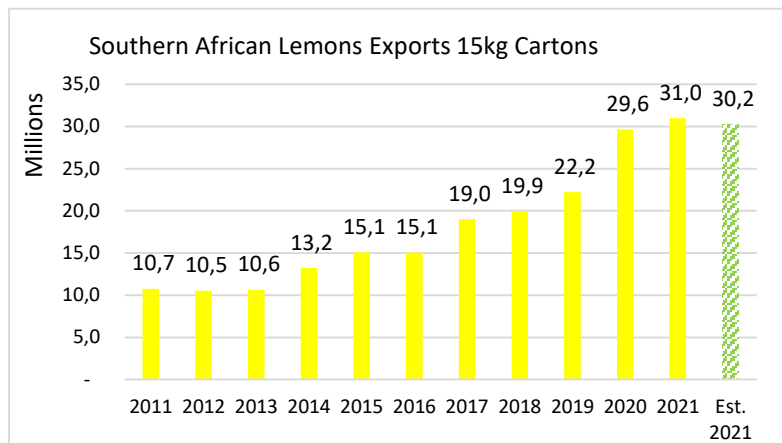


"The time is always right, to do what is right." Martin Luther King, Jr.

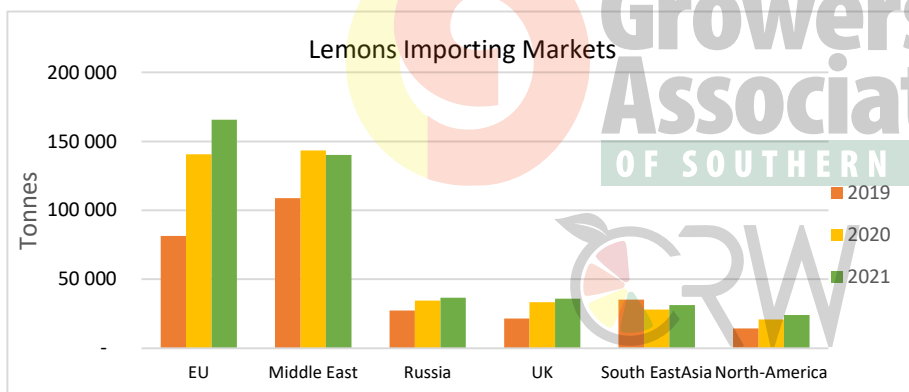
2021 Lemon Seasonal Review (Portia Magwaza)

This has been a very tough lemon season given the range of logistics and market challenges growers and exporters have had to face. While export volumes are up this does not necessarily translate into better returns back to farms as the costs have increased significantly, the exchange rate moved against exporters and lemon prices well below 2020 values.

Lemon volumes packing for exports was 31 million cartons in 2021, finishing 3% up on the March 2021 estimate of 30.2 million cartons. The biggest region is Sundays River Valley with 13.5 million cartons (at 3% below the estimate); followed by Senwes at 3.8 million cartons (8% above the estimate); while Boland at 2.6 million was 19% over the estimate. This growth can be attributed to recent planting now coming into production. Patensie with 1.8 million cartons was 21% over the estimate despite having to deal with very dry conditions for this production cycle. Hoedspruit (2.3 million cartons) was 6% less than the estimate.



Lemons peaked at size 113, 138 and 100. This season the peak weeks for packing was from week 24-week 27. In 2020, the peak weeks for packing were week 19-21 so relatively higher volumes coming slightly later in the 2021 season.



As with Grapefruit and Navels, the EU remains the number one import market at 166 000 tonnes. The Middle East imports have declined from 143 000 tonnes in 2020, to 140 000 tonnes in 2021. Russian imports increased from 35 000 tonnes (2020) to 37 000 tonnes (2021) just ahead of North-America (24 000).

COVID 19 Vaccinations

Administered in last 24 hours = 125 868; total administered = 24 471 210; Individual vaccinated = 16 153 676 (= 40.59% of adult population). Source: <https://sacoronavirus.co.za/latest-vaccine-statistics/>

Packed and Shipped-[This will be the last table as the season has finished] *Using a combination of PPECB and Agrihub data to account for shipping timing

End of Week 45 Million 15 Kg Cartons	Packed	Packed	Packed	Shipped	Shipped	Original Estimate	Latest Prediction	Final Packed
SOURCE: PPECB/AGRIHUB	2019	2020	2021	2020	2021	2021	2021	2020
Grapefruit (17kg)			15.5 m		15.2 m			
Grapefruit	16.8 m	15.5 m	17.5 m	15.2 m	17.2 m	18.0 m	17.6 m	15.5 m
Soft Citrus	18.2 m	23.6 m	30.9 m	23.6 m	29.5 m	30.5 m	30.8 m	23.6 m
Lemons	22.1m	28.4 m	31.0 m	27.1 m	29.7 m	30.2 m	30.9 m	29.6 m
Navels	24.3 m	26.2 m	27.2 m	25.2 m	27.2 m*	26.3 m	27.2 m	26.2 m
Valencia	46.0 m	55.1 m	55.0 m	53.1 m	55.0m*	58.0 m	55.1 m	55.1 m
Total	128.2m	150.0m	161.6m	144.2 m	158.6m*	163.0 m	161.6 m	150 m