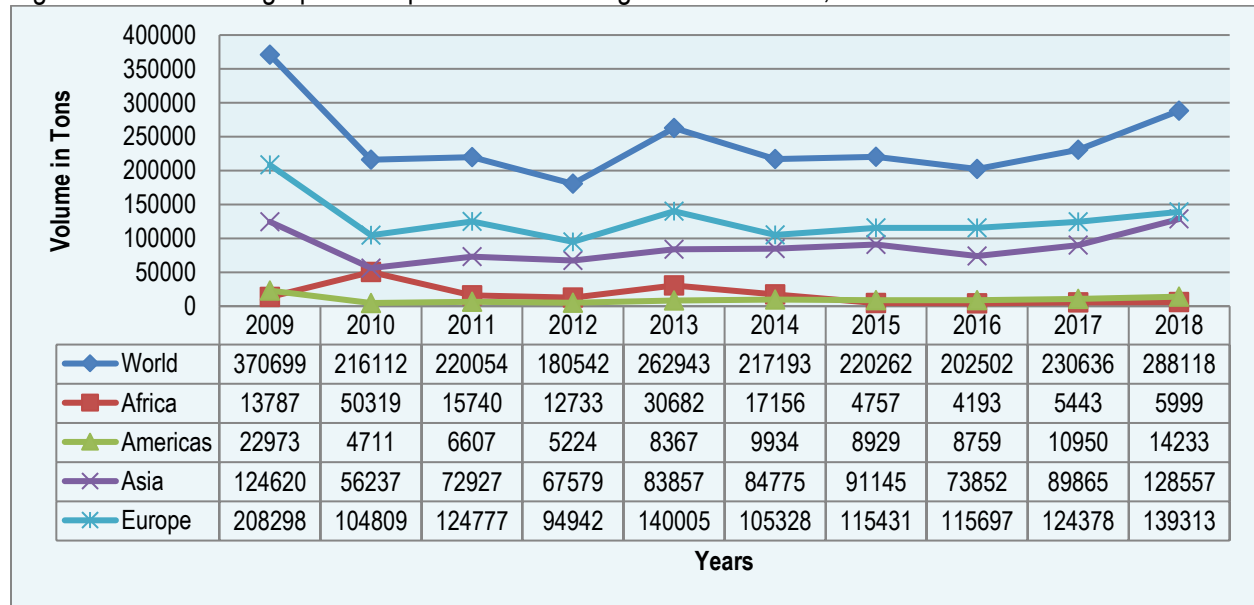


Source: Quantec Easydata

2.9.3 Grapefruits

Quantities of South African exports of grapefruits to the various regions of the world during the last decade are shown in Figure 34. Grapefruits totalling 288 118 tons and worth R2.4 billion were exported by South African in 2018. Most of South Africa's exports of grapefruits are destined for the European and Asian markets. In 2018, Europe accounted for 48% (139 313 tons) of total South African exports (288 118 tons) of grapefruits while those to Asia accounted for 45% (128 557 tons). There was a 41% decrease in South African grapefruit exports in 2010. The decrease was after a huge increase in the demand for South African grapefruits in Asia and Europe in 2009. Exports to the world increased by 25% between 2017 and 2018. Exports to Africa and the Americas remained below 30 000 tons for most part during the period under review. The European and Asian markets will be disaggregated further below.

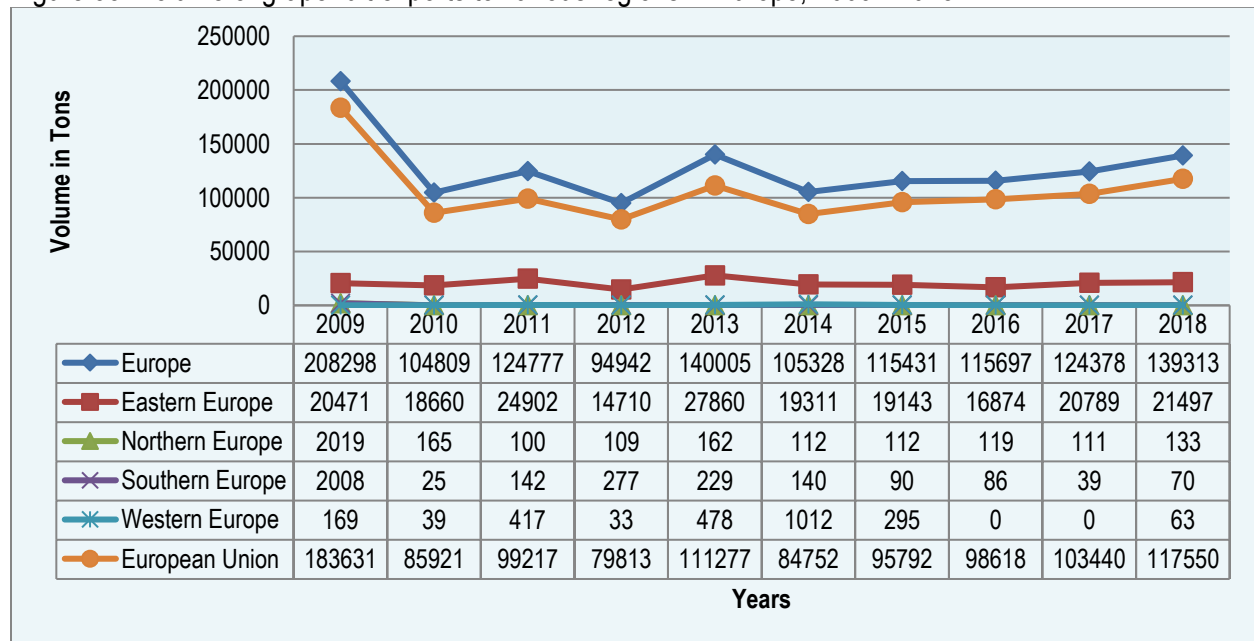
Figure 34: Volume of grapefruit exports to various regions of the world, 2009 - 2018



Source: Quantec Easydata

Volumes of South African exports of grapefruits to the various regions of Europe from 2009 to 2018 are presented in Figure 35.

Figure 35: Volume of grapefruit exports to various regions in Europe, 2009 - 2018



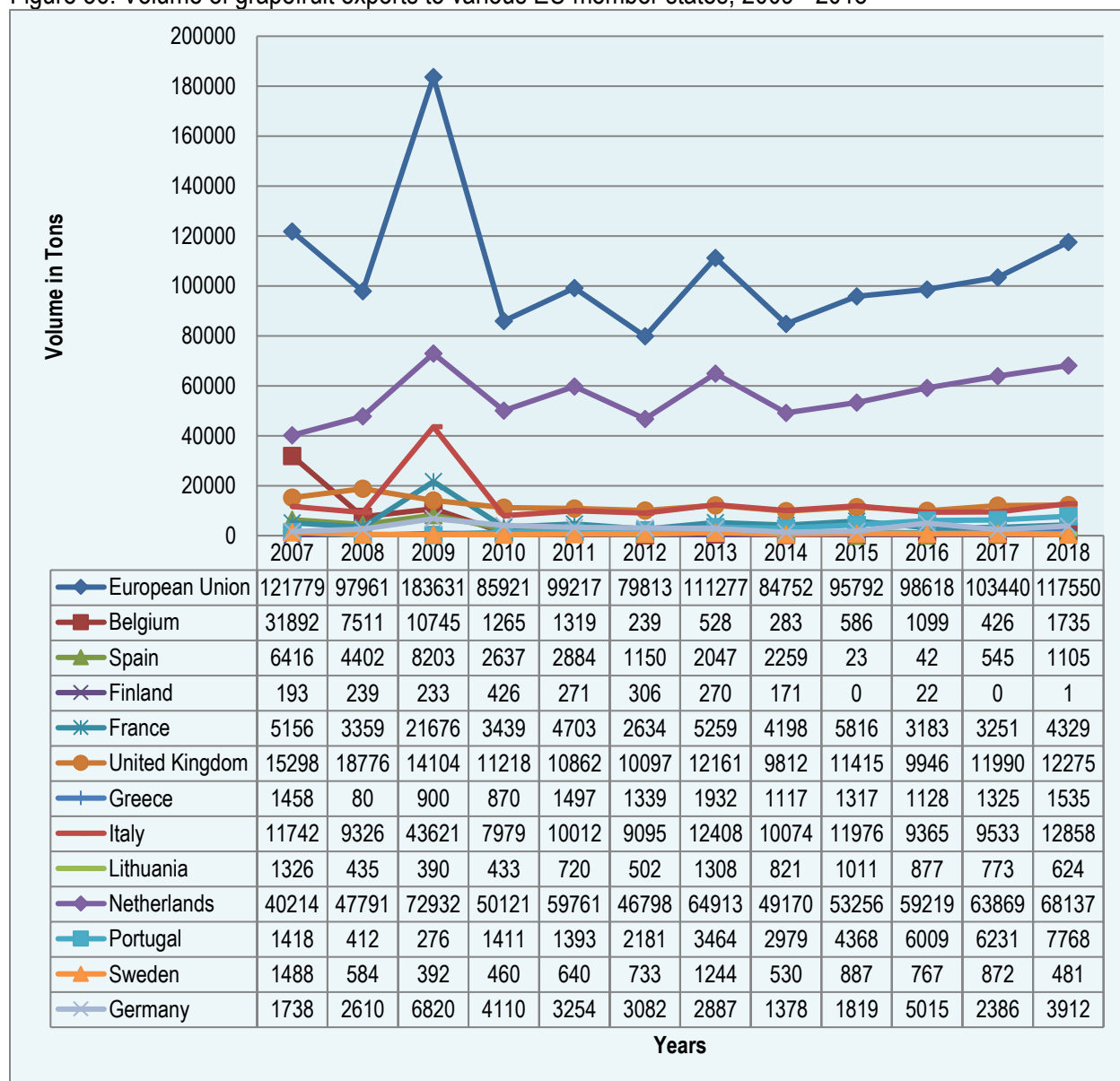
Source: Quantec Easydata

It is evident from Figure 35 that during the last decade the bulk of South African grapefruit exports that went to Europe were destined for the European Union. In 2018, 84% of all South African exports of grapefruits to Europe were absorbed by the European Union, with the remaining quantities going to Eastern Europe. Total South African exports of grapefruits to Europe peaked in 2009 at 208 298 tons. South African grapefruit

exports to Europe rose by 20% between 2017 and 2018. Another growing market for South African grapefruits is Eastern Europe. Grapefruit exports to Eastern Europe increased by 3% in 2018 as compared to 2017.

Due to its significance to South African grapefruit exports the European Union market is further disaggregated in Figure 36.

Figure 36: Volume of grapefruit exports to various EU member states, 2009 - 2018



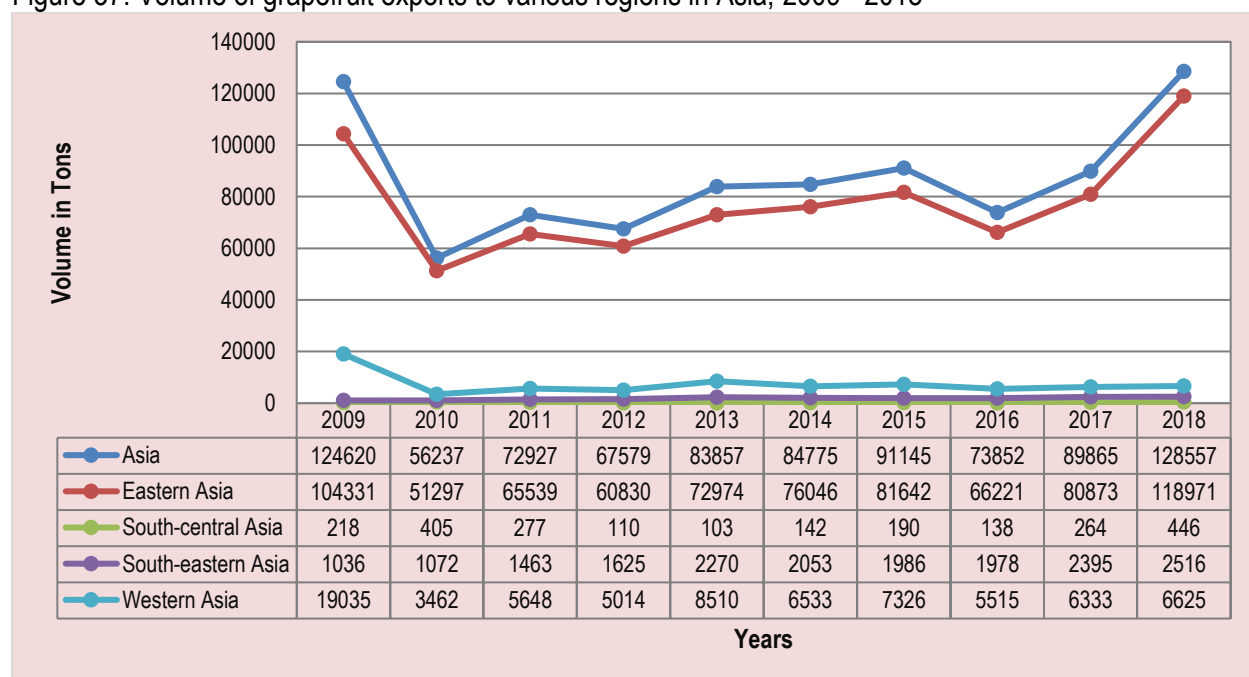
Source: Quantec Easydata

It is important to note that only those countries whose grapefruit imports from South Africa were at least 1 000 tons in at least one year during the period under review are shown in Figure 36. The major importers of South African grapefruits in the European Union are the Netherlands, Italy and the United Kingdom. In 2018 the Netherlands accounted for 58% of all South African grapefruit exports to the European Union while the Italy and United Kingdom accounted for 11% and 10% respectively during the same year. Other important

players in 2018 included Portugal (7%) and France (4 %). Grapefruit exports to the European Union as a whole increased by 14% between 2017 and 2018.

Figure 37 presents volumes of South African exports of grapefruits to the different regions of Asia. The major Asian region in terms of South African grapefruit exports is Eastern Asia. The region absorbed 93% of the total South African exports of grapefruits to Asia in 2018. The total South African grapefruit exports to Asia peaked at 128 557 tons in 2018. South African exports of grapefruits to Asia increased by 3% between 2009 and 2018 while those to Eastern Asia also increased by 14% during the same period. South African exports of grapefruits to Asia declined from 124 620 tons in 2009 to 56 237 tons in 2010, representing a decline of 55%. Between 2017 and 2018, exports of grapefruit to Asia increased by 143%.

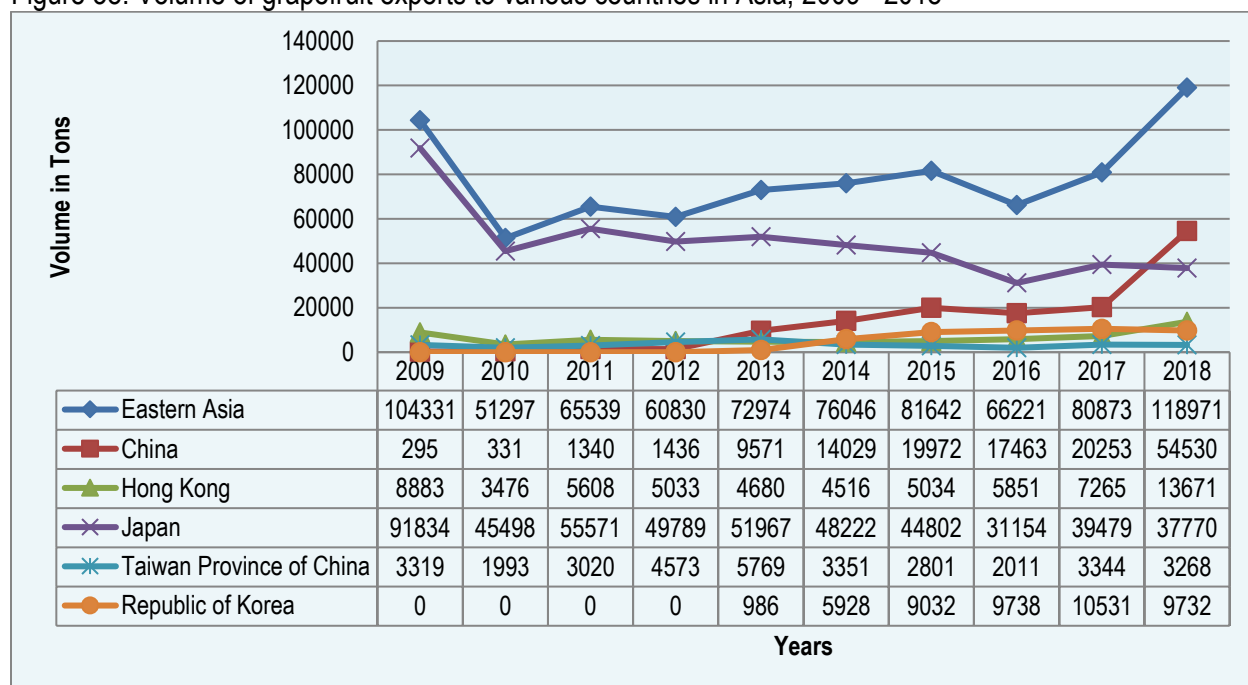
Figure 37: Volume of grapefruit exports to various regions in Asia, 2009 - 2018



Source: Quantec Easydata

Volumes of South African grapefruit exports to the different countries in Eastern Asia during the last decade are presented in Figure 38. Note that only those countries whose grapefruit imports from South Africa were at least 1 000 tons in at least one year during the period under review are shown in Figure 38. The major importer of South African grapefruit in Eastern Asia is China. In 2018, China absorbed 46% of the total South African exports of grapefruits to Eastern Asia. South African exports of grapefruits to China increased by 146% between 2017 and 2018. Other importers of South African grapefruit in Eastern Asia are Japan, Korea and Taiwan.

Figure 38: Volume of grapefruit exports to various countries in Asia, 2009 - 2018

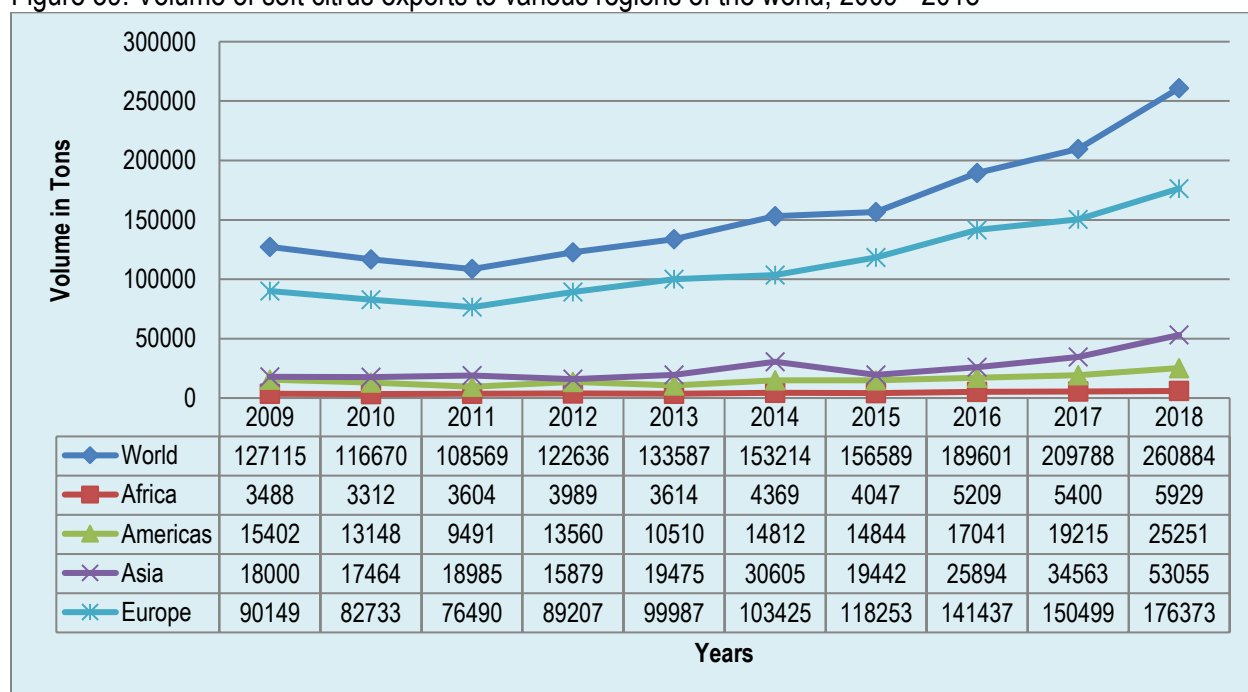


Source: Quantec Easydata

2.9.4 Soft citrus

Figure 39 presents volumes of South African exports of soft citrus to the different regions of the world during the last decade.

Figure 39: Volume of soft citrus exports to various regions of the world, 2009 - 2018

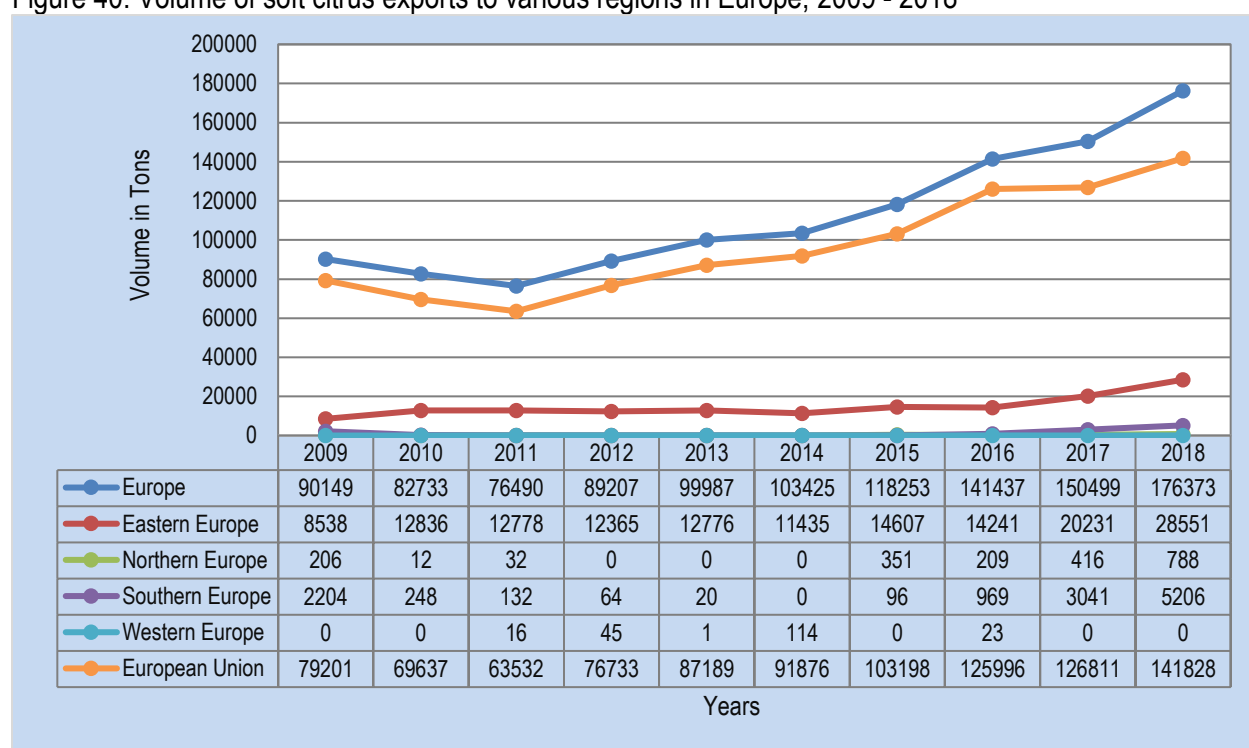


Source: Quantec Easydata

Most of South Africa's exports of soft citrus during the past ten years went to Europe. The continent absorbed 68% of the total South African exports of soft citrus in 2018. South African exports of soft citrus to the world increased by 24% between 2017 and 2018. The second most important continent for South African exports of soft citrus in 2018 was Asia, which absorbed 20% (53 055 tons) during the same year. Exports to Africa and the Americas have been stable over the last decade, remaining below the 30 000 tons mark.

Export volumes for South African soft citrus to the various regions of Europe for the period 2009 to 2018 are presented in Figure 40. It is evident that during the last decade the European Union absorbed the bulk of South African exports of soft citrus that went to Europe. The European Union accounted for 80% of the total South African exports of soft citrus in 2018. Eastern Europe absorbed 16% of the grapefruit exports while the remaining 4% was shared by other regions.

