



Gendered Costs of the US Tariff Shock in South Africa's Export Citrus Sector

Vahini Naidu and Sylvester Wullo Bagooro

Abstract

The 30 per cent unilateral tariff on South African exports to the US in August 2025 exposed structural asymmetries obscured by aggregate trade data. The citrus sector's competitive advantage, a feminised seasonal workforce, sees women concentrated in the lowest-paid, least secure roles. Ownership in the sector is overwhelmingly male-dominated. The study shows that women workers and producers bear concentrated adjustment costs yet remain invisible to gender-blind governmental responses. US Executive Order 14168 (2025) further narrows scope for gender-transformative provisions in any successor to the African Growth and Opportunity Act (AGOA).

1. Introduction

In 2025, the South African citrus sector packed a record 203.4 million 15-kilogram cartons (Citrus Growers' Association of Southern Africa (CGA) 2025). Citrus is the country's largest agricultural export category by value and the United

States is one of the sector's premium overseas markets, although the Netherlands remains the largest destination by volume (USDA FAS 2025; Chisoro/Landani 2024). The CGA reported export earnings for the 2025 season¹ of approximately 2.47 billion US dollars (CGA 2025). Against the backdrop of this record, the Trump administration's announcement on 2 April 2025 of a 30 per cent unilateral tariff introduced a structural shock whose costs, while not fully visible in the data for the 2025 season, are disproportionately borne by women workers and producers in the sector.

The sector's production base is also marked by a sharp racial and gender skew. In 2023 only 117 of the approximately 1 200 commercial citrus growers in South Africa were Black, accounting for 10 per cent of the industry by number, eight per cent by area planted, and six per cent by total exports. Only eight of those 117 were women (Chisoro/Landani 2024, citing CGA 2023). Drawing on sixteen semi-structured interviews with Black growers and industry stakeholders across Limpopo and the Eastern Cape, Chisoro/Landani (2024) conclude that citrus production and markets continue to be dominated by white male-owned and managed farms, with limited entry and expansion of Black male and women-owned farming businesses, »per-

¹ The South African citrus export season runs approximately from April to October, with peak packing and shipping concentrated in the July–September period.

petuating a distinct race and gender gap». The case study integrates this ownership-level analysis with the workforce-level analysis below, since the costs of a trade shock fall across both.

What aggregate trade statistics do not reveal is that the sector's competitive advantage is structurally dependent on a feminised seasonal workforce. In a 2026 status report on women's work across agrifood systems in sub-Saharan Africa, the Food and Agriculture Organization of the United Nations (FAO), together with the Natural Resources Institute (NRI), and African Women in Agricultural Research and Development (AWARD), finds that women constitute close to 50 per cent of the agrifood-system's workforce in the region, nine percentage points above the global average (FAO/AWARD/NRI 2026). Within South Africa, Statistics South Africa (Stats SA) 2024 Agricultural Survey indicates that approximately 40 per cent of commercial agricultural workers are women, with a disproportionate concentration in seasonal, low-wage roles without job security or social protection (Stats SA 2024; Commission for Gender Equality (CGE) 2025; for a note on data limitations, see Annex A). Vulnerability is not evenly distributed. Race, geography, migration status, and household composition intersect with gender to produce concentrated disadvantage among Black women in rural Western Cape and Limpopo, including undocumented migrant workers from Zimbabwe and other neighbouring states (Naidu/Ossome 2018; Cousins *et al.* 2018; Chisoro/Landani 2024). These workers are hired predominantly on daily or piece-rate contracts, frequently excluded from Unemployment Insurance Fund (UIF) contributions (UNCTAD 2022; Sibeko/Phalatse/Ossome 2021). Like women agricultural workers across the Global South, they also carry the double burden of unpaid reproductive work such as childcare, cooking, eldercare, and household maintenance, alongside their paid harvest labour (UNCTAD 2022; Sibeko/Phalatse/Ossome 2021).

This case study addresses a central question. When the sector absorbs an external trade shock, who bears the costs and why are those costs distributed as they are? The analysis draws on three interlocking frameworks: the Moser Triple Role Framework (Moser 1993), which disaggregates women's labour into productive, reproductive, and community management roles; the ILO Decent Work Agenda (ILO 1999), the normative standard against which seasonal employment conditions should be evaluated; and UNCTAD's (2022) gendered economy framework, which contextualises the trade-gender nexus at macro, meso, and micro levels. Following the analytical vocabulary set out in Chapter 1, the case study assesses whether the South African government's response is gender-blind, gender-responsive, or gender-transformative. It also engages with US Executive Order 14168 (2025), which directs federal agencies to remove gender ideology from official policy language and narrows the space for gender-sensitive provisions in any trade instrument negotiated with the United States, including any AGOA successor arrangement. Methodologically, the case study integrates secondary literature, official statistics, the pub-

lished findings of the CCRED-Oxfam working paper on inclusion in the citrus industry (Chisoro/Landani 2024), and original semi-structured interviews conducted with sector experts in 2026. This case study focuses primarily on women in their role as workers including as farm owners in the citrus value chain. It does not claim to tell the whole story of how trade shocks affect women, since labour market figures alone do not capture impacts on unpaid care work, food security, or community life. These broader dimensions are addressed through the Moser framework in the analysis that follows.

2. Participation Without Power. Moser, Decent Work, and Seasonal Citrus Labour

2.1 The Moser Triple Role Framework Applied

Moser's Triple Role Framework (Moser 1993) identifies three simultaneous domains of women's labour. The productive role covers income-generating market work. The reproductive role covers domestic and care work that sustains the labour force. The community management role covers voluntary work that compensates for absent public services. While satellite accounts increasingly attempt to measure unpaid household and care work, the productive role remains the only domain systematically recognised in core national accounts, labour law, and trade policy; drawing on Moser's framework, the reproductive and community management roles are structurally marginalised in the institutions that govern employment and commerce (UNCTAD 2022). The framework's critical insight is that these roles are mutually constraining. A reduction in seasonal employment is never simply a job loss but a compound disruption across all three spheres.

