

INVESTIGATING THE KEY LIMITATIONS AND IMPROVEMENTS INFLUENCING THE COMPETITIVE SUCCESS OF SOUTH AFRICA'S ORANGER EXPORTERS



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Abstract

The objective of identifying constraining factors is to reveal that the key obstacles affecting the competitiveness of South Africa's domestic orange industry include issues such as the "quality of unskilled labor," "trust in the honesty of politicians," "electricity suppliers," "health," "South Africa's land reform policy," "South Africa's BEE policy," and "crime." Additionally, challenges related to the lack of quality infrastructure, bilateral agreements with trading countries, and poor performance of ports relative to their global counterparts have been identified. The constraining factors were ranked, with the top issues aligning closely with the industry's current challenges.

In contrast, enhancing factors play a crucial role in boosting industry competitiveness in both domestic and international markets. The key elements contributing positively include the availability of unskilled labor, local input suppliers, scientific research institutions, technological quality, the cost of unskilled labor, soil conditions, and the sustainability of local input suppliers. Attention to maintaining and improving these factors is crucial for the sustained competitiveness of the South African orange sector.

1. Introduction

The competitiveness of the South African orange industry is critical for its long-term survival. As a result of the changing regulatory and business environments that influence the way industries operate, this research study aims to investigate the factors influencing the competitive success of the domestic orange industry. The investigation of the industry's competitive success remains critical amidst the changes in the business environment, particularly those on the demand and market side, and rivalry (Ndou, 2012). This study adopted Porter's competitive diamond model to gather key success factors and constraints that continue to impact the competitiveness of the South African orange industry.

According to Pitts and Lagnevik (1998), this model measures the competitive potential or competitive process, which is often qualitative. It looks at the availability of superior inputs or factors impacting the competitiveness of the industry, which could be used to identify and improve competitiveness (Pitts & Lagnevik, 1998). Porter's Diamond model asserts that certain countries and industries exhibit greater competitiveness due to inherent factors. According to (Grant, 1991), Porter emphasizes the pivotal role of the home base in establishing a competitive advantage, particularly in industries where local government is dynamic and challenging. Porter (1990a) identified four key aspects within the domestic environment—factor conditions, demand conditions, related and supporting industries, and firm strategy, structure, and rivalry—that significantly shape the context enabling domestic

firms to achieve and sustain competitive advantage. Additionally, he acknowledges the influence of "government" and "chance" as factors impacting these major determinants (Ndou, 2012). The subsection below highlights the study objective, aim, and hypothesis.

1.1. The study's aim

This study aimed to evaluate the competitive success factors influencing South African orange producers and exporters.

1.2. The objectives of the study

To identify and describe key limitations and improvements influencing the competitive success of local orange producers and exporters.

1.3. Hypotheses of the study

The null hypothesis is that no significant limitations or success factors influence the competitiveness of South African oranges.

2. Literature Review and Theoretical Framework

Examining the factors influencing industrial competitiveness is a key focus of this study (Bilgen, 2010). This investigation delves into the defense industry of Turkey by employing the diamond model and an expert opinion survey to identify variables within these determinants. Additionally, a survey of national competitiveness in the United States is conducted. The literature review draws from reputable journals, with preliminary and comprehensive searches conducted through peer-reviewed articles, reports, books, and Google Scholar (Anaesth, 2016). Primary keywords such as "orange industry", "competitiveness", and "diamond model" guide the search. A qualitative analysis of competitive levels is carried out, and the diamond model aids in identifying strategies for the recovery of the tourism industry in Sri Lanka. Six different elements contribute qualitative information to the research (Fernando, 2021).

Porter aimed to identify the factors in a country's environment that impact the competitive advantage of businesses in specific industries or sectors. This effort led to the development of the widely recognized "diamond framework" (Porter, 1990: 71-130), which consists of four key determinants: factor conditions, demand conditions, related and supporting industries, and firm strategy, structure, and rivalry. These determinants examined both individually and, in their interactions, play a crucial role in either fostering or impeding the establishment and endurance of competitive advantage for industries within a country.