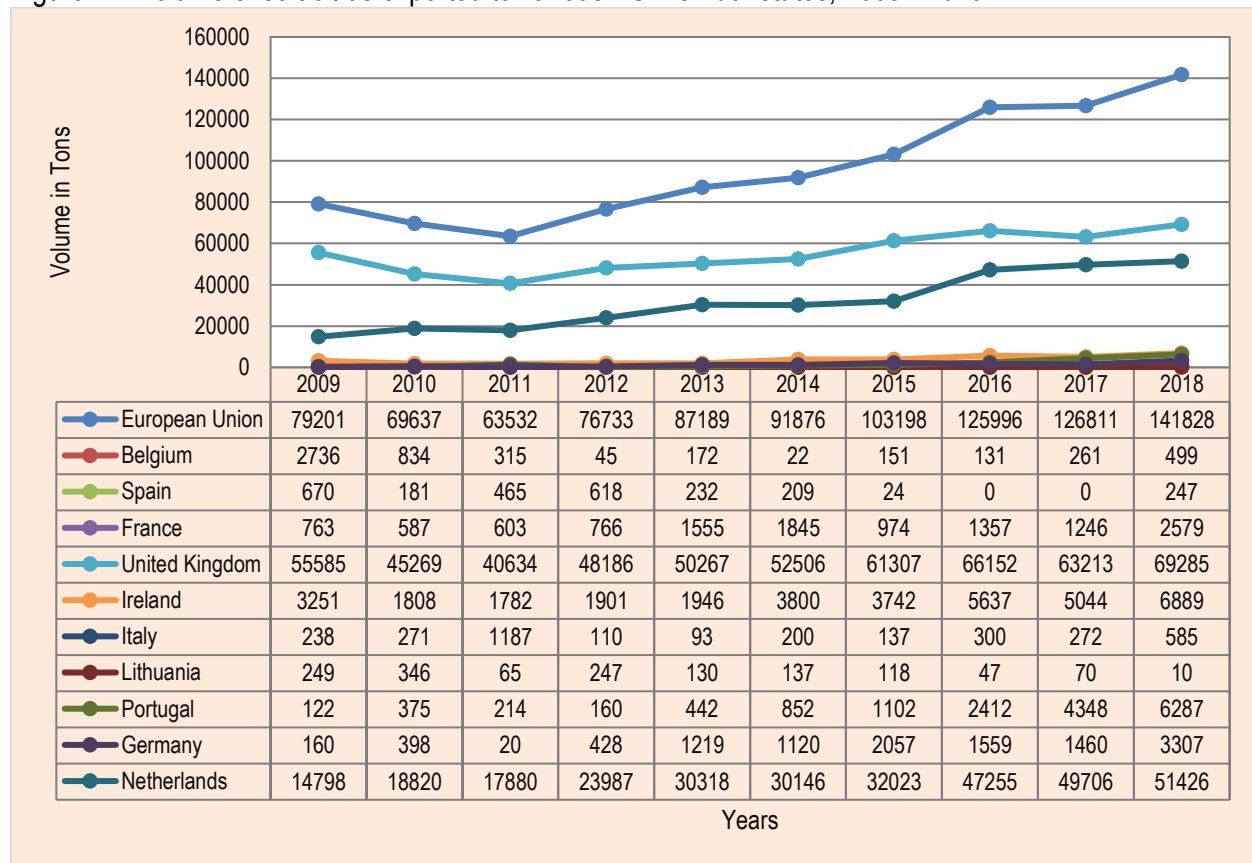
Figure 40: Volume of soft citrus exports to various regions in Europe, 2009 - 2018



Source: Quantec Easydata

Due to its relative importance to exports of South African soft citrus the European Union market is further disaggregated below. Volumes of South African exports of soft citrus to the different European Union member states during the last decade are presented in Figure 41. Only those countries whose imports of soft citrus from South Africa were at least 1 000 tons in at least one year during the period under review are shown in Figure 41. The major importers of soft citrus from South Africa are the United Kingdom and the Netherlands. In 2018, the two countries accounted for 85% of the total South African exports of soft citrus to the European Union, with the United Kingdom accounting for 49% and the Netherlands contributing 36%. Between 2017 and 2018, exports to the United Kingdom went up by 10% while those to the Netherlands also increased by 3%.

Figure 41: Volume of soft citrus exported to various EU member states, 2009 - 2018

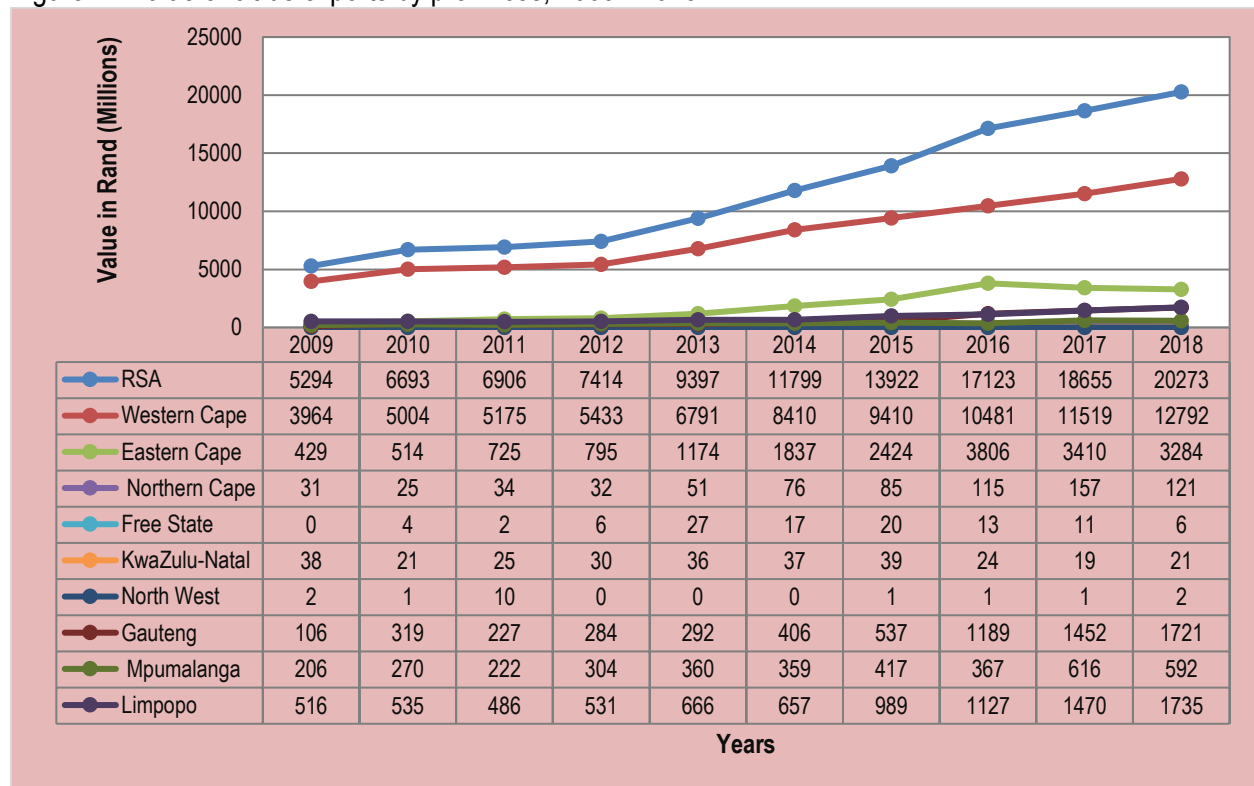


Source: Quantec Easydata

2.10 Provincial and district export values of South African citrus

Figure 42 below depicts the value of citrus exports from each province of South Africa during the last ten years. The figure presents an interesting but somewhat misleading view of the source of citrus products destined for the export markets. Firstly, the fact that approximately 63% of the citrus export value was derived from the Western Cape in 2018 does not mean that the province was the main producer of citrus. It only implies that the majority of registered exporters are based in the Western Cape. Secondly, the province (Western Cape) serves as exit point for citrus exports through the Cape Town harbour. Citrus products worth R20 billion were exports by South Africa in 2018. Following the Western Cape in terms of the value of citrus exports in 2018 were the Eastern Cape at 16.2%, Limpopo at 8.6% and Gauteng both at 8.5%.

Figure 42: Value of citrus exports by provinces, 2009 - 2018

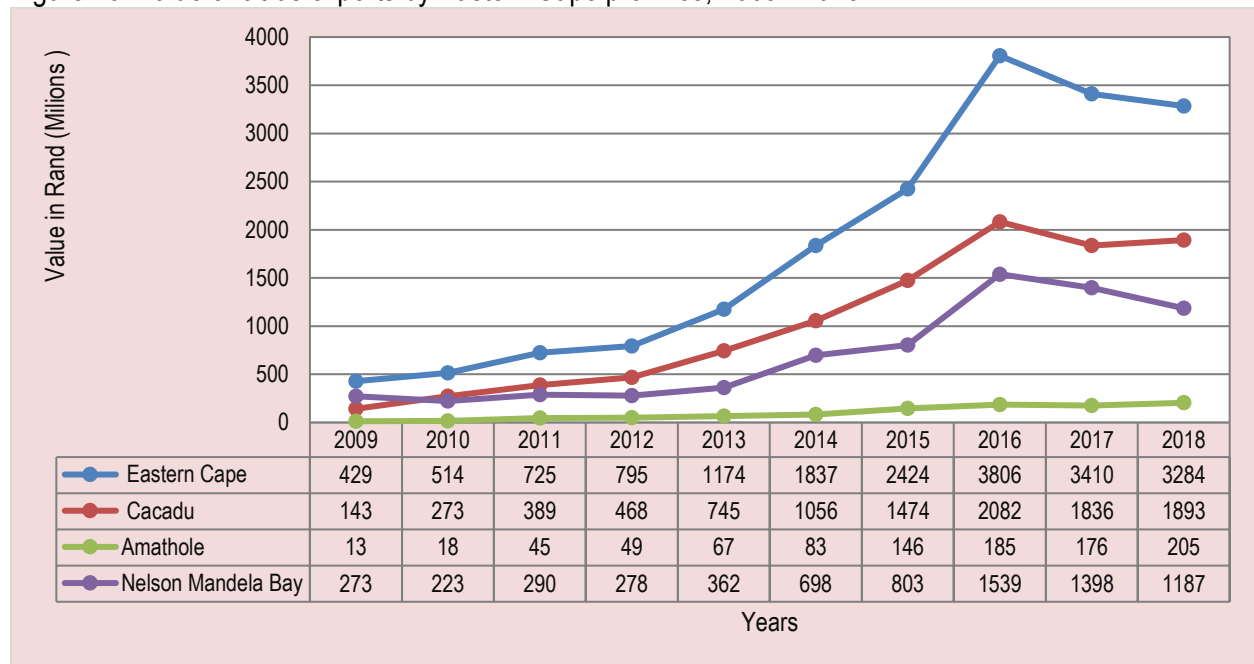


Source: Quantec Easydata

The following figures (Figures 43 - 51) show the value of citrus exports from the various districts in the nine provinces of South Africa.

Figure 43 illustrates values of citrus exports by the Eastern Cape Province. It is clear from Figure 43 that citrus exports from the Eastern Cape are mainly from the Nelson Mandela, Cacadu and Amathole municipalities. High export values for the leading municipalities were recorded in 2016 (for Amatole, Nelson Mandela and Cacadu). The use of the Port Elizabeth harbour as an exit point may have played a major role in both Nelson Mandela and Cacadu municipalities being leaders in the export of citrus from the Eastern Cape. A total of R3.2 billion worth of citrus products exports was recorded by the Eastern Cape in 2018. This was 4% lower than the value exported in 2017.

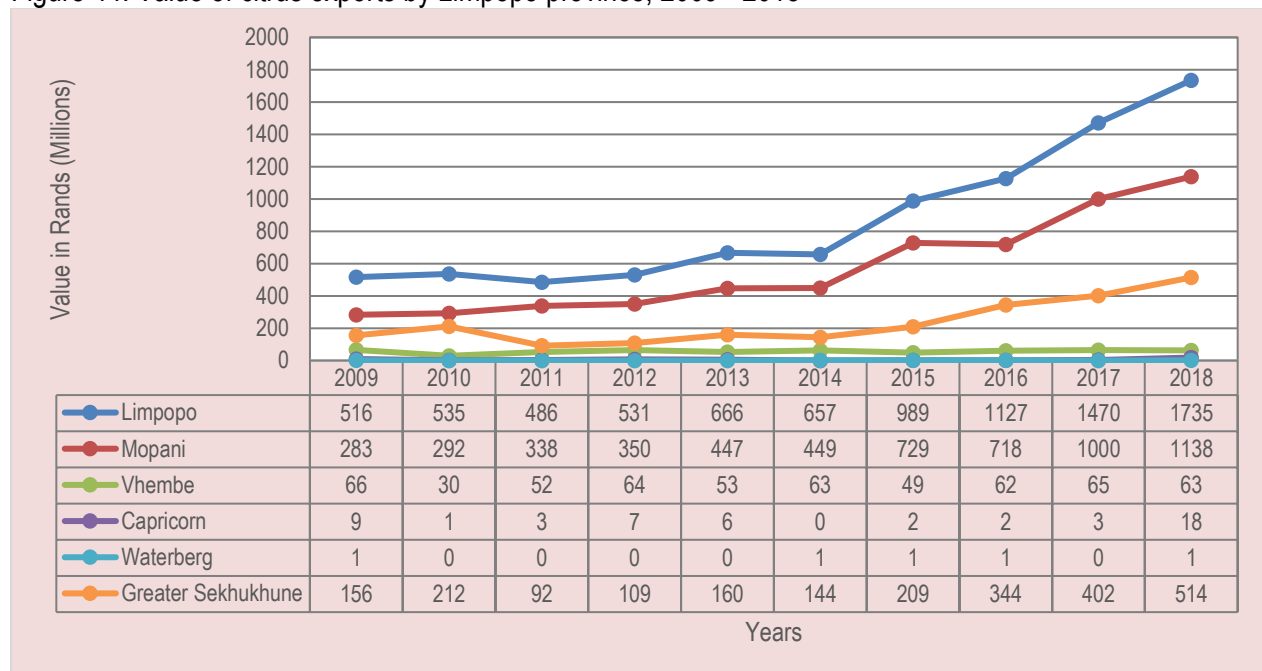
Figure 43: Value of citrus exports by Eastern Cape province, 2009 - 2018



Source: Quantec Easydata

Values of citrus exports by the Limpopo province are shown in Figure 44.

Figure 44: Value of citrus exports by Limpopo province, 2009 - 2018

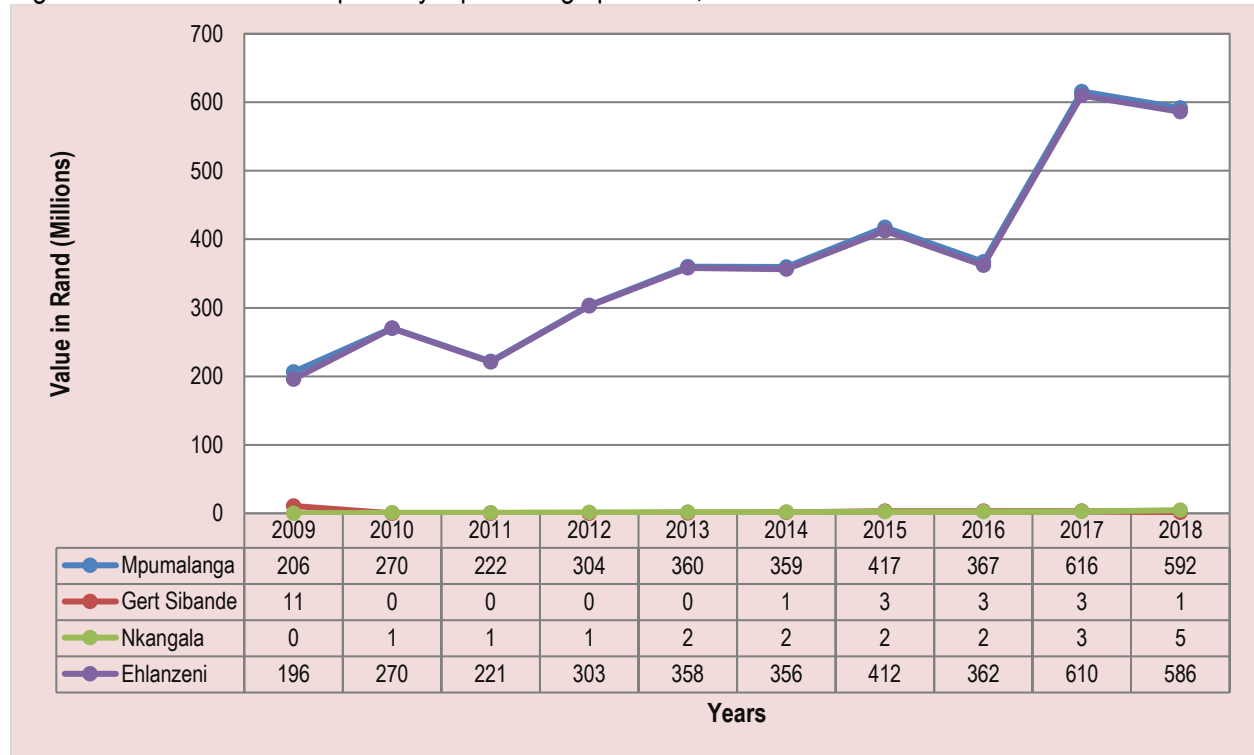


Source: Quantec Easydata

The major citrus exporting region in the Limpopo province is Mopani. The region recorded R1.1 billion worth of citrus product exports in 2018. Other important exporting regions are the Greater Sekhukhune and Vhembe municipalities. High export values of the leading municipalities were recorded in 2018 for both for Mopani

and Greater Sekhukhune. The total export value for citrus product exports from Limpopo increased from R1.4 billion in 2017 to R1.7 billion in 2018. Values of citrus exports from the Mpumalanga province are depicted in Figure 45.

Figure 45: Value of citrus exports by Mpumalanga province, 2009 - 2018

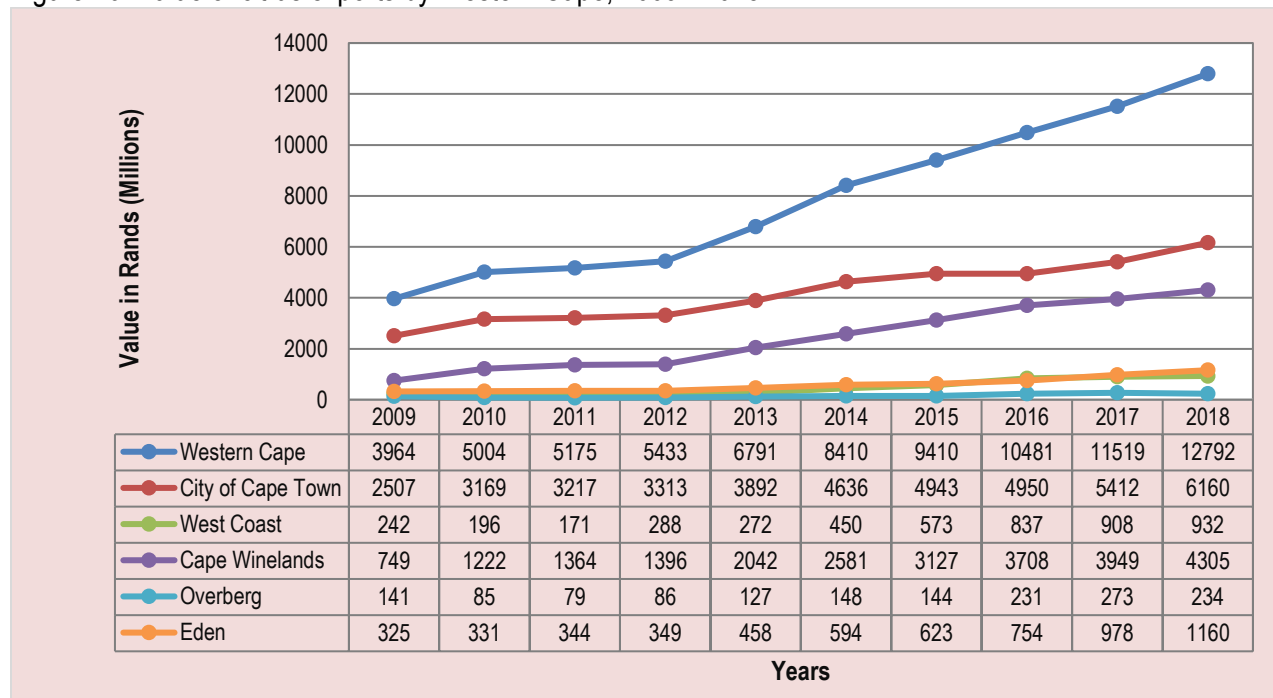


Source: Quantec Easydata

Citrus exports from Mpumalanga are mainly from Ehlanzeni and to a lesser extent Gert Sibande municipalities. High export values for the leading municipalities were recorded in 2017 (for Ehlanzeni) and in 2009 (for Gert Sibande municipality). A total value of R592 million worth of citrus products exports was recorded by Mpumalanga in 2018. This was a decrease from R610 million recorded in 2017.

Values of citrus exports from the Western Cape are illustrated in Figure 46. The major citrus exporting region in the Western Cape is the City of Cape Town. The city recorded citrus exports worth R6.1 billion in 2018. Other leading municipalities are the Cape Winelands and Eden which recorded citrus exports worth R4.3 billion and R1.1 billion respectively during 2018. The use of the Cape Town harbour as an exit point plays a major role in the City of Cape Town being a leader in the export of citrus from the Western Cape.

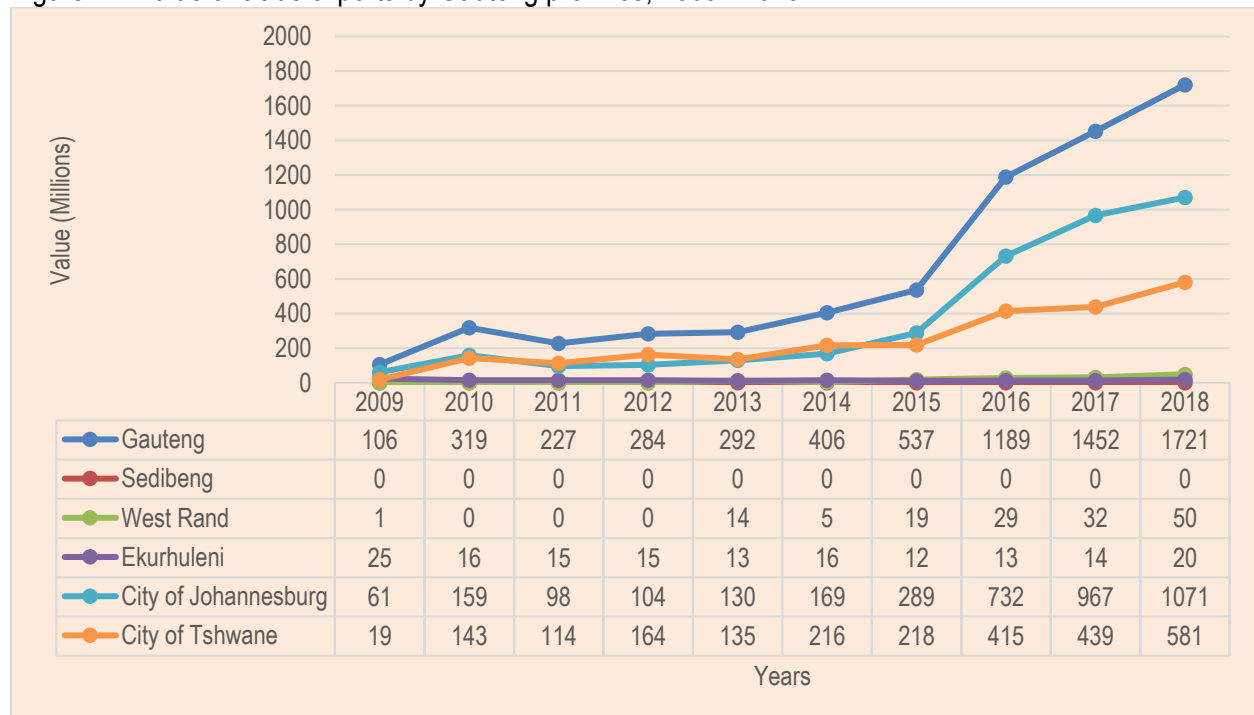
Figure 46: Value of citrus exports by Western Cape, 2009 - 2018



Source: Quantec Easydata

Citrus export values from the Gauteng province are presented in Figure 47.

Figure 47: Value of citrus exports by Gauteng province, 2009 - 2018

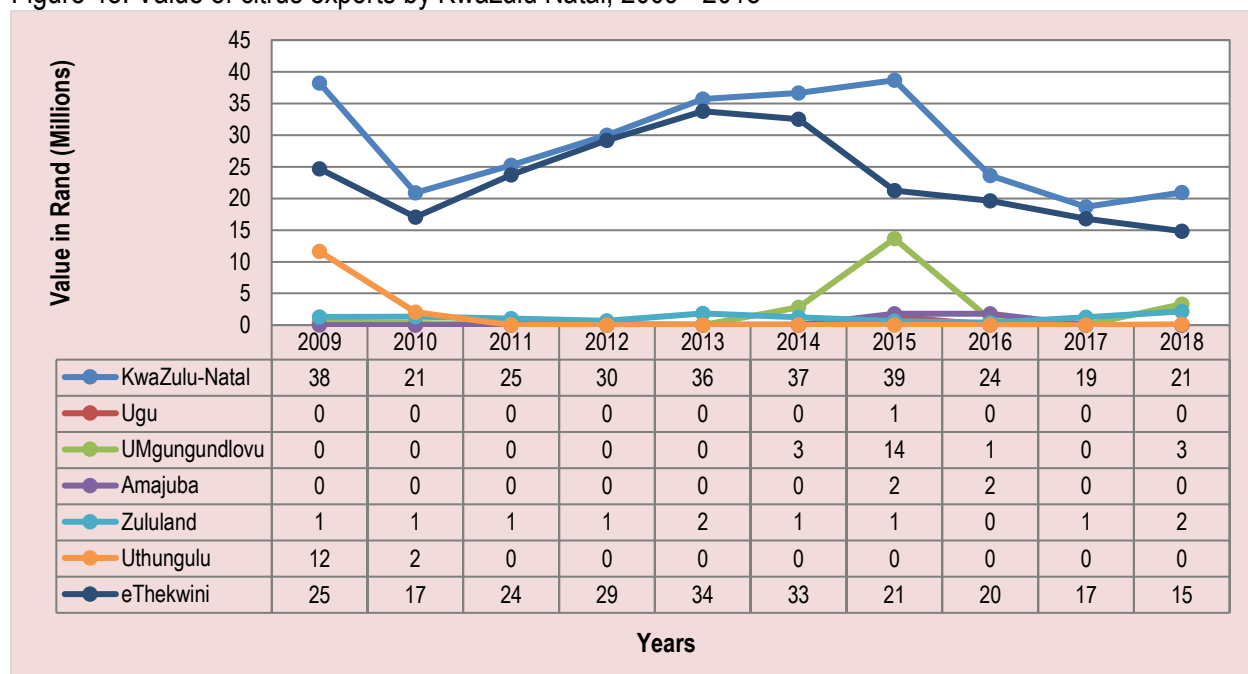


Source: Quantec Easydata

The total value of citrus products exports from Gauteng increased from R106 million in 2009 to R1.7 billion in 2018, an increase of 1 519% in ten years. The major citrus products exporting regions in Gauteng are the Cities of Tshwane and Johannesburg. The City of Tshwane (as well as City of Johannesburg) have been recording high values throughout the entire decade. The Ekurhuleni municipality and to lesser extent, the West Rand, are other exporters of citrus products in Gauteng over the past ten years.