In the productive sphere, women are concentrated in picking, sorting, packing, and post-harvest processing, the most physically intensive, lowest-paid, and least secure positions in the value chain. CGE (2025) confirms women farmworkers are disproportionately concentrated in these roles, while men hold a disproportionate share of supervisory, machine-operating, and year-round permanent positions. The National Agricultural Marketing Council (NAMC 2023) reports that only 15.2 per cent of farm managers in commercial agriculture are female. The CCRED-Oxfam study finds that on Black-owned citrus farms women hold administrative, production-management, and farm-management positions but rarely directorships, also noting that male citrus farmers tend to view women as core support systems rather than fellow farmers (Chisoro/Landani 2024). This exemplifies vertical segregation, the element of gender inequality within that distribution whereby women are systematically excluded from the most senior and advantaged positions (Blackburn and Jarman, 2005; UNCTAD 2022). In the reproductive sphere, the same women return from harvest shifts to perform unpaid childcare, eldercare, and household maintenance. In South Africa in 2023, the gender gap in time spent on unpaid domestic and care work stood at

Moser Role	Activities in Citrus Sector	Impact of Tariff Shock	Policy Gap
Productive	Picking, sorting, packing, processing (piece-rate / daily wage)	Reduction in seasonal hiring; loss of income; no UIF access	No income protection measure in government response
Reproductive	Childcare, cooking, eldercare, household maintenance after/between shifts	Income loss intensifies unpaid burden; reduced household food consumption; withdrawal of children from school	No recognition in trade adjustment data or policy
Community Management	Voluntary welfare activities; compensating for absent public services through community support	Income loss triggers expanded community role: women assume household crisis management, increase subsistence activities, and take on additional informal work to compensate for lost wages	Entirely absent from policy framework

9.1 percentage points of a 24-hour day, equivalent to women spending on average over two hours per day more than men on tasks including cooking, cleaning, childcare, and eldercare (World Bank Gender Data Portal 2025, drawing on UN Statistics Division data). Sibeko /Phalatse/Ossome (2021) demonstrate that the persistence of unpaid household production allows employers to expect the reproduction of labour in the absence of a living wage, since household production, encompassing cooking, cleaning, childcare, and eldercare, absorbs subsistence costs the wage does not cover. South Africa's competitive advantage in premium export markets is, in part, subsidised by the unpaid reproductive labour of the women who work across its value chain.

A critical comparative question the framework surfaces concerns men in the off-season. CGE (2025) and Sustainability Initiative of South Africa (SIZA) (2025) data indicate that male workers in agriculture are more frequently retained on year-round contracts for orchard maintenance and mechanised tasks. Men thereby accumulate continuous Unemployment Insurance Fund (UIF) contributions, longer employment records, and housing benefits tied to permanent employment, while women are cyclically released and rehired without accruing equivalent entitlements. It is crucial to reference this structural asymmetry when evaluating whether seasonal work is worthwhile for women.

2.2 Is a Seasonal Job a Decent Job?

The ILO defines decent work as productive work for women and men in conditions of freedom, equity, security, and human dignity, organised around four pillars: employment creation, rights at work, social protection, and social dialogue (ILO 1999).

Applied to seasonal citrus farmworkers, a systematic deficit is evident across all four pillars. From 1 March 2026 the

South African National Minimum Wage stands at 30.23 rand (approximately 1.55 euro at early-2026 exchange rates) per hour following the increase gazetted in Government Gazette 54075 (Department of Employment and Labour 2026). Compliance gaps in the seasonal agricultural sector are documented through SIZA's social and environmental monitoring programme (SIZA 2025). ILO Convention C184 on Safety and Health in Agriculture (2001), the benchmark for occupational protection, has not been ratified by South Africa. The rights of seasonal workers under the Basic Conditions of Employment Act (BCEA) are formally recognised but de facto enforcement is constrained by contract type and geographical isolation (SAHRC 2019).

Social protection exclusion is the most acute failure. Seasonal workers on daily or piece-rate contracts frequently do not have UIF contributions remitted, which means that when employment is curtailed they have no recourse to unemployment insurance. Structural exclusion of seasonal agricultural workers from UIF arises in part because South Africa's social protection architecture was designed around the standard employment relationship of continuous, formal employment, a design that treats seasonal and piece-rate work as exceptional rather than structural (Ncamane 2024). This is a wider pattern across informal work in the South African economy. In 2024, informal employment accounted for 29.8 per cent of total employment, with women and men roughly equally represented quantitatively (27.8 per cent and 31.5 per cent respectively), but women disproportionately concentrated in the lowest-paid informal occupations, including domestic work, elementary labour, and seasonal agricultural roles (Stats SA 2025a). UK supermarket supply-chain studies have documented women grape pickers in South Africa going hungry despite full-time work, because their wages fall below a living-wage threshold (Wilshaw 2018). Occupational health is a further dimension the regulatory architecture leaves under-protected. Studies of women workers on South African commercial farms record dermal

ILO Pillar	Normative Standard	Condition in Seasonal Citrus	Key Source
Employment Creation	Productive work with adequate income	Seasonal; piece-rate; national minimum wage 30.23 rand/hour (from 1 March 2026) frequently not enforced	SIZA (2025); CGE (2025); Dept of Employment and Labour (2026)
Rights at Work	ILO C184; BCEA; Core Labour Standards	South Africa has not ratified C184; enforcement limited for seasonal workers	South African Human Rights Commission (SAHRC) (2019); ILO (2001)
Social Protection	UIF; occupational health coverage; social security	UIF contributions frequently not paid for daily/piece-rate workers; no sector-specific safety net	CGE (2025); SAHRC (2019)
Social Dialogue	Collective bargaining; trade union representation	Low collective bargaining coverage; no seasonal agricultural bargaining council	CGE (2025); Labour Relations Act 66 of 1995

symptoms, respiratory irritation, and cholinesterase abnormalities consistent with sustained pesticide exposure (Atinkut Asmare *et al.* 2022). The CGE (2025) documents social protection exclusion as structural; the administrative architecture is calibrated to the standard employment relationship that does not encompass seasonal workers. Social dialogue is effectively absent. Collective bargaining coverage is low and there is no sector-specific bargaining council for seasonal agricultural workers (CGE 2025; Labour Relations Act 66 of 1995).