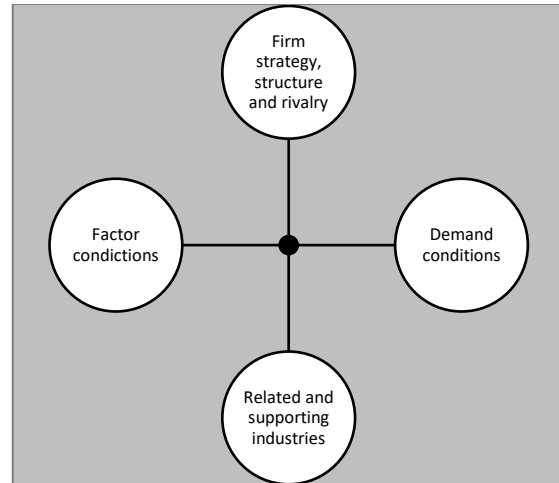


Figure 1. Diagram: Model of Study

3. Methodology and Data

This paper aims to evaluate the critical constraints and enhancements impacting the competitiveness of South African oranges. To gauge South Africa's competitiveness, the chosen methodology is the generalized double diamond model (GDDM), which aligns with the paper's objectives and has demonstrated its suitability for a developing country such as South Africa. According to this model, an industry's competitive advantage is determined by four key attributes: factor conditions, demand conditions, related and supporting industries, and firm strategy, structure, and rivalry. Furthermore, government policies and external factors such as chance serve as exogenous shocks, supporting the overall framework of industry competitiveness alongside the previously mentioned attributes.

This paper explores the impact of local factors on the competitiveness of orange producers and exporters in a specific region. A total of 102 questionnaires were distributed to a diverse group of individuals involved in the orange industry. Of these, 67 surveys were collected, resulting in a response rate of 65.7%. Following an assessment of the current competitiveness of the orange industry in South Africa using the diamond theory from a comprehensive perspective, the subsequent phase of this study involves examining the factors that contribute to both the decline and growth of competitiveness within the orange industry in South Africa.

4. Results

The Porter model initially proposed limited government intervention, but in his competitiveness analysis, the government was seen as a crucial player in implementing indirect policy measures. Policies in areas such as education, research and development, taxation, standardization, consumer protection, transportation, and communication should be tailored to enhance

competition. The appendix provides a summary table (Table 13.1) outlining the factors influencing the competitiveness of the orange industry, emphasizing the significant role of government discussed earlier. This section serves the dual purpose of categorizing factors and providing input for the identification of key determinants in the Porter model analysis. This categorization aids stakeholders in the orange industry in formulating strategic approaches for ensuring sustainability. Factors are assessed on a Likert scale, with ratings from 4 to 5 for positive impacts, 1 to 2 for negative impacts, and 3 for neutral factors in terms of their influence on competitiveness.

4.1. Constraint factors

Table 1.1 underscores the primary factors limiting the competitiveness of South African oranges. These constraining elements were organized based on their respective ratings, revealing a clear alignment with the challenges confronting the citrus industry. The foremost impediments include issues such as the "quality of unskilled labor," "trust in political honesty," "electricity suppliers," "health," "South Africa's land reform policy," "South Africa's BEE policy," and "crime," all of which significantly hinder the competitiveness of the orange industry in the country.

Table 1.1. Constraining factors of South African orange competitiveness

Constraining factors	Rating
Quality of Unskilled labor□	1.29
Trust in the honesty of politicians	1.57
Electricity suppliers	1.71
Health (HIV/AIDS. TB)	1.71
South Africa's land reform policy	1.86
South Africa's BEE policy	1.86
Crime	1.86
Economic development and growth	1.86
Cost of technology	2.00
Cost of using storage facilities	2.14

Source: Survey results and own calculations (2023)

4.2. Enhancing factors

Boosting factors are acknowledged as key contributors to industry competitiveness, impacting both domestic and international markets. Table 1.2 delineates the fundamental elements driving South African orange sector competitiveness in a positive direction. It is imperative to pay increased attention to factors such as the availability of unskilled labor, local input suppliers, scientific research institutions, technological quality,

the cost of unskilled labor, soil conditions, and the sustainability of local input suppliers to ensure the continuous enhancement of their status.

Table 1.2. Factors that enhance the competitiveness of SA oranges.

Enhancing factors	Rating
Availability of Unskilled labor□	4.43
Availability of local input suppliers	4.43
Availability Scientific research institutions	4.29
Quality of technology	4.14
Cost of Unskilled labor□	4.14
Condition Soils	4.14
Sustainability of local input suppliers	4.14
Availability of storage facilities	4.14
Weather condition	4.00
Competition in the international market	4.00
Regulatory standards	4.00
Quality of infrastructure	3.86
Quality of Skilled labor□	3.86

Source: Survey results and own calculations (2023)