Values of citrus exports from Kwazulu Natal are presented in Figure 48. The major exporter of citrus products in Kwazulu Natal is eThekweni municipality. The municipality recorded exports of citrus products worth R15 million in 2018. This was an increase from the R17 million recorded in 2017. Other important contributors towards the total value of citrus products exports in Kwazulu Natal during the past ten years are Zululand and Umgungundlovu. Generally, there were some fluctuations on the citrus export values for eThekweni municipality over the past decade. The use of the Durban harbour as an exit point plays a major role in eThekweni municipality being a leader in the export of citrus from Kwazulu Natal.

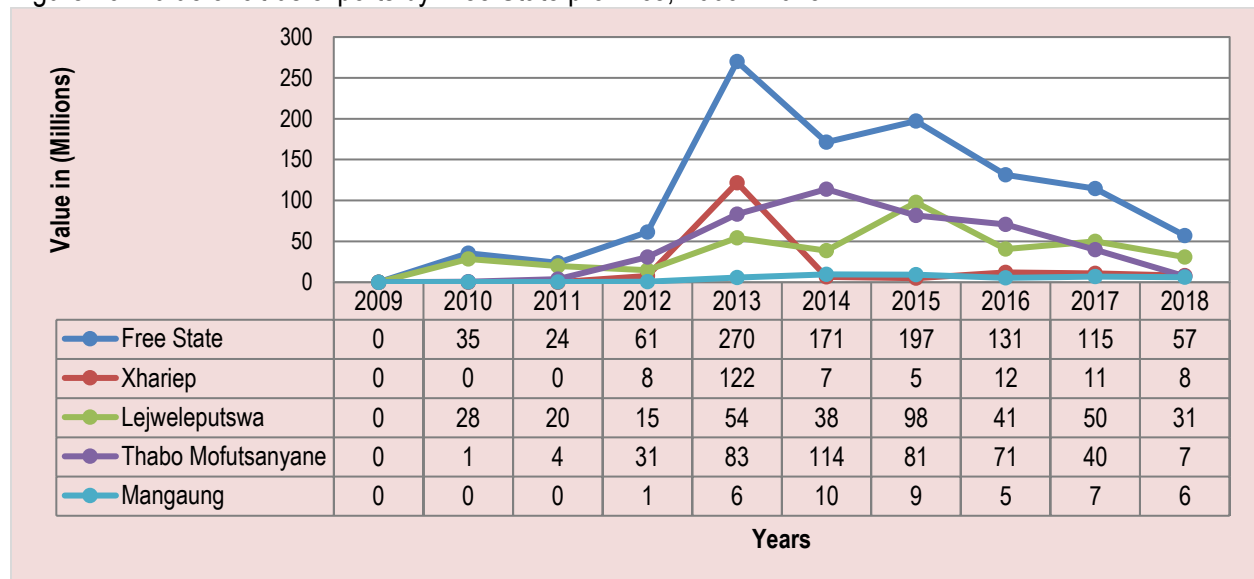
Figure 48: Value of citrus exports by Kwazulu Natal, 2009 - 2018



Source: Quantec Easydata

Values of citrus exports from the Free State province are shown in Figure 49. It is clear from Figure 49 that citrus exports from the Free State are mainly from Xhariep, Thabo Mofutsanyane and Mangaung municipalities. High export value for the leading municipality was recorded in 2013 when the Xhariep municipality exported citrus products worth R270 million. Citrus products worth R57 million were exported by the Free State province in 2018.

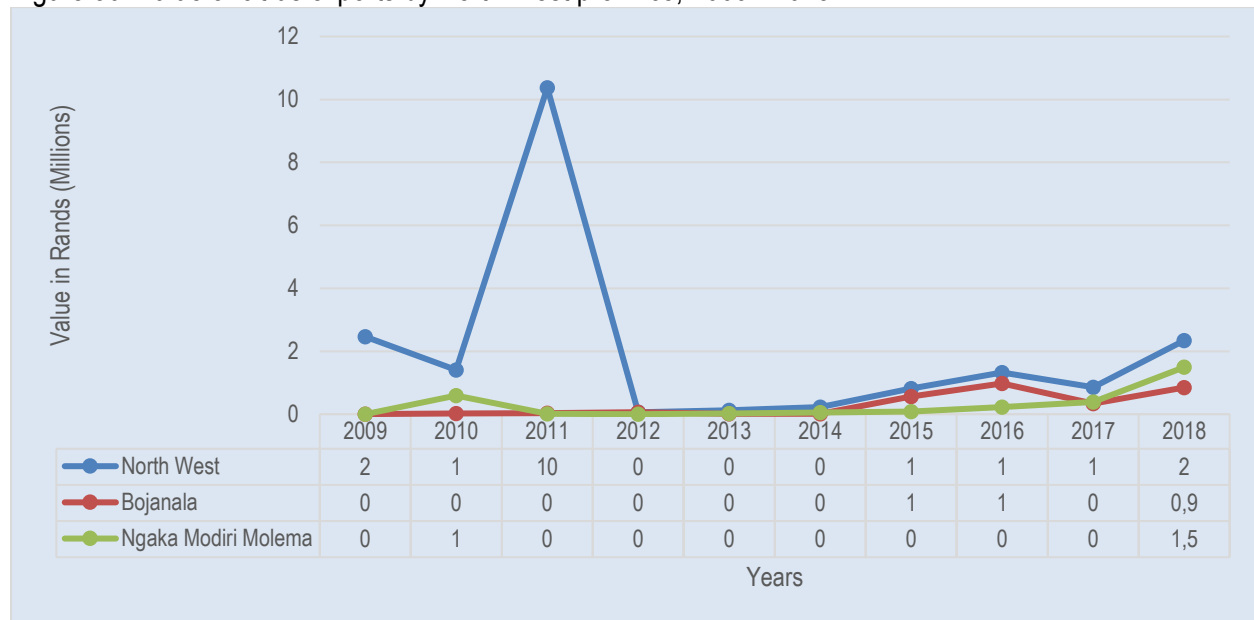
Figure 49: Value of citrus exports by Free State province, 2009 - 2018



Source: Quantec Easydata

Values of citrus exports from the North West province are shown in Figure 50.

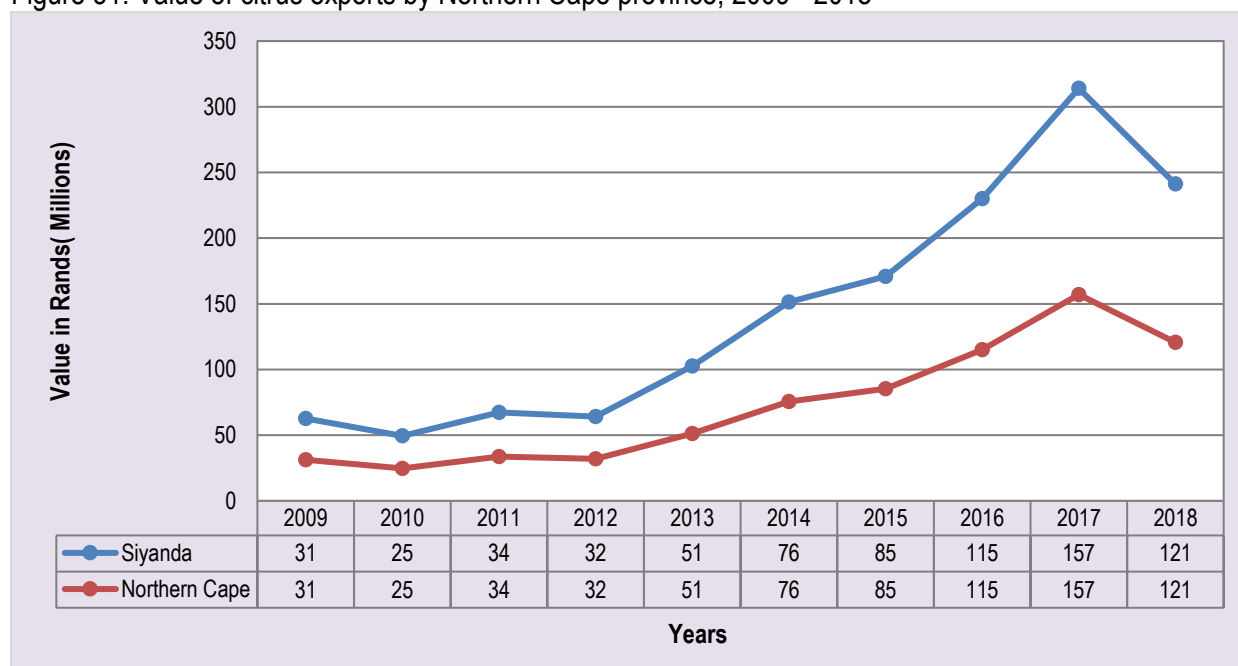
Figure 50: Value of citrus exports by North West province, 2009 - 2018



Source: Quantec Easydata

The major exporters of citrus products in the North West province are Dr Ruth Segomotsi Mompoti and Bojanala districts. Values of citrus exports from the Northern Cape province are shown in Figure 51.

Figure 51: Value of citrus exports by Northern Cape province, 2009 - 2018



Source: Quantec Easydata

It is clear from Figure 51 that citrus exports from the Northern Cape are mainly from Siyanda municipality. High export values for the Siyanda district were recorded in 2017. Citrus products exports worth R121 million were recorded in the Northern Cape in 2018. The value was down from the R157 million recorded in 2017.

2.11 Share analysis

Table 2 is an illustration of provincial shares towards national citrus exports. It shows that Western Cape together with Eastern Cape and Limpopo province (to a lesser extent) have commanded the greatest share of citrus exports for the past ten years. The three provinces accounted for 88% of the total value of citrus products exports in 2018. This is in spite of the fact that Limpopo, Eastern Cape and Mpumalanga provinces are the leading producers of citrus products. Limpopo, Gauteng and Mpumalanga provinces accounted for 8.6%, 8.5% and 2.9% respectively while Kwazulu Natal accounted for 0.1% in 2018. The Eastern Cape Province accounted for 16.2% of the total citrus products export value in 2018. As explained earlier, this means that the leading export provinces (Western Cape and Gauteng) derive their advantage from the fact that the registered exporters are based in their provinces and they also have exit points for citrus exports.

Table 2: Share of Provincial citrus exports to the total RSA citrus exports (%), 2009 – 2018

Years District	2009	2010	2011	2012	2013	2014	2015	2016	2017	2018
RSA	100.0	100.0	100.0	100.0	100.0	100.0	100.0	100.0	100.0	100.0
Western Cape	74.9	70.5	69.9	69.1	67.5	67.6	62.3	58.9	62.1	63.1
Eastern Cape	8.1	7.7	10.5	10.7	12.5	15.8	17.5	22.2	18.8	16.2
Northern Cape	0.6	0.4	0.5	0.4	0.5	0.5	0.5	0.7	1.0	0.6
Free State	0.0	0.0	0.0	0.0	0.1	0.1	0.1	0.1	0.0	0.0
Kwazulu-Natal	0.7	0.2	0.3	0.3	0.3	0.2	0.3	0.1	0.0	0.1

Years District	2009	2010	2011	2012	2013	2014	2015	2016	2017	2018
North West	0.0	0.1	0.2	0.1	0.0	0.0	0.1	0.0	0.0	0.0
Gauteng	2.0	8.0	6.1	6.4	5.9	5.4	7.2	9.1	8.0	8.5
Mpumalanga	3.9	4.4	3.4	4.4	3.8	2.6	3.2	2.2	2.4	2.9
Limpopo	9.8	8.8	9.1	8.6	9.4	7.8	9.0	6.8	7.5	8.6

Source: Calculated from Quantec Easydata

Tables 3 to 11 show shares of the various districts' citrus exports to the various provincial citrus exports.

Table 3 presents the shares of district citrus exports to the total Eastern Cape provincial citrus exports for the years 2009 to 2018. The leading citrus export district in the Eastern Cape is Cacadu and Nelson Mandela. The Cacadu district contributed 57.6% to total Eastern Cape citrus exports in 2018 while Nelson Mandela accounted for 36.1% of total exports. Nelson Mandela was followed by Amatole districts with 6.2% in 2018.

Table 3: Share of districts' citrus exports to total Eastern Cape provincial citrus exports (%), 2009 – 2018

Years District	2009	2010	2011	2012	2013	2014	2015	2016	2017	2018
Eastern Cape	100.0	100.0	100.0	100.0	100.0	100.0	100.0	100.0	100.0	100.0
Cacadu	33.3	30.9	24.3	26.7	20.9	19.3	19.3	15.6	53.2	57.6
Amathole	3.1	3.5	6.2	6.2	5.7	4.5	6.0	4.9	5.3	6.2
Nelson Mandela	63.6	65.6	69.4	67.3	73.5	76.2	74.7	79.5	41.4	36.1

Source: Calculated from Quantec Easydata

The shares of district citrus exports to the Mpumalanga provincial citrus exports are presented in Table 4. The leading contributor to provincial citrus exports in 2018 was the Ehlanzeni district (99%). The Gert Sibande contributed 0.8% of total exports in 2018.

Table 4: Share of districts' citrus exports to total Mpumalanga provincial citrus exports (%), 2009 - 2018

Years District	2009	2010	2011	2012	2013	2014	2015	2016	2017	2018
Mpumalanga	100.0	100.0	100.0	100.0	100.0	100.0	100.0	100.0	100	100.0
Gert Sibande	5.3	5.1	6.4	8.5	15.2	13.2	7.0	0.3	0	0.8
Ehlanzeni	95.2	94.9	94.0	91.5	84.8	86.8	93.0	96.5	100	99.0

Source: Calculated from Quantec Easydata

In the Limpopo province, the contributions of the various districts to total provincial citrus exports are distributed between two main districts (see Table 5). In 2018 the leading district was Mopani with 65.6% share. It was followed by Greater Sekhukhune and Vhembe at 29.7% and 3.6% respectively.

Table 5: Share of districts' citrus exports to total Limpopo provincial citrus exports (%), 2009 - 2018

Years District	2009	2010	2011	2012	2013	2014	2015	2016	2017	2018
Limpopo	100.0	100.0	100.0	100.0	100.0	100.0	100.0	100.0	100.0	100.0
Mopani	54.9	56.4	74.0	70.1	74.3	75.8	79.0	61.9	68.0	65.6
Vhembe	12.8	7.3	11.1	11.7	7.0	8.2	4.2	7.3	4.1	3.6
Capricorn	1.7	0.2	0.5	1.1	0.6	0.0	0.2	0.2	0.0	1.1
Waterberg	0.2	0.0	0.0	0.0	0.0	0.1	0.1	0.1	0.0	0.0
Sekhukhune	30.2	36.1	14.6	17.2	18.1	16.0	16.6	30.5	27	29.7

Source: Calculated from Quantec Easydata

Table 6 presents the shares of citrus exports to the Free State provincial citrus exports for years between 2009 and 2018. Majority of citrus products recorded in the Free State province were from the Lejweleputswa district. In 2018, Lejweleputswa district was the leading (54.2%) municipality. It was followed by Xhariep at 14%, which was followed by both Thabo Mofutsanyane and Mangaung municipalities who recorded 13% and 11% respectively (see Table 6).

Table 6: Share of districts' citrus exports to total Free State provincial citrus exports (%), 2009- 2018

Years District	2009	2010	2011	2012	2013	2014	2015	2016	2017	2018
Free State	0.0	0.0	0.0	100.0	100.0	100.0	100.0	100.0	100.0	100.0
Xhariep	0.0	0.0	0.0	100.0	100.0	11.1	8.3	12.8	9.1	14.1
Lejweleputswa	0.0	0.0	0.0	0.0	0.0	11.1	16.7	5.7	46.0	54.2
Thabo Mofutsanyane	0.0	0.0	0.0	0.0	0.0	67.7	67.7	75.7	36.2	13.0
Mangaung	0.0	0.0	0.0	0.0	0.0	11.1	8.3	5.7	8.7	11.0

Source: Calculated from Quantec Easydata

In the Northern Cape, all of the citrus exports recorded in 2018 were from the Siyanda district (100%).

Table 7: Share of districts' citrus exports to total Northern Cape provincial citrus exports (%), 2009 - 2018

Years District	2009	2010	2011	2012	2013	2014	2015	2016	2017	2018
Northern Cape	100.0	100.0	100.0	100.0	100.0	100.0	100.0	100.0	100.0	100.0
Siyanda	100.0	100.0	100.0	100.0	100.0	100.0	100.0	100.0	100.0	100.0

Source: Calculated from Quantec Easydata

During 2018, the major citrus exporting district in the North West province was Ngaka Modiri Molema. This district recorded citrus exports worth 63.6% in 2018, followed by the Bojanala district which recorded 36.3% worth of exports in the same period. (see Table 8).

Table 8: Share of districts' citrus exports to total North West provincial citrus exports (%), 2009 - 2018

Years District	2009	2010	2011	2012	2013	2014	2015	2016	2017	2018
North West	100.0	100.0	100.0	100.0	100.0	100.0	100.0	100.0	100.0	100.0

Bojanala	0.0	0.0	0.0	0.0	0.0	0.0	11.1	20.2	33	36.3
Dr Ruth Mompoti	100.0	50.0	100.0	100.0	100.0	100.0	88.9	79.8	0.0	0.0
Ngaka Modiri Molema	0.0	50.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	63.6

Source: Calculated from Quantec Easydata

The shares of district citrus exports to the Kwazulu Natal provincial citrus exports are presented in Table 9. In 2018, the majority of citrus exports in Kwazulu Natal were from the eThekweni district (70.9%). eThekweni was followed by Umgungundlovu district at 15.8%.

Table 9: Share of districts' citrus exports to total Kwazulu Natal provincial citrus exports (%), 2009 - 2018

Years District	2009	2010	2011	2012	2013	2014	2015	2016	2017	2018
Kwazulu-Natal	100.0	100.0	100.0	100.0	100.0	100.0	100.0	100.0	100.0	100.0
Ugu	0.0	0.0	0.0	0.0	0.0	0.0	2.5	0.7	0.5	0.0
Umgungundlovu	1.2	2.0	0.0	0.0	0.0	11.1	37.5	3.6	0.7	15.8
Amajuba	0.0	0.0	0.0	0.0	0.0	0.0	5.0	7.5	0.0	0.0
Zululand	2.6	6.3	0.0	0.0	0.0	0.0	2.5	1.6	7.0	10.3
Uthungulu	31.6	12.5	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.7
eThekweni	65.8	75.0	100.0	100.0	100.0	88.9	52.5	86.6	91	70.9

Source: Calculated from Quantec Easydata

In the Gauteng province the contributions of the various districts to total provincial citrus exports are distributed between three main districts (see Table 10). In 2018 the leading district was the City of Johannesburg with 62.2% share. It was followed by the City of Tshwane and West Rand at 33.7% and 2.9%, respectively.

Table 10: Share of districts' citrus exports to total Gauteng provincial citrus exports (%), 2007 - 2016

Years District	2009	2010	2011	2012	2013	2014	2015	2016	2017	2018
Gauteng	100.0	100.0	100.0	100.0	100.0	100.0	100.0	100.0	100.0	100.0
West Rand	0.9	0.0	1.7	2.1	2.7	1.1	2.0	2.0	0.0	2.9
Ekurhuleni	23.6	2.6	3.1	2.7	1.6	2.2	1.3	0.9	2	1.2
City of Johannesburg	57.6	39.9	29.5	28.6	33.6	28.3	18.6	46.5	1	62.2
City of Tshwane	17.9	57.6	65.8	66.5	62.1	68.5	78.2	50.6	67	33.7

Source: Calculated from Quantec Easydata

The shares of district citrus exports to the total Western Cape provincial citrus exports are presented in Table 11. The leading citrus export districts in the Western Cape in 2018 were the City of Cape Town (48.2%) and the Cape Winelands (33.7%). The Eden, West Coast and Overberg districts followed at 9.1%, 7.2% and 1.8% respectively.

Table 11: Share of districts' citrus exports to total Western Cape provincial citrus exports (%), 2009 - 2018

Years District	2009	2010	2011	2012	2013	2014	2015	2016	2017	2018
Western Cape	100.0	100.0	100.0	100.0	100.0	100.0	100.0	100.0	100.0	100.0
City of Cape Town	63.2	66.5	65.5	61.9	58.8	55.0	55.7	48.0	46	48.2
West Coast	6.1	4.2	3.5	5.6	5.3	5.7	6.6	8.3	8	7.2
Cape Winelands	18.9	20.2	22.3	23.8	27.3	28.7	28.3	33.2	35	33.7
Overberg	3.6	1.5	1.3	1.5	1.9	2.2	1.6	2.1	2	1.8
Eden	8.2	7.6	7.4	7.2	7.7	8.4	7.8	8.4	9	9.1

Source: Calculated from Quantec Easydata

2.12 Imports

South Africa is a net exporter of all citrus products. As will be illustrated in the subsections that follow, South Africa annually imports relatively little citrus products from the rest of the world.

2.12.1 Orange

During 2018, South Africa imported a total volume of 3 672 tons of oranges worth US\$1 301 thousands. Of the total tonnages imported in 2018, 62% (2 270 tons) came from Swaziland. South Africa's imports of oranges in 2018 represented 0.01% of world orange imports and its ranking in the world was number 107.

2.12.2 Grapefruit

A total volume of 2 703 tons with a value of US\$628 thousands was imported by South Africa in 2018. Eswatini contributed 77% (2 083 tons) to total South African grapefruit imports in 2018. Another major source of South Africa's grapefruit imports in 2018 was Spain. The country accounted for 14% (374 tons) to total South African imports of grapefruits during the same year. During 2018 South Africa's imports of grapefruits represented 0.1% of world grapefruit imports and its ranking in the world was number 49.

2.12.3 Lemons and limes

South Africa imported a total volume of 1 193 tons of lemons and limes worth US\$974 thousands in 2018. Of the total imported volume, 837 tons (70%) came from SACU member states; 142 tons (12%) came from Spain. In 2018, South Africa's imports of lemons and limes represented 0.0% of world imports and its ranking in the world was 85.

2.12.4 Soft citrus

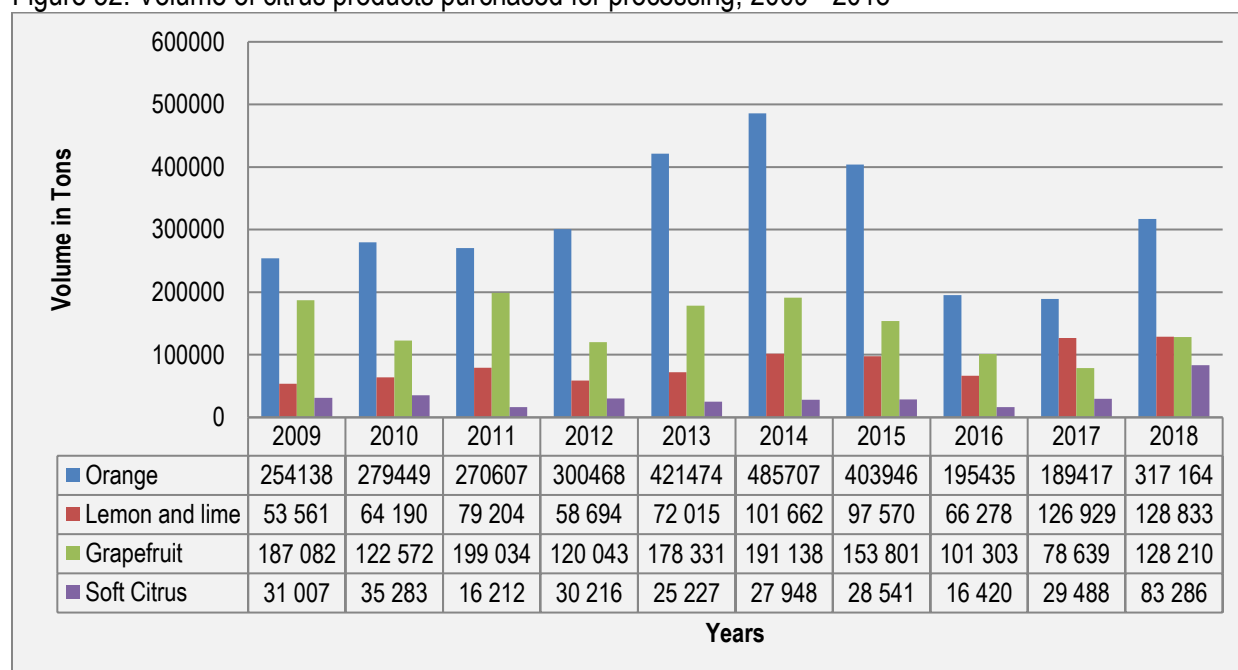
During 2018, South Africa imported a total volume of 888 tons of soft citrus valued at US\$1 200 thousands. South Africa's imports from Spain took up 42% (375 tons) of the total imports to the country. Israel contributed

39% (346 tons) towards South Africa's total soft citrus imports in 2018. South Africa's imports of soft citrus represented 0.01% of world soft citrus imports and its ranking in the world was number 80.

2.13 Processing

The volumes of citrus available for processing in South Africa fluctuate yearly, depending on the crop size and the percentages of exportable fruit. In 2018, the processing industries absorbed approximately 24% (657 493 tons) of all citrus production (2 746 175 tons). That represents direct purchases from growers and quantities of citrus purchased from the NFPMs. The quantities of citrus purchased for processing are presented in Figure 52.

Figure 52: Volume of citrus products purchased for processing, 2009 - 2018



Source: CGA, 2019

It is clear from Figure 52 that oranges constitute the majority of citrus purchased for processing. In terms of the total citrus purchased for processing in 2018, oranges constituted 48%, followed by lemons and limes and grapefruit at 20% each. Most citrus products processed are converted into juice and can be presented in different forms such as frozen, concentrate and freshly-squeezed juice.

