

The new SWSA regime includes requirements for publication, public comment, final declarations, and subsequent regulations concerning prohibited and restricted activities. The practical issue is one of a workflow conflict. A project could be deemed approved under PDALA within the 30-day decision timeframe, while simultaneously being stalled by the longer timelines in water licensing, or vice versa. This mismatch can adversely affect financing, planting windows, contractor bookings, and seasonal labour planning.

Authorisations

A third tension arises from how each law handles authorisations. PDALA explicitly states that compliance with its process does not exempt applicants from fulfilling any other statutory authorisation requirements and that obtaining authorisations under other laws does not negate the need for PDALA authorisation when required. This creates a deliberate "double key" approach. The water amendments similarly expand the realm of state oversight. For example, they tighten control over the transfer of water use authorisations, prohibit private water trading, and empower the minister to reallocate water across sectors, provinces, or catchments in the public interest.

The potential contradiction for growers is practical rather than legal. A grower may obtain a PDALA authorisation for a land-use change aimed at enhancing productivity or resilience, but then find it difficult to secure or retain the necessary water authorisation, as the water regime may push for reallocation, curtailment, or refusal in sensitive source areas.

What and by whom?

A fourth area where contradictions may arise is in defining what is being protected and by whom. The water amendments introduce terms such as "strategic water source areas" and embed protections for these zones through licensing restrictions and regulations.



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Conversely, PDALA introduces "protected agricultural areas," which are designated to safeguard high-value agricultural land (including irrigated land) from non-agricultural land uses and to promote long-term production and food security.

In practice, these designations might overlap in geography, but rely on different scientific criteria and be administered by different departments. This raises a governance risk, where a producer could face overlapping protected area rules, each with different maps, update cycles, and compliance expectations. PDALA requires that protected agricultural areas be reviewed at least every five years and maintained in registers and maps, including notifications to the registrar of deeds. The water amendment mandates that the water minister identifies and publishes SWSAs and later issues regulations for managing activities within and around them. If the boundaries or classifications are updated at separate times, growers may experience regulatory "moving targets," particularly in peri-catchment zones.

Policy perception of agriculture

A fifth tension concerns the policy treatment of agriculture as both a beneficiary and a source of risk. PDALA's philosophy is that agriculture, especially on high-potential

land, should be preserved, protected, and supported through coordinated planning, norms, and standards aimed at ensuring viable farming units and food security.

While the amended water regime does not oppose agriculture, it explicitly recognises agriculture as a potential pressure on water source areas, imposing licensing constraints and setbacks in vulnerable SWSAs. As a result, growers may encounter contradictory messages during implementation, with agricultural authorities advocating for optimal agricultural use and stable farming systems, whilst water authorities impose stricter conditions or refuse additional water use authorisations where ecological risks are heightened.

None of these tensions represent a legal impossibility. South African administrative law is accustomed to multi-authorisation regimes, but they do create operational risks. The "contradictions" will not manifest as explicit clauses that contradict each other, but rather as conflicting outcomes arising from different competent authorities applying diverse statutory tests to the same development.



The intensive search for EARLY MANDARINS

Probably three in five of my grower enquiries are a request for information on new early mandarins. By Jon Roberts

Jon Roberts

When it comes to new early mandarins, growers' have a keen interest in the picking window weeks from 14–25. During the mandarin boom, this citrus type climbed from the fourth to the second most planted in the last

decade. This upward trend in hectares planted will probably continue for the coming decade.

However, following a peak of more than 3.5 million mandarin hybrid buds sold in 2018, bud sales have declined to nearly half a million in the past season. This downturn is largely attributed to the increased concentration of these mandarin hybrids in the late citrus harvesting window, a segment that may be approaching market saturation.

The industry is actively searching for early-season mandarins that match the quality of late-season varieties while replacing traditional Clementine and Satsuma cultivars. Their plantings are declining due to challenges such as alternate bearing, seed presence, and less consistent performance across certain growing regions and postharvest challenges.

Therefore, the industry quest is on for a 12 month supply of early-season mandarins that can match the quality of their late-season counterparts. They must deliver the same eating quality as late-season mandarins, and command the same premium prices driven by strong consumer preference.

However, the challenge has been finding cultivars that consistently deliver the same quality and display these characteristics of late-season mandarins:

- early maturity without compromising yield
- high-quality external easy-peeling rind and high-quality internal characteristics
- low seed content in open-pollinated conditions
- consistent performance across South African production regions.

Current research and evaluation programmes are exploring newer cultivars. A universally accepted drop-in replacement that can be produced at scale and ticks all the boxes is still pending.

Are early mandarins the only viable option?

Beyond mandarins, other opportunities are subject to set criteria around profit per hectare, and low risk and maintenance cultivars with multiple revenue streams.

Other South African segments like Valencia oranges have significant advantages, if they are suitable for the region in question. These are often downplayed when comparing "market buzz" to "actual economic returns."

Valencias' profitability strengths

New early Valencia cultivars like Kas and Gie 5 early, especially, yield premium "first in the market" prices, which may render them as relevant as early mandarins.

Distinguishing characteristics i.t.o. yield consistency and volume:

- high cumulative yield per hectare
- more stable bearing across seasons
- good adaptation to a range of South African climatic zones.

Table 1. Valencias’ income-generating ability

Grade	Channel	Real world value
1	Fresh export	Premium returns, favourable exchange rates.
2	Fresh domestic	Solid returns contributing to packing cost.
3	Juice processing	Value floor revenue for fresh export

This leads to predictable production volumes, which is important for both export and processing supply.

Multiple revenue streams

Unlike many mandarins that are only sold fresh, with a lower juice-price value, Valencias can generate income across all fruit grades (see **Table 1**).

Recent trends in juicing markets – including higher juice and concentrate prices – have strengthened the floor price of grades that, two to three years ago, were marginal at best.

Lower maintenance - production costs

Valencias generally have:

- less intensive production requirements, leading to lower production and labour costs per ton
- simpler harvest economies-of-scale, due to fruit size and production
- less manipulation and fewer harvest rounds.

Juice suitability

The global market for orange juice (especially NFC and concentrate) has firmed in recent years, evidenced by:

- Valencias’ favourable juice quality and yield
- improved export and local processing contracts
- flexible routing into fresh or processed channels reduces risk.

These are further additions to profit-per-hectare stability.

Economic reality: price vs. volume

Early mandarins, especially, can command high prices at specific windows, but:

- price volatility can be high
- seasonal competition from the northern hemisphere can depress early and late windows



- seed content and postharvest issues add quality risk
- volume per hectare, even in the good season, doesn’t always offset lower fruit size or pack outs.

Conversely, Valencia trades on volume and floor pricing, making cash flows and risk profiles more predictable and often more profitable.

Possible alternative considerations

Instead of basing decisions on “Which is the best early mandarin?”, a more strategic, commercially-centred question for South African growers could be “Which crop mix maximizes profit per hectare across price cycles while minimising risk?”

Regarding the evaluation of current Valencia blocks for renewal, with improved rootstocks, new Early cultivars and renewed orchards:

- increase yield

- improve juice quality
- strengthen dual-market returns.

Use data-driven variety selection for mandarins (and Navels)

Rather than chasing a single “silver bullet” focus on:

- region-specific cultivar performance trials of soft citrus and Navels (pigmented)
- seedless stability under open pollination
- ease of harvest and labour cost metrics
- market access windows vs. price achieved, and consider region-specific, premium paying Navel types – late or pigmented. ▮



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