4.3. Porter Analysis

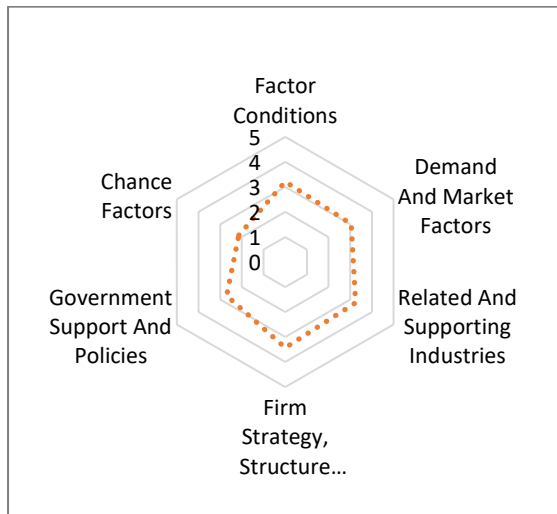
Table 1.3 and Figure 1.1 provide an overview of competitiveness factors and their influence on South Africa's orange sector. The majority of the factors are considered neutral, with only two being less restrictive. This highlights South Africa's open economy and the imperative to maximize competitiveness. As indicated in the table, government support and opportunities are less constraining, while factor conditions, demand, market variables, linked and supporting industries, and firm strategy have a neutral impact on competitiveness, suggesting an unforeseen effect on overall competitiveness.

Table 1.3. Porter's analysis of factors of competitiveness

Porter Analysis	Rating
Factor Conditions	3.21
Demand And Market Factors	3.05
Related And Supporting Industries	3.25
Firm Strategy, Structure, and Rivalry	3.43
Government Support and Policies	2.70
Chance Factors	2.14

Source: Survey results and own calculations (2023)

Figure 1.1. Porter's summary conditions on the competitiveness of SA oranges.



Source: Survey results and own calculations (2023)

5. Determinants of competitiveness in the South African oranges industry

a. Factor conditions

The factor conditions in South Africa's orange sector refer to the status of production elements, including land, labor, capital, and technology. According to Porter's model, these factors play a crucial role in determining competitive advantage. South Africa's competitiveness in the orange sector depends on how efficiently it utilizes these factors and incorporates advanced technologies. Shifting from relying on basic factors to relying on advanced factors, such as modern infrastructure and a highly educated

workforce, is essential for enhancing competitiveness. Innovation can also help reduce or eliminate certain basic components, such as unskilled labor, contributing to overall sector competitiveness.

The survey data highlight key factors identified by respondents that contribute to the competitiveness of the South African orange industry. Notably, the ready availability of unskilled workers is considered crucial, with a high rating of 4.43. This is attributed to the fact that most roles in the orange sector do not require technical expertise, resulting in lower costs. The respondents believe that the affordability of unskilled labor, rated at 4.14, positively impacts the industry's competitiveness. The majority of unskilled laborers receive a minimum wage of R25.42 per hour, which is perceived as manageable and not a significant cost burden for the orange sector.

The respondents underscored the significance of technology and infrastructure quality in determining the competitiveness of South Africa's orange industry. The favorable weather in key production areas, such as Limpopo, Eastern Cape, and Western Cape, supports the production of citrus fruits, including oranges. However, drought has led to a 21% reduction in orange production, raising concerns among respondents about unfavorable rainfall conditions hindering industry competitiveness. Additionally, respondents highlighted that costs related to technology, infrastructure, skilled personnel, and overall business operations adversely affect the competitiveness of the orange industry.

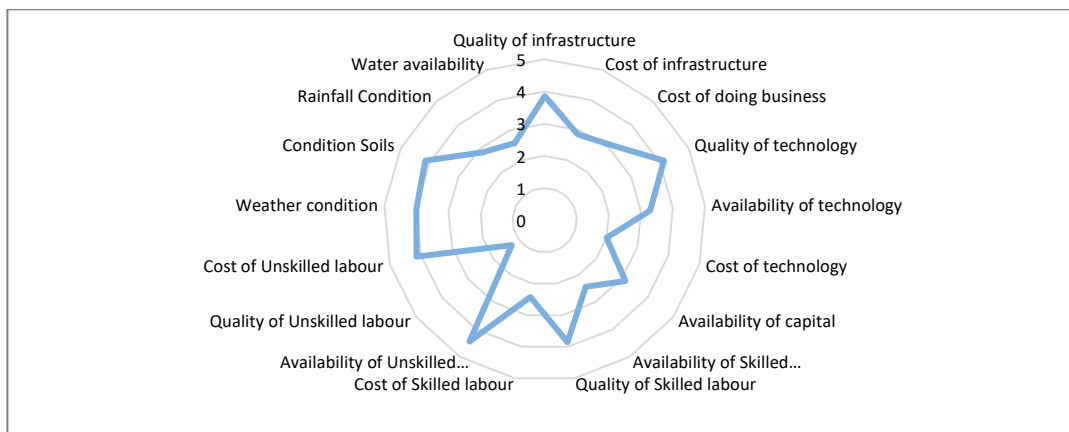


Figure 1.2: Factor conditions determining the competitiveness of SA oranges.