2.13.1 Orange

Oranges are commonly peeled and eaten fresh, or squeezed for juice. It has a thick bitter rind that is usually discarded, but can be processed into animal feed by removing water, using pressure and heat. It is also used in certain recipes as flavouring or a garnish. The outer most layer of the rind is grated or thinly veneered with a tool called a zester, to produce orange zest, popular in cooking because it has a flavour similar to the fleshy inner part of the orange. The white part of the rind called the pericarp with the pith, is a source of pectin and has nearly the same amount of vitamin C as the flesh. Products made from the orange include:

- Orange juice,

- Sweet orange oil, a by-product of the juice industry is produced by pressing the peel.
- Orange blossom. The petals of orange blossoms can be made into delicately citrus scented version of rosewater. Orange blossom water is a common part of the Middle Eastern cuisine. Fallen blossoms can be dried and be used to make tea.
- Orange blossom honey or citrus honey is produced by putting beehives in the citrus groves during bloom, which also pollinates seeded citrus varieties. Orange blossom honey is highly priced, and tastes much like orange.
- Marmalade. All parts of the orange are used to make marmalade: the pith and the pips are separated and typically placed in a muslin bag where they are boiled in the juice (and sliced peel) to extract their pectin, aiding the setting process.
- Orange peel is used by gardeners as a slug repellent.

2.13.2 Lemon

Slices of lemon are served as a garnish on fish or meat or with iced or hot tea, to be squeezed for the flavourful juice. Lemon soup is made by adding slices of lemon to dry bread roll that has been sautéed in shortening until soft and then sieved. Sugar and a cup of wine are added and the mixture brought to a boil, and then served.

Lemon juice, fresh, canned, concentrated and frozen, or dehydrated and powdered, is primarily used for lemonade, in carbonated beverages, or other drinks. It is also used for making pies and tarts, as a flavouring for cakes, cookies, cake icings, puddings, sherbet, confectionery, preserves and pharmaceutical products. A few drops of lemon juice, added to cream before whipping, gives stability to the whipped cream.

Lemon peel can be candied at home and is preserved in brine and supplied to manufacturers of confectionery and baked goods. It is the source of lemon oil, pectin and citric acid. Lemon oil, often with terpenes and sesquiterpenes removed, is added to frozen or otherwise processed lemon juice to enrich the flavour. It is much employed as a flavouring for hard candies.

2.13.3 Lime

Lime fruit particularly their juices are used in beverages, such as limeade (akin to lemonade). Alcoholic beverages prepared with lime include cocktails such as gin and tonic, margarita and Cuba libre, as well as many drinks that may be garnished with thins slice of the fruit or corkscrew strip of the peel (twist).

2.13.4 Grapefruit

Grapefruit is customarily a breakfast fruit, chilled, cut in half, the sections loosened from the peel and each other by a special curved knife, and the pulp spooned from the "half-shell". Some consumers sweeten it with white or brown sugar, or a bit of honey. Some add cinnamon, nutmeg or cloves. As an appetizer before dinner, grapefruit halves may be similarly sweetened, lightly broiled, and served hot, often topped with a maraschino cherry. The sections are commonly used in fruit cups or fruit salads, in gelatines or puddings and tarts. They are commercially canned in syrup. In countries like Australia, grapefruit is commercially processed as marmalade. It may also be made into jelly. The juice is marketed as a beverage fresh, canned, or dehydrated as powder, or concentrated and frozen. It can be made into excellent vinegar or carefully fermented as wine.

Grapefruit peel is candied and is an important source of pectin for the preservation of other fruits. The peel oil, expressed or distilled, is commonly employed in soft-drink flavouring, after the removal of 50% of the monoterpenes. The main ingredient in the outer peel oil is nookatone. Extracted nookatone, added to grapefruit juice powder, enhances the flavour of the reconstituted juice. Naringin, extracted from the inner peel (albedo), is used as a bitter in "tonic" beverages, bitter chocolate, ice cream and ices. It is chemically converted into a sweetener about 1,500 times sweeter than sugar. After the extraction of naringin, the albedo can be reprocessed to recover pectin.

Grapefruit seed oil is dark and exceedingly bitter but, bleached and refined, it is pale-yellow, blend, much like olive oil in flavour, and can be used similarly. Because it is an unsaturated fat, its production has greatly increased since 1960.

3. MARKET INTELLIGENCE

3.1 Competitiveness of South African citrus products

Competitiveness is described as an industry's capacity to create superior value for its customers and improved profits for the stakeholders in the value chain. The driving force in sustaining a competitive position is productivity that is output efficiency in relation to specific inputs with regard to human, capital and natural resources.

In 2018, South African orange exports represented 14.4% of world exports and its ranking in the world exports was number 2. South African lemon and lime exports represented 7.4% of world exports and its ranking on the world exports was number 5. South African grapefruit exports represented 19.4% of world exports and its ranking on the world exports was number 2. South African naartjie exports represented 5.6% of world exports and its ranking on the world exports was number 5.

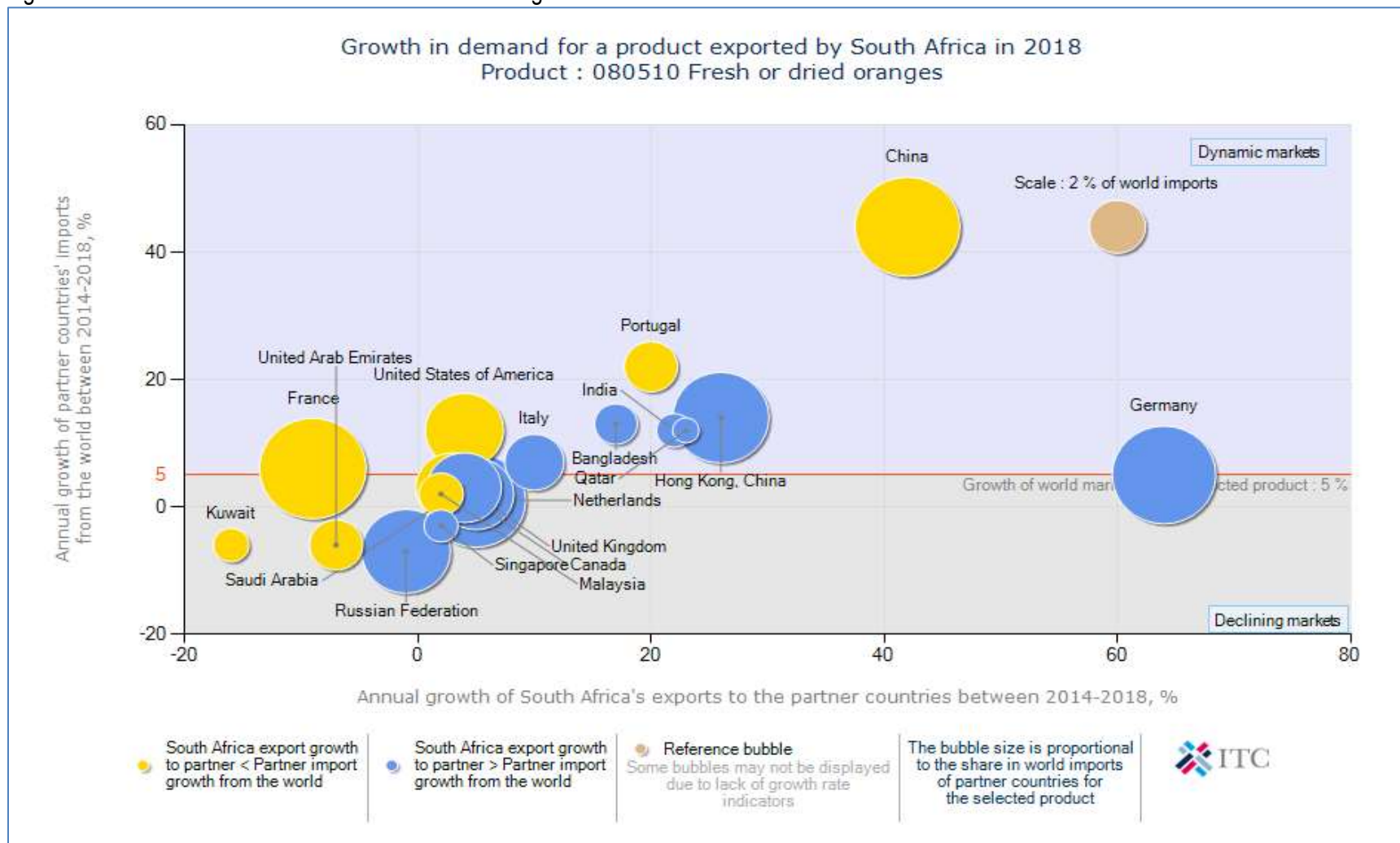
As depicted on Figure 53 below, South African orange exports are growing faster than the world imports in, Hong Kong, China, Bangladesh, Qatar, India and Italian markets. South Africa's performance in those markets can be regarded as gains in dynamic markets.

South African orange exports have declined faster than world imports in the Kuwait and United Arab Emirates markets. South Africa's performance into those markets can be regarded as losses in declining markets.

South African orange exports are declining while the world imports are declining in the Russian Federation markets. South Africa's performance in those markets can be regarded as gains in declining and should be viewed as achievement in adversity.

South African orange exports are declining while the world imports are growing in China and Portugal markets. These markets are dynamic and South African performance should be regarded as an underachievement.

Figure 53: Growth in demand for the South African oranges in 2018



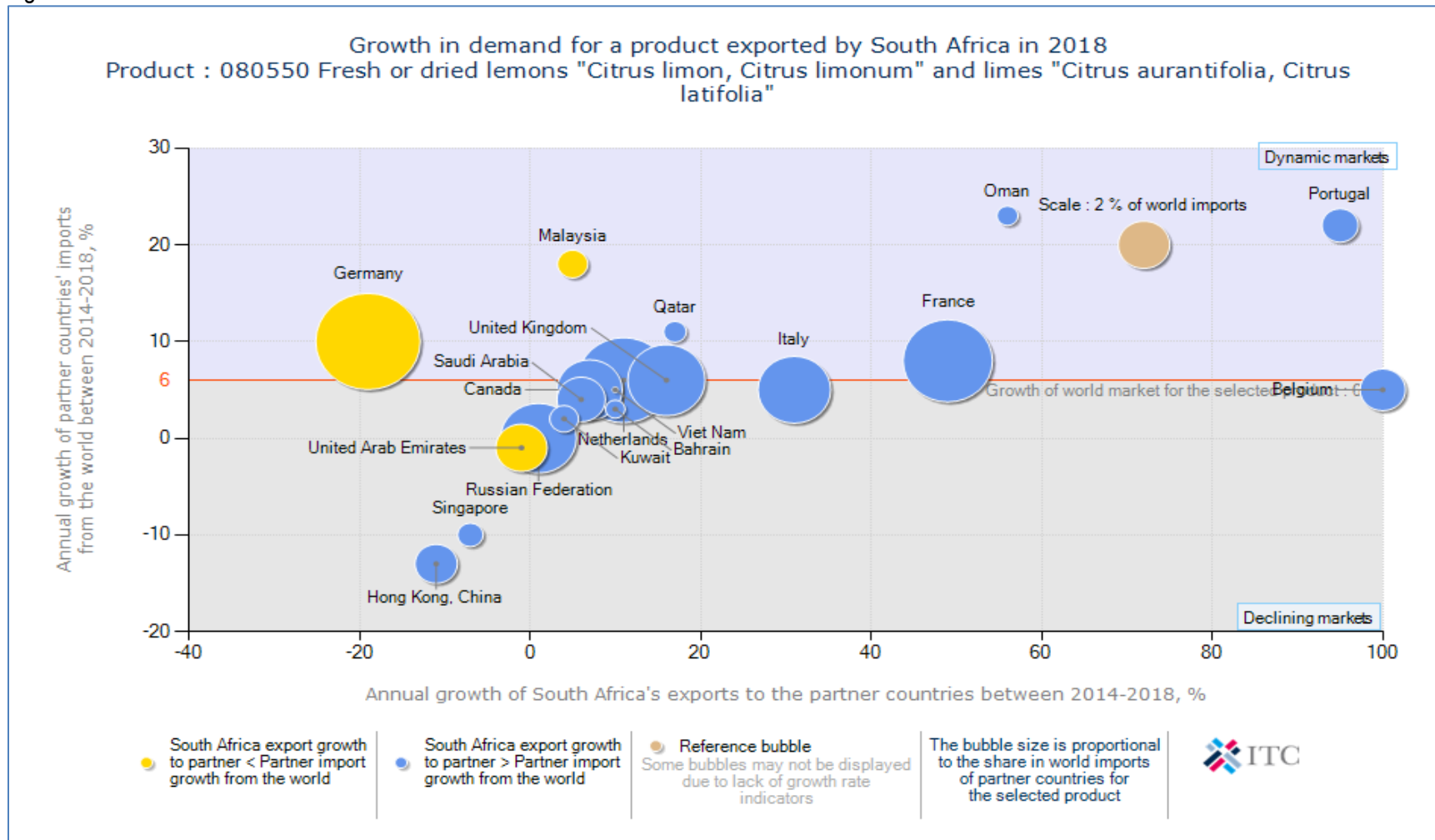
Source: TradeMap, ITC

As depicted on Figure 54 below, South African lemon and lime exports are growing faster than the world imports in Oman, Portugal, France, Italy, Belgium, and Qatar markets. South Africa's performance in those markets can be regarded as gains in dynamic markets.

South African lemon and lime exports are growing while the world imports are declining in Hong Kong, China and Singapore markets. South Africa's performance in those markets can be regarded as gains in declining markets and should be viewed as achievement in adversity.

South African lemon and lime exports are declining while the world imports are growing in the Germany, and Malaysia markets. These markets are dynamic and South African performance should be regarded as an underachievement.

Figure 54: Growth in demand for the South African lemon and limes in 2018



Source: TradeMap, ITC

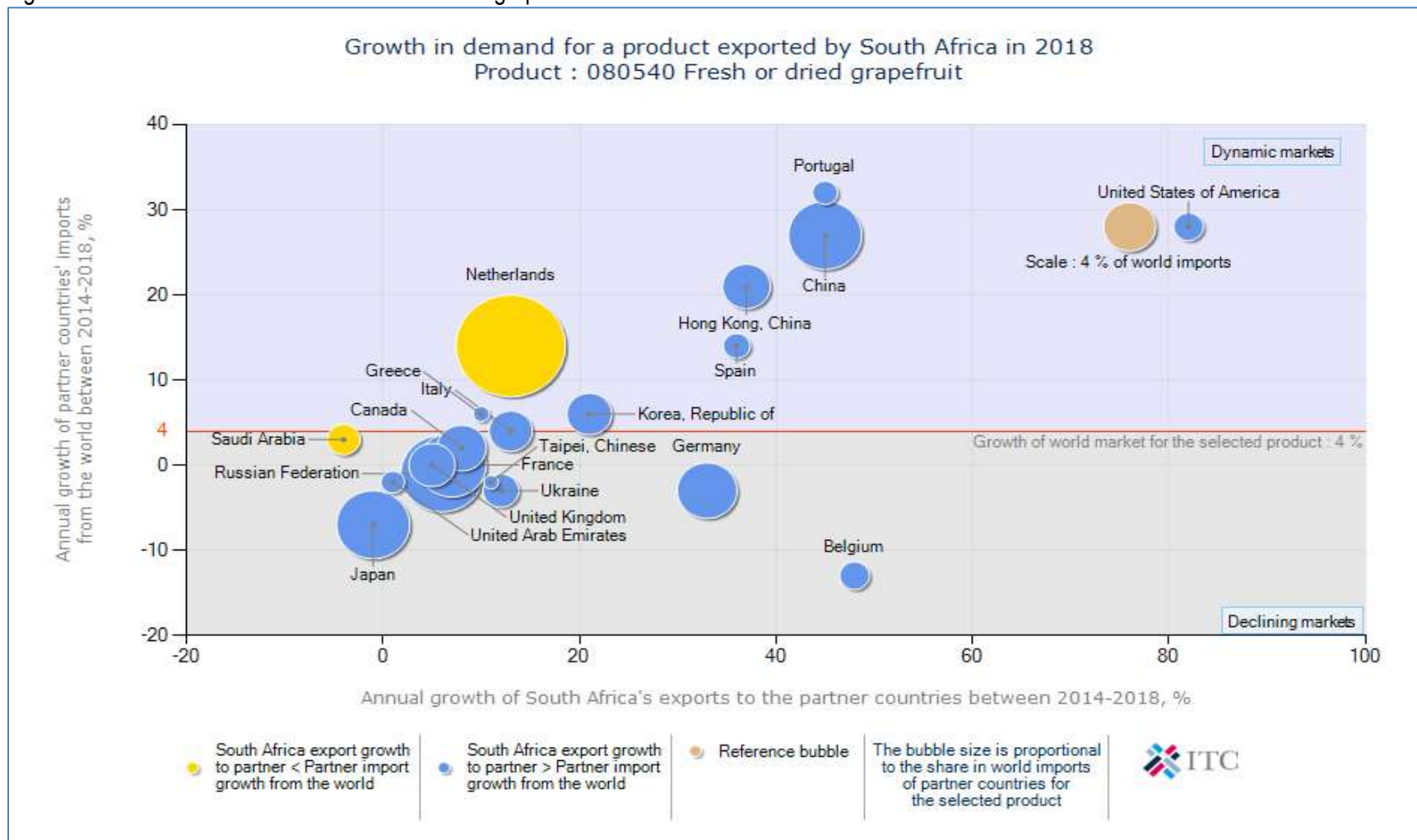
As depicted in Figure 55 below, South African grapefruit exports are growing faster than the world imports in Spain, China, Hong kong, China, Portugal, Republic of Korea and United States of America. South Africa's performance in those markets can be regarded as gains in dynamic markets.

South Africa's grapefruit exports have declined faster than world imports in Netherlands markets. These markets are dynamic and South Africa's performance in these markets should be regarded as an underachievement.

South African lemon and lime exports are growing while the world imports are declining, Japan and Belgium markets. South Africa's performance in those markets can be regarded as gains in declining markets and should be viewed as achievement in adversity.

South African orange exports have declined faster than world imports in the Saudi Arabia markets. South Africa's performance into those markets can be regarded as losses in declining markets.

Figure 55: Growth in demand for the South African grapefruit in 2018



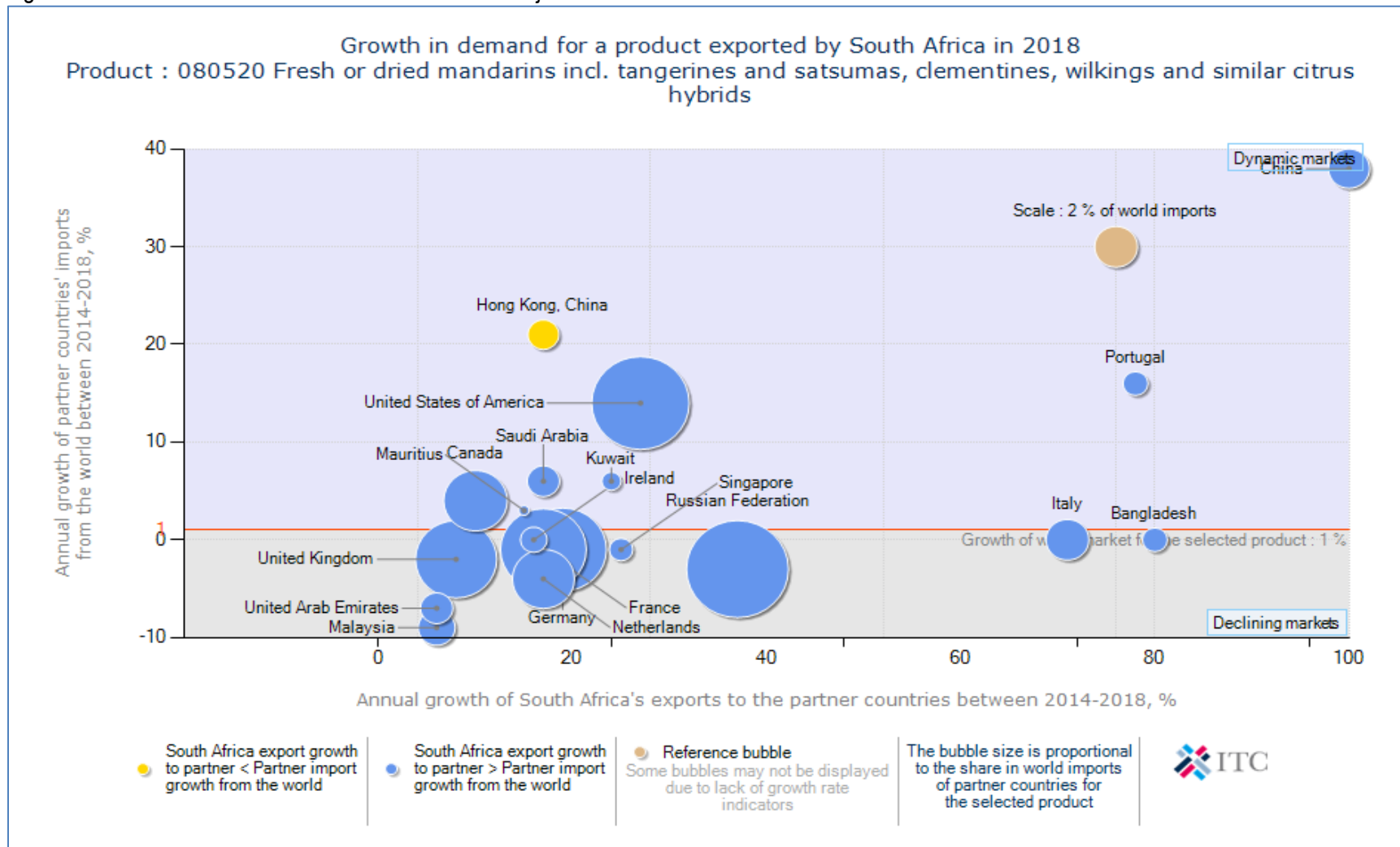
Source: TradeMap, ITC

As depicted on Figure 56 below, South African naartjie exports are growing faster than the world imports in China, United State of America, Portugal, Kuwait, Saudi Arabia, Canada and Mauritius markets. South Africa's performance in those markets can be regarded as gains in dynamic markets.

South African naartjie exports are growing while the world imports are declining in United Arab Emirates, Malaysia and Netherlands markets. South Africa's performance in those markets can be regarded as gains in declining markets and should be viewed as achievement in adversity.

South African naartjie exports are declining while the world imports are growing in Hong Kong, China markets. These markets are dynamic and South Africa's performance should be regarded as an underachievement.

Figure 56: Growth in demand for the South African naartjies in 2018



Source: TradeMap, ITC

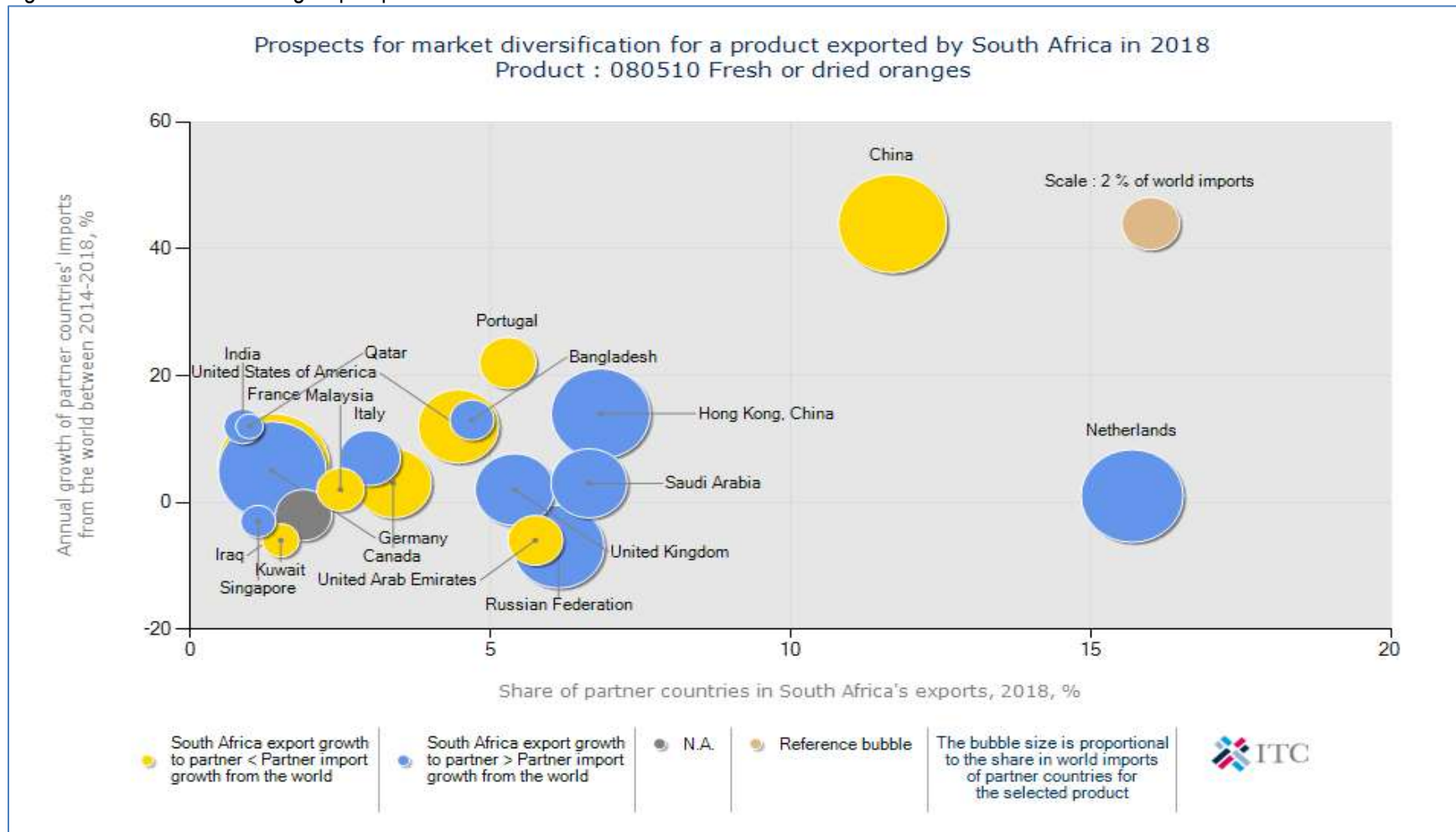
Figure 57 below illustrates prospects for market diversification by South African exporters of oranges in 2018. Netherlands, China, United Arab Emirates, and Hong Kong, China hold a bigger market share of South African orange exports.