3. The Tariff Shock and Its Gendered Employment Effects

Prior to the April 2025 announcement, South Africa exported approximately 119 million US dollars in citrus to the United States annually (California Citrus Mutual 2025), representing approximately 6.58 million standard 15-kilogram export cartons. Within the US market for Southern Hemisphere counter-seasonal citrus, South Africa held a share of approximately 13.9 per cent, ranking behind Chile, Peru, and Argentina (Walsh 2025). The 30 per cent tariff entered into force on 8 August 2025 under Executive Order 14326 (The White House 2025a). On 14 November 2025, a US Executive Order issued retroactively to 13 November 2025 exempted fresh oranges from Trump's unilateral tariff regime. Mandarins, a significant component of the premium US-bound export basket, were excluded from the exemption (The White House 2025b; Fresh Fruit Portal 2025). In February 2026, the United States reduced tariffs to approximately 10 per cent for most South African goods not subject to other measures, though mandarins remained subject to the 30 per cent tariff throughout the 2026 citrus season (California Citrus Mutual 2026; NAMC 2025).

The African Growth and Opportunity Act (AGOA) is a United States trade preference programme that grants qualifying sub-Saharan African countries duty-free access to the US

market for a broad range of goods, including citrus. South Africa has been a beneficiary since 2001. AGOA expired on 30 September 2025 and was reauthorised through 31 December 2026 by H.R. 7148, signed by President Trump on 3 February 2026 (Brownstein 2026; Agbiz 2026). The one-year extension leaves open the question of longer-term renewal. Following the US Supreme Court's ruling limiting the executive's unilateral use of tariffs, trade preferences such as AGOA may increasingly serve as instruments of bilateral leverage rather than stable long-term arrangements, making a multi-year renewal unlikely in the near term. Since women seasonal workers are the first to lose employment when growers reduce US-bound export volumes, the resulting uncertainty compounds the gendered employment effects documented in this case study. See Table 3 for the full tariff chronology.

The distributional pattern documented by Engel *et al.* (2021) confirms that trade shocks produce impacts that are large, geographically concentrated, and long-lasting, with adjustment costs disproportionately borne by vulnerable groups. Two factors explain why the overall impact of the 2025 tariff on employment was not immediately visible in sector data. Sector experts interviewed for this case study, in observations consistent with the broader market analysis in Chisoro/Landani (2024), note that the tariff coincided with the South African harvest and trade season, so contracts and shipping for the 2025 crop were largely already underway, and that the Netherlands and other European destinations absorb larger absolute shares than the US (interviews 2026; Chisoro/Landani 2024; USDA FAS 2025). Sector experts interviewed for this case study further noted that the US tariff shock compounded a series of pre-existing trade pressures, including Southern African Development Community (SADC) market disruptions and the EU's citrus black spot phytosanitary regime, with women seasonal workers and undocumented migrants from neighbouring states identified as the most exposed groups across all of these shocks. The more severe consequences and their dis-

Date	Event	Tariff Rate	Product Scope
2 Apr 2025	»Liberation Day« announcement (EO 14257)	30% (post 90-day pause)	All South African goods
8 Aug 2025	30% reciprocal tariff enters into force (EO 14326)	30%	All South African goods
30 Sep 2025	AGOA expired	AGOA preferences suspended	All AGOA goods
13–14 Nov 2025	Agricultural exemption EO issued	0% (duty-free)	Fresh oranges only (mandarins excluded)
3 Feb 2026	AGOA reauthorised through 31 Dec 2026 (H.R. 7148)	AGOA preferences reinstated	All eligible goods except tariff-overridden lines
Feb 2026	Reciprocal tariff reduced for most South African goods	~10% (most goods); 30% retained on mandarins through 2026 citrus season	Most South African goods; mandarins exempted from reduction

tributional impacts will materialise in the 2026 season; the absence of a documented impact to date should not be read as the absence of structural exposure. NAMC (2025) recorded a year-on-year decline of approximately 15 000 agricultural jobs as of Q3 2025, even as quarter-on-quarter agricultural employment in the sector rose by 14 000 during Q3, a recurring seasonal pattern driven by the annual peak in hiring for fruit, vegetable, and field crop harvests, which concentrate labour demand in the July–September period. NAMC does not disaggregate these figures by subsector or sex (see Annex D).

UNCTAD (2022) observes that women who mostly hold part-time and seasonal or temporary jobs are dismissed first, also noting that women, who make up a large percentage of the informal workforce, cannot access economic rescue packages. When a grower reduces packing volumes, the first operational adjustment is most likely a reduction in seasonal packing staff, the domain most densely occupied by women, while the male-dominated permanent workforce is insulated by contract. The shock thus operates at all three levels of the analytical framework presented by UNCTAD (2022), drawing on Elson *et al.* (1997): At the macro level it depresses sector revenue and aggregate employment; at the meso level firms reallocate risk away from permanent contracts onto piece-rate ones; at the micro level, income loss in the productive sphere triggers intensification of unpaid reproductive labour, such as substitution of purchased food with home production and increased community reciprocity (UNCTAD 2022; Sibeko/Phalatse/Ossome 2021); the mechanisms through which this occurs at the household level are discussed in Section 2.1. The pattern echoes the FAO's findings on Senegal's export horticulture (FAO/AWARD/NRI 2026), suggesting a regional rather than country-specific structural feature.

The distributional and developmental consequences of such a shock extend well beyond sector-level trade and

employment indicators. Drawing on comparable cases, the GIZ/LSE study on the 2025 US tariff shock in Lesotho and Cambodia (Belrhiti *et al.* 2026) documents a pattern of household adjustment whose logic is structurally applicable to South Africa's citrus regions. Income loss triggers immediate cuts to protein-rich food and preventive healthcare, withdrawal of children from school, and the relocation of children to rural areas where grandparents absorb care costs (Belrhiti *et al.* 2026). Women assume the role of household crisis managers, simultaneously combining additional informal work, subsistence activities, and expanded caregiving, with unpaid care work intensifying both in hours and psychological strain. South Africa-specific evidence from the COVID-19 shock, a comparable sudden income disruption, confirms this pattern. Casale and Posel (2020) find that women accounted for two-thirds of net job losses in the early lockdown period, while simultaneously absorbing a disproportionate share of increased childcare and household work, with the burden falling most heavily on African women in lower earnings brackets. Extrapolating from the GIZ study and comparable data for the agricultural sector, indirect job losses in transport, street vending, or rental housing can be estimated for each dismissed worker as a result of reduced purchasing power in the local economy (Belrhiti *et al.* 2026). The knock-on effects of income loss in agricultural labour markets are more limited than in manufacturing, where local employment multipliers are typically substantially higher (Belrhiti *et al.* 2026). In South Africa's citrus-growing regions, the more significant second-order effects are those discussed below, namely informal-sector contraction, labour-force exit, and geographic concentration of adjustment costs in former homeland municipalities.