Source: Survey results and own calculations (2023)

b. Demand factors

Porter's model emphasizes the importance of local demand conditions, particularly in the orange industry, with a focus on quality rather than quantity. In South Africa, a competitive

advantage is achieved by understanding buyer demands in the local market better than in the case of imported oranges. Differences in local demand contribute to variations in competitive advantage among countries. The structure of demand

segments is crucial for prioritization, with segmented demand influenced by product variety. South Africa can excel in categories with significant local demand but limited demand elsewhere, and diversifying segments can provide a competitive edge. However, while high local demand is beneficial for economies of scale, it may hinder innovation and upgrading, pushing companies to compete in foreign markets.

The radar chart presents the demand factors affecting the South African orange industry based on a structured survey with respondent ratings. The local market size, rated at 3.42, has a neutral impact, as most oranges are exported globally (70%), with only 7% consumed domestically. Market growth and local purchasers, both rated at 2.86, contribute positively to the competitiveness of the industry in local markets due to the focus on export-oriented production. The data suggest that export dynamics play a significant role in shaping the demand conditions for the South African orange sector.

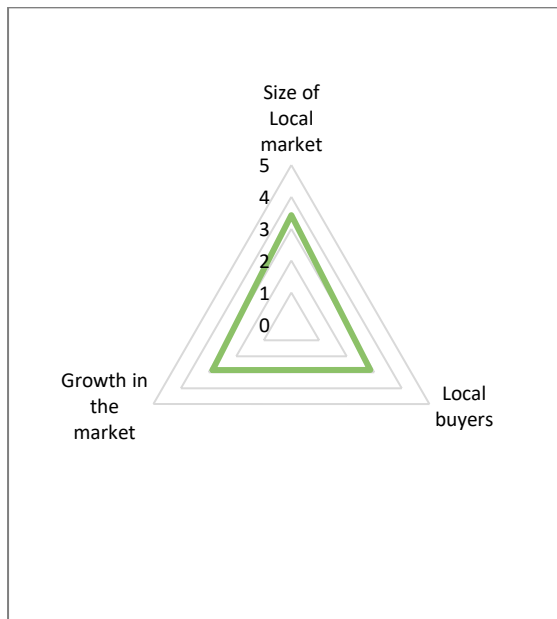


Figure 1.3. Demand conditions determine the competitiveness of SA oranges.

Source: Survey results and own calculations (2023)

c. Related and supporting industries

The passage emphasizes the significance of interconnected industries, highlighting their collaboration on various tasks such as distribution, technology development, manufacturing, and marketing while maintaining competition based on value management. The interdependence among industries can lead to technical exchanges and the emergence of competitive local suppliers serving multiple sectors. In the context of South Africa, the innovation and competitiveness of companies play a vital role in supporting downstream industries by providing superior tools or inputs. For businesses in the orange industry seeking a competitive edge, access to supporting industries with cost-effective inputs is crucial. The key to success lies in collaboration between downstream sectors and local input sources, leveraging innovations from competitive supporting industries. The passage refers to a graph indicating that specific supporting industries, such as scientific research institutions, local input suppliers, storage facilities, and sustainable local input providers, have positively contributed to the competitiveness of the orange industry, with a high score of 4.14/4.43.

The competitiveness of the orange industry in South Africa is influenced by various factors, including the quality of local input suppliers, specialized technological services, communications enterprises, and collaborations with scientific research institutions. These factors collectively have a neutral impact, averaging a rating of 3.5, indicating their moderate influence on enhancing the industry's competitiveness. However, the energy supply sector significantly underperformed, receiving a low rating of 1.71. This sector's poor performance, highlighted by frequent load shedding up to level 6, poses a severe threat to the orange industry. A deteriorating energy supply system forces industry to experience up to 10 hours of daily power outages, leading to increased production costs. The reliance on diesel generators for cold rooms and packing facilities further exacerbates these challenges, negatively impacting industry competitiveness in global markets. The broader issues faced by South Africa's energy supply system include the challenges faced by the orange industry.