In terms of market size, France was the largest orange importer in 2018 with just over US\$459 million (489 302 tons) worth of orange imports, or roughly 7.7% of the world orange market. Second was the China with just over US\$436 million (390 109 tons) worth of orange imports, or roughly 7.3% market share followed by Germany with just over US\$431 million (469 295 tons) worth of orange imports, or roughly 7.2% market share.

Whilst three countries dominate world orange imports, it is interesting to note that countries like Vietnam, together with Myanmar and Denmark have experienced higher annual growth rates in terms of orange imports from 2014 - 2018. In terms of growth in value, Myanmar experienced an annual growth rate of 89%. Second was Denmark with 45% annual growth rate followed by Slovakia at 29%. It is important to note that growth by all these mentioned countries has been off a relatively low base These countries represent possible lucrative markets for South African orange producers.

It is also important to note that orange imports from the world to countries such as the Russia, Italy and Belgium, Germany and United Kingdom have declined from 2014 – 2018 and as a result those countries recorded negative growth rates in orange imports.

Figure 57: South African orange's prospects for market diversification in 2018



Source: TradeMap, ITC

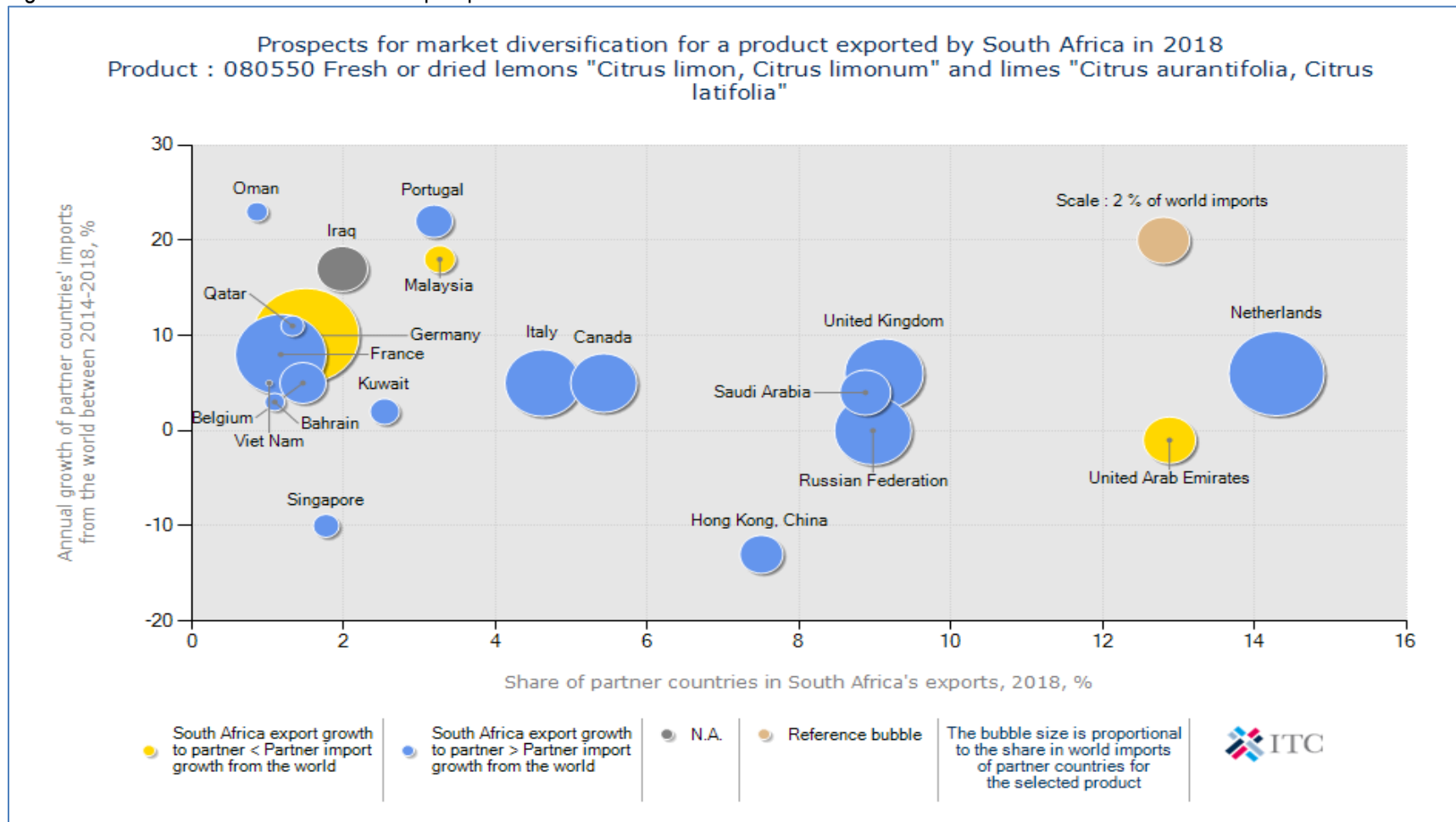
Figure 58 below illustrates prospects for market diversification by South African exporters of lemon and limes in 2018. Netherlands, United Kingdom and United Arab Emirates, and Hong Kong, China hold a bigger market share of South African lemon and lime exports.

In terms of market size, USA was the largest lemon and lime importer in 2018 with just over US\$651 million (780 183 tons) worth of lemon and lime imports, or roughly 16.2% of the world lemon and lime market. Second was Germany with just over US\$371 million (196 572 tons) worth of lemon and lime imports, or roughly 9.2% market share followed by Netherlands with just over US\$292 million worth of lemon and lime imports, or roughly 7.3% market share.

Whilst three countries dominate world lemon and lime imports, it is interesting to note that countries like Belgium, together with Switzerland and Spain have experienced higher annual growth rate in terms of lemon and lime imports from 2014 – 2018. Belgium experienced an annual growth rate of 4 586%. Second was Switzerland at 4 484% annual growth rate followed by Spain at 1 890%. These countries represent possible lucrative markets for South African lemon and lime producers.

It is also important to note from Figure 58 that lemon and lime imports from the world to countries such as Vietnam and Kuwait have declined from 2014 – 2018 and as a result those countries recorded negative growth rates in lemon and lime imports.

Figure 58: South African lemon and limes' prospects for market diversification in 2018



Source: TradeMap, ITC

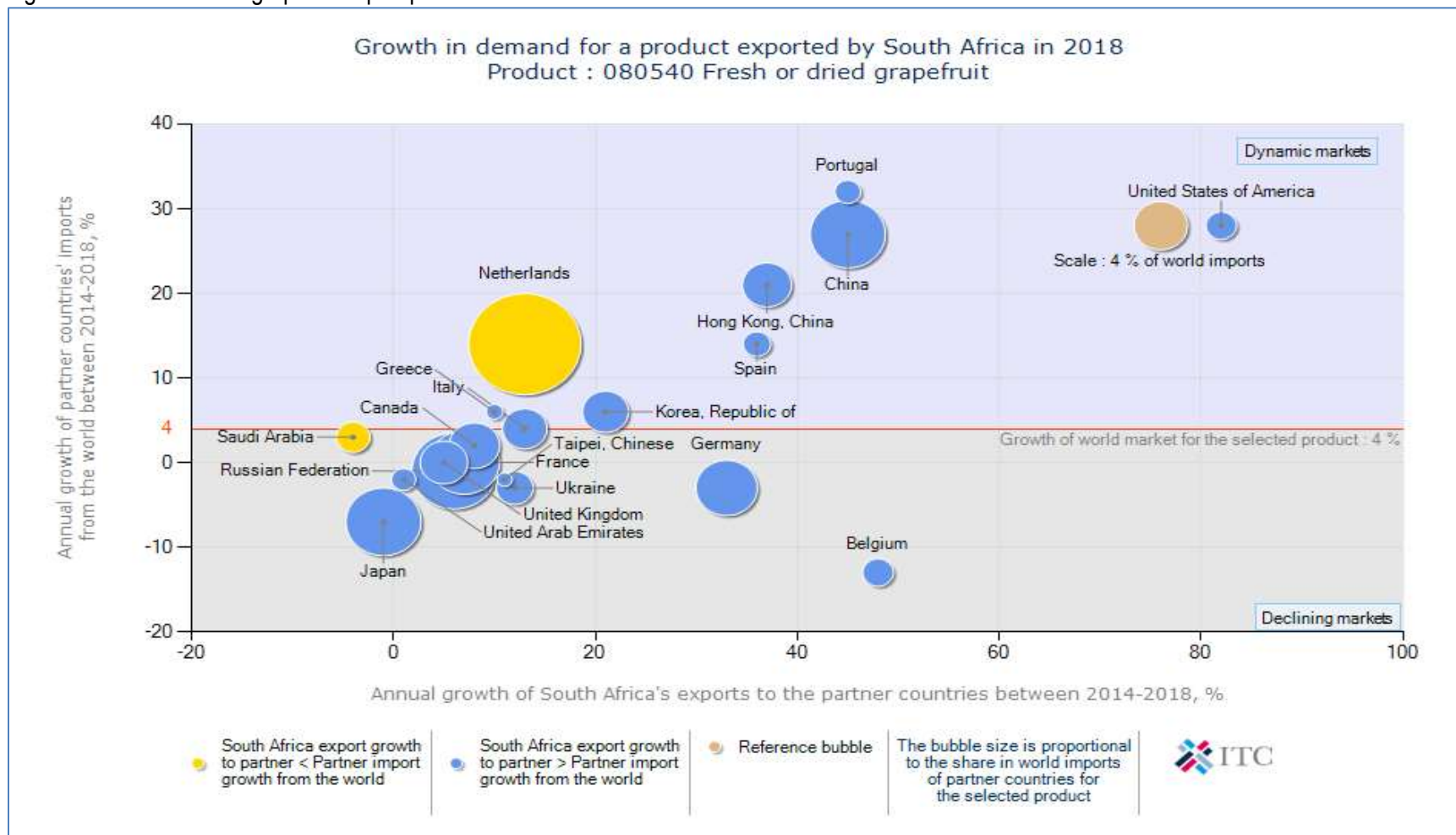
Figure 59 below illustrates prospects for market diversification by South African exporters of grapefruit in 2018. Netherlands, Japan, Russia and China hold a bigger market share of South African grapefruit exports.

In terms of market size, the Netherlands was the largest grapefruit importer in 2018 with just over US\$198 million (201 769 tons) worth of grapefruit imports, or roughly 18.3% of the world grapefruit market. Second was Russia with just over US\$112 million (147 501 tons) worth of grapefruit imports, or roughly 10.3% market share followed by China with just over US\$87 million (79 441 tons) worth of grapefruit imports, or roughly 8% market share.

Whilst three countries dominate world grapefruit imports, it is interesting to note that countries like Bahamas, together with Kuwait and Iraq have experienced higher annual growth rate in terms of grapefruit imports from 2014– 2018. Bahamas experienced an annual growth rate of 114%. Second was Kuwait with 109% annual growth rate followed by Iraq at 89%. It is important to note that growth by all these mentioned countries has been from a relatively low base. These countries represent possible lucrative markets for South African grapefruit producers.

It is also important to note that grapefruit imports from the world to countries such as the Argentina and Slovakia have declined from 2014 – 2018 and as a result those countries recorded negative growth rates in grapefruit imports.

Figure 59: South African grapefruit's prospects for market diversification in 2018



Source: TradeMap, ITC

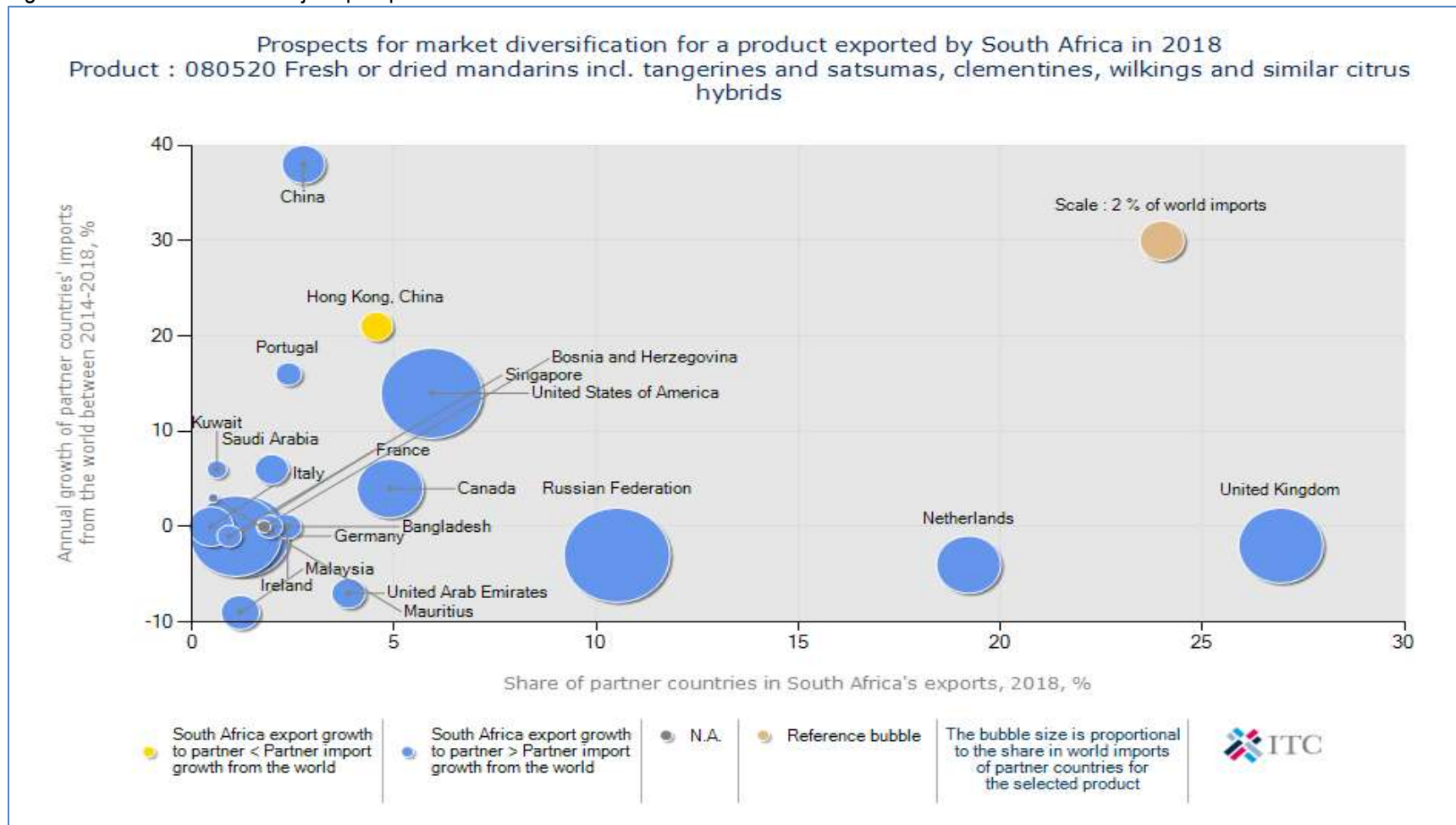
Figure 60 below illustrates prospects for market diversification by South African exporters of naartjies in 2018. The United Kingdom, Netherlands and Russian Federation hold a bigger market share of South African naartjie exports.

In terms of market size, Russia was the largest naartjie importer in 2018 with just over \$610 million (843 870 tons) worth of naartjie imports, or roughly 12.5% of the world naartjie market. Second was USA with just over \$555 million (340 696 tons) worth of naartjie imports, or roughly 11% market share followed by Germany with just over \$441 million (362 311 tons) worth of naartjie imports, or roughly 9% market share.

Whilst three countries dominate world lemon and lime imports, it is interesting to note that countries like Malaysia, together with Bangladesh and Kazakhstan have experienced higher annual growth rates in terms of naartjie imports from 2014 – 2018. Malaysia experienced an annual growth rate of 643%. Second was Bangladesh with 78% annual growth rate followed by Kazakhstan at 75%. It is important to note that growth by all these mentioned countries has been from a relatively low base. These countries represent possible lucrative markets for South African naartjie producers.

It is also important to note that naartjie imports from the world to countries such as Sweden have declined from 2014 – 2018 and as a result those countries recorded negative growth rates in naartjie imports.

Figure 60: South African naartjies' prospect for market diversification in 2018



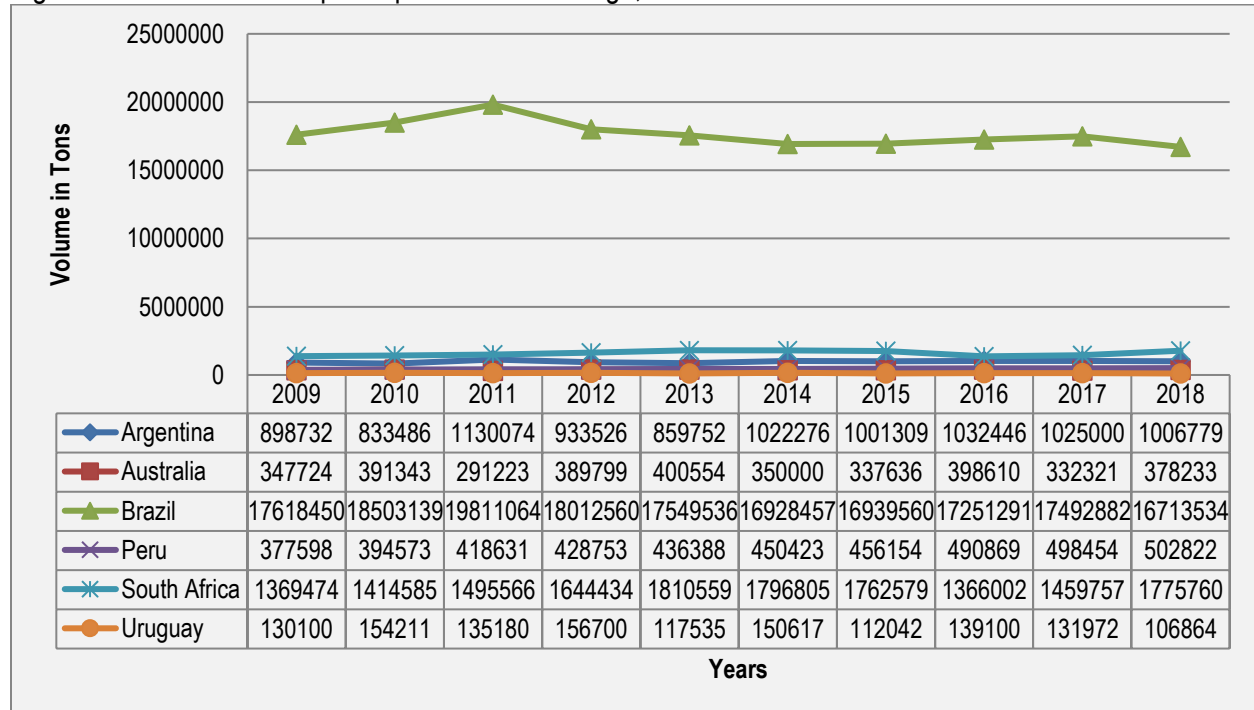
Source: TradeMap, ITC

Figures 61 to 64 below illustrate southern hemisphere production of oranges, lemons and limes, grapefruit and naartjies during the past ten years.

3.2 South Africa vs. southern hemisphere production

Figure 61 presents southern hemisphere production of oranges for the years 2009 to 2018.

Figure 61: Southern hemisphere production of orange, 2009 -2018

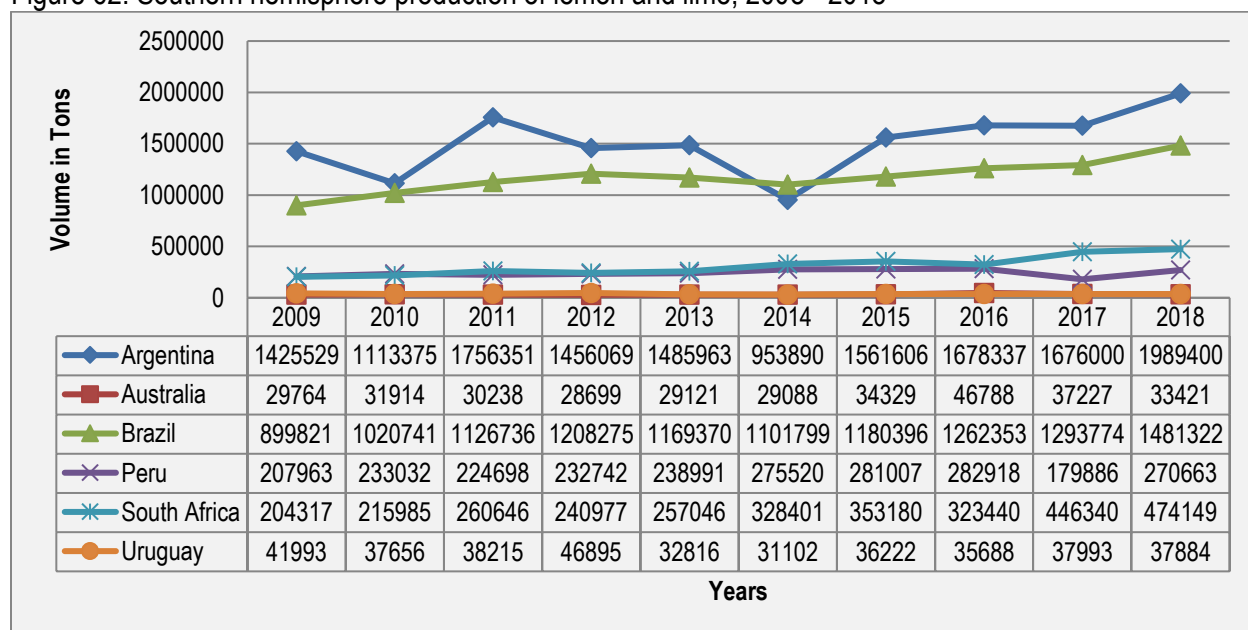


Source: FAOSTAT

It can be seen from Figure 61 that South Africa was the second largest producer of oranges (9% in 2018) in the southern hemisphere after Brazil (82%). A total volume of 20 million tons of oranges was produced in the world during 2018 and southern hemisphere production represented 27% of total world production in the same year. The major producers of oranges in the Southern hemisphere are vying for the lucrative North American and European markets.

The fact that a country can produce a large output does not necessarily mean it will be a big net exporter as this depends on the size of the quality of production, domestic market and whether excess produce is harvested. In the case of Brazil, the largest producer of oranges in the southern hemisphere, their domestic market is so large that the country exports relatively little. Brazil exported 26 068 tons of oranges in 2018. This represented 0.2% of its total production during the same year. Volumes for southern hemisphere production of lemons and limes for the years 2008 to 2018 are presented in Figure 62.

Figure 62: Southern hemisphere production of lemon and lime, 2008 - 2018



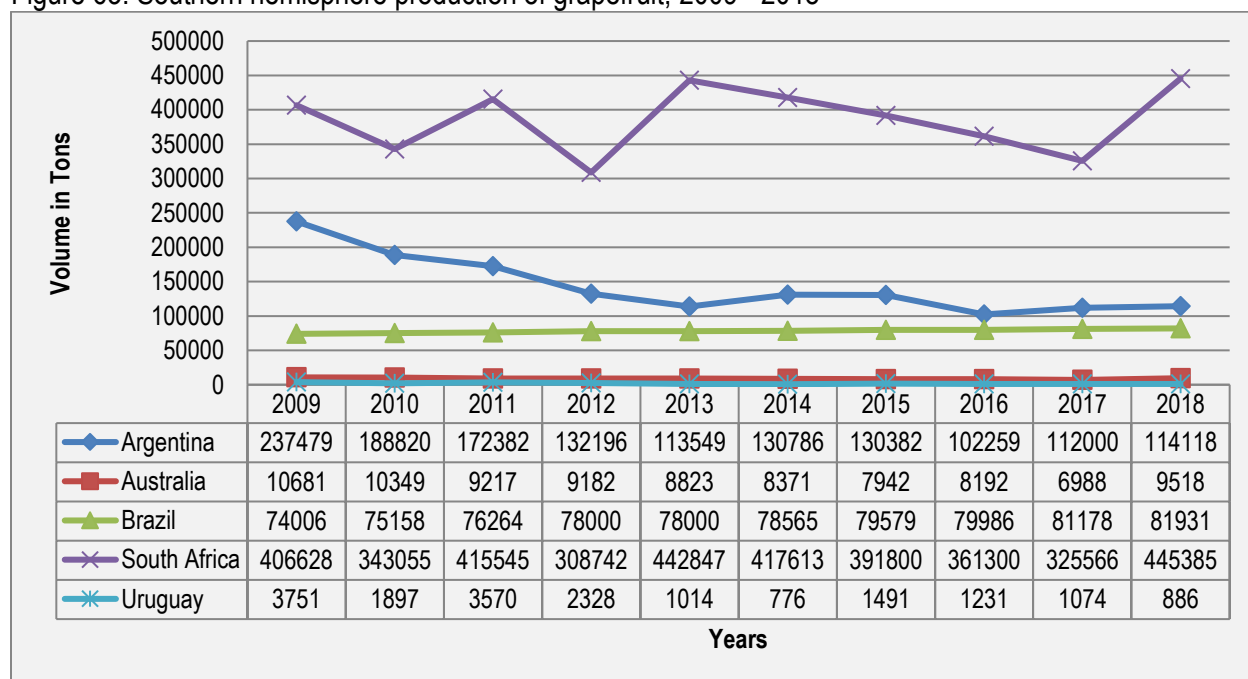
Source: FAOSTAT

It can be observed from Figure 62 that South Africa was the third largest producer of lemon and limes (11% in 2018) in the southern hemisphere after Argentina (46%). World production of lemons and limes during 2018 stood at 19.3 million tons while southern hemisphere production stood at 4.2 million tons during the same year. This means that 22% of world production of lemons and limes came from the southern hemisphere in 2018.

As already highlighted above, the fact that a country can produce a large output does not necessarily mean it will be a big net exporter as this depends on the size of the domestic market and whether excess produce is harvested. In the case of Peru, the fourth largest producer of lemon and limes in the southern hemisphere in 2018, their domestic market is so large that the country exports relatively little. Peru exported 11 012 tons of lemons and limes in 2018 and its share in world exports was 0.3%.

