



European lemon market mostly stable, but citrus black spot risk high

Lemon exports pull ahead of last year



The South African lemon harvest which started three to four weeks earlier than last year has resulted in accelerated exports: by week 17, exactly two million cartons (15kg) more than last year YTD had been exported (6.1 million cartons).

The difference between 2022 and 2023's packed lemon volumes was almost four million cartons.

The lemon campaign is around a fifth through; the export estimate for the 2023 season is 37.7 million 15kg cartons.

Currently Europe is the most stable and the best market for South African lemons - but only for production units without citrus black spot (CBS). It has been a wet summer and CBS incidence is high while the phytosanitary measures from the EU have been tightened.

The Perishable Product Export Control Board inspect 1% of all the citrus fruit from non-CBS free areas (much of the northern provinces of the country plus the Eastern Cape and KwaZulu-Natal to the east) between arrival and packaging.

One incidence of CBS disqualifies the originating orchard from further exports to the EU that season; three incidences and the entire production unit is barred for the rest of the season.

As a result of the CBS risk there has been an increase in the volume of lemons sent to the Middle East, which traditionally is South Africa's favoured market for early lemons and where just over half of the country's lemons have gone.



The Middle East lemon market has since crashed with roughly the same regularity as in many previous years.

Russia has been absorbing more lemons this season: 12% of South Africa's lemons have gone there, over only 5% YTD 2022.

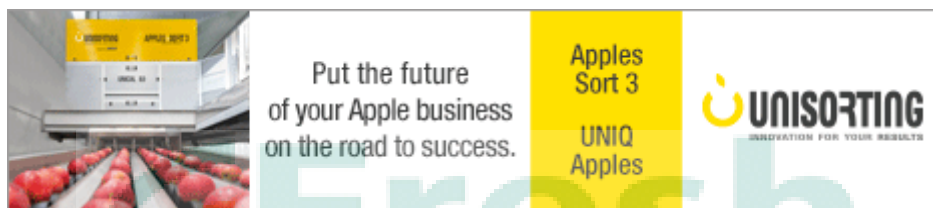
South East Asia has received the same percentage of lemons, down by 5% on last year's early exports.

The United Kingdom dissociating itself from the EU has been a boon to South African citrus producers. The lemon trade with the UK is up by 3% to constitute 7% of the total exports YTD.

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