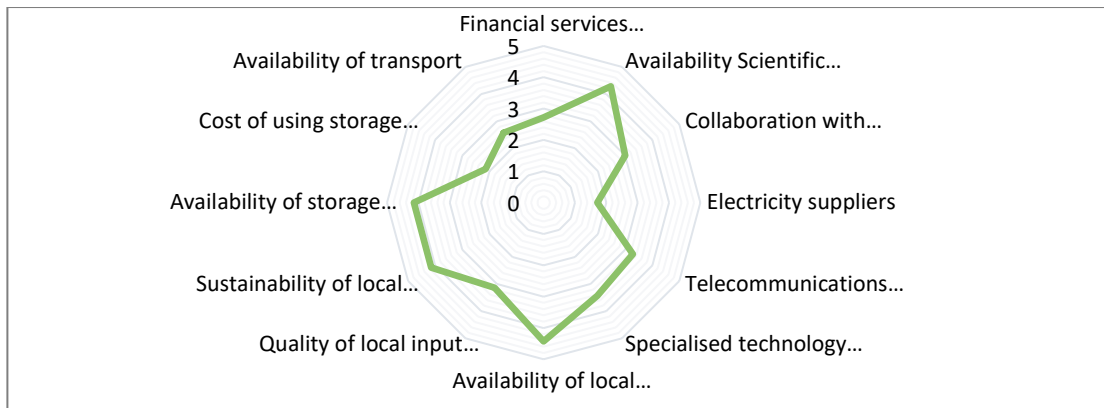


Figure 1.4. Related and supporting industry conditions on the competitiveness of SA oranges.

Source: Survey results and own calculations (2023)

d. Firm strategy, structure, and rivalry

The examination of firm strategy, structure, and rivalry involves exploring different methods of creating, organizing, and managing businesses, influencing local competition, and gaining a competitive edge. In the context of orange exporters, their strategy and structure are shaped by cultural and socioeconomic factors, aligning with specific characteristics that enhance competitive advantage in particular sectors. Local competition is pivotal in the innovation process, contributing to both local and international commercial success. Porter's research in 1990 emphasized a strong correlation between local rivalry and the establishment and maintenance of competitive advantage, underscoring the significance of understanding and navigating competitive dynamics at the local level.

In summary, Porter's observation highlights the positive impact of competition among domestic businesses on innovation and improvement, emphasizing that local competitors drive each other to adopt cost-cutting strategies, innovate products, and

enhance organizational structures. He argues against direct collaboration among competitors, stating that it diminishes competitive advantage. The depicted graph shows respondents rating international market competitiveness at (4/5), signaling increased competition due to the introduction of new products impacting demand for oranges. This trend poses both a threat and an opportunity for orange providers, suggesting potential losses or gains in existing retail markets for oranges.

In the orange industry, the exchange of information between suppliers (rated 3.71/5) and customers (rated 3.43/5) is crucial for enhancing competitiveness, as depicted in Figure 1.5. Additionally, investing in research and development (rated 3.43/5) is identified as a significant factor influencing industry competitiveness. Local market competition (rated 3.29/5) contributes positively to industry competitiveness, whereas the entry of new competitors has a detrimental effect. Overall, effective information flow and strategic investment play pivotal roles in strengthening the competitiveness of the orange industry.

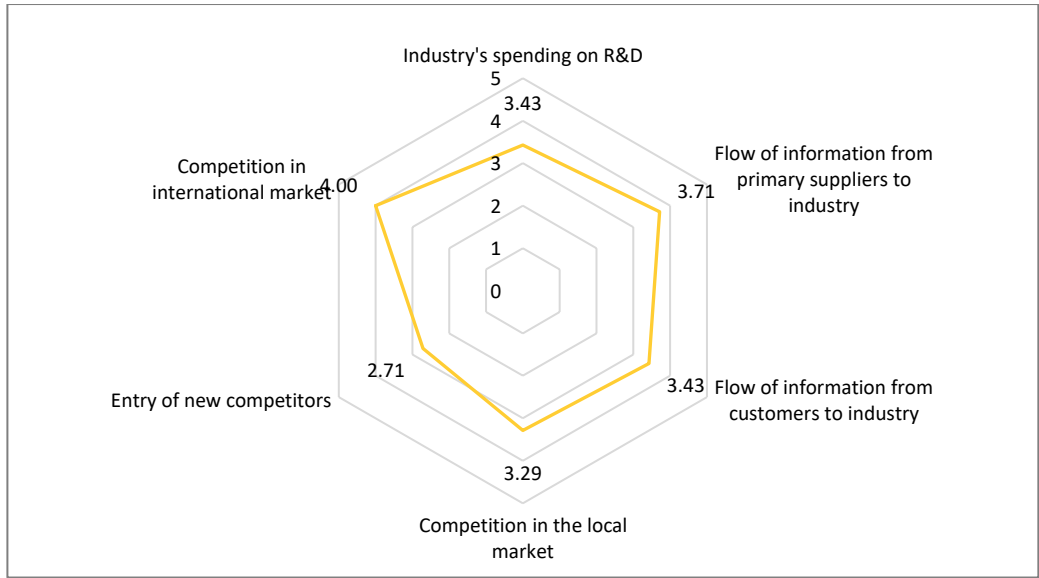


Figure 1.5. Industry strategy and rivalry conditions on the competitiveness of SA oranges.
Source: Survey results and own calculations (2023)

e. Government support and policy

Government interventions, such as subsidies and policies, have a substantial impact on different sectors. In education and capital markets, government interventions shape circumstances. For example, laws can influence product standards, affecting demand conditions. Regulations, including advertising restrictions and impact-connected industries. Tax policies and anti-trust legislation significantly influence strategy, structure, and rivalry within industries. The government, acting as both a consumer and

a provider of inputs, directly influences the fundamental drivers of competitive advantage in the economy. In the 1990s, certain employment restrictions highlighted by the AES were seen as hindrances to industry competitiveness. Key legislation, such as the Basic Conditions of Employment Act of 1997 and the Employment Equity Act of 1998, aimed at benefiting employees, has been observed to result in higher transaction and salary costs for businesses. This impact is particularly notable among low-skilled workers.