Volumes for southern hemisphere production of grapefruit for the years 2009 to 2018 are presented in Figure 63. It is clear from Figure 63 that South Africa was the largest producer of grapefruit (68% in 2018) in the southern hemisphere. Argentina was the second largest producer with 18% followed by Brazil with 13%. World production of grapefruits during 2018 stood at 9.3 million tons while southern hemisphere production stood at 651 thousand tons during the same year. This means that 7% of world production of grapefruit came from the southern hemisphere in 2018.

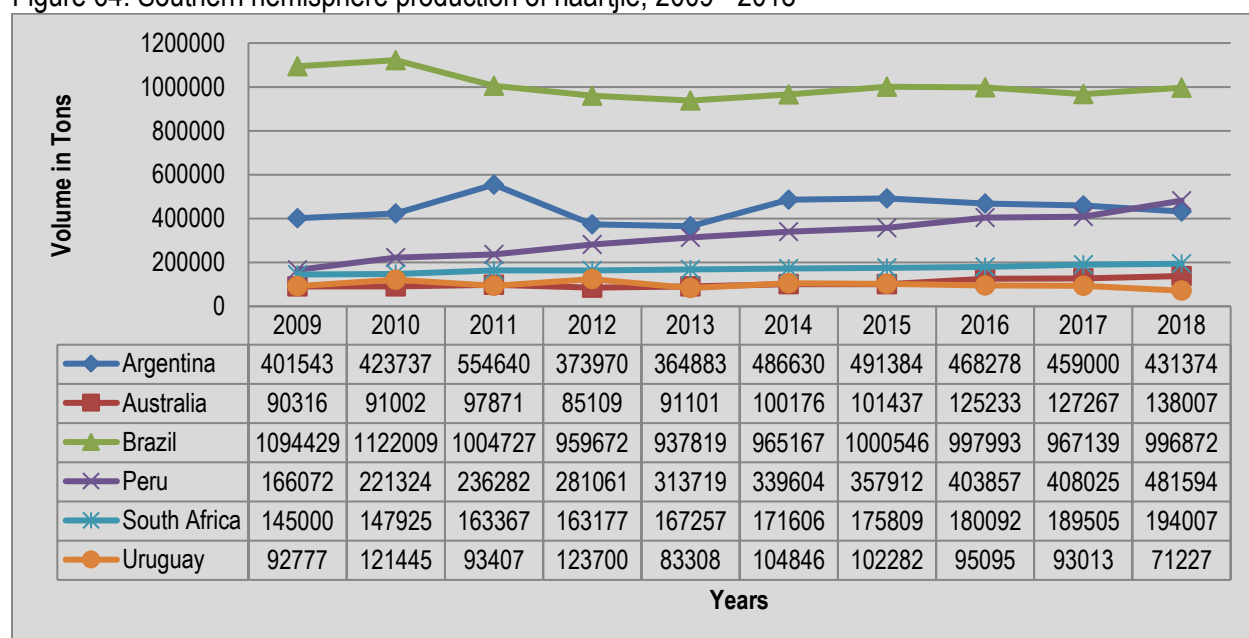
Figure 63: Southern hemisphere production of grapefruit, 2009 - 2018



Source: FAOSTAT

Volumes of southern hemisphere production of naartjies for the past ten years are presented in Figure 64. It can be seen from Figure 62 that South Africa was the fourth largest producer of naartjies (8% in 2018) in the southern hemisphere after Brazil (43%), Peru (21%) and Argentina (19%). The fact that a country can produce a large output does not necessarily mean it will be a big net exporter as this depends on the size of the domestic market and whether excess produce is harvested. In the case of Peru, the largest producer of naartjies in the southern hemisphere exported 158 847 tons of naartjies in 2018 and its share in world exports was 3.9%. This was lower than the fourth placed South Africa which exported 260 850 tons and its share in world exports was 5.6%. Total world production of naartjies during 2018 stood at 34.3 million tons while southern hemisphere production stood at 2.3 million tons during the same period.

Figure 64: Southern hemisphere production of naartjie, 2009 - 2018



Source: FAOSTAT, SHAFTE

4. MARKET ACCESS

Barriers to trade can be divided into tariff barriers (including quotas, ad valorem tariffs, specific tariffs and entry price systems) and non-tariff barriers (sanitary and phyto-sanitary measures, labels, etc.). The main markets for fruit (including citrus products) employ various measures, both tariff and non-tariff to protect the domestic industries. Whilst many of the non-tariff measures can be justified under the auspices of issues such as health and standards, the tariff measures are increasingly under the scrutiny of the World Trade Organization (WTO), and as such are gradually being phased out. Nevertheless, exporters need to be aware of all the barriers that they may encounter when trying to get their produce onto foreign shelves.

4.1 Tariff, quotas and the price entry system

Tariffs are either designed to earn government revenue from products being imported or to raise the price of imports so as to render local produce more competitive and protect domestic industries.

Quotas can be used to protect domestic industries from excessive imports originating from areas with some form of competitive advantage (which can therefore produce lower cost produce). Tariffs and quotas are often combined, allowing the imports to enter at a certain tariff rate up to a specified quantity. Thereafter, imports from that particular region will attract higher tariffs, or will not be allowed at all. This phenomenon is referred to as tariff rate quotas (TRQs).

The entry price system, which is used in many northern hemisphere markets, makes use of multiple tariff rates during different periods when domestic producers are trying to sell their produce, and lower the tariffs during their off-season. Alternatively, the tariff rate can be a function of a market price – if the produce enters at a price which is too low (and therefore likely to be too competitive), it qualifies for a higher tariff schedule.

Whilst tariff mechanisms can be prohibitive and result in restricted market access, it is often non-tariff barriers that restrict countries like South Africa from successfully entering large and developed markets. Non-tariff barriers may include product standards, sanitary and phyto-sanitary standards (SPS), food health and safety issues, food labelling and packaging, product certification procedures, quality assurance and other standards and grades.

Table 12 presents tariffs applied by the leading export markets for oranges originating from South Africa during 2018. It is important to note that tariffs applied by members of the European Union are presented in Annexure 1 as European Union tariffs. They are therefore not reported individually. During 2018, the Netherlands, United Kingdom, Italy, and Portugal were part of the leading markets for South African exports of oranges. EU tariffs for oranges are presented in Annexure 1 due to the large number of national tariff lines contained in the EU schedule.

Table 12: Tariffs applied by leading markets to oranges (080510) from South Africa during 2018

COUNTRY	HS CODE	PRODUCT DESCRIPTION	TRADE REGIME	APPLIED TARIFFS	TOTAL AD VALORE M EQUIVALENT TARIFF
Russia	0805102000	Citrus fruit, fresh or dried: Orange: sweet orange fresh	Preferential tariff for GSP countries	75% of the general rate(MFN)	3.75%
	0805108000	Citrus fruit, fresh or dried: Oranges: Other	Preferential tariff for GSP countries MFN duties (Applied)	75% of the general rate(MFN)	4.00%
Saudi Arabia	08051000	Citrus fruit, fresh or dried: Oranges	MFN duties (Applied)	0.00%	0.00%
United Arab Emirates	08051000	Citrus fruit, fresh or dried: Oranges	MFN duties (Applied)	0.00%	0.00%
Hong Kong	08051000	Citrus fruit, fresh or dried: Oranges	MFN duties (Applied)	0.00%	0.00%
United States of America	08051000	Oranges, fresh or dried	Preferential tariff for AGOA countries	0.00%	0.00%
			MFN duties (Applied)	19.00 \$/Ton	1.52%
Canada	08051000	Citrus fruit, fresh or dried: Oranges	MFN duties (Applied)	0.00%	0.00%
Bangladesh	08051010	Oranges fresh or dried, wrapped/canned up to 2.5kg	MFN duties (Applied)	25.00%	25.00%

COUNTRY	HS CODE	PRODUCT DESCRIPTION	TRADE REGIME	APPLIED TARIFFS	TOTAL AD VALORE M EQUIVALENT TARIFF
	08051020	Oranges, fresh or dried, nes	MFN duties (Applied)	25.00%	25.00%
Kuwait	08051000	Citrus fruit, fresh or dried: Oranges	MFN duties (Applied)	0.00%	0.00%
Malaysia	080510100	Citrus fruit, fresh or dried: Orange: fresh	MFN duties (Applied)	0.00%	0.00%
	080510200	Citrus fruit, fresh or dried: Oranges: Dried	MFN duties (Applied)	0.00%	0.00%
Nigeria	0805100000	Agrios (citricos) frescos o secos: Naranjas	MFN duties (Applied)	20.00%	20.00%
Zambia	08051010	Oranges fresh (tne)	Preferential tariff for South Africa	0.00%	0.00%
			MFN duties (Applied)	25.00%	25.00%

Source: Market Access Map, ITC

Upon examination of Annexure 1 one realises that South African oranges no longer enjoy preferential market access in the European Union. South African oranges gain access into the USA through both the African Growth and Opportunities Act (AGOA) and the General System of Preferences (GSP). Duty free access is also gained in Zambia through the Preferential Tariff agreement. South African oranges face the highest tariff of (25%) in Bangladesh and Nigeria (20%). The Russian Federation also imposes a 3.75% duty of imports along with a 5.00% or 18.93 \$/Ton (whichever is the greater) duty on oranges originating from South Africa.

Table 13 presents tariffs applied by the leading export markets to lemons and limes originating from South Africa during 2018. The tariffs applied by the European Union member states are also presented as EU tariffs and not individually. EU member states that featured in the leading markets for South African lemons and limes during 2018 are the Netherlands, United Kingdom and Italy. Other countries that featured in the list are the Saudi Arabia, Russia, United Arab Emirates, Hong Kong, Kuwait, Malaysia, Ukraine, Canada, and Singapore.

Table 13: Tariffs applied by leading markets to lemons and limes (080550) from South Africa during 2018

COUNTRY	HS CODE	PRODUCT DESCRIPTION	TRADE REGIME	APPLIED TARIFFS	TOTAL AD VALOREM EQUIVALENT TARIFF
Saudi Arabia	08055010	Citrus fruit, fresh or dried: Lemons (Citrus limon, Citrus limonum) and limes (Citrus aurantifolia, Citrus latifolia): Fresh	MFN duties (Applied)	0.00%	0.00%
	08055020	Citrus fruit, fresh or dried: Lemons (Citrus limon, Citrus limonum) and limes (Citrus aurantifolia, Citrus latifolia): Dried	General tariff	0.00%	0.00%
Russia	0805501000	Citrus fruit, fresh or dried: Lemons (Citrus limon, Citrus limonum) and limes (Citrus aurantifolia, Citrus latifolia): No description at level 10	Preferential tariff for GSP countries	3.75% or 12.53 \$/Ton whichever is the greater	3.75%
			MFN duties (Applied)	5.00% or 16.70 \$/Ton whichever is the greater	5.00%
	0805509000	Citrus fruit, fresh or dried: Lemons (Citrus limon, Citrus limonum) and limes (Citrus aurantifolia, Citrus latifolia): No description at level 10	Preferential tariff for GSP countries	3.75%	3.75%
			MFN duties (Applied)	5.00%	5.00%
United Arab Emirates	08055010	Citrus fruit, fresh or dried: Lemons (Citrus limon, Citrus limonum) and limes (Citrus aurantifolia, Citrus latifolia): Fresh	MFN duties (Applied)	0.00%	0.00%
	08055020	Citrus fruit, fresh or dried: Lemons (Citrus limon, Citrus limonum) and limes (Citrus aurantifolia, Citrus latifolia): Dried	MFN duties (Applied)	0.00%	0.00%
European Union	080550101001	Fresh or dried lemons "Citrus limon, Citrus limonum" : Fresh. If the declared price is higher than or equal to 46.2 EUR/100 kg	MFN duties (Applied)	OQTR: 6.40%/IQ TR:6.00%	OQTR: 6.40%/IQTR:6.00%

COUNTRY	HS CODE	PRODUCT DESCRIPTION	TRADE REGIME	APPLIED TARIFFS	TOTAL AD VALOREM EQUIVALENT TARIFF
	080550101002	Fresh or dried lemons "Citrus limon, Citrus limonum" : Fresh. If the declared price is higher than or equal to 45.3 EUR/100 kg	MFN duties (Applied)	QQTR: $\frac{6.40\% + 9.73}{\$/Ton}$ IQTR : 6.00%	QQTR: $\frac{7.34\%}{}$ IQTR : 6.00%
	080550101003	Fresh or dried lemons "Citrus limon, Citrus limonum" : Fresh. If the declared price is higher than or equal to 44.4 EUR/100 kg	MFN duties (Applied)	QQTR: 6.40% + 19.40\$/Ton IQTR: 6.00%	QQTR: 8.29% IQTR: 6.00%
	080550101004	Fresh or dried lemons "Citrus limon, Citrus limonum" : Fresh. If the declared price is higher than or equal to 43.4 EUR/100 kg	MFN duties (Applied)	QQTR: $\frac{6.40\% + 30.28}{\$/Ton}$ IQTR : 6.00%	QQTR: $\frac{9.33\%}{}$ IQTR : 6.00%
	080550101005	Fresh or dried lemons "Citrus limon, Citrus limonum" : Fresh. If the declared price is higher than or equal to 42.5 EUR/100 kg	MFN duties (Applied)	QQTR: $\frac{6.40\% + 40.01}{\$/Ton}$ IQTR : 6.00%	QQTR: $\frac{10.28\%}{}$ IQTR : 6.00%
	080550101006	Fresh or dried lemons "Citrus limon, Citrus limonum" : Fresh. If the declared price is higher than or equal to 0 EUR/100 kg	MFN duties (Applied)	QQTR: $\frac{6.40\% + 276.81}{\$/Ton}$ IQTR : 6.00%	QQTR: $\frac{33.22\%}{}$ IQTR : 6.00%
	080550109001	Fresh or dried lemons "Citrus limon, Citrus limonum" : Other. If the declared price is higher than or equal to 46.2 EUR/100 kg	MFN duties (Applied)	QQTR: $\frac{6.40\%}{}$ IQTR : 6.00%	QQTR: $\frac{6.40\%}{}$ IQTR : 6.00%
	080550109002	Fresh or dried lemons "Citrus limon, Citrus limonum" : Other. If the declared price is higher than or equal to 45.3 EUR/100 kg	MFN duties (Applied)	QQTR: $\frac{6.40\% + 9.73}{\$/Ton}$ IQTR : 6.00%	QQTR: $\frac{7.34\%}{}$ IQTR : 6.00%
	080550109003	Fresh or dried lemons "Citrus limon, Citrus limonum" : Other. If the declared price is higher than or equal to 44.4 EUR/100 kg	MFN duties (Applied)	QQTR: $\frac{6.40\% + 19.46}{\$/Ton}$ IQTR : 6.00%	QQTR: $\frac{8.29\%}{}$ IQTR : 6.00%

COUNTRY	HS CODE	PRODUCT DESCRIPTION	TRADE REGIME	APPLIED TARIFFS	TOTAL AD VALOREM EQUIVALENT TARIFF
	080550109004	Fresh or dried lemons "Citrus limon, Citrus limonum" : Other. If the declared price is higher than or equal to 43.4 EUR/100 kg	MFN duties (Applied)	QQTR: <u>6.40% + 30.28 \$/Ton</u> IQTR : 6.00%	QQTR: <u>9.33%</u> IQTR : 6.00%
	080550109005	Fresh or dried lemons "Citrus limon, Citrus limonum" : Other. If the declared price is higher than or equal to 42.5 EUR/100 kg	MFN duties (Applied)	QQTR: <u>6.40% + 40.01 \$/Ton</u> IQTR : 6.00%	QQTR: <u>10.28%</u> IQTR : 6.00%
	080550109006	Fresh or dried lemons "Citrus limon, Citrus limonum" : Other. If the declared price is higher than or equal to 0 EUR/100 kg	MFN duties (Applied)	QQTR: <u>6.40% + 276.81 \$/Ton</u> IQTR : 6.00%	QQTR: <u>33.22%</u> IQTR : 6.00%
	0805509011	Fresh or dried limes "Citrus aurantifolia, Citrus latifolia" : Fresh Limes (Citrus latifolia)	Preferential tariff for South Africa MFN duties (Applied)	0.00% 12.80%	0.00% 12.80%
	0805509019	Fresh or dried limes "Citrus aurantifolia, Citrus latifolia" : Fresh Other	Preferential tariff for South Africa MFN duties (Applied)	0.00% 12.80%	0.00% 12.80%
	0805509091	Fresh or dried limes "Citrus aurantifolia, Citrus latifolia" : Other : Limes (Citrus latifolia)	Preferential tariff for South Africa MFN duties (Applied)	0.00% 12.80%	0.00% 12.80%
	0805509099	Fresh or dried limes "Citrus aurantifolia, Citrus latifolia" : Other	Preferential tariff for South Africa	0.00% 12.80%	0.00% 12.80%

COUNTRY	HS CODE	PRODUCT DESCRIPTION	TRADE REGIME	APPLIED TARIFFS	TOTAL AD VALOREM EQUIVALENT TARIFF
			MFN duties (Applied)		
	0805900000	Fresh or dried citrus fruit (excl. oranges, lemons "Citrus limon, Citrus limonum", limes "Citrus aurantifolia, Citrus latifolia", grapefruit, mandarins, incl. tangerines and satsumas, clementines, wilkings and similar citrus hybrids)	Preferential tariff for South Africa	0.00%	0.00%
Hong Kong	08055000	Citrus fruit, fresh or dried: Lemons (Citrus limon, Citrus limonum) and limes (Citrus aurantifolia, Citrus latifolia)	MFN duties (Applied)	0.00%	0.00%
Malaysia	080550100	Fresh or dried lemons `Citrus limon, Citrus limonum` and limes `Citrus aurantifolia, Citrus latifolia`	MFN duties (Applied)	5.00%	5.00%
	080550200	Citrus fruit, fresh or dried : Lemons (Citrus limon, Citrus limonum) and limes (Citrus aurantifolia, Citrus latifolia) : Limes (Citrus aurantifolia, Citrus latifolia)	MFN duties (Applied)	5.00%	5.00%
Canada	08055000	Fresh or dried lemons Citrus limon, Citrus limonum and limes Citrus aurantifolia, Citrus latifolia	MFN duties (Applied)	0.00%	0.00%
Singapore	08055000	Lemons & limes fresh or dried (tne)	MFN duties (Applied)	0.00%	0.00%

Source: Market Access Map, ITC

Table 13 indicates that South African lemons do not have preferential access into the European markets. This is an indication that lemons did not form part of the list of products whose tariffs were to be reduced when the TDCA came into effect. They may have been on the list that the European Union member states classified as sensitive products and therefore did not form part of the negotiations. Limes however enter the European Union through preferential tariffs for South Africa. South African lemons and limes face 0% duties in Saudi Arabia, United Arab Emirates, Hong Kong, Kuwait, Canada, and Singapore markets. Russia imposes an import duty of 3.75% on lemons and limes while lemons and limes entering Malaysia faces a 5% MFN duty.

Table 14 presents tariffs applied by the leading export markets to grapefruit originating from South Africa during 2018. The Netherlands, United Kingdom, Italy, France, Germany, and Spain featured in the leading markets for South African grapefruits in 2018. These countries are members of the European Union and their tariffs will be presented collectively as European Union tariffs. Other countries that featured in the list are Japan, Russia, Canada, Hong Kong, Mozambique, United Arab Emirates, Chinese Taipei, Ukraine, and Saudi Arabia.

Table 14: Tariffs applied by leading markets to grapefruit (080540) from South Africa during 2018

COUNTRY	HS CODE	PRODUCT DESCRIPTION	TRADE REGIME	APPLIED TARIFFS	TOTAL AD VALOREM EQUIVALENT TARIFF
Japan	080540000A	Grapefruit, including pomelos, fresh or dried, if imported during the period from 1st June to 30th November	MFN duties (Applied)	10.00%	10.00%
	080540000B	Grapefruit, including pomelos, fresh or dried, if imported during the period from 1st December to 31st May	MFN duties (Applied)	10.00%	10.00%
European Union	0805400011	Fresh or dried grapefruit : Grapefruit, fresh White	Preferential tariff for South Africa	0.00%	0.00%
			MFN duties (Applied)	1.50%	1.50%
	0805400019	Fresh or dried grapefruit : Grapefruit, fresh Pink	Preferential tariff for South Africa	0.00%	0.00%
			MFN duties (Applied)	1.50%	1.50%
	0805400031	Fresh or dried grapefruit : Fresh pomelos White	Preferential tariff for South Africa	0.00%	0.00%
			MFN duties (Applied)	1.50%	1.50%
0805400039	Fresh or dried grapefruit : Fresh pomelos Pink	Preferential tariff for South Africa	0.00%	0.00%	
		MFN duties (Applied)	1.50%	1.50%	
0805400090	Fresh or dried grapefruit : Other	Preferential tariff for South Africa	0.00%	0.00%	
			MFN duties (Applied)	1.50%	1.50%

COUNTRY	HS CODE	PRODUCT DESCRIPTION	TRADE REGIME	APPLIED TARIFFS	TOTAL AD VALOREM EQUIVALENT TARIFF
Russia	0805400000	Fresh or dried grapefruit	Preferential tariff for GSP countries MFN duties (Applied)	75% of the general rate(MFN) 5% but not less than 0.015 euro per kg	3.75% 5.00%
Canada	08054000	Fresh or dried grapefruit	MFN duties (Applied)	0.00%	0.00%
Hong Kong	08054000	Citrus fruit, fresh or dried: Grapefruit, including pomelos	MFN duties (Applied)	0.00%	0.00%
United Arab Emirates	08054000	Citrus fruit, fresh or dried: Grapefruit, including pomelos	MFN duties (Applied)	0.00%	0.00%
Chinese Taipei	08054020	Pomelos, fresh or dried	MFN duties (Applied)	OQTR:184.00%/IQR:25.00%	OQTR:184.00%/IQR:25.00%
	08054091107	Other grapefruit, fresh or dried (Imported from 1st January to 30th September each year)	MFN duties (Applied)	15.00%	15.00%
	08054092106	(Imported from 1st October to 31st December each year)	MFN duties (Applied)	30.00%	30.00%
Saudi Arabia	08054000	Citrus fruit, fresh or dried: Lemons (Citrus limon, Citrus limonum) and limes (Citrus aurantifolia, Citrus latifolia): Dried	MFN duties	0.00%	0.00%

Source: Market Access Map, ITC

South African grapefruits enter European Union member states markets duty-free through a preferential tariff for South Africa while Japan imposes a 10% MFN duty on grapefruit originating from South Africa. Russia imposes a 3.75% or 13.08 \$/ton (whichever is the greater) while Canada, Hong Kong, UAE, and Saudi Arabia apply a 0% MFN tariff on South African grapefruit exports. The Chinese Taipei imposes duties ranging from 15% to as high as 184% to grapefruits originating from South Africa.

Table 15 presents tariffs applied by the leading export markets for naartjies originating from South Africa during 2018. Tariffs for European Union member states are presented together as EU tariffs and not individually. During 2018, EU members that featured in the leading markets for South African naartjies were the United Kingdom, Netherlands, Italy, Ireland, Finland, and France. Other countries that featured in the list are Russia, Hong Kong, Canada, United Arab Emirates, United States of America, Saudi Arabia, Kuwait, Angola, and Malaysia.