In South Africa's specific institutional context, these dynamics are compounded by two structural features. First, poor rural and peri-urban households in the citrus-growing regions of the Western Cape and Limpopo already depend on

diversified livelihoods, combining wages with subsistence agriculture, petty trade, and communal resource access rather than wages alone. When the wage component falls, the remaining strategies are activated but are not adequate substitutes, and the burden of managing that gap falls disproportionately on women (Sibeko/Phalatse/Ossome 2021). Second, South Africa's labour market is characterised by high structural unemployment, a small informal sector, rigid wages, and historically low inter-regional mobility, particularly in former homeland municipalities where the greatest concentration of agricultural labour is found. World Bank evidence on earlier trade shocks in South Africa shows that income per capita in former homeland municipalities fell 3.7 per cent per 10 per cent tariff-linked employment contraction, compared to 1.4 per cent in other municipalities, and that displaced workers in these areas were more likely to exit the labour force altogether than to find alternative employment (Erten, Leight, and Tregenna 2019; Bastos and Santos 2021). These dynamics suggest that the second-order effects of a sustained export shock in the citrus sector would be geographically concentrated, long-lasting, and disproportionately borne by women in already-marginalised rural communities.

4. Government and Industry Responses. Policy Without a Gender Lens

4.1 The Five-Element Government Response

On 4 August 2025, the Department of International Relations and Cooperation (DIRCO) and Department of Trade, Industry and Competition (DTIC) issued a joint media statement organising the government's response around five key elements. These were continued engagement with the United States, export diversification, an economic response package, trade defence and competitiveness measures, and demand-side interventions, including facilitation of AGOA renewal (DIRCO/DTIC 2025). The statement committed to »protect jobs and productive capacity in South Africa« (DIRCO/DTIC 2025). None of the five elements contained a gender-specific measure. There was no requirement for working-capital recipients to demonstrate minimum wage compliance for seasonal workers, no gender impact assessment of diversification measures, and no UIF access provision for workers whose seasonal employment was curtailed. In terms of the analytical typology adopted in the joint media statement, the response is gender-blind: an apparently neutral package distributing adjustment costs unevenly because women and men have different roles, needs, and exposures. Parliament's Select Committee on Economic Development and Trade welcomed the AGOA reauthorisation on 5 February 2026 but raised no question of gendered employment impacts (Parliament of South Africa 2026). UNCTAD (2022) identifies this pattern as a structural failure: mainstreaming gender in trade policy requires consideration at every stage of the process, but in practice rarely occurs.

The response also fails to acknowledge the structural hierarchy of inequality on which the sector rests. Sector experts interviewed for this case study describe Black women as being located at the bottom of the social hierarchy in commercial citrus, with race and geography compounding gender, in observations consistent with the producer-level findings of Chisoro/Landani (2024) (interviews 2026; Chisoro/Landani 2024). Black women growers face barriers in accessing capital and property equity not faced by white growers, partly because property values in townships are systematically lower and the collateral basis for borrowing is weaker. They also lack the established industry networks, packhouse relationships, and marketing-agent connections through which white commercial growers access production loans, market information, and export logistics. Industry transformation funding is real but limited. The CCRED–Oxfam study estimates that the 20 per cent transformation share of the citrus industry's statutory export levy works out to approximately 549 000 rand (29 000 US dollars) per Black grower per year, against working capital requirements of 9 to 20 million rand for a 100-hectare farm in a single season (Chisoro/Landani 2024). The CGDC has consequently begun shifting strategy from supporting all 117 Black growers towards concentrating on roughly 19 judged most likely to become commercially sustainable. This shift is itself a distributional choice with gendered consequences that the government's tariff response does not address.

4.2 The Gender Language Constraint: Executive Order 14168

The government's response must be situated within a contested international landscape around gender language. United States Executive Order 14168, signed on 20 January 2025 declares it the policy of the United States to recognise two sexes that are »not changeable and are grounded in fundamental and incontrovertible reality«, directs federal agencies to remove and cease issuing materials that »promote or otherwise inculcate gender ideology«, and stipulates that federal funds shall not be used to promote »gender ideology« as defined in Section 2(f) of the Order (Executive Order 14168 2025). Implementing guidance issued by the Office of Personnel Management has, in practice, replaced »gender« with »sex« across federal Human Resources and forms infrastructure. Any trade instrument engaging with the United States that incorporates gender-sensitive provisions or references the Beijing Declaration and Platform for Action (1995) is, from the US federal perspective, ideologically contestable and would potentially be precluded from negotiations. The Beijing Declaration was adopted by consensus by representatives of 189 governments and is foundational to international work aiming to advance equality and full human rights for women. EO 14168 in effect instrumentalises international legal vocabulary against the gender justice agenda it was designed to advance.

This constraint is directly relevant to any AGOA successor arrangement. It is not only that trade-related policies and measures tend to be gender-blind; EO 14168 introduces a

further layer of deliberate foreclosure. Its characterisation of gender as ideology is at odds with the standard analytical definition.

A second dimension of the US policy environment compounds this constraint. In March 2026, the Office of the United States Trade Representative (USTR) initiated Section 301 investigations into 60 economies, including South Africa, citing their failure to ban imports of goods produced with forced labour (USTR 2026a). In June 2026, the USTR proposed an additional 12.5 per cent tariff on South African goods on this basis, finding that South Africa had not imposed an effective forced labour import prohibition (USTR 2026b). The South African government rejected the finding, noting its ratification of key ILO conventions and existing enabling legislation (DTIC 2026b). The irony is considerable. The same US administration that invokes workers' rights as grounds for new tariffs on South African exports simultaneously forecloses gender-sensitive provisions in trade instruments through EO 14168 and imposes trade shocks whose adjustment costs are borne disproportionately by the women workers it purports to protect. Labour standards, in this context, function as a tool of trade leverage rather than as a normative commitment to workers' rights.