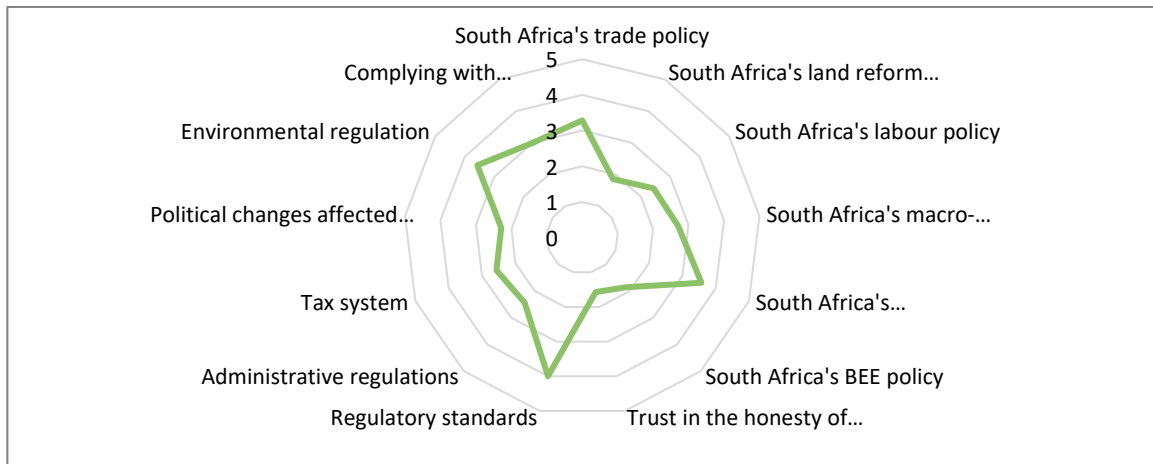


Figure 1.6. Government and policy conditions on the competitiveness of SA oranges.
Source: Survey results and own calculations (2023)

f. Chance factors

Chance events are crucial in molding microeconomic conditions, encompassing natural disasters such as warfare, storms, earthquakes, droughts, and floods, as well as shifts in global financial markets, input pricing, demand, and technological

breakthroughs. Unanticipated occurrences can cause disruptions, impacting industries' adaptability and opportunities for growth. Porter (1990) proposed that industries with strong competitive advantages in microeconomic environments are more likely to recover from chance event repercussions and potentially gain new

competitive edges. The graph depicts responses to chance variables seen as major constraints on competitiveness. It emphasizes factors perceived as beyond industry control. The most significant restrictive chance factor, scoring 1.71 out of 5, is the health-related impact of HIV/AIDS and other chronic conditions. The suggested strategies involve improving the health of industrial workers through initiatives such as recruitment, training, and health enhancement programs.

Crime and economic development are identified as the second most limiting chance factors, impacting the stability of the labor force and influencing investment expectations, each rated at 1.86 out of 5. On a positive note, exchange rate fluctuations, rated at 3.14 out of 5, are recognized as the sole factor enhancing the competitiveness of the South African orange industry. The current depreciation of the South African currency is boosting orange exports, positively impacting the overall competitiveness of the orange sector, given its export orientation.