Table 15: Tariffs applied by leading markets to naartjies (080520) from South Africa during 2018

COUNTRY	HS CODE	PRODUCT DESCRIPTION	TRADE REGIME	APPLIED TARIFFS	TOTAL AD VALOREM EQUIVALENT TARIFF
European Union	0805201005	Fresh or dried clementines : Fresh	Preferential tariff for South Africa	0.00%	0.00%
			MFN duties (Applied)	16.00%	16.00%
	0805201099	Fresh or dried clementines : Other	Preferential tariff for South Africa	0.00%	0.00%
			MFN duties (Applied)	16.00%	16.00%
	0805203005	Fresh or dried monreales and satsumas : Fresh	Preferential tariff for South Africa	0.00%	0.00%
			MFN duties (Applied)	16.00%	16.00%
	0805203099	Fresh or dried monreales and satsumas : Other	Preferential tariff for South Africa	0.00%	0.00%
MFN duties (Applied)			16.00%	16.00%	
0805205007	Fresh or dried mandarins and wilkings : Mandarins Fresh	Preferential tariff for South Africa	0.00%	0.00%	
		MFN duties (Applied)	16.00%	16.00%	
0805205029	Fresh or dried mandarins and wilkings : Other	Preferential tariff for South Africa	0.00%	0.00%	
		MFN duties (Applied)	16.00%	16.00%	
0805205037	Fresh or dried mandarins and wilkings : Wilkings Fresh	Preferential tariff for South Africa	0.00%	0.00%	
		MFN duties (Applied)	16.00%	16.00%	

COUNTRY	HS CODE	PRODUCT DESCRIPTION	TRADE REGIME	APPLIED TARIFFS	TOTAL AD VALOREM EQUIVALENT TARIFF
	0805205089	Fresh or dried mandarins and wilkings : Other	Preferential tariff for South Africa MFN duties (Applied)	0.00% 16.00%	0.00% 16.00%
	0805207005	Fresh or dried tangerines : Fresh	Preferential tariff for South Africa MFN duties (Applied)	0.00% 16.00%	0.00% 16.00%
	0805207099	Fresh or dried tangerines : Other	Preferential tariff for South Africa MFN duties (Applied)	0.00% 16.00%	0.00% 16.00%
	0805209005	Fresh or dried tangelos, ortaniques, malaquinas and similar citrus hybrids (excl. clementines, monreales, satsumas, mandarins, wilkings and tangerines) : Fresh Citrus hybrids known as `minneolas`	Preferential tariff for South Africa MFN duties (Applied)	0.00%16.00%	0.00%16.00%
	0805209009	Fresh or dried tangelos, ortaniques, malaquinas and similar citrus hybrids (excl. clementines, monreales, satsumas, mandarins, wilkings and tangerines) : Fresh Other	Preferential tariff for South Africa MFN duties (Applied)	0.00% 16.00%	0.00% 16.00%
	0805209091	Fresh or dried tangelos, ortaniques, malaquinas and similar citrus hybrids (excl. clementines, monreales, satsumas, mandarins, wilkings and tangerines) : Other : Citrus hybrids known as `minneolas`	Preferential tariff for South Africa MFN duties (Applied)	0.00% 16.00%	0.00% 16.00%
	0805209099	Fresh or dried tangelos, ortaniques, malaquinas and similar citrus hybrids (excl. clementines, monreales, satsumas, mandarins, wilkings and tangerines) : Other	Preferential tariff for South Africa MFN duties (Applied)	0.00% 16.00%	0.00% 16.00%

COUNTRY	HS CODE	PRODUCT DESCRIPTION	TRADE REGIME	APPLIED TARIFFS	TOTAL AD VALOREM EQUIVALENT TARIFF
Russia	0805201000	Citrus fruit, fresh or dried: Mandarins (including tangerines and satsumas); clementines, wilkings and similar citrus hybrids: No description at level 10	Preferential tariff for GSP countries MFN duties (Applied)	3.75% or 12.53 \$/Ton whichever is the greater 5.00% or 16.70 \$/Ton whichever is the greater	3.75% 5.00%
	0805203000	Citrus fruit, fresh or dried: Mandarins (including tangerines and satsumas); clementines, wilkings and similar citrus hybrids: No description at level 10	Preferential tariff for GSP countries MFN duties (Applied)	3.75% or 12.53 \$/Ton whichever is the greater 5.00% or 16.70 \$/Ton whichever is the greater	3.75% 5.00%
	0805205000	Citrus fruit, fresh or dried: Mandarins (including tangerines and satsumas); clementines, wilkings and similar citrus hybrids: No description at level 10	Preferential tariff for GSP countries MFN duties (Applied)	3.75% or 12.53 \$/Ton whichever is the greater 5.00% or 16.70 \$/Ton whichever is the greater	3.75% 5.00%
	0805207000	Citrus fruit, fresh or dried: Mandarins (including tangerines and satsumas); clementines, wilkings and similar citrus hybrids: No description at level 10	Preferential tariff for GSP countries MFN duties (Applied)	3.75% or 12.53 \$/Ton whichever is the greater	3.75% 5.00%

COUNTRY	HS CODE	PRODUCT DESCRIPTION	TRADE REGIME	APPLIED TARIFFS	TOTAL AD VALOREM EQUIVALENT TARIFF
				5.00% or 16.70 \$/Ton whichever is the greater	
	0805209000	Citrus fruit, fresh or dried: Mandarins (including tangerines and satsumas); clementines, wilkings and similar citrus hybrids: No description at level 10	Preferential tariff for GSP countries MFN duties (Applied)	3.75% or 12.53 \$/Ton whichever is the greater 5.00% or 16.70 \$/Ton whichever is the greater	3.75% 5.00%
Hong Kong	08052010	Mandarins (including tangerines and satsumas), fresh or dried	MFN duties (Applied)	0.00%	0.00%
	08052090	Citrus fruit, fresh or dried: Mandarins (including tangerines and satsumas); clementines, wilkings and similar citrus hybrids: Other	MFN duties (Applied)	0.00%	0.00%
Canada	08052000	Fresh or dried mandarins incl. tangerines and satsumas, clementines, wilkings and similar citrus hybrids	MFN duties (Applied)	0.00%	0.00%
UAE	08052000	Citrus fruit, fresh or dried: Mandarins (including tangerines and satsumas); clementines, wilkings and similar citrus hybrids	MFN duties (Applied)	0.00%	0.00%
USA	08052000	Mandarins (including tangerines and satsumas); clementines, wilkings and similar citrus hybrids, fresh or dried	Preferential tariff for AGOA countries MFN duties (Applied)	0.00% 1.9 cents/kg	0.00% 1.28%
Saudi Arabia	08052000	Citrus fruit, fresh or dried: Mandarins (including tangerines and satsumas); clementines, wilkings and similar citrus hybrids	MFN duties (Applied)	0.00%	0.00%

COUNTRY	HS CODE	PRODUCT DESCRIPTION	TRADE REGIME	APPLIED TARIFFS	TOTAL AD VALOREM EQUIVALENT TARIFF
Kuwait	08052000	Citrus fruit, fresh or dried: Mandarins (including tangerines and satsumas); clementines, wilkings and similar citrus hybrids	MFN duties (Applied)	0.00%	0.00%
Angola	08052020	Tangerinas, mandarinas e satsumas; clementinas, wilkings e outros citrinos híbridos semelhantes, frescos ou secos	MFN duties (Applied)	50.00%	50.00%
	08052010	Mandarins (including tangerines and satsumas), fresh or dried	MFN duties (Applied)	50.00%	50.00%
Malaysia	080520110	Fresh or dried mandarins incl. tangerines and satsumas, clementines, wilkings and similar citrus hybrids: Mandarins (including tangerines and satsumas); clementines, wilkings and similar citrus hybrids: Mandarins (including tangerines and satsumas), fresh	MFN duties (Applied)	5.00%	5.00%
	08050120	Fresh or dried mandarins incl. tangerines and satsumas, clementines, wilkings and similar citrus hybrids: Mandarins (including tangerines and satsumas); clementines, wilkings and similar citrus hybrids: Mandarins (including tangerines and satsumas), dried	MFN duties (Applied)	5.00%	5.00%

Source: Market Access Map, ITC

European Union member states impose a 16% MFN duty for South Africa for all naartjies originating from South Africa. Russia imposes general tariffs (MFN) ranging of 5% while Canada, Hong Kong, the UAE, Saudi Arabia, and Kuwait impose a 0.0% MFN duty. South African naartjies enter the USA market duty-free as a result of the AGOA. Angola imposes the highest import duty on naartjies originating from South Africa at 50% while Malaysia imposes a tariff of 5% ad valorem.

In reality, the tariffs are likely to be far lower for South Africa when considering the preferential agreements, but at the same time, most tariff structures are particularly complex, with quotas, seasonal tariffs and specific tariffs (an amount per unit than rather than a percentage of value) all contributing to many different tariff lines and often higher duties payable than one might have anticipated initially. One must also bear in mind that most tariffs are designated to protect domestic industries, and as such are likely to discriminate against those attempting to compete with the domestic producers of that country.

4.2 Non-tariff barriers

4.2.1 Quality standards

The procedure for setting standards was followed again in 2009 and the different variety focus groups (VFGs) once again assisted the DAFF by making recommendations on the different quality standards.

4.2.2 Biosecurity

South Africa continued to monitor the movement of *Bactrocera Invadens* (BI) to the North. Traps have been set up along all northern borders and are being continuously monitored. To date no BI have been found. A focussed BI steering committee has been established consisting of government and fruit industry representatives. The stockpile of chemicals has been renewed and is available for eradication purposes should BI be found.

4.2.3 Plant Protection Product (PPP) database

Being able to comply with PPP Maximum Residue Levels (MRLs) remains the cornerstone to official and private food safety standards. CGA's PPP database was created to become a web-based tool to store, manage and share the mounting volume of technical and commercial data relating to PPPs and MRLs used on export citrus in southern Africa. Further developments to the system in 2008/9 included: The ability to record reasons for MRL changes; functionality to track the "history" of an active and MRLs over time; making the system more user-friendly. In the near future the PPP database will go "live" for use by producers, agrochemical supply companies and general users, whereas to date it has been for internal CGA/CRI use only.

4.3 European Union (EU)

The interceptions of South African fruit with Citrus Black Spot (CBS) in Europe declined considerably in 2009, dropping by 75%. During 2009 a delegation from the Food and Veterinary Office (FVO) of the EU visited South Africa as a follow up to the European Food Safety Authorities (EFSA) report. The FVO delegation found that the South African citrus industry is largely compliant with all requirements.

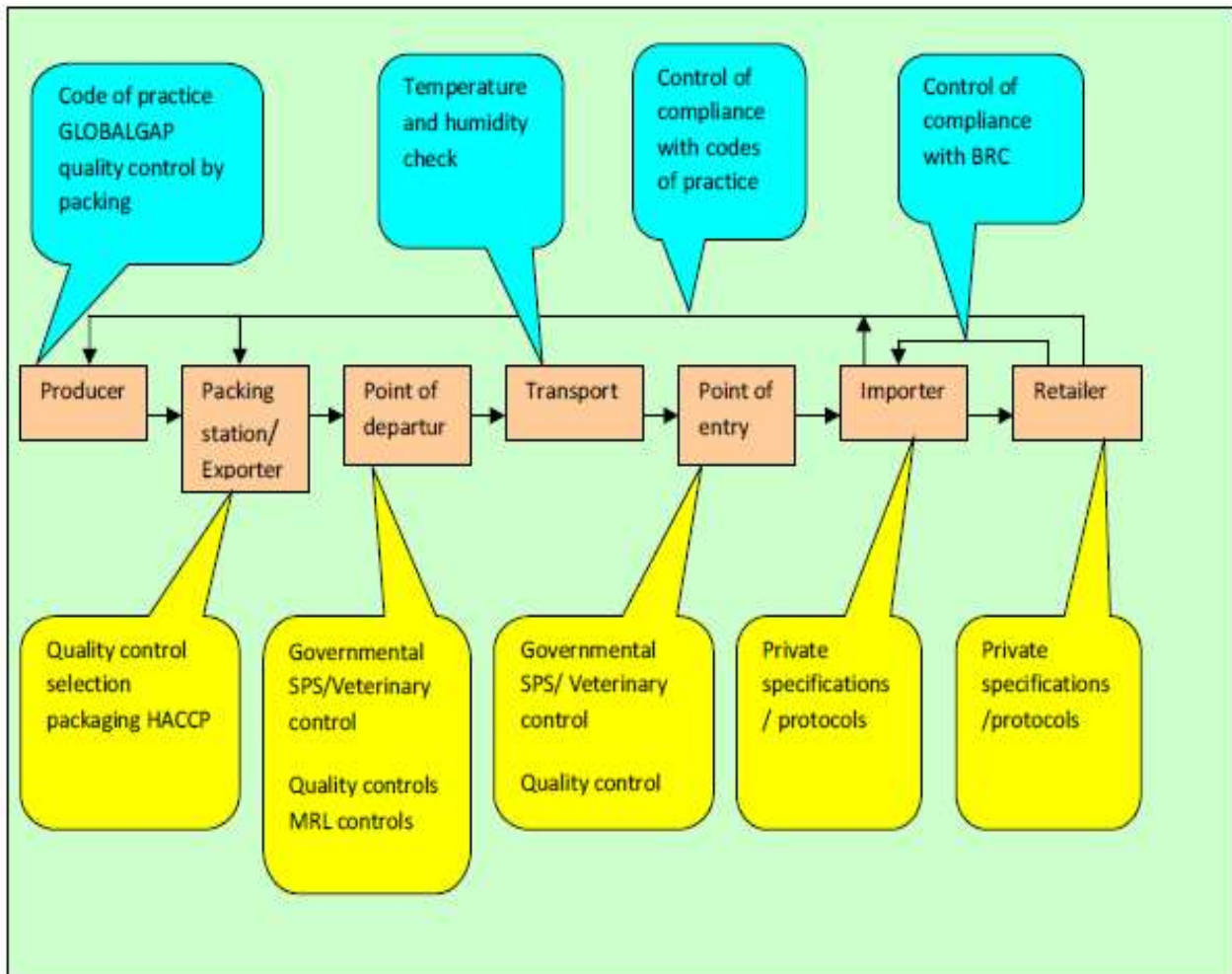
Landmark Europe continues to represent the CGA in Brussels and continues to assist the CGA in monitoring the CBS issue, keeping the CGA abreast of developments, and keeping EU officials informed of developments from a South African point of view.

4.4 Consumer health and safety requirements

Increasing consumer conscience about health and safety issues has prompted a number of safety initiatives in Europe, such as GLOBALPGAP (formerly EUREPGAP) on good agricultural practices (GAP) by the main European retailers, the international management system of HACCP, which is independently certified and required by legislation for European producers as well as food imported into Europe (EC 852/2004), and the ISO 9000 management standards system (for producers and working methods) which is certified by the International Standards Organization (ISO).

The development of public and private standards involves interventions at multiple points along the value chain. An illustration of the multiple points and multiple standards that are applied for fresh fruit and vegetables and for fish is shown in Figure 65. There are controls by different agents carried out in different ways at different points along the value chain in response to the requirements of private sector companies, coalitions of private-sector standards setters and public agencies. Standards in agribusiness value chains operate, by definition, at multiple points. They are created, adopted, applied and verified by different actors (enterprises and institutions) at different points in the value chain.

Figure 65: Food safety and quality control in the fruit and vegetable supply chain



Source: UNIDO

4.5 Japan

The Grapefruit Focus Group (GFG) decided to continue with co-ordination of shipments of grapefruit into Japan. Coordinators were employed in both South Africa and Japan. Shipments were monitored and adjusted to ensure rateable delivery to Japan and to keep stocks at acceptable levels (three weeks of sales). This initiative was deemed a success.

Growers considered the recommendations with regard to promotions in Japan. It was agreed that any promotions would need to be accompanied by good quality fruit and co-ordinated shipping. The promotion of South African grapefruits in Japan is currently under. The initiative is funded through statutory levies paid by producers who export grapefruits to Japan.

4.6 United States of America

During February 2010 the USA finalised the rule-making process for the inclusion of 16 new magisterial districts to export to the USA. This means that these magisterial districts situated in the Northern Cape, Free

State and North West can export to the USA from 2010. Given the fact that the magisterial districts are suitable for grapefruit production, this could mean that the full basket of citrus will now be offered from South Africa to the USA.

5. DISTRIBUTION CHANNELS

There are roughly three distinct sales channels for exporting fruits. One can sell directly to an importer with or without the assistance of an agent. One can supply fruits combined, which will then contract out importers/marketers and try to take advantage of economies of scale and increased bargaining power. At the same time combined fruits might also supply large retail chains. One can also be a member of a private or cooperative export organization which will find agents or importers and market the produce collectively. Similar to combined fruits, an export organization can either supply wholesale market or retail chains, depending on particular circumstances. Export organizations will wash, sort and package the produce.

They will also market the goods under their own name or on behalf of the member, which includes taking care of labelling, bar-coding, etc. Most of the time, export organizations will enter into a collective agreements with freight forwarders, negotiating better prices and services (more regular transport, lower peak season prices, etc.). Some countries have institutions that handle all the produce (membership compulsory) and sell only to a restricted number of selected importers.

Agents will establish contacts between producers/export organizations and buyers in the importing country, and will usually take between 2% and 3% commission. In contrast, an importer will buy and sell his/her own capacity, assuming the full risk (unless on consignment). They will also be responsible for clearing the produce through customs, packaging and assuring label/quality compliance and distribution of the produce. Their margins lie between 5% and 10%. The contract importers of fruit combines market and distribute the produce of the combines, clear it through customs and in some cases treat and package it.

Only few exporters have long term contracts with wholesale grocers who deliver directly to retail shops, but with the increasing importance of standards (EUREGAP, etc.) and the year round availability of fruit, the planning of long term contractual relationship is expected to increase.

6. LOGISTICS

6.1 Mode of transport

The transport of fruits falls into two categories namely ocean cargo and air cargo. Ocean cargo takes much longer to reach the desired location but costing considerably less. The choice of transportation method depends, for most parts on the fragility of the produce and how long it can remain relatively fresh. With the advent of technology and container improvements, the feasibility, cost and attractiveness of sea transport have improved considerably. With the increased exports by South Africa, the number and the regularity of maritime routes have increased. These economies of scale could benefit South Africa if more producers were to become exporters and take advantage of the various ports which have special capabilities in handling fruit produce (Durban new fruit terminal).

6.2 Cold chain management

Cold chain management is crucial when handling perishable products, from the initial packing houses to the refrigerated container trucks that transport the produce to the shipping terminals, through to the storage facilities at these terminals, onto actual shipping vessels and containers, and finally on to the importers and distributors that must clear the produce and transport it to the markets/retail outlets. For every 10 Degree Celsius increase above the recommended temperature, the rate of respiration and ripening of produce can increase twice or even thrice. Related to this are increasing important traceability standards which require an efficient controlled supply chain and internationally accepted business standards.

6.3 Packaging

Packaging can also play an important role in ensuring safe and efficient transport of a product and conforming to handling requirements, uniformity recyclable material specifications, phytosanitary requirements, proper storage needs and even attractiveness for marketing purposes.

The business panel of any carton (including printed carton labels) should comply with the requirements as established by the EU or any other regulations that are specified by a target market. Producers are advised to present their designs to the Perishable Products Export Control Board (PPECB) before they can order any cartons from a manufacturer. The following is normally required:

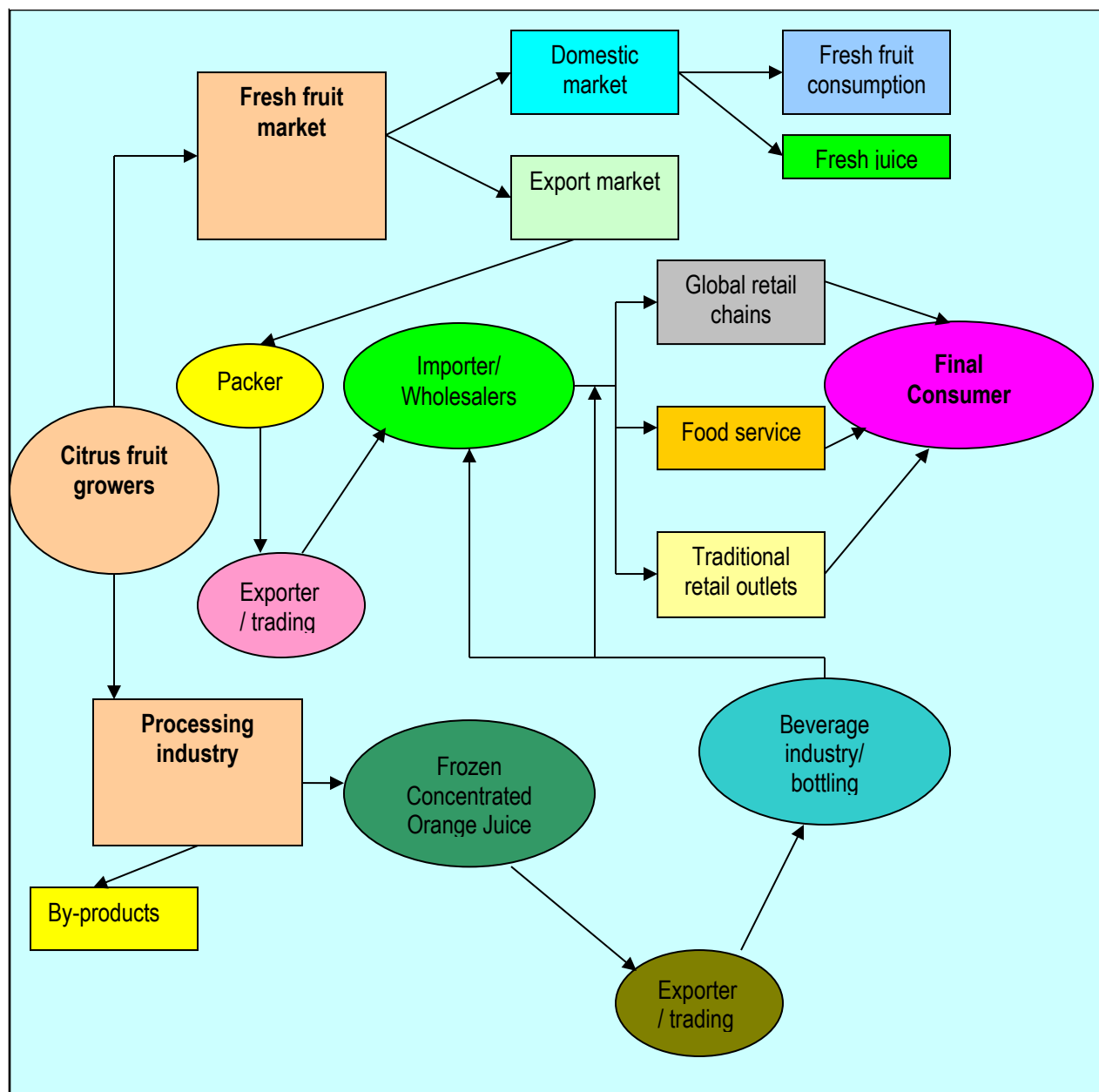
- Class I or II
- Fruit type
- Carton depth
- Country of Origin: "Produce of South Africa"
- Complete address of exporter or producer
- Name of variety
- Content of carton: "14 x punnets or bags"
- PUC or PHC code: Registered producer – or Pack House Code with DAFF
- Date code
- Food safety accreditation number: Global Gap, Nature's Choice registration number, etc.

7. MARKET VALUE CHAIN

This analysis of the citrus marketing value chain is simplified because numerous interconnections were omitted and the size, levels of control and importance of each of the links and flows could not possibly be shown in a single diagram. In the citrus value chain, harvested fruit may go to the fresh fruit market, in order to be consumed fresh, or squeezed freshly at home to be consumed as juice, or it may enter the processing industry, in order to obtain juice (mainly in the form of Frozen Concentrated Orange Juice (FCOJ) for ease of transport in international trade) and other by-products. There is an increasing competition in this sector, with restructuring and changes in the marketing chain, in a context of globalization. The market is increasingly consumer driven.

The following discussion will focus on the main segments of the citrus value chain namely: domestic and export markets, processing industry, global retail chains and consumers. The citrus value chain is presented in Figure 64.

Figure 66: The citrus value chain



Source: UNCTAD Secretariat

7.1 Domestic and export markets

Locally, citrus fruit sold for the fresh market is taken to pack houses where it is graded and packed. It is then transported for distribution to retailers such as grocery stores. Culled fruit not meeting grade for fresh market is transported to processing plants for juice extraction. Bulk juice is moved to concentrate plants for evaporation and freezing into frozen concentrate or to canning plants for retail packaging. Retail packaged citrus juice may be sold to retailers for sale to consumers under a nationally advertised brand or private grocery chain label. As citrus products change form and move through market channels, value is added from labour, capital and management.

The industry is linked to input supply businesses that provide fertilizers, chemicals, orchard care services, packaging materials, transportation, etc. Labour for citrus production and processing is provided by labourers in farms and from surrounding towns. The export market is more important for the fresh citrus fruits from South Africa than for juice.

7.2 Processing industry

There are two kinds of juice processors: bulk processors who produce most of the world's orange juice and marketing processors who sell the packaged juice under their own brand name and often purchase additional juice from bulk processors. The beverage industry buys the juice concentrate in order to add the water and transform, bottle and market it. These bottlers have undergone a process of mergers and acquisitions (e.g. Coca Cola with Minute Maid and Pepsi Cola with Tropicana)

7.3 Global retail chains

Global retail chains are playing an increasing role in the distribution of produce in South Africa and other developed countries (particularly in the EU and USA). This tendency is also developing in Latin America and Asia. Increasing concentration and consolidation in retail chains, as well as their global expansion has improved their position and augmented their buying power in the market. It allows them to influence the marketing chain in order to better control it. They impose more stringent requirements when determining conditions of production and distribution. Supermarkets demand higher quantities, better qualities and lower prices.

This downstream shift of power in the produce marketing chain is leading to increased vertical coordination mainly through supply chain management practices. Supermarkets tend to build long-term relationships with preferred suppliers in order to guarantee continuous supply at the required levels of quality. The NFPMs' importance has declined dramatically as long-term relationships between retailers and growers have developed. Following suit, some citrus fruits growers and citrus processing companies are reacting, shifting from their production orientation to a more market oriented approach, improving supply chain management, in order to better meet consumers' demands. The new marketing and trade practices of retail chains also include slotting allowances and fees, in order to place the product on supermarket shelves, special packaging and other marketing and trade promotion services.

7.4 Final consumer

Consumer preferences are changing and they are demanding more healthy and natural products (they are becoming increasingly aware of the health and nutritive benefits of eating more fresh fruit and fruit juices). Consumers are also more interested in dietary issues, in consuming more food low in fat and sugar, and this favours fruit consumption. Food safety has also become a very significant issue, particularly after the food scares in Europe. Consumers demand higher quality of the food they consume and they are interested in the taste, appearance or shape of the fruit. They want to be informed about the food they are consuming through appropriate labelling and tracking and traceability schemes. They are also interested in innovation, showing an increasing taste for variety and demanding the continuing presence of new products. At the same time, new lifestyles have led to increased preferences for quick and easy to prepare food. Convenience has become an important factor in produce demand. This favours particularly the consumption of juice and easy

to peel fruit, such as clementines. In addition, consumers are also ever more concerned about production conditions, both environmental and social, demanding more organic and fair-trade products.

8. ORGANIZATIONAL ANALYSIS

8.1 Producer and associated organizations

The main association responsible for the citrus industry in South Africa is the Citrus Growers Association of Southern Africa (CGA). Its objectives are as follows:

- Providing the industry with access to global markets,
- Optimizing cost effective production of quality fruit,
- Continual commitment to research, development and communication with all stakeholders,
- Caring for the environment and the community within which the citrus farmers operate.

The CGA was established by citrus growers in the wake of deregulation. Growers were concerned that certain functions previously carried out by the Citrus Board could be discontinued or downsized. With the demise of a single channel marketing system there are often questions about “who represents the citrus grower?” The CGA believes that it is their role to fill this void. Growers’ interests are furthered through representation to citrus industry stakeholders – including government, exporters, research institutions and suppliers to the citrus industry. The CGA represents the interests of the producers of export citrus. In total 1 400 growers throughout Southern Africa (including Zimbabwe and Swaziland) are members of the Association.

8.2 Strengths, Weaknesses, Opportunities and Threat analysis

Some of the strengths, weaknesses, threats and opportunities of the citrus production sector in South Africa are presented in Figure 65.