5. Towards Gender-Transformative Reforms

Sector experts interviewed for this case study emphasised that addressing the differential impacts of trade shocks requires state intervention at the granular level, targeted at gender-specific needs, rather than sector-wide support measures that leave the underlying structure of inequality intact. Reforms must be sequenced from the immediately achievable to the strategically ambitious. The foundation is data. As Engel *et al.* (2021) demonstrate, proactive policy design requires understanding distributional impacts before or during a shock, not after it. The government should require citrus exporters receiving working-capital or market-diversification support to submit sex-disaggregated employment data by contract type and province as a condition of eligibility. Standardising reporting requirements across NAMC, the CGDC, and SIZA would close the principal data gaps documented in Annex A.

When it comes to social protection and decent work, the most achievable immediate reform is extension of UIF access to seasonal agricultural workers through a simplified registration mechanism independent of continuous formal employment. Minimum wage compliance, verified through SIZA social-standards audits, should be a condition of access to export-facilitation support, including access to the zero-tariff Chinese agricultural market available from 1 May 2026 under the bilateral framework signed in February 2026 (DTIC 2026; Xinhua 2026). Active labour market policies should be designed to address compound shocks, including tariffs, climate disruption, and phytosanitary trade interruptions such as the European Union's citrus black spot regime, rather than considering each shock in

isolation. The government should also support extension of collective bargaining coverage to seasonal agricultural workers, addressing the absence of social dialogue identified as a structural decent work deficit (UNCTAD 2022).

Three measures pertaining to producer-level inclusion are achievable within the existing legislative framework. First, the Citrus Transformation Scheme being designed by NAMC with the citrus industry should pool provincial transformation funds and earmark a share for Black women growers, with disbursements conditional on access to working capital at scale rather than grant-based piecemeal support (Chisoro/Landani 2024). Second, partnership agreements between Black growers and white commercial farmers, packhouses, or marketing agents should be brought within NAMC's statutory levy conditions, requiring transparent disclosure of production loan terms, sale proceeds, and management fees, since without such transparency partnership-based inclusion produces dependence rather than financial independence (Chisoro/Landani 2024). Third, market intelligence and network access for Black women growers, including in the Asian markets toward which NAMC has been steering diversification, should be embedded in publicly funded export promotion. Sector experts cautioned that NAMC's market expansion initiatives in Asian markets have so far operated at an aggregate industry level, with benefits accruing primarily to large-scale commercial producers rather than to Black women farmers or seasonal workers.

At the strategic level, South Africa's announcement of intention to ratify the African Continental Free Trade Area (AfCFTA) Protocol on Women and Youth in Trade in June 2025 (APAnews 2025) creates a domestic legal hook for gender-transformative provisions in regional frameworks. The Protocol specifically requires AfCFTA state parties to address financial access barriers for women traders, including collateral requirements that disadvantage women where customary land tenure limits women's inheritance and ownership rights (Africa Trade Policy Centre 2025).

The reform package above is sequenced along the spectrum set out in Chapter 1: Sex-disaggregated data requirements move the response from gender-blind to gender-aware; conditional UIF, minimum-wage compliance, and the Citrus Transformation Scheme's earmarking of funds move it to gender-responsive; non-regression and reporting clauses in trade instruments, partnership-agreement transparency, and extension of collective bargaining coverage move it toward a gender-transformative approach. Given the EO 14168 environment, the AfCFTA route and the Economic Partnership for Shared Prosperity (CAEPA) framework are likely to be more productive negotiating venues for these provisions than any AGOA successor in the short term.

6. Recommendations

Government (DIRCO, DTIC, Department of Employment and Labour)

- Require sex-disaggregated employment data by contract type and province as a condition of eligibility for working-capital or market diversification support.
- Establish a simplified UIF registration mechanism for seasonal agricultural workers independent of continuous formal employment.
- Link access to the zero-tariff Chinese agricultural market under CAEPA (from 1 May 2026) to minimum wage compliance verified through SIZA audits.
- Route gender-transformative provisions in trade frameworks through AfCFTA and CAEPA rather than any AGOA successor.

Sector (CGA, Citrus Growers Development Chamber, NAMC, packhouses)

- Pool provincial transformation funds and earmark a dedicated share for Black women growers, disbursed at working-capital scale (9–20 million rand) rather than grant-based piecemeal support.
- Require transparent disclosure of production loan terms, sale proceeds, and management fees in partnership agreements between Black growers and commercial farms / packhouses.
- Extend market-intelligence and trade-facilitation support for Asian markets explicitly to Black women producers.

Trade unions and workers' organisations

- Support establishment of a sector-specific bargaining council for seasonal agricultural workers.
- Run targeted UIF registration campaigns in the Western Cape and Limpopo during the pre-season period (April to June), before seasonal contracts begin.

Women's rights bodies (CGE, civil society)

- Advocate for a standing requirement for pre-implementation gender impact assessment of government trade adjustment packages.
- Ensure undocumented migrant women workers from neighbouring states are included in any UIF extension mechanism.

International and multilateral bodies (ILO, UNCTAD, FAO)

- Support South Africa toward ratification of ILO Convention C184 on Safety and Health in Agriculture, with technical assistance for implementation.
- Synthesise findings from South Africa, Senegal, Lesotho, and Cambodia into a common framework to protect seasonal women workers in agricultural export value chains.

Conclusion

The US tariff shock for South African citrus is, at its distributional core, a gender shock with a racialised geography. The Moser framework reveals that women seasonal workers are not simply employees whose hours have been reduced. They are the load-bearing structure of a household and community economy whose productive, reproductive, and community management roles are simultaneously destabilised by income loss. The ILO Decent Work standard demonstrates that the employment they hold, even in normal times, falls below the threshold of productive work in conditions of freedom, equity, security, and human dignity. At the producer level nationally, eight Black women growers operate against an ownership structure dominated by white male-owned farms, with the shock exacerbating capital, network, and infrastructure asymmetries.

