

# FROM THE DESK OF THE CEO

*"Our destiny is frequently met in the very paths we take to avoid it."  
(Jean de La Fontaine)*

## AN UPDATE ON LEMON EXPORTS

As the Citrus Growers' Association of Southern Africa (CGA), we continue to provide information to all stakeholders in the value chain to enable them to make better decisions. The season has been eventful in many ways thus far, and with a number of curve balls thrown at us all. But besides that, we remain focussed on success in whatever ways we can achieve it.

Variety Focus Group meetings are held on an ongoing basis to review initial estimates and adjust numbers based on the best available information provided by regional representatives. The most recent adjustment comes following a meeting of the Lemon Variety Focus Group. The export estimate for the 2026 lemon season has been revised upwards. The projection now stands at 49.4 million, from the previous figure of 45.8 million 15kg cartons. This is a testimony to the dynamisms and somewhat unpredictable nature of the 2026 export season.

Importantly, what was reported from the production regions is that key areas have shown continued favourable growing conditions for the lemon crop, and this despite the season being later than usual. Further, reporting noted that there was a marked acceleration of fruit colour development, due to no less than three cold fronts, which also contributed to the fruit being ready for export. Increased rainfall in many lemon-producing areas has also resulted in a positive growth curve, supporting larger fruit sizes, and ultimately resulting in higher carton volumes.

It is very important to underscore that, considering the unpredictable nature of the 2026 season, there should be more deliberate coordination and effective communication amongst stakeholders. This can create capacity for logistical resilience across the value chain. Hopefully it provides the best position to assist in managing the increase in volumes. These efforts aim to ensure a steady and stable supply of fruit to global markets and the prevention of under- and oversupply at any given time.

Packing activity remains concentrated in key regions, with Senwes, Patensie, and the Boland accounting for the bulk of volumes still to be harvested. Whilst regions like Letsitele in Limpopo and the Sunday's River Valley in the Eastern Cape have recorded the most significant upward revisions in their projections, it is worth mentioning that our expectations are such that the lemon season will conclude more abruptly than usual, with a noticeable drop in volume around mid-July, rather than a gradual tapering.

Fruit quality for the season remains excellent, reinforcing South Africa's reputation as a reliable supplier of high-quality citrus to all markets.

## INTERESTING FACTS

In 1907, the first successful commercial export of 3,000 standard cases of oranges was shipped to Great Britain, marking a pivotal milestone in the history of South Africa's citrus industry.

## PACKED AND SHIPPED VOLUMES

| End of week 25<br>million 15 kg<br>cartons | Packed | Packed | Packed | Shipped | Shipped | Original<br>Estimate | Latest<br>Prediction | Final<br>Packed | Vision<br>260 |
|--------------------------------------------|--------|--------|--------|---------|---------|----------------------|----------------------|-----------------|---------------|
| SOURCE:<br>PPECB / AGRIHUB                 | 2024   | 2025   | 2026   | 2025    | 2026    | 2026                 | 2026                 | 2025            | 2026          |
| Grapefruit                                 | 11.3 m | 11.3 m | 11.7 m | 9.9 m   | 10.9 m  | 17.8 m               | 16.8 m               | 15.3 m          | 15.5 m        |
| Lemons                                     | 22 m   | 24.9 m | 35.7 m | 22.3 m  | 30.9 m  | 45.9 m               | 49.4 m               | 41.6 m          | 43.4 m        |
| Mandarins                                  | 15.9 m | 19.5 m | 17.6 m | 14.9 m  | 15.8 m  | 52.7 m               | 49.4 m               | 53.5 m          | 50 m          |
| Navels                                     | 11.1 m | 13.5 m | 10.7 m | 8.4 m   | 8 m     | 30 m                 | 26.8 m               | 31.6 m          | 32.3 m        |
| Valencia                                   | 3.3 m  | 5.3 m  | 3 m    | 2.4 m   | 1.3 m   | 63 m                 | 62.6 m               | 62 m            | 67.8 m        |
| Total                                      | 63.6 m | 74.5 m | 78.7 m | 57.9 m  | 66.9 m  | 209.4 m              | 205 m                | 204 m           | 209 m         |