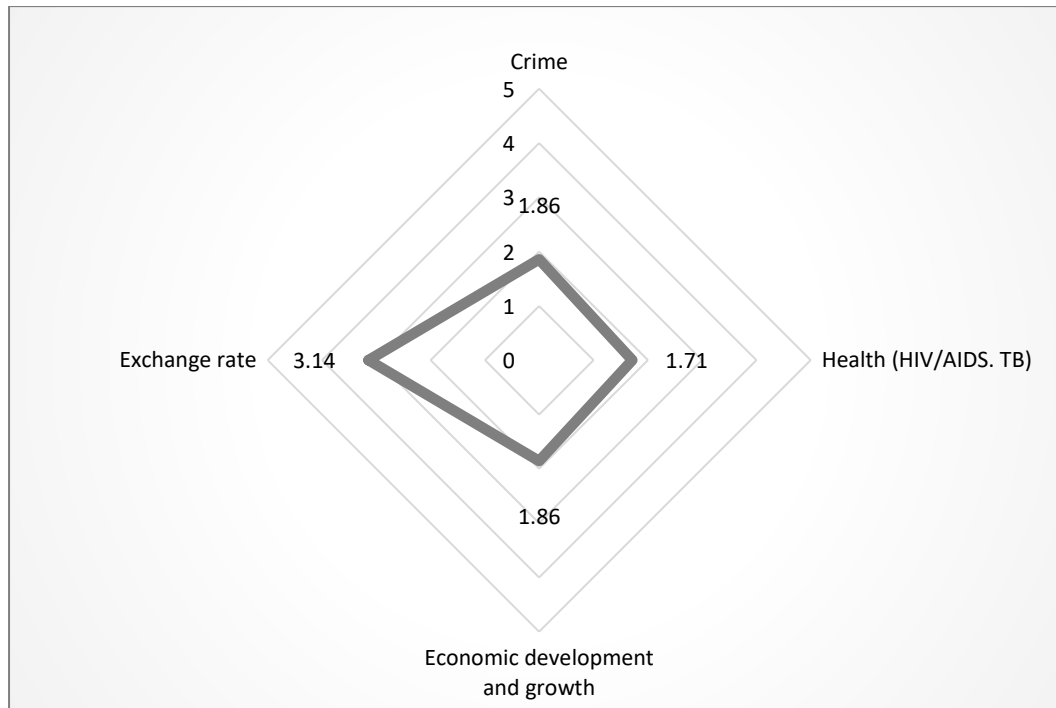


Figure 1.7. Chance factor conditions on the competitiveness of SA oranges.

Source: Survey results and own calculations (2023)

6. Key Information Summary

This section summarizes findings from open-ended survey questions and formal discussions within the orange industry. Key points emphasize the critical role of robust research support, adherence to good production practices, and expertise in cultivating high-quality fruits for improving the competitive performance of the orange sector. Challenges include inadequate infrastructure (roads, railways, and ports), the absence of bilateral agreements with trading partners, and underperforming ports leading to higher freight costs, shipment delays, and negative effects on quality and financial returns. Additionally, South Africa's reliance on Blanket Trade Agreements without a comprehensive understanding of their impact further impedes the industry's competitiveness by hindering the identification of market access opportunities.

In the international orange market, countries such as Egypt, Peru, Chile, Argentina, Spain, Australia, and Morocco are formidable

competitors, posing significant challenges. It is crucial to address the constraints hindering the competitiveness of the orange industry for the overall benefit of the sector. These constraints, if not resolved, could lead to inadequate financial returns, jeopardizing the industry's sustained growth and the well-being of those involved. The government plays a key role in influencing industry competitiveness through infrastructure and trade agreements. However, the impact of the Government's Cadre Deployment Policy and State Capture has led to the deterioration of infrastructure and the loss of efficiency in the global market.

7. Conclusions, Recommendation, and Implications for Policy

In this section, the study evaluates the outcomes of the third hypothesis, focusing on identifying the factors influencing the competitiveness of the citrus fruit industry using the Porter approach. A total of 102 questionnaires were distributed via email

to a diverse group of orange producers and exporters, resulting in a 65.7% response rate, with 67 surveys returned. This response rate is considered representative of drawing precise conclusions. The analysis reveals that most competitiveness factors are neutral variables, with only two scenarios having fewer restrictive constraints. This underscores the importance of South Africa's open economy and the need to enhance competitiveness. Government support and opportunities face fewer constraints, while variables such as demand, market conditions, factor conditions, related and supporting industries, and firm strategy exhibit a neutral influence, suggesting an unexpected impact on competitiveness.

Key limitations and success factors

Skills training

In this study, respondents raised concerns about the quality of unskilled labor and the scarcity of skilled labor in the orange industry. Limited availability of both types of labor was noted, affecting the industry's competitiveness. The inadequacy of skill training and unappealing wages for skilled workers were identified as potential causes. Skilled labor, especially for tasks such as pruning, was deemed crucial for sustained productivity, emphasizing the importance of training programs in the orange sector. A collaborative effort between the industry and the government was emphasized to address these issues. Additionally, respondents expressed significant worries about workforce health, including the prevalence of HIV/AIDS, TB, and other disorders. The study recommends ongoing efforts to educate the workforce about these health conditions, building upon past government investments in health.

Cost of Production

South Africa is facing challenges in competing effectively for production, primarily due to its high availability and production costs. These costs encompass various inputs, such as capital, land, water, energy, chemicals, labor, technical specialists, and managerial talent. Rising input costs, driven by competition for essential resources, particularly in agriculture, pose a significant hurdle.