Government and industry responses were calibrated to the sector and the firm: taking export volumes, market diversification, diplomatic engagement, and grower cash flow into account, but not the income security of women seasonal workers, structural exclusions from social protection, or the racialised gender gap in producer-level inclusion. As UNCTAD (2022) notes, »trade policy affects women and men in structurally distinct way« and frameworks that fail to incorporate a gender dimension reproduce existing inequalities. Addressing these structural drivers would require state intervention not only at the broader industry level but also at the granular level where gender-specific needs can be targeted.

EO 14168 adds a further constraint negotiators must address. Securing gender-just provisions through AfCFTA and CAEPA, where the AGOA route is constrained, is as much a negotiating objective as any tariff schedule.

Unless sex-disaggregated employment and ownership data are collected at the subsector level, the costs of trade shocks will remain invisible. Taking such data as a foundation, income protection, decent work standards tied to export facilitation, transformation-oriented funding earmarks, partnership-agreement transparency, and gender-transformative provisions in regional trade arrangements can be devised and implemented. The sector's record harvest of 2025, achieved partly thanks to the labour of underprotected women workers and the marginal participation of Black women producers, should provide the resources and the moral imperative to begin.

References

- African Union (2024):** Protocol to the Agreement Establishing the African Continental Free Trade Area on Women and Youth in Trade. Adopted 18 February 2024. Addis Ababa: African Union Commission.
- Agbiz (2026):** 'The Extension of AGOA is a Welcome Development', Pretoria: Agricultural Business Chamber of South Africa, 3 February 2026.
- APAnews (2025):** 'South Africa ratifies AfCFTA Protocol on Women and Youth in Trade', African Press Agency, 27 June 2025.
- Atinkut Asmare, B., Freyer, B and Bingen, J. (2022):** 'Women in agriculture: pathways of pesticide exposure, potential health risks and vulnerability in sub-Saharan Africa', in *Environmental Sciences Europe*, 34:89. doi.org/10.1186/s12302-022-00638-8.
- Bastos, P. and Santos, N. (2021):** *Long-Run Effects of Trade Liberalization on Local Labor Markets: Evidence from South Africa*. Policy Research Working Paper No. 9686, Washington, DC: World Bank.
- Beijing Declaration and Platform for Action (1995):** Fourth World Conference on Women, Beijing, 4–15 September 1995. New York: United Nations.
- Belrhiti, I. et al. (2026):** *Uncertain Trade, Unequal Burdens: The Gendered Impacts of US Tariffs in Cambodia and Lesotho*. Bonn / Eschborn: GIZ.
- Brownstein (2026)** 'Bless the Trade Down in Africa: AGOA Short-Term Reauthorization', *Brownstein Hyatt Farber Schreck Insight*, February 2026.
- California Citrus Mutual (2025):** 'Reciprocal Trade Action Reshapes Citrus Import Landscape', California Citrus Mutual News, 7 August 2025. Available at: <https://www.cacitrusmutual.com/2025/08/07/reciprocal-trade-action-reshapes-citrus-import-landscape/> (Accessed 28.4.2026).
- (2026):** 'South Africa Citrus Industry Update', *California Citrus Mutual News*, 11 February 2026. Available at: <https://www.cacitrusmutual.com/2026/02/12/south-africa-citrus-industry-update/> (Accessed 28.4.2026).
- Casale, D. and Posel, D.(2020):** *Gender and the Early Effects of the Covid-19 Crisis in the Paid and Unpaid Economies in South Africa*. NIDS-CRAM Wave 1 Policy Paper. Johannesburg: Southern Africa Labour and Development Research Unit (SALDRU), University of the Witwatersrand. Available at: <https://cramsurvey.org> (Accessed 28.4.2026).
- Citrus Growers' Association of Southern Africa (CGA) (2025):** *2025 Season Industry Communications and Statistics*. Rivonia: CGA.
- Chisoro, S. and Landani, N. (2024):** *Meaningful inclusion and participation of black and women farmers in South Africa's citrus industry*. CCRED-Oxfam SA Fair4All Project Working Paper. Johannesburg: Centre for Competition, Regulation and Economic Development (CCRED), University of Johannesburg.
- Commission for Gender Equality (CGE) (2025):** *Do women reap what they sow? The experiences of women farm workers, a sequel*. Johannesburg: CGE.
- Cousins, B. et al. (2018):** 'Social reproduction of "classes of labour" in the rural areas of South Africa: contradictions and contestations', in: *Journal of Peasant Studies*, 45(5-6), pp. 1060–1085. doi.org/10.1080/03066150.2018.1482876.
- Department of Employment and Labour (2026):** National Minimum Wage Determination, *Government Gazette* No. 54075, 3 February 2026, Pretoria: Department of Employment and Labour.
- Department of International Relations and Cooperation (DIRCO) / Department of Trade, Industry and Competition (DTIC) (2025):** Joint Statement on US Tariffs, Pretoria: DIRCO / DTIC, 4 August 2025.
- Department of Trade, Industry and Competition (DTIC) (2026):** Framework Agreement on Economic Partnership for Shared Prosperity (CAEPA), signed 6 February 2026 in Beijing, Pretoria, DTIC. Available at: <https://www.gov.za/news/media-statements/minister-parks-tau-signs-framework-agreement-economic-partnership-shared> (Accessed 28.4.2026).
- (2026b):** 'Minister Tau Notes US Findings on Section 301 Investigations'. Media Statement, 3 June 2026. Pretoria.
- Elson, D. (1991/1997):** 'Male Bias in Macro-economics: The Case of Structural Adjustment', in Elson, D. (ed.) *Male Bias in the Development Process*. Manchester: Manchester University Press.
- Engel, J. et al. (2021):** *The Distributional Impacts of Trade: Empirical Innovations, Analytical Tools, and Policy Responses*. Trade and Development Series, Washington, DC: World Bank. doi: 10.1596/978-1-4648-1704-5.
- Erten, B., Leight, J. and Tregenna, F. (2019):** 'Trade Liberalization and Local Labor Market Adjustment in South Africa', *Journal of International Economics*, 118, pp. 448–467.
- Executive Order 14168 (2025):** Defending Women From Gender Ideology Extremism and Restoring Biological Truth to the Federal Government. *Federal Register*, Vol. 90, 30 January 2025, pp. 8615–8618. (FR Doc. 2025-02090).
- FAO / AWARD / NRI (Food and Agriculture Organization of the United Nations / African Women in Agricultural Research and Development / Natural Resources Institute) (2026):** *The Status of Women in Agrifood Systems in Sub-Saharan Africa*. Rome: FAO. doi.org/10.4060/cd9262en.
- Fresh Fruit Portal (2025):** 'South Africa's orange growers elated over US tariff exemption, but lament the exclusion of mandarins', 21 November 2025. Available at: <https://www.freshfruitportal.com/news/2025/11/21/cga-tariff-exemption/> (Accessed 28.4.2026).
- International Labour Organization (ILO) (1999):** *Decent Work. Report of the Director-General to the 87th Session of the International Labour Conference*. Geneva: ILO.
- (2001):** C184 – Safety and Health in Agriculture Convention, 2001. Geneva: ILO.
- Interviews (2026):** Semi-structured interviews with sector experts and stakeholders in the South African citrus value chain, conducted by the authors during the preparation of this case study. Cited in text as 'interviews 2026'. Identifying details withheld for confidentiality.
- KAL Group (2025), cited in Walsh, S. (2025):** 'US tariffs unlikely to undermine SA agriculture competitiveness'. Johannesburg: KAL Group, October 2025.
- Labour Relations Act 66 of 1995 (Republic of South Africa):** Pretoria: Government Printer.
- Moser, C. (1993):** *Gender Planning and Development: Theory, Practice and Training*, London / New York: Routledge.
- Naidu, S. and Ossome, L. (2018):** 'Work, gender, and immiseration in South Africa and India', in *Review of Radical Political Economics*, 50 (2): pp. 332–348. doi.org/10.1177/0486613416666530.
- National Agricultural Marketing Council (NAMC) (2023-a):** *Employment Structural Patterns: Agricultural Industry Statistics*, 2023. Pretoria: NAMC.
- (2025-b):** *Insights into South Africa's Agricultural Employment Trends, Quarter 3-2025*. Pretoria: NAMC, November 2025.
- Ncamane, N. (2024):** An analysis of informal workers and the coverage of South Africa's Covid-19 Temporary Employee / Employer Relief Scheme (TERS), *Law, Democracy and Development*, 28: pp. 288–310. doi.org/10.17159/2077-4907/2024/ldd.v28.13.
- Parliament of South Africa (2026):** Select Committee on Economic Development and Trade welcomes AGOA extension. Press release, 5 February 2026. Cape Town: Parliament of the Republic of South Africa.
- Sibeko, B., Phalatse, S. and Ossome, L. (2021):** *Feminist Proposals on Macroeconomic Policies Needed for a COVID-19 Economic Recovery: A Perspective from the African Continent*. Johannesburg: Institute for Economic Justice / NAWI Afrifem Macroeconomics Collective / Gender and Development Network.
- SIZA (Sustainability Initiative of South Africa) (2025):** *SIZA Monitoring & Evaluation Report on Social and Environmental Compliance*. Paarl: SIZA.
- South African Human Rights Commission (SAHRC) (2019):** *Farm Workers and Human Rights*. Johannesburg: SAHRC.
- Statistics South Africa (Stats SA) (2024):** *Census of Commercial Agriculture 2017/18 and Annual Agricultural Survey updates*. Pretoria: Statistics South Africa.
- (2025a):** *Quarterly Labour Force Survey, Q2:2025*. Statistical Release P0211. Pretoria: Statistics South Africa.
- (2025b):** *Sustainable Development Goals: South Africa Country Report 2025*. Pretoria: Statistics South Africa.
- UNCTAD (2022):** *Looking at the Trade and Gender Nexus from a Development Perspective: A brief overview – Concepts, definitions and analytical frameworks*. UNCTAD / DITC / 2021/2. Geneva: United Nations Conference on Trade and Development.
- United States Department of Agriculture, Foreign Agricultural Service (USDA FAS) (2025):** *South Africa Citrus Annual GAIN Report*. Washington, DC: USDA FAS.
- USTR (2026a):** 'USTR Initiates 60 Section 301 Investigations Relating to Failures to Effectively Enforce Prohibitions on Importation of Goods Produced with Forced Labor'. Washington DC: Office of the United States Trade Representative, 12 March 2026.
- (2026b):** 'USTR Makes Findings and Proposes Action in 60 Section 301 Investigations'. Washington DC: Office of the United States Trade Representative, 2 June 2026.
- White House (2025a):** Executive Order 14326 of 31 July 2025 – Further Modifying the Reciprocal Tariff Rates. Washington, DC: The White House.
- (2025b):** Executive Order 14360 of 14 November 2025 – Modifying the Scope of the Reciprocal Tariffs With Respect to Certain Agricultural Products. *Federal Register*, Vol. 90, No. 226, 25 November 2025 (FR Doc. 2025-21203). Washington, DC: The White House.
- Wilshaw, R. (2018):** *UK Supermarket Supply Chains: Ending the Human Suffering Behind Our Food*. Oxford: Oxfam.

