Update:

South Africa maintains 49.4 million-carton lemon export forecast

The Citrus Growers' Association of Southern Africa (CGA) has reported a strong lemon season for 2026. However, the season has been notable for departing from established norms in two respects: both the larger size of the crop and the earlier timing of the season's course have been unusual by historical standards.

The lemon season for the Northern growing regions has effectively drawn to a close, with final volumes tracking closely in line with the updated estimates communicated throughout the season. As elsewhere in the country, this increase was largely due to increased rainfall resulting in improved fruit size.

The Sundays River Valley, in the Eastern Cape, widely regarded as one of the premier lemon-growing regions in the world, has shown significantly increased yields per hectare, marking a welcome recovery after two consecutive years of average crops. Current assessments indicate the Northern Hemisphere lemon season will, in the next few weeks, not yet have reached the stage where it is able to fully replace Southern Hemisphere supply.

"This season has also produced an unusual packing pattern. For the first time, a significant number of Sundays River Valley producers completed close to 80% of their lemon crop by the end of June - a departure from previous seasons in which progress across the valley has typically been far more uniform," explained Hannes de Waal, Vice Chair of the CGA and CEO of the Sundays River Citrus Company.

While the Sundays River Valley was spared flooding, growers have monitored the potential downstream impact of those weather events (including an intense windstorm) and remain aware of potential impacts to the relatively low volumes still to be packed in the valley. Current fruit sizing means local growers are packing count 64 and smaller lemons for export, with larger fruit being directed to the three juice factories serving the valley. That volume destined for processing may yet increase.

The timing of the Western Cape's lemon season mirrors that of the Eastern Cape, with a sudden tapering off expected soon.

The season is not without its pressures. The ongoing conflict in the Middle East is having a tangible effect on export routes and market access, particularly for grade 3 fruit destined for Iraq. The additional cost of transshipping through Turkey has rendered those supply lines uneconomical, and very little grade 3 fruit is currently being packed for that market and instead being redirected to local juice factories at lower returns.

"Our growers are resilient, but the cost of geopolitical instability is real, and it is felt on every farm," said Leroux Venter, Chairperson of the CGA's Lemon Variety Focus Group. "We are monitoring the situation closely, particularly as the Northern Hemisphere season approaches and market dynamics continue to shift."

The current export estimate figure for the entire national lemon season remains unchanged at 49.4 million 15kg cartons.

For more information:
CGA
Tel: +27 (0) 31 765 2514
www.cga.co.za (https://www.cga.co.za/)

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