Figure 67: Strengths, weaknesses, threats and opportunities for the South African citrus industry

Strengths	Weaknesses
<ul style="list-style-type: none"> • The industry's export operations and leading players are well established. • An efficient export infrastructure exists and market access has been improved. • The South African citrus industry is known for excellent overall quality for fruit (strong reputation in major international markets). • Sound communication mechanisms to majority of industrial participants. • High level of investment in current technology within pack houses and cold chain facilities. • Industry has all traceability systems in place, as required by accreditation protocols. 	<ul style="list-style-type: none"> • Production is largely dependent on climatic conditions which can only be partially manipulated by man through irrigation. • Deteriorating research infrastructure and capacity may limit new technology development in the future. • Saturation of traditional export markets. • Reliance on the UK and EU as main export market. • Relatively high input and capital costs. • Volatile fruit prices • An element of fragmentation in the industry. • Lengthy supply chain beyond the pack house. • Lack of industry control on efficiency and productivity in supply chain beyond farm gate and pack house door. • Poor skills and knowledge of the new entrants. • Delays due to degradation of the supporting infrastructure within the supply chain (handling facilities at ports, roads and energy supply). • Commercial and other barriers still exist for new entrants (particularly small scale farmers)
Threats	Opportunities
<ul style="list-style-type: none"> • Increased competition from the Southern Hemisphere counterparts like Chile, Brazil, and Argentina. • Oversupply of fruit into established export markets. • Availability and cost of irrigation water. • Impact of climate change especially in the Western Cape. • Inflation rate with regard to cost of labour and farming and also packing prerequisites. • Currency variability. • Increased protectionism by the EU and other established markets. • Citrus fruit diseases. 	<ul style="list-style-type: none"> • Market access initiatives to the Middle East, Asia (India, Indonesia) and China. • Increasing demand due to the consumers demand for healthy diets. • Potential for increased local market consumption. • Increased urbanization. • Harmonization of the institutional environment.

9. EMPOWERMENT ISSUES AND TRANSFORMATION OF THE AGRICULTURE SECTOR

9.1 Youth in citrus

The CGA has in the past few years published two publications under the transformation portfolio, namely 'Our Citrus Transforms' and 'Women in Citrus'. Following the publication of those publications, the CGA has published 'Youth in Citrus' which highlight the importance of the youth in the citrus sector. The publication also aims to motivate the youth to be involved in agriculture in general and in the citrus industry in particular.

9.2 Mentorship

The DAFF has joined with CGA in an initiative aimed at transferring skills from established citrus growers to new entrants in the industry. The DAFF has provided funding, while CGA has identified mentors and mentees, established agreements with these parties, and monitored progress on these farms. Dr Richard Bates was contracted by CGA to administer and monitor progress. Starting from 2010, the mentorship programme will be funded by provinces from the CASP fund.

The CGA has established a manual that guides mentorship activities. This manual provides detail on the roles and responsibilities of all those involved in the mentorship programme. Detailed reports on the different mentorship initiatives are available from CGA.

9.3 Extension

CGA has two extension personnel (seconded to CRI) dedicated to assist emerging growers from the north (Mpumalanga, Limpopo and Kwazulu Natal) and south region (Eastern Cape, Western Cape and Kwazulu Natal). The CGA has requested the provincial departments of agriculture and rural development to provide government extension personnel who will be trained as citrus specialists to provide support to growers. The CGA has already signed a memorandum of understanding (MoU) with the Limpopo department and is now in the process of signing other MoUs with the Eastern Cape and KZN provinces.

10. BUSINESS OPPORTUNITIES AND CHALLENGES

10.1 Business opportunities

The formation of associations focusing on targeted markets, sharing logistics and coordinating marketing plans are becoming a norm. There is a greater maturity and an understanding for the need to coordinate without sacrificing enterprise.

Prospects for growth and development in Southern African citrus industry depends on the availability of water and meeting the market needs. The industry is export – driven, and the local market cannot sustain large volumes of the fruit as a result the challenge on South African farmers to acquire new markets with attractive prices to cover the cost of inputs.

Export volumes have doubled over the past 30 years, from some 38 million cartons before deregulation to more than 70 million cartons in 2007. This was mainly due to more exporters discovering and developing

new markets. It means that citrus export volumes are distributed to a wider array of markets and as a result producers are less vulnerable to market collapses.

The end of pooling system whereby all fruit would come through a single channel was good for growers. Regardless of quality, all growers would get an average price at the end of the day under the old system. Its abolishment has meant that growers are now properly compensated for good quality and costs are more transparent.

As far as citrus exporting is concerned, members find it difficult to compete price-wise on the normally over supplied world markets against countries like Brazil and USA in terms of processed citrus (apart from acid content, which is low sugar/ acid ratios). SA valencia concentrates often necessitate local processors to trade at 5-10 % below the world prices, while the unit price is high.

10.2 Challenges

The rising costs of production: With added requirements of food safety and traceability adding to the cost of administration burden, many smaller farming units are becoming unsustainable.

Legislative requirements such as labour, water and environmental laws and skills development requirements are becoming cumbersome and making the business of citrus farming less profitable.

Global harmonization of standards: without global harmonization of in food safety and good agricultural practice standards then the additional costs and administration will take their toll on grower returns and profitability. Retailers and other supply chain role players must work together to make harmonized standards a reality – inspected once, accepted everywhere must be a reality. Otherwise it will only be certification agencies that will prosper.

Global warming: According to producers global warming is affecting western seaboard of the southern hemisphere countries, and the rising of the transport cost – which accounts for 30 – 40% of the price of getting a piece of fruit to the market. It is clear that the industry has some hurdles to overcome.

Emerging sector: Despite all the support that was received through partnerships created, the environment under which emerging farmers operate continues to demand improvement on the following:

- Use of title deeds as a form of collateral.
- Capacity and capability of trust and Community Property Associations (CPA) to engage on commercial ventures.
- Accessibility to support programs from the government and other role-players.
- Credit policies of various financial institutions.

11. ACKNOWLEDGMENTS

THE FOLLOWING INSTITUTIONS ARE ACKNOWLEDGED

11.1 National Agricultural Marketing Council Private Bag X 935

Pretoria
0001
Tel (012) 341 1115
Fax (012) 341 1811
Web: www.namc.co.za

11.2 Citrus Growers Association of Southern Africa

P.O Box 461
Hillcrest
3650
Tel (031) 765 2514
Fax: (031) 765 8029
www.cga.co.za

11.3 Quantec

www.quantec.co.za

11.4 S. A Citrus Processor Association

P.O Box 4417
Tzaneen
0850
082 410 5252
Email jsheppard@telkomsa.net

**11.5 National Department of Agriculture, Forestry and Fisheries
Directorate: Statistics and Economic Analysis**

Private X246
Pretoria
0001
Tel (012) 319 84 54
Fax (012) 319 8031
www.daff.gov.za

11.6 Trade and Industry Policy Strategies (TIPS)

P.O. Box 11214
Hatfield
0028
Tel (012) 322 7181
Fax (012) 431 7910
www.tips.co.za

11.7 United Nations Conference on Trade and Development (UNCTAD)

www.unctad.org

11.8 International Trade Centre (ITC)

www.trademap.org; www.macmap.org

THE CITRUS PROCESSORS ARE AS FOLLOWS:

11.9 LG Juices (Pty) Ltd

P. O. Box 8
Citrus Dal
7340
Tel (022) 921 3544
Fax (022) 921 3814

11.10 Granor-Passi (Pty) Ltd

P.O Box 584
Polokwane
0700
Tel (015) 298 6000
Fax (015) 298 8479

11.11 Valor Citrus Processors (Pty) Ltd

P.O Box 2071
North End
Port Elizabeth
6056
Tel (041) 486 2146
Fax (041) 486 4112

11.12 Magalisberg Citrus Co-operative Ltd

Private Bag X 5094
Brits
0250
Tel (012) 256 6703
Fax (012) 256 6769

11.13 Riverside Processors

P.O Box 286
Malelane
1320
Tel (013) 790 3015
Fax (013) 790 0072

11.14 Onderberg Verwerkings Koporasie

P.O Box 543
Malelane
1320
Tel (013) 790 1146
Fax (013) 790 1148

11.15 Letaba Citrus Processors (Pty) Ltd

Private Bag X 4019

Tzaneen
0850
Tel (015) 304 4000
Fax (015) 304 4230

11.16 Ceres Fruit Juices

PO Box 337
Bedfordview
2008
Tel: 011 622 0001/5
Fax: 011 622 0012
www.ceres.co.za

11.17 Marble Hall Citrus Processors

838 Afaat Street
Marble Hall
Mpumalanga
0472
Tel: 013 2611 308

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Annexure 1: Tariffs applied by European Union member states to oranges (080510) from South Africa during 2018

HS CODE	PRODUCT DESCRIPTION	TRADE REGIME	APPLIED TARIFFS	TOTAL AD VALOREM EQUIVALENT TARIFF
080510201101	Fresh sweet oranges : Navels, Navelines, Navelates, Salustianas, Vernas, Valencia lates, Maltese, Shamoutis, Ovalis, Trovita and Hamllins Of high quality. If the declared price is higher than or equal to 35.4 EUR/100 kg	MFN duties (Applied)	4.80%	4.80%
080510201102	Fresh sweet oranges : Navels, Navelines, Navelates, Salustianas, Vernas, Valencia lates, Maltese, Shamoutis, Ovalis, Trovita and Hamllins Of high quality. If the declared price is higher than or equal to 34.7 EUR/100 kg	MFN duties (Applied)	4.8% + 7.93 EUR/100 kg	5.73%
080510201103	Fresh sweet oranges : Navels, Navelines, Navelates, Salustianas, Vernas, Valencia lates, Maltese, Shamoutis, Ovalis, Trovita and Hamllins Of high quality. If the declared price is higher than or equal to 34 EUR/100 kg	MFN duties (Applied)	4.8% + 14.99 EUR/100 kg	6.65%
080510201104	Fresh sweet oranges : Navels, Navelines, Navelates, Salustianas, Vernas, Valencia lates, Maltese, Shamoutis, Ovalis, Trovita and Hamllins Of high quality. If the declared price is higher than or equal to 33.3 EUR/100 kg	MFN duties (Applied)	4.8% + 2.1 EUR/100 kg	7.58%
080510201105	Fresh sweet oranges : Navels, Navelines, Navelates, Salustianas, Vernas, Valencia lates, Maltese, Shamoutis, Ovalis, Trovita and Hamllins Of high quality. If the declared price is higher than or equal to 32.6 EUR/100 kg	MFN duties (Applied)	4.8% + 2.8 EUR/100 kg	8.50%
080510201106	Fresh sweet oranges : Navels, Navelines, Navelates, Salustianas, Vernas, Valencia lates, Maltese, Shamoutis, Ovalis, Trovita and Hamllins Of high quality. If the declared price is higher than or equal to 26.4 EUR/100 kg	MFN duties (Applied)	4.8% + 76.02 EUR/100 kg	14.19%
080510201107	Fresh sweet oranges : Navels, Navelines, Navelates, Salustianas, Vernas, Valencia lates, Maltese, Shamoutis, Ovalis, Trovita and Hamllins Of high quality. If the declared price is higher than or equal to 25.9 EUR/100 kg	MFN duties (Applied)	4.8% + 76.02 EUR/100 kg	14.19%
080510201108	Fresh sweet oranges : Navels, Navelines, Navelates, Salustianas, Vernas, Valencia lates, Maltese, Shamoutis, Ovalis, Trovita and Hamllins Of high quality. If the declared price is higher than or equal to 25.3 EUR/100 kg	MFN duties (Applied)	4.8% + 76.02 EUR/100 kg	14.19%
080510201109	Fresh sweet oranges : Navels, Navelines, Navelates, Salustianas, Vernas, Valencia lates, Maltese, Shamoutis, Ovalis, Trovita and Hamllins Of high quality. If the declared price is higher than or equal to 24.8 EUR/100 kg	MFN duties (Applied)	4.8% + 76.02 EUR/100 kg	14.19%

HS CODE	PRODUCT DESCRIPTION	TRADE REGIME	APPLIED TARIFFS	TOTAL AD VALOREM EQUIVALENT TARIFF
080510201110	Fresh sweet oranges : Navels, Navelines, Navelates, Salustianas, Vernas, Valencia lates, Maltese, Shamoutis, Ovalis, Trovita and Hamlins Of high quality. If the declared price is higher than or equal to 24.3 EUR/100 kg	MFN duties (Applied)	4.8% + 76.02 EUR/100 kg	14.19%
080510201111	Fresh sweet oranges : Navels, Navelines, Navelates, Salustianas, Vernas, Valencia lates, Maltese, Shamoutis, Ovalis, Trovita and Hamlins Of high quality. If the declared price is higher than or equal to 0 EUR/100 kg	MFN duties (Applied)	4.8% + 76.02 EUR/100 kg	14.19%
080510201901	Fresh sweet oranges : Navels, Navelines, Navelates, Salustianas, Vernas, Valencia lates, Maltese, Shamoutis, Ovalis, Trovita and Hamlins Other. If the declared price is higher than or equal to 35.4 EUR/100 kg	MFN duties (Applied)	4.80%	4.80%
080510201902	Fresh sweet oranges : Navels, Navelines, Navelates, Salustianas, Vernas, Valencia lates, Maltese, Shamoutis, Ovalis, Trovita and Hamlins Other. If the declared price is higher than or equal to 34.7 EUR/100 kg	MFN duties (Applied)	4.8% + 0.7 EUR/100 kg	6.01%
080510201903	Fresh sweet oranges : Navels, Navelines, Navelates, Salustianas, Vernas, Valencia lates, Maltese, Shamoutis, Ovalis, Trovita and Hamlins Other. If the declared price is higher than or equal to 34 EUR/100 kg	MFN duties (Applied)	4.8% + 1.4 EUR/100 kg	7.23%
080510201904	Fresh sweet oranges : Navels, Navelines, Navelates, Salustianas, Vernas, Valencia lates, Maltese, Shamoutis, Ovalis, Trovita and Hamlins Other. If the declared price is higher than or equal to 33.3 EUR/100 kg	MFN duties (Applied)	16.00% + 27.72 \$/Ton	18.15%
080510201905	Fresh sweet oranges : Navels, Navelines, Navelates, Salustianas, Vernas, Valencia lates, Maltese, Shamoutis, Ovalis, Trovita and Hamlins Other. If the declared price is higher than or equal to 32.6 EUR/100 kg	MFN duties (Applied)	16.00% + 36.96 \$/Ton	18.86%
080510201906	Fresh sweet oranges : Navels, Navelines, Navelates, Salustianas, Vernas, Valencia lates, Maltese, Shamoutis, Ovalis, Trovita and Hamlins Other. If the declared price is higher than or equal to 26.4 EUR/100 kg	MFN duties (Applied)	16.00% + 93.72 \$/Ton	23.26%
080510201907	Fresh sweet oranges : Navels, Navelines, Navelates, Salustianas, Vernas, Valencia lates, Maltese, Shamoutis, Ovalis, Trovita and Hamlins Other. If the declared price is higher than or equal to 25.9 EUR/100 kg	MFN duties (Applied)	16.00% + 93.72 \$/Ton	23.26%
080510201908	Fresh sweet oranges : Navels, Navelines, Navelates, Salustianas, Vernas, Valencia lates, Maltese, Shamoutis, Ovalis, Trovita and Hamlins Other. If the declared price is higher than or equal to 25.3 EUR/100 kg	MFN duties (Applied)	16.00% + 93.72 \$/Ton	23.26%

HS CODE	PRODUCT DESCRIPTION	TRADE REGIME	APPLIED TARIFFS	TOTAL AD VALOREM EQUIVALENT TARIFF
080510201909	Fresh sweet oranges : Navels, Navelines, Navelates, Salustianas, Vernas, Valencia lates, Maltese, Shamoutis, Ovalis, Trovita and Hamlins Other. If the declared price is higher than or equal to 24.8 EUR/100 kg	MFN duties (Applied)	16.00% + 93.72 \$/Ton	23.26%
080510201910	Fresh sweet oranges : Navels, Navelines, Navelates, Salustianas, Vernas, Valencia lates, Maltese, Shamoutis, Ovalis, Trovita and Hamlins Other. If the declared price is higher than or equal to 24.3 EUR/100 kg	MFN duties (Applied)	16.00% + 93.72 \$/Ton	23.26%
080510201911	Fresh sweet oranges : Navels, Navelines, Navelates, Salustianas, Vernas, Valencia lates, Maltese, Shamoutis, Ovalis, Trovita and Hamlins Other. If the declared price is higher than or equal to 0 EUR/100 kg	MFN duties (Applied)	16.00% + 93.72 \$/Ton	23.26%
080510209201	Fresh sweet oranges : Other : Sanguines and semi-sanguines Of high quality. If the declared price is higher than or equal to 35.4 EUR/100 kg	MFN duties (Applied)	16.00%	16.00%
080510209202	Fresh sweet oranges : Other : Sanguines and semi-sanguines Of high quality. If the declared price is higher than or equal to 34.7 EUR/100 kg	MFN duties (Applied)	16.00% + 9.24 \$/Ton	16.72%
080510209203	Fresh sweet oranges : Other : Sanguines and semi-sanguines Of high quality. If the declared price is higher than or equal to 34 EUR/100 kg	MFN duties (Applied)	16.00% + 18.48 \$/Ton	17.43%
080510209204	Fresh sweet oranges : Other : Sanguines and semi-sanguines Of high quality. If the declared price is higher than or equal to 33.3 EUR/100 kg	MFN duties (Applied)	16.00% + 27.72 \$/Ton	18.15%
080510209205	Fresh sweet oranges : Other : Sanguines and semi-sanguines Of high quality. If the declared price is higher than or equal to 32.6 EUR/100 kg	MFN duties (Applied)	16.00% + 36.96 \$/Ton	18.86%
080510209206	Fresh sweet oranges : Other : Sanguines and semi-sanguines Of high quality. If the declared price is higher than or equal to 26.4 EUR/100 kg	MFN duties (Applied)	16.00% + 93.72 \$/Ton	23.26%
080510209207	Fresh sweet oranges : Other : Sanguines and semi-sanguines Of high quality. If the declared price is higher than or equal to 25.9 EUR/100 kg	MFN duties (Applied)	16.00% + 93.72 \$/Ton	23.26%
080510209208	Fresh sweet oranges : Other : Sanguines and semi-sanguines Of high quality. If the declared price is higher than or equal to 25.3 EUR/100 kg	MFN duties (Applied)	16.00% + 93.72 \$/Ton	23.26%
080510209209	Fresh sweet oranges : Other : Sanguines and semi-sanguines Of high quality. If the declared price is higher than or equal to 24.8 EUR/100 kg	MFN duties (Applied)	16.00% + 93.72 \$/Ton	23.26%

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080510209210	Fresh sweet oranges : Other : Sanguines and semi-sanguines Of high quality. If the declared price is higher than or equal to 24.3 EUR/100 kg	MFN duties (Applied)	16.00% + 93.72 \$/Ton	23.26%
080510209211	Fresh sweet oranges : Other : Sanguines and semi-sanguines Of high quality. If the declared price is higher than or equal to 0 EUR/100 kg	MFN duties (Applied)	16.00% + 93.72 \$/Ton	23.26%
080510209401	Fresh sweet oranges : Other Other Sanguines and semi-sanguines Other. If the declared price is higher than or equal to 35.4 EUR/100 kg	MFN duties (Applied)	16.00%	16.00%
080510209402	Fresh sweet oranges : Other Other Sanguines and semi-sanguines Other. If the declared price is higher than or equal to 34.7 EUR/100 kg	MFN duties (Applied)	16.00% + 9.24 \$/Ton	16.72%
080510209403	Fresh sweet oranges : Other Other Sanguines and semi-sanguines Other. If the declared price is higher than or equal to 34 EUR/100 kg	MFN duties (Applied)	16.00% + 18.48 \$/Ton	17.43%
080510209404	Fresh sweet oranges : Other Other Sanguines and semi-sanguines Other. If the declared price is higher than or equal to 33.3 EUR/100 kg	MFN duties (Applied)	16.00% + 27.72 \$/Ton	18.15%
080510209405	Fresh sweet oranges : Other Other Sanguines and semi-sanguines Other. If the declared price is higher than or equal to 32.6 EUR/100 kg	MFN duties (Applied)	16.00% + 36.96 \$/Ton	18.86%
080510209406	Fresh sweet oranges : Other Other Sanguines and semi-sanguines Other. If the declared price is higher than or equal to 26.4 EUR/100 kg	MFN duties (Applied)	16.00% + 93.72 \$/Ton	23.26%
080510209407	Fresh sweet oranges : Other Other Sanguines and semi-sanguines Other. If the declared price is higher than or equal to 25.9 EUR/100 kg	MFN duties (Applied)	16.00% + 93.72 \$/Ton	23.26%
080510209408	Fresh sweet oranges : Other Other Sanguines and semi-sanguines Other. If the declared price is higher than or equal to 25.3 EUR/100 kg	MFN duties (Applied)	16.00% + 93.72 \$/Ton	23.26%
080510209409	Fresh sweet oranges : Other Other Sanguines and semi-sanguines Other. If the declared price is higher than or equal to 24.8 EUR/100 kg	MFN duties (Applied)	16.00% + 93.72 \$/Ton	23.26%
080510209410	Fresh sweet oranges : Other Other Sanguines and semi-sanguines Other. If the declared price is higher than or equal to 24.3 EUR/100 kg	MFN duties (Applied)	16.00% + 93.72 \$/Ton	23.26%

HS CODE	PRODUCT DESCRIPTION	TRADE REGIME	APPLIED TARIFFS	TOTAL AD VALOREM EQUIVALENT TARIFF
080510209411	Fresh sweet oranges : Other Other Sanguines and semi-sanguines Other. If the declared price is higher than or equal to 0 EUR/100 kg	MFN duties (Applied)	16.00% + 93.72 \$/Ton	23.26%
080510209601	Fresh sweet oranges : Other : Of high quality. If the declared price is higher than or equal to 35.4 EUR/100 kg	MFN duties (Applied)	16.00%	16.00%
080510209602	Fresh sweet oranges : Other : Of high quality. If the declared price is higher than or equal to 34.7 EUR/100 kg	MFN duties (Applied)	16.00% + 9.24 \$/Ton	16.72%
080510209603	Fresh sweet oranges : Other : Of high quality. If the declared price is higher than or equal to 34 EUR/100 kg	MFN duties (Applied)	16.00% + 18.48 \$/Ton	17.43%
080510209604	Fresh sweet oranges : Other : Of high quality. If the declared price is higher than or equal to 33.3 EUR/100 kg	MFN duties (Applied)	16.00% + 27.72 \$/Ton	18.15%
080510209605	Fresh sweet oranges : Other : Of high quality. If the declared price is higher than or equal to 32.6 EUR/100 kg	MFN duties (Applied)	16.00% + 36.96 \$/Ton	18.86%
080510209606	Fresh sweet oranges : Other : Of high quality. If the declared price is higher than or equal to 26.4 EUR/100 kg	MFN duties (Applied)	16.00% + 93.72 \$/Ton	23.26%
080510209607	Fresh sweet oranges : Other : Of high quality. If the declared price is higher than or equal to 25.9 EUR/100 kg	MFN duties (Applied)	16.00% + 93.72 \$/Ton	23.26%
080510209608	Fresh sweet oranges : Other : Of high quality. If the declared price is higher than or equal to 25.3 EUR/100 kg	MFN duties (Applied)	16.00% + 93.72 \$/Ton	23.26%
080510209609	Fresh sweet oranges : Other : Of high quality. If the declared price is higher than or equal to 24.8 EUR/100 kg	MFN duties (Applied)	16.00% + 93.72 \$/Ton	23.26%
080510209610	Fresh sweet oranges : Other : Of high quality. If the declared price is higher than or equal to 24.3 EUR/100 kg	MFN duties (Applied)	16.00% + 93.72 \$/Ton	23.26%
080510209611	Fresh sweet oranges : Other : Of high quality. If the declared price is higher than or equal to 0 EUR/100 kg	MFN duties (Applied)	16.00% + 93.72 \$/Ton	23.26%

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080510209801	Fresh sweet oranges : Other Other Sanguines and semi-sanguines Other. If the declared price is higher than or equal to 35.4 EUR/100 kg	MFN duties (Applied)	16.00%	16.00%
080510209802	Fresh sweet oranges : Other Other Sanguines and semi-sanguines Other. If the declared price is higher than or equal to 34.7 EUR/100 kg	MFN duties (Applied)	16.00% + 9.24 \$/Ton	16.72%
080510209803	Fresh sweet oranges : Other Other Sanguines and semi-sanguines Other. If the declared price is higher than or equal to 34 EUR/100 kg	MFN duties (Applied)	16.00% + 18.48 \$/Ton	17.43%
080510209804	Fresh sweet oranges : Other Other Sanguines and semi-sanguines Other. If the declared price is higher than or equal to 33.3 EUR/100 kg	MFN duties (Applied)	16.00% + 27.72 \$/Ton	18.15%
080510209805	Fresh sweet oranges : Other Other Sanguines and semi-sanguines Other. If the declared price is higher than or equal to 32.6 EUR/100 kg	MFN duties (Applied)	16.00% + 36.96 \$/Ton	18.86%
080510209806	Fresh sweet oranges : Other Other Sanguines and semi-sanguines Other. If the declared price is higher than or equal to 26.4 EUR/100 kg	MFN duties (Applied)	16.00% + 93.72 \$/Ton	23.26%
080510209807	Fresh sweet oranges : Other Other Sanguines and semi-sanguines Other. If the declared price is higher than or equal to 25.9 EUR/100 kg	MFN duties (Applied)	16.00% + 93.72 \$/Ton	23.26%
080510209808	Fresh sweet oranges : Other Other Sanguines and semi-sanguines Other. If the declared price is higher than or equal to 25.3 EUR/100 kg	MFN duties (Applied)	16.00% + 93.72 \$/Ton	23.26%
080510209809	Fresh sweet oranges : Other Other Sanguines and semi-sanguines Other. If the declared price is higher than or equal to 24.8 EUR/100 kg	MFN duties (Applied)	16.00% + 93.72 \$/Ton	23.26%
080510209810	Fresh sweet oranges : Other Other Sanguines and semi-sanguines Other. If the declared price is higher than or equal to 24.3 EUR/100 kg	MFN duties (Applied)	16.00% + 93.72 \$/Ton	23.26%
080510209811	Fresh sweet oranges : Other Other Sanguines and semi-sanguines Other. If the declared price is higher than or equal to 0 EUR/100 kg	MFN duties (Applied)	16.00% + 93.72 \$/Ton	23.26%
0805108010	Fresh or dried oranges (excl. fresh sweet oranges) : Fresh	MFN duties (Applied)	16.00%	16.00%

HS CODE	PRODUCT DESCRIPTION	TRADE REGIME	APPLIED TARIFFS	TOTAL AD VALOREM EQUIVALENT TARIFF
0805108090	Fresh or dried oranges (excl. fresh sweet oranges) : Other	MFN duties (Applied)	16.00%	16.00%

Source: MacMap, ITC