Annex A: Methodological Note on Data Gaps

1. Sex-disaggregated seasonal employment data (citrus-specific): no such published, regularly updated figures for the citrus subsector are available. SIZA audits contain occupational disaggregation but are not publicly available in disaggregated form. The 40 per cent figure for women in commercial agriculture cited in Section 1 is drawn from broader Stats SA agricultural data (Stats SA 2024) and should not be treated as a citrus-subsector-specific figure.
2. Female farm manager classification: NAMC (2023) reports that 15.2 per cent of farm managers in commercial agriculture are female, the most recent disaggregated figure available. Citrus-subsector-specific data on women in supervisory positions remain unpublished. The CCRED-Oxfam study (Chisoro/Landani 2024) provides qualitative evidence on women holding farm-management, production-management, and administrative positions but rarely directorships.
3. Post-season employment audit: NAMC's Q3 2025 report records a year-on-year decline of approximately 15 000 agricultural jobs, while Q3 2025 quarter-on-quarter agricultural employment rose due to horticultural harvest demand (NAMC 2025). The figures are not disaggregated by subsector or sex. A targeted post-season audit of citrus employment changes disaggregated by contract type and sex is required.
4. Income loss quantification: No study has quantified income loss for women seasonal workers attributable to the tariff shock. Given the absence of UIF records for piece-rate workers, this requires primary data collection.
5. Female ownership at the producer level: the previously unverifiable ownership figure has now been resolved. Chisoro/Landani (2024), drawing on CGA (2023) data, document that of approximately 1 200 commercial citrus growers in South Africa, 117 were Black growers and only eight were women. Disaggregation by both race and gender at the level of total commercial growers (across white-owned and Black-owned farms combined) remains unpublished.
6. SIZA Critical Alerts: The two Critical Alerts against citrus suppliers for failure to pay the seasonal minimum wage are documented in the SIZA Social Monitoring and Evaluation Report, Q4 2024–2025 (SIZA 2025).
7. Absence of gender impact assessment as a finding: the lack of a gender impact assessment of the government's five-element response is itself evidence of structural institutional design failure, not merely a data gap.