To improve its competitiveness, the country's production sector must identify crucial points in the supply chain where transaction costs can be minimized. For example, the orange industry could enhance its competitiveness by reducing transportation costs. One strategy involves coordinating activities within the industry, such as collectively transporting products to the market by farmers. By sharing costs, pooling resources for input purchases, and negotiating prices as a unified group, the industry can strengthen its bargaining power, ultimately boosting its overall competitiveness.

Exploring alternative markets

The lack of diversity in the local orange sector necessitates exploring new markets for South African oranges. This is particularly crucial given the decline in the conventional European market due to trade restrictions. This study emphasizes the importance of entering the promising Asian market with innovative approaches and improved fruit quality to gain a competitive advantage. The initiative aims to promote orange diversification in Asian markets, ensuring the long-term sustainability and competitiveness of the South African orange sector. Additionally, consumer education is highlighted as a key strategy for overcoming local constraints. By emphasizing the health benefits of South African oranges, the industry can potentially enhance profitability and sustainability.

Availability of transport and electricity suppliers

The competitive advantage of a company or industry is determined by how it organizes and executes activities within the value chain, as highlighted by Porter in 1990. For the South African orange industry, an efficient value chain is crucial to ensure quick and well-coordinated transportation, processing, and distribution of products, ultimately reducing costs while maintaining product quality, freshness, and safety. Effective value chain management is therefore essential for enhancing industry competitiveness. The current power supply shortage in South Africa is recognized as a constraint on the competitiveness of orange exports. Research indicates a strong, long-term correlation between power consumption and exports, implying that these two variables move in the same direction. The ongoing load-shedding crisis in South Africa significantly affects the orange industry. To address this issue, the government should consider designating export-oriented industries as essential services exempt from load shedding and providing subsidies to industries investing in generators or solar systems. This suggests that increasing the electricity supply to boost consumption may be a strategic approach to enhancing export performance, both presently and historically.

Quality of local input suppliers

The competitiveness of the South African orange sector is hampered by the inferior quality of local input suppliers, as discussed by Deasy (2022). Importing higher-quality inputs has been shown to improve productivity and increase exports. Deasy establishes a connection between the use of imported inputs, heightened productivity, and expanded exports. To address the negative impact of low-quality local suppliers on orange exports, stakeholders are urged to improve input quality standards. Another potential solution involves government intervention to facilitate the industry's access to high-quality inputs from

international markets, fostering greater productivity and increased exports.

Entry of new competitors

According to survey participants, the entry of new competitors has had a detrimental impact on the competitiveness of South African oranges in both local and international markets. Increased market competition is seen to reduce market share, especially during periods of low demand, and may force lower prices, resulting in diminished profit margins. To counter these challenges, the orange industry must prioritize enhancing the quality of exported oranges to attract foreign markets and expand its market share. Particularly in Asian markets, improving orange quality through investments is deemed essential for maintaining competitiveness.

BEE and land reform policy

The government's role is crucial in enhancing the competitiveness of the orange sector through effective policies that ensure a well-functioning market. Specific initiatives such as land reform and BEE may need modifications to address concerns about the prolonged land reform process, which hinders investments in farming. Creating a conducive business environment is the government's responsibility to improve the industry's competitiveness by encouraging effective policies and attracting investments.

Political changes and trust in politicians significantly impact international business within a country. Researchers and practitioners have highlighted the negative effects of political insecurity and corruption on FDI. In South Africa, political developments and a lack of trust in politicians are identified as obstacles to the competitiveness of the orange industry. Maintaining political stability is essential for increasing exports, as noted by Srivastava and Green (1986). Fosu (2003) suggested that political instability decreases expected returns, leading to capital flight and disrupting exports. Policy stability, linked to the political setup, is crucial for foreign direct investment, exports, and foreign portfolio investment. It is recommended to avoid abrupt government changes to maintain policy continuity, with each succeeding democratic government legally bound to uphold long-term ongoing policies.

Fight Crime and high incidence of Health

High crime rates in South Africa negatively impact the orange industry, leading to financial burdens and decreasing competitiveness. The issue goes beyond theft from farmers, affecting the industry's overall appeal to foreign investments. The increase in the prevalence of HIV/AIDS adds another layer of challenge to business competitiveness. Given that both crime and

AIDS are external challenges beyond the industry's control, the government's involvement is crucial in addressing these issues. Government initiatives targeting HIV/AIDS, crime, and macroeconomic stability are essential for reducing associated costs and improving the competitiveness of the South African orange sector.

Moreover, there is a significant link between South African orange exports and economic development. Increased exports contribute to economic growth, while higher income levels facilitate expanded trade, fostering bilateral exchanges. The discouragement of investment due to high crime rates may hinder long-term productivity in South Africa. However, augmented economic productivity can support the orange sector in boosting exports and overall industry growth.

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