Government Responses

Tab. A

Response area	Content	Women's involvement or gendered dimension
Vis-à-vis the USA	Continued diplomatic engagement with the US; facilitation of AGOA renewal, secured through H.R. 7148 (signed 3 February 2026) extending AGOA through 31 December 2026 (DIRCO / DTIC 2025)	No gender-specific conditions attached to engagement; women seasonal workers not mentioned in parliamentary debate on AGOA reauthorisation (Parliament of South Africa 2026)
Vis-à-vis domestic industry	Five-element response package: export diversification, economic response package, trade defence and competitiveness measures, working-capital support, AGOA facilitation (DIRCO/DTIC 2025); CAEPA bilateral framework with China signed February 2026 opening zero-tariff agricultural access from 1 May 2026 (DTIC 2026)	No gender impact assessment of diversification measures; no minimum wage compliance requirement linked to working-capital support; NAMC's Asian-market initiatives have benefited large-scale commercial producers rather than Black women growers (interviews 2026)
Vis-à-vis workers	No specific worker-directed measure included in the five-element response; no UIF access provision for workers whose seasonal employment was curtailed	Response is gender-blind: an apparently neutral package that distributes adjustment costs unevenly because women and men have different roles, needs, and exposures (UNCTAD 2022). No women's organisations or gender bodies were consulted in preparing the response

Industry Responses / Demands

Tab. B

Actor	Response	Gendered dimension
CGA / CGDC	CGA documented record 2025 season (203.4 million cartons; 2.47 billion US dollars export earnings); CGDC shifted strategy from supporting all 117 Black growers toward concentrating resources on approximately 19 growers judged most commercially viable (Chisoro/Landani 2024)	CGDC's concentration strategy is a distributional choice with gendered consequences: the eight Black women growers are less likely to meet commercial viability thresholds, given capital and network barriers.
NAMC	Began designing a Citrus Transformation Scheme; steered market diversification toward Asian markets	Asian-market initiatives operate at aggregate industry level; benefits accrue primarily to large-scale commercial farms rather than Black women producers or seasonal workers (interviews 2026).
Packhouses / commercial growers	Expedited 2025 shipments ahead of tariff entry into force; absorbed tariff shock in 2025 through pre-existing contracts	Where cost pressure is absorbed at farm level, the adjustment mechanism is typically contract degradation i.e., shifting workers from permanent to piece-rate arrangements, which disproportionately affects women.
SIZA	Continued social and environmental monitoring programme; two Critical Alerts issued against citrus suppliers for failure to pay the seasonal minimum wage (SIZA 2025)	Audit findings are not publicly available in sex-disaggregated form; women's concentration in piece-rate roles means non-compliance with minimum wage provisions affects them disproportionately.

Actor	Response	Gendered dimension
Trade unions	No sector-specific bargaining council for seasonal agricultural workers exists; collective bargaining coverage in seasonal agriculture is low (CGE 2025; Labour Relations Act 66 of 1995).	Absence of social dialogue infrastructure means women seasonal workers, the most numerous and most precarious group, have no formal mechanism through which to raise tariff-related employment concerns.
Seasonal workers	No documented collective response; individual coping strategies consistent with GIZ/LSE (2026) findings include cuts to food and health-care, withdrawal of children from school, intensification of subsistence activities, and increased reliance on community reciprocity networks.	Women assume the role of household crisis managers across all three Moser roles simultaneously; unpaid care work intensifies in both hours and psychological strain when income falls.
Black women growers	Operating within existing CGDC and NAMC frameworks but facing capital, collateral, and network barriers that limit effective participation in tariff-response initiatives	The country's eight Black women growers face a compound disadvantage: the tariff shock exacerbates pre-existing asymmetries in capital access, packhouse relationships, and market intelligence that white commercial growers do not face (Chisoro/Landani 2024).

Access to full study



Gendered Impacts – Blind Responses

The 2025 Tariff Crisis and the Case for
Gender Transformative Reforms

➔ www.fes.de/lnk/study-gender-justice-and-global-trade

About the authors

Vahini Naidu is Programme Coordinator of the Trade for Development Programme at the South Centre. She is an international trade lawyer whose work spans US trade policy, WTO reform, and inclusive trade policy for the Global South.

Sylvester Wulfo Bagooro is a trade economist with experience in policy research and advocacy on trade and investment issues and Africa's development. He currently serves as Senior Programme Officer at Third World Network-Africa, where he leads the trade work.

Imprint

Publisher

Friedrich-Ebert-Stiftung e.V.
Godesberger Allee 149
53175 Bonn
info@fes.de

Publishing department

Division for International Cooperation |
Global and European Policy

Responsibility for content and editing

Katia Schnellecke | International Gender Justice and Feminism

Editing

Helen Ferguson

Contact

Christiane Heun
Christiane.Heun@fes.de

Design / Layout

Brendle Grafik | Design, Stefanie Brendle

Image credits

picture alliance / Ikon Images | Stuart Kinlough

The views expressed in this publication are not necessarily those of the Friedrich-Ebert-Stiftung e.V. (FES). Commercial use of the media published by the FES is not permitted without the written consent of the FES. FES publications may not be used for election campaign purposes.

September 2026

© Friedrich-Ebert-Stiftung e.V.

Further publications of the Friedrich-Ebert-Stiftung can be found here:

➔ www.fes.de